



TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

Texas Community Development Block Grant Program

Introduction to Start-Up Documentation Processes



Agenda

- Introduction to TDA-GO Key Features
- Start Up Documentation Pages
- Where Do I find ...?
- Q & A

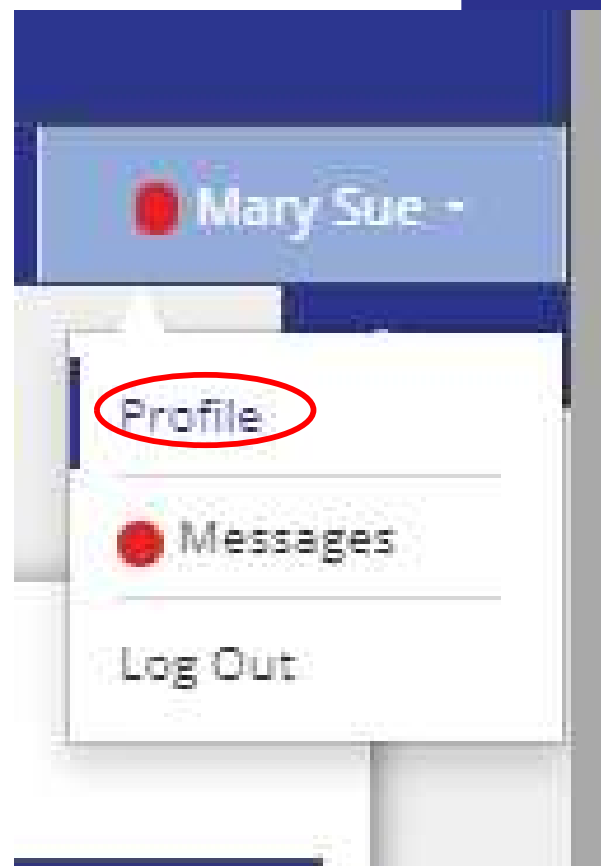
TxCDBG Program

TDA-GO Key Features



TDA- GO Key Features - Profile

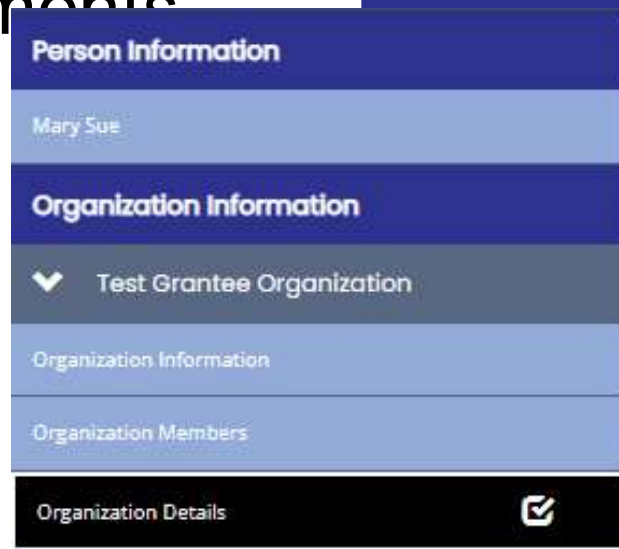
- Profile Menu –
 - Dropdown from your name
 - Information applies to all grants





TDA- GO Key Features - Profile

- Profile Menu –
 - Person Information – role and contact information for specific individual
 - Organization Information – general contact information for the community/organization
 - Organization Members – list of individuals with access to the Organization itself (not specific grants)
 - Organization Details – upload documents to be used across multiple grants





TDA- GO Key Features - Navigation

- Navigation Menu –
 - Window on left side of screen
 - All tabs refer to the same Application/Grant
- Searches –
 - Header across top of screen
 - Find a specific Grant or document

The screenshot displays the TDA- GO application interface. At the top, the Texas Department of Agriculture logo and the text "TEXAS DEPARTMENT OF AGRICULTURE" are visible. Below this, a navigation menu is shown with tabs for "Home" and "Searches -". The "Searches -" tab is highlighted with a red circle. The main content area shows a document titled "CDV21-0118" with a "Forms" dropdown menu. The "Forms" menu is open, showing a list of application forms: "Applicant Contact Information", "General Information", "Project Feasibility Information", and "Community Needs Assessment". Each form has a checkmark icon to its right. The "Applicant Contact Information" form is highlighted with a red circle. To the right of the forms, a "Document" panel displays the following information:

Template	Community Development Block
Document Name	CDV21-0118
Organization	Test Grantee Organization



TDA- GO Key Features - Roles

- **Authorized Official** – confirm as authorized by resolution
- **Payment Processor** – authorized by resolution for payments only
- **Project Director** – local staff certified as TxCDBG administrators
- **Agency Viewer** – local staff, view only
- **Consultant** – third party certified as TxCDBG administrators



TDA- GO Key Features - Add/Edit People

Role to be Added	Role that can create
Authorized Official	Current AO or TDA*
Project Director, Payment Processor or Agency Viewer	AO, PD, or TDA*
Consultant	TDA*

* To request TDA assistance with Add/Edit people, send written request to CDBGapps@texasagriculture.gov

- ▼ Status Options
 - Grant Agreement in Legal Review
- ▼ Tools
 - Landing Page
 - Add/Edit People**
 - Status History

Person	Organization	Role	Active Dates
Alexander, Robin	GrantWorks, Inc.	Consultant	02/05/21 -
App Team, GrantWorks	GrantWorks, Inc.	Consultant	03/01/21 -
Barnard, Suzanne	Texas Department of Agriculture	TDA Director	09/22/21 -
Baumgardner, Olivia	GrantWorks, Inc.	Consultant	03/18/21 -
Engledow, Trenton	Texas Department of Agriculture	Funding Specialist	11/12/21 - 12/02/21
Fearneyhough, Jason	Texas Department of Agriculture	Executive	11/08/21 -
Fryer, Mindy	Texas Department of Agriculture	Funding Specialist	11/12/21 - 12/01/21



TDA- GO Key Features - Save Button

- Top right corner, beneath your name
- If there is no button, you will not be allowed to save changes





TDA- GO Key Features - Status Changes

- Navigation menu, left of the screen
- Select the Option you for the Status you want to change the document **TO BE**



- Example: to submit this report, click *Performance Report Submitted* to change the document **to become** that submitted status



TDA- GO Key Features - Related Document

- Navigation menu, left of the screen
- Subdocuments related to the Parent Grant



Initiate Related Document

Select a parent document and available related document. Use the Create button to initiate the related document.

Document Identifier:

Parent Document

Available Documents

Create

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Grant Agreements



TxCDBG Start Up Documents Grant Agreement Certification

- Navigation menu, Award Section

Click here to generate Grant Agreement: [Grant Agreement](#)

Authorized Signatory.
Each person signing the Agreement certifies that he or she is authorized by the Department or Grant Recipient to bind the party on whose behalf they are signing to the terms and conditions in the Agreement.

This Agreement is executed by the Parties in their capacities as stated below.

By checking this box, I agree to use electronic signatures. Furthermore, I confirm that I have signature authority to execute this document and it is an electronic representation of my signature for all purposes when I use it on documents, including legally binding contracts-just the same as a pen-and-paper signature.

<input checked="" type="checkbox"/>	Signature of Grant Recipient Authorized Official Mary Sue	Date 10/13/2021
<input checked="" type="checkbox"/>	Signature of TDA Authorized Official Executive TDA	Date 10/13/2021

Fully executed original agreement:

Grant Agreement Figure:

Select [Drag Files Here](#)

Select [Drag Files Here](#)

logo-hud.png
6.2k x 4.2k



TxCDBG Start Up Documents

Grant Agreement, cont.

- To generate PDF agreement, click *Grant Agreement* link
- To execute, check the box and save the page

Click here to generate Grant Agreement: [Grant Agreement](#)

Authorized Signatory.
Each person signing the Agreement certifies that he or she is authorized by the Department of Agriculture.

This Agreement is executed by the Parties in their capacities as stated below:

By checking this box, I agree to use electronic signatures. Furthermore, I confirm that I understand that electronic signatures are legally binding contracts-just the same as a pen-and-paper signature.

Signature of Grant Recipient Authorized Official
Mary Sue

- Change status to ... *TDA Signature*



TxCDBG Start Up Documents Grant Agreement, cont

- TDA Staff will upload executed documents and agreement attachments

Fully executed original agreement:

Drag Files Here

Grant Agreement Figure:

Drag Files Here

Amendments

 logo-hud.png
11.29 KB

Amendment Number

Amendment Upload

Drag Files Here

TxCDBG Program

Materials & Services Record



TxCDBG Start Up Documents Materials & Services Report

- Navigation menu, Related Documents section
- To begin, click *Initiate Related Document*
- Confirm Grant number and type of Document, then *Create*

The screenshot shows a web application interface. On the left is a navigation menu for document ID "CDV21-0108". The menu items include: Home, Searches, Status History, Attachment Repository, Modification Summary, Document Validation, Notes, Print Document, Related Documents (expanded), and a sub-menu with "Initiate Related Doc" circled in red. Other items in the sub-menu are Payment Request, Performance Report, and Materials and Services Report. On the right, a modal dialog titled "Initiate Related Document" is open. It contains a search box for "Document Identifier" with the placeholder "Search parent documents by identifier...", a dropdown for "Parent Document" with "CDV21-0108" selected, and another dropdown for "Available Documents" with "Materials and Services Report 2021" selected. A blue "Create" button is at the bottom right of the dialog.



TxCDBG Start Up Documents Materials & Services Report, cont.

- Each section and page within the MSR builds on previously entered information, avoiding errors due to rekeying data

	Original	Contract Change Order	Current	Balance Difference
Total Contract amount	0	0	0	0
Amounts not funded by TxDOT	0	0	0	0
Amounts not funded by other	0	0	0	0
Amounts not funded by other (Total)	0	0	0	0
Original Project Cost	0	0	0	0



TxCDBG Start Up Documents Materials & Services Report, cont.

MSR Documents

- Procurement
- Labor Standards
- MBE Reporting
- Eligible Costs

CDV21-0108-MSR-02

Forms

- Materials and Services Record Main Form
- MSR Labor Standards**
- MSR Subcontractors

Status Options

- MSR Vendor Selection Submitted

Tools

- Landing Page
- Add/Edit People

MSR – Labor Standards

Instructions:
Please complete this page and press the save button.
Required field are marked with an *

Wage Decision Number *	County Work Performed in *	Date WD Published *	Type of WD *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

If Exempt, Reason *

Attach copy of WD *

WD Approved by TDA SME *



TxCDBG Start Up Documents Materials & Services Report, cont.

- Each service provider/contractor requires a separate MSR
- Best Practice:
 - Administrator – complete MSR now
 - Engineer – complete MSR now
 - Construction – initiate one MSR now, enter data for Labor Standards and first section of Main Form

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Performance Reports



TxCDBG Start Up Documents Performance Reports

- Navigation menu, Related Documents section
- Automatically Generated
 - Environmental Review
 - Acquisition of Real Property
 - Group A Documents
 - Group B Document
- Manually Generated
 - Current Status Report
 - Mid Point Progress Report

Performance Report	
CDBG - Environmental	
CDV21-0118-ENV-01: Performance Report In Process	
CDBG - Acquisition	
CDV21-0118-ACQ-01: Performance Report In Process	
CDBG - Group A	
CDV21-0118-GPA-01: Performance Report In Process	
CDBG - Group B	
CDV21-0118-GPB-01: Performance Report In Process	



TxCDBG Start Up Documents

PR - Environmental Review

- Environmental Review Main Form
 - Basic Information for Aggregated Project
 - Certification / RROF
 - AUGF

The screenshot shows a web application interface for the Environmental Review Main Form. On the left is a navigation sidebar with a dark blue header containing the ID 'CDV21-0118-ENV-01'. Below the header are several menu items: 'Forms' (expanded), 'Performance Report Selection', 'Performance Report', 'Environmental Review Main Form' (highlighted in black), 'Environmental Review Checklist', 'Status Options' (expanded), 'Performance Report Submitted', 'Performance Report Cancelled', 'Tools' (expanded), and 'Landing Page'. The main content area has a light gray header with the title 'Environmental Review Main Form'. Below the header, there are instructions: 'Instructions: Please complete the page and press the save button. Required fields are marked with an *'. The form is divided into sections. The 'Basic Information' section contains three text input fields: 'Certifying Officer Name (see resolution) *' (0 of 100), 'Certifying Officer Title *' (0 of 100), and 'Environmental Review Preparer Name: *' (0 of 100). Below these is a larger text area for 'Description of Aggregated Project (must include work to be funded by TxCDBG): *'.



TxCDBG Start Up Documents

PR - Environmental Review, cont.

- Environmental Review Checklist
 - Rows based on selected Level of Review

Compliance Factors: Statutes, Executive Orders, and Regulations listed at 24 CFR §58.5 and §58.6	Are formal compliance steps required? *	Are mitigation steps required? *	Description of Source Documentation *	Compliance determinations *	Description of Mitigation Measures *
Section A (24 CFR §58.6)					
Airport Hazards 24 CFR part 51 Subpart D	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



TxCDBG Start Up Documents

PR - Environmental Review, cont.

- Based on selected level of review, pages appear for Section 106 and Part 55.
- To request Section 106 Exemption, provide all required data, including “Date Requested” but do **not** change the status of the Env Review

Performance Report	
Environmental Review Main Form	<input type="checkbox"/>
Environmental Review Checklist	<input checked="" type="checkbox"/>
Environmental Review - Section 106	<input type="checkbox"/>
Environmental Review Part 55	<input type="checkbox"/>

After review confirmation that the project described in this environmental review meets the requirements of the Programmatic Agreement between TDA and THC, the Grant Recipient requests approval of this exemption from review by the State Historical Preservation Officer and all participating Tribal Historical Preservation Officers. This project will follow all statutes regarding Texas historical properties should any changes or additions be made to this project.

Date Exemption Requested

TDA Environmental Review Specialist Action

Exemption Approved

Exemption Declined



TxCDBG Start Up Documents PR - Environmental Review, cont.

- Embedded Reports facilitate publication/consultation
 - Ex: text for Tribal Consultation letters generated for each selected tribe

No Section 106 Exemption

SHPO: click [HERE](#) to be directed to the Texas Historical Commission's eTRAC review system.

Date Request Submitted: *

THPO: Select relevant tribes below based on the location of the project, as listed; [HERE](#). [Click HERE to generate Tribal Consultation Notice](#).

Absentee-Shawnee Tribe of Indians of Oklahoma

Alabama-Coushatta Tribe of Texas



TxCDBG Start Up Documents PR - Environmental Review

- Environmental Review Main Form
 - Certification / RROF
 - AUGF
- Change Status to *Performance Report Submitted*

Performance Report	
Environmental Review Main Form	<input checked="" type="checkbox"/>
Environmental Review Checklist	<input type="checkbox"/>
Environmental Review - Section 106	<input type="checkbox"/>
Environmental Review Part 55	<input type="checkbox"/>
▼ Status Options	
Performance Report Submitted	
Performance Report Cancelled	
▼ Tools	
Landing Page	
Add/Edit People	
Status History	
Attachment Repository	

With reference to the above Program Activity(ies)/Project(s), I, the undersigned officer of the responsible entity, certify that:

1. The responsible entity has fully carried out its responsibilities for environmental review, decision-making and action pertaining to the project(s) named above.
2. The responsible entity has assumed responsibility for and complied with and will continue to comply with, the National Environmental Policy Act of 1969, as amended, and the environmental procedures, permit requirements and statutory obligations of the laws cited in 24 CFR 58.5; and also agrees to comply with the authorities in 24 CFR 58.6 and applicable State and local laws.
3. The responsible entity has assumed responsibility for and complied with and will continue to comply with Section 106 of the National Historic Preservation Act, and its implementing regulations 36 CFR 800, including consultation with the State Historic Preservation Officer, Indian tribes and Native Hawaiian organizations, and the public.
4. After considering the type and degree of environmental effects identified by the environmental review completed for the proposed project described in Part 1 of this request, I have found that the proposal did require the preparation and dissemination of an environmental impact statement.
5. The responsible entity has disseminated and/or published in the manner prescribed by 24 CFR 58.43 and 58.55 a notice to the public in accordance with 24 CFR 58.70 and as evidenced by the attached copy (copies) or evidence of posting and mailing procedure.
6. The dates for all statutory and regulatory time periods for review, comment or other action are in compliance with procedures and requirements of 24 CFR Part 58.
7. In accordance with 24 CFR 58.71(b), the responsible entity will advise the recipient (if different from the responsible entity) of any special environmental conditions that must be adhered to in carrying out the project.

As the duly designated certifying official of the responsible entity, I also certify that:

8. I am authorized to and do consent to assume the status of Federal official under the National Environmental Policy Act of 1969 and each provision of law designated in the 24 CFR 58.5 list of NEPA-related authorities insofar as the provisions of these laws apply to the HUD responsibilities for environmental review, decision-making and action that have been assumed by the responsible entity.
9. I am authorized to and do accept, on behalf of the recipient personally, the jurisdiction of the Federal courts for the enforcement of all these responsibilities, in my capacity as certifying officer of the responsible entity.

RROF Certification (Certifying Officer listed above) Date



TxCDBG Start Up Documents

PR – Acquisition

- Acquisition Plan
 - Respond to each prompt
 - Change Status to *Performance Report Submitted*

The screenshot shows a web interface for the "Acquisition Plan" form. On the left is a navigation sidebar with a dark blue header containing the ID "CDV21-0118-ACQ-01". Below the header are sections: "Forms" (with a dropdown arrow), "Performance Report Selection" (with a checkmark icon), "Performance Report" (highlighted in dark blue), "Acquisition Plan" (highlighted in black with a square icon), and "Status Options" (with a dropdown arrow). Under "Status Options", there are three items: "Performance Report Submitted" and "Performance Report Cancelled".

The main content area is titled "Acquisition Plan" and contains the following text:

Instructions:
Please complete the page and press the save button.
Required fields are marked with an *

1. Identify the acquisition necessary for this project *

- No acquisition activity is required for this project.
- Acquisition is required and subject to the Uniform Relocation Act (URA)
- Non-URA Acquisition is required for this project



TxCDBG Start Up Documents PR – Acquisition

- Once Acquisition Plan is approved:
 - Acquired Parcels page appears
 - Use *Add* option below your name to create a separate page for each parcel
 - No Status Change required

The screenshot displays the TxCDBG web application interface. On the left is a navigation sidebar with the following items: Performance Report, Acquisition Plan (checked), Acquired Parcels (highlighted), Acquired Parcels Summary, Status Options, Tools, and Landing Page. The main content area shows a form for adding a new parcel with the following fields: Address of Property * (text input), City, State, Zip Code * (text input, dropdown, text input), Previous Owner * (text input), New Owner * (text input), Type of Transaction * (dropdown), and Type of Acquisition * (dropdown). A blue notification banner at the bottom right shows a user profile for Jane PD and a list of actions: New Note, Save, Add, and Delete.



TxCDBG Start Up Documents PR – Group A

- Respond to each prompt
- Change Status to *Performance Report Submitted*

CDV2021055-GPA-01

Instructions:
Please complete the page and press the save button.
Required fields are marked with an *

Group A Documents

Resolution adopting or reaffirming Community Policies *

Section 3 Service Area map *

Fair Housing Activities *

Limited English Proficiency

Language Group Census Data - Table B16001	Estimated Group Population	Speaks English less than "very well"	Percent LEP
Total Community Population per Table B16001 *	5000	600	12.00%

The screenshot shows a web application interface for submitting documents. On the left is a navigation menu with options like 'Forms', 'Performance Report Selection', 'Performance Report', 'Group A', 'Status Options', and 'Tools'. The main area contains a form with several sections: 'Group A Documents', 'Resolution adopting or reaffirming Community Policies *', 'Section 3 Service Area map *', 'Fair Housing Activities *', and 'Limited English Proficiency'. Each of these sections has a 'Select' button and a 'Drag Files Here' area. Three files named 'handy smurf.png' (119.52 KB) are shown as uploaded. At the bottom, there is a table for 'Language Group Census Data - Table B16001' with columns for 'Estimated Group Population', 'Speaks English less than "very well"', and 'Percent LEP'. The table shows a total community population of 5000, with 600 people speaking English less than 'very well', resulting in a 12.00% LEP rate.



TxCDBG Start Up Documents PR – Group B

- Respond to each prompt
- Change Status to *Performance Report Submitted*
- **Can only be submitted after Performance Reports for Environmental Review, Acquisition, and Group A**

The screenshot displays the TxCDBG Start Up Documents interface. On the left, a sidebar menu is visible with the following items: "Performance Report" (selected), "Group B" (with a square icon), "Status Options" (with a dropdown arrow), "Performance Report Submitted", "Performance Report Cancelled", "Tools" (with a dropdown arrow), and "Landing Page".

The main content area is titled "Performance Report" and contains the following information:

Required fields are marked with an *

Upload the following documentation prior to requesting construction funds.

Section 3 Notice to residents *

Temporary Signage (photo) *

Award Date for construction/primary grant activity, as reported on MSR. *

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Other



TxCDBG Start Up Documents

Grant Overview

- Navigation menu, Award Section
- No Status Changes, can be updated at any time

Award	
Agreement Certification	<input checked="" type="checkbox"/>
Grant Overview	<input type="checkbox"/>



TxCDBG Start Up Documents Grant Overview

- Various Program Requirements
 - Key Personnel Designations
 - Special Conditions
 - Force Account Approval
 - Special Requests / Unique documents
 - TDA determined Hold Status

Grant Overview

Instructions:

Please complete this page and press the Save button.

Required fields are marked with an *

Designated Personnel

Primary Administrative Contact within TDA-GO!

Name

Email

Phone Number

As the Authorized Official, I designate the following individuals to be responsible for critical program requirements:

- Labor Standards Officer - individual responsible for overseeing the labor standards portion of the contract for assuring compliance with all requirements under Chapter 7 of the TxCDBG Project Implementation Manual

0 of 100

- Civil Rights Officer - local official / staff member responsible for oversight and compliance of fair housing and equal opportunity activities as required by the TxCDBG Grant Agreement and Chapter 10 of the TxCDBG Project Implementation Manual

0 of 100

Authorized Official

Date



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