Applications and Awards: Status Process and Responsibilities				
Document Status	**Activity During This Status**	**Special Notes**	**Save Permissions**	**Responsible for Changing Status to Push Document**
Application in Process	Drafting of application by Grant Recipient	ALL form fields must be completed and all documents uploaded before AO changes status to Submit	Authorized Official, Project Director, Consultant	Authorized Official
Application Submitted	Initial review of application for basic eligibility and completeness		TDA Staff	TDA Staff
Application Adjustments Needed	Application edits for clarifications or correctable deficiencies identified during the Scoring Complete step	Optional status	Authorized Official, Project Director, Consultant	Authorized Official
Application Adjustments Submitted	TDA review of corrected application		TDA Staff	TDA Staff
Application Approved	Grant has been awarded	90 day issues must be addressed during this status.	TDA Staff	TDA Staff
Application Approved Pending Changes	Application edits for items identified during the formal award process	Optional status	Authorized Official, Project Director, Consultant	Authorized Official
Grant Agreement Pending Grant Recipient Signature	Review and execution of grant agreement by Grant Recipient		Authorized Official	Authorized Official
Grant Executed	Grant agreement fully executed	Required reports are initiated for documenting project progress during the life of the grant	See below	See below
Document Status for Applications Not Funded				
Application Cancelled (Not Submitted)	Application not submitted		n/a	n/a
Application Ineligible	Application disqualified		n/a	n/a
Application Not Recommended for Funding	Application met basic eligibility criteria but did not score within funding range	Not reviewed for detailed program eligibility.	n/a	n/a
Application Pending - Wait List	Application not awarded during current process, but may be awarded if funding allows (including 2nd year grant awards)- meets basic eligibility criteria but did not score within funding range	Not yet reviewed for detailed program eligibility.	TDA Staff	TDA Staff

Performance Reports: Status Process and Responsibilities *Includes Environmental Review, Acquisition of Real Property, Group A, and Group B*

Document Status	Activity During This Status	Special Notes	Save Permissions	Responsible for Changing Status to Push Document
Performance Report In Process	Preparation of report by Grant Recipient	ALL form fields must be complete and all documents uploaded before the status is changed to Submit. Must have 2 different certifications by persons with authority to make payments.	Project Director, Consultant	Project Director, Consultant
Performance Report Submitted	Review by TDA Staff		TDA Staff	TDA Staff
Performance Report In Review	Review by TDA Subject Matter Expert		TDA Staff	TDA Staff
Performance Report Approved	Report has been accepted by TDA Staff	The original report pages cannot be edited in this status; however additional pages for updated information are now available for Environmental Review and Acqusition reports.	n/a	n/a
Status Option for Performance Report not Submitted				
Performance Report Cancelled	Report not submitted		n/a	n/a

Materials and Services Reports: Status Process & Responsibilities *Must create new MSR for each vendor/service provider contract*

Document Status	Activity During This Status	Special Notes	Save Permissions	Responsible for Changing Status to Push Document
MSR Vendor Selection In Process	Preparation of report by Grant Recipient	Remember Labor Standards must be approved by TDA before completing the Main Form and changing status to Submit.	Project Director, Consultant	Project Director, Consultant
MSR Vendor Selection Submitted	Review by TDA Staff	ALL form fields must be completed and all documents uploaded before the status is changed to Submit.	TDA Staff	TDA Staff
MSR Vendor Selection Accepted	Report has been accepted by TDA Staff	The original report pages, other than the Subcontractor form, cannot be edited in this status.	n/a	Project Director, Consultant
MSR Change Order in Process	Preparation of change order by Grant Recipient		Project Director, Consultant	Project Director, Consultant
MSR Change Order Submitted	Review by TDA Staff		TDA Staff	TDA Staff
MSR Change Order Complete	Report has been accepted by TDA Staff	Unapproved costs will be clearly identified.	n/a	Project Director, Consultant
MSR Contract Closeout in Process	Final information prepared by Grant Recipient	Includes Certificate of Construction Completion.	Project Director, Consultant	Project Director, Consultant
MSR Contract Completion Submitted	Review by TDA Staff		n/a	TDA Staff
MSR Contract Complete	MSR contract closeout accepted by TDA Staff		n/a	n/a

Payment Requests: Status Process and Responsibilities

Document Status	Activity During This Status	Special Notes	Save Permissions	Responsible for Changing Status to Push Document
Payment Request in Process	Preparation of payment request by Grant Recipient	ALL form fields must be complete and all documents uploaded before the status is changed to Submit. Must have 2 different certifications by persons with authority to make payments.	Authorized Official, Project Director, Consultant, Payment Processor	Project Director, Consultant
Request for Payment Submitted	Review by TDA Staff		TDA Staff	TDA Staff
Payment Request in Review	Confirmation of budget availbility for payment request		TDA Staff	TDA Staff
Approved for Payment	Program and budget approval of payment request, including IDIS and CAPPS processing		n/a	Automated
CAPPS Payment in Process	Automated creation of CAPPS voucher		n/a	Automated
Request for Payment Pending Information	TDA hold status for more information or final closeout approval for final payment		TDA Staff	TDA Staff
CAPPS Payment Processed	Payment has been issued by Comptroller		n/a	n/a
Approved - Manual Processing	Program and budget approval of payment request - action to be processed outside the CAPPS system		n/a	n/a
Status Option for Payment Request not Submitted				
Payment Request Cancelled	Payment not submitted		n/a	n/a

Amendments: Status Process and Responsibilities

Document Status	Activity During This Status	Special Notes	Save Permissions	Responsible for Changing Status to Push Document
Amendment Request in Process (CDBG)	Drafting of amendment request by Grant Recipient	No new reports or payment requests can be started during this time.	Authorized Official, Project Director, Consultant	Authorized Official
Amendment Request Submitted	Review by TDA Staff. Report will be returned for corrections until request is complete and can be recommended to management		TDA Staff	TDA Staff
Amendment Grant Agreement Details Updated	TDA incorporates grant agreement revisions into amendment document		TDA Staff	TDA Staff
Amendment Pending Grant Recipient Signature	Review and execution of grant amendment by Grant Recipient		Authorized Official	Authorized Official
Amendment Pending TDA Signature	Review and execution of grant amendment by TDA Executive		TDA Staff	TDA Staff
Amendment Complete/ Grant Agreement Executed	Grant amendment fully executed		n/a	Automated change to Grant Executed
Status Options for Amendments not Approved				
Amendment Request Cancelled	Amendment not submitted/reviewed		n/a	n/a
Amendment Request Denied	Amendment request submitted, but not approved by TDA		n/a	n/a

Closeout: Status Process and Responsibilities

Document Status	Activity During This Status	Special Notes	Save Permissions	Responsible for Changing Status to Push Document
Closeout In Process	Preparation of closeout by Grant Recipient	*Prior* to clicking Begin Closeout to put the closeout in process, ALL reports must be completed, reviewed for accuracy, and follow manual timelines.	Authorized Official, Project Director, Consultant	Authorized Official
Closeout Submitted	Review by TDA Staff	If submitted with aggregious errors, the closeout will go back in process and the submission date will **NOT** be accepted.	TDA Staff	TDA Staff
Closeout Revision Required	Revisions required by grant recipient for minor and correctable items identified by TDA	Optional status - will not invalidate original closeout submission date.	Authorized Official, Project Director, Consultant	Authorized Official
Closeout Submitted Verify Final Review	Review of project status and readiness for closeout by TDA		TDA Staff	TDA Staff
Closeout Pending Final Monitoring	Closeout awaiting completion of final monitoring review by TDA	Optional status	n/a	TDA Staff
Closeout In Review	Final review and acceptance of grant closeout information by TDA		TDA Staff	TDA Staff
Grant Closed	Grant is administratively complete	Record Retention period has NOT begun.	n/a	TDA Staff
Funding Year Closed	TDA Funding Year has been closed with HUD, record retention period begins		n/a	n/a
Status Option for Closeout not Submitted				
Closeout Cancelled	Closeout not submitted		n/a	Automated change to Grant Executed