

How to Complete the Monitoring Report

**When the TDA Program Monitor sends the Monitoring Notice via TDA-GO, an email will also be sent to the Project Director(s) and any Consultants assisting with the grant.*

1. Open the Monitoring Report

The Monitoring Report should appear in your My Tasks. Click the document name.

My Tasks

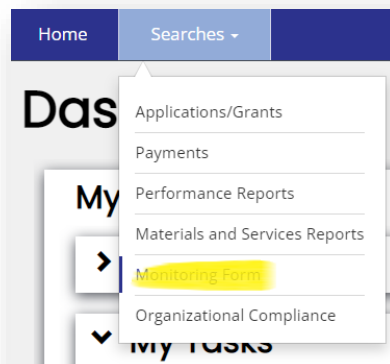
› Filter

▼ My Tasks

Name	Document Type	Organization	Status
CDM22-0033-MON-01	Monitoring Report	GroundUP	Monitoring Document Preparation
CDM22-0033-MSR-02	Materials and Services Report	GroundUP	MSR Selection in Process
CDM22-0033-PMT-01	Payment Request 2022	GroundUP	Payment Request in Process
CDV22-0032-ACQ-01	Performance Report	GroundUP	Performance Report in Process

If you don't see the Monitoring Report in your My Tasks, you may not be assigned to it. You can check by using the Search function.

On the Home page, click "Search" and select "Monitoring Form".



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Leave all fields blank and click "Search".

Document Search

Document Name	<input type="text"/>	Year	<input type="text"/>
Document Type	<input type="text"/>	Status	<input type="text"/>
Organization	<input type="text"/>	Person	<input type="text"/>

Click the document name.

▼ **Documents**

Name	Organization	Type	Status
CDM22-0033-MON-01	GroundUP	Monitoring Report 2022	Monitoring Document Preparation

< 1 >

If there are no results for your search, ask local staff or consultants assigned to the parent document (in this example that's CDM22-0033) to add you to the Monitoring Report.

2. Check the Monitoring Documentation Request (MDR) form

CDM22-0033-MON-01

▼ Forms

- Monitoring Documentation Request
- Environmental Review - Post Release Review (Self Monitoring)
- Acquisition of Real Property (Self Monitoring)

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This form will tell you what Compliance Areas have been selected for review and whether they are self-monitoring or desk review. TDA staff will also update the status of each area under review.

The following Compliance Areas are selected for review.

Compliance Area	Requested?	Supporting Docs	CAP Required	Status
Environmental Review - Post Release Review (Self Monitoring)	<input checked="" type="checkbox"/>		<input type="text"/>	Requested
Acquisition of Real Property (Self Monitoring)	<input checked="" type="checkbox"/>		<input type="text"/>	Requested
Procurement (Self Monitoring)	<input type="checkbox"/>		<input type="text"/>	

3. Self-Monitoring

If a Compliance Area is selected for self-monitoring, there will be separate tabs in the blue navigation bar under the MDR that need to be completed. Click the tabs to open the checklists.

The following Compliance Areas are selected for review.

Compliance Area	Requested?
Environmental Review - Post Release Review (Self Monitoring)	<input checked="" type="checkbox"/>
Acquisition of Real Property (Self Monitoring)	<input checked="" type="checkbox"/>
Procurement (Self Monitoring)	<input type="checkbox"/>
Labor Standards (Self Monitoring)	<input type="checkbox"/>
Civil Rights Review (Self Monitoring)	<input type="checkbox"/>

For Environmental Review, indicate the Level of Review.

This must match the Level of Review indicated on the Environmental Performance Report.

Level of Review

- Exempt, Categorically Excluded (b), or Categorically Excluded - converted to exempt
- Categorically Excluded (a)
- Environmental Assessment

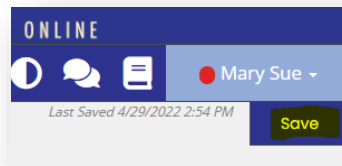
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For all self-monitoring areas, complete the entire checklist and provide clarifying information if required.

If your response is "NA", you may also mark the clarification response as "NA".

	Question	Response *	Clarification Required	Clarification Response
E1	Did the Grant Recipient commit HUD funds or non-HUD funds or undertake a choice-limiting action prior to the State's environmental clearance?	No	AUGF date	6/1/2022
E1.1		NA	Acq of Property Conveyance date	NA
E1.2		No	Construction Contract Executed date	6/2/2022
E1.3		NA	Adverse impact or choice-limiting action	NA

Be sure to click "Save" when you finish the checklist. You may also save and finish later.



4. Desk Review

If a Compliance Area is selected for desk review, supporting documentation needs to be uploaded in the "Supporting Docs" column.

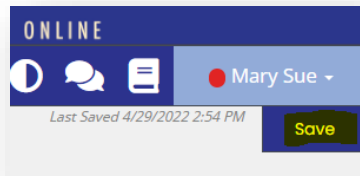
Financial Management	<input checked="" type="checkbox"/>	Select Drag Files Here
Environmental Review - Post Release	<input type="checkbox"/>	Select Drag Files Here
Acquisition of Real Property	<input type="checkbox"/>	Select Drag Files Here
Procurement	<input type="checkbox"/>	Select Drag Files Here
Labor Standards - Limited Review for 10 Day Confirmation	<input type="checkbox"/>	Select Drag Files Here
Labor Standards	<input checked="" type="checkbox"/>	Select Drag Files Here
Civil Rights Review	<input checked="" type="checkbox"/>	Select Drag Files Here

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For a list of acceptable docs, see form A1302 that's available on the [CDBG website](#).

Chapter 13 Monitor Review			Download	Download
13 Monitor Review	A1301	Monitor Checklist	Download	TDA-GO only
13 Monitor Review	A1302	Self-Monitoring Review Checklist and Certification	Download	TDA-GO only
13 Monitor Review	A1302	Support Documentation for Monitoring Review		View/Download

Click "Save"



5. Submit Monitoring Documentation

The Authorized Official must submit the report to TDA by clicking "Submit Monitoring Documentation".

