



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

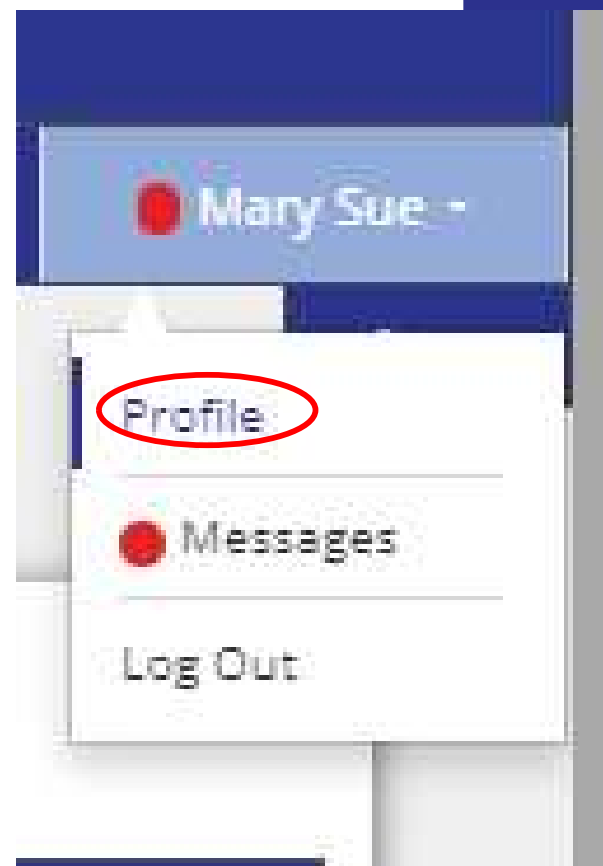
TxCDBG Program

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

A screenshot of the TDA- GO Profile Menu interface. The menu is displayed as a vertical list of options. The first option is "Person Information" in white text on a dark blue background. Below it is a light blue bar with the text "Mary Sue". The next option is "Organization Information" in white text on a dark blue background. Below it is a dark blue bar with a white downward arrow and the text "Test Grantee Organization". The next option is "Organization Information" in white text on a light blue background. Below it is a light blue bar with the text "Organization Members". The final option is "Organization Details" in white text on a dark blue background, with a white checkmark icon to its right.

Person Information
Mary Sue
Organization Information
▼ Test Grantee Organization
Organization Information
Organization Members
Organization Details



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

A screenshot of the TDA- GO application interface. The header is yellow with the Texas Department of Agriculture logo and the text "TEXAS DEPARTMENT OF AGRICULTURE" and "COMMISSION". Below the header is a dark blue navigation bar with "Home" and "Searches" (circled in red). The main content area is divided into two sections. The left section, titled "CDV21-0118", contains a "Forms" dropdown menu and a list of application sections: "Applicant Contact Information", "General Information", "Project Feasibility Information", and "Community Needs Assessment". The right section, titled "Document", contains a "Template" dropdown menu and a list of document sections: "Community Development Block", "Document Name", "CDV21-0118", "Organization", and "Test Grantee Organization". The "Searches" header and the "Forms" dropdown menu are circled in red.



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



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

TxCDBG Program

Grant Agreements



TxCDBG Start Up Documents

Grant Agreement Certification

- Navigation menu, Award Section

Navigation Menu:

- Budget Details
- Required Uploads
- Pre-Agreement Strategy
- Certification
- CDV - Community Development Fund
- Award**
- Agreement Certification**
- Grant Overview
- Amendment**
- Amendment Request Form
- Proposed CDBG Performance Statement Revisions
- Amendment Certification Form
- Status Options

Grant Agreement Certification Form:

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.

Signature of Grant Recipient Authorized Official	Date
☒ Mary Sue	10/13/2021
Signature of TDA Authorized Official	Date
☒ Executive TDA	10/13/2021

Fully executed original agreement:

Grant Agreement Figure:

logo-hud.png 6.25 KB



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:	Select Drag Files Here
Grant Agreement Figure:	Select Drag Files Here
Amendments	logo-hud.png 11.29 KB X
Amendment Number	Amendment Upload
	Select 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 the TxCDBG system interface. On the left is a navigation menu with a dark blue header containing "Home" and "Searches -". The menu items include "CDV21-0108", "Status History", "Attachment Repository", "Modification Summary", "Document Validation", "Notes", "Print Document", "Related Documents" (with a dropdown arrow), "Initiate Related Doc" (circled in red), "Payment Request", "Performance Report", and "Materials and Services Report". The main content area is partially obscured by a modal dialog box titled "Initiate Related Document" with a close button (X) in the top right corner. The dialog box contains the instruction: "Select a parent document and available related document. Use the Create button to initiate the related document." It has three input fields: "Document Identifier" with a placeholder "Search parent documents by identifier...", "Parent Document" with a dropdown menu showing "CDV21-0108", and "Available Documents" with a dropdown menu showing "Materials and Services Report 2021". A blue "Create" button is located at the bottom right of the dialog box.



- [illegible]



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 *

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

TxCDBG Program

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

CDV21-0118-ENV-01

▼ Forms

Performance Report Selection

Performance Report

Environmental Review Main Form

Environmental Review Checklist

▼ Status Options

Performance Report Submitted

Performance Report Cancelled

▼ Tools

Landing Page

Environmental Review Main Form

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

Basic Information

Certifying Officer Name (see resolution) *

0 of 100

Certifying Officer Title *

0 of 100

Environmental Review Preparer Name: *

0 of 100

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					



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	☐
Environmental Review Checklist	☒
Environmental Review - Section 106	☐
Environmental Review Part 55	☐

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	☐
Environmental Review Checklist	☐
Environmental Review - Section 106	☐
Environmental Review Part 55	☐
▼ 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*

CDV21-0118-ACQ-01

▼ Forms

Performance Report Selection

Performance Report

Acquisition Plan

▼ Status Options

Performance Report Submitted

Performance Report Cancelled

Acquisition Plan

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 Start Up Documents interface. On the left is a navigation menu with the following items: Performance Report, Acquisition Plan (with a checkmark icon), Acquired Parcels (highlighted with a square icon), Acquired Parcels Summary (with a square icon), Status Options (with a dropdown arrow), Tools (with a dropdown arrow), and Landing Page. The main content area shows a form for adding a new parcel. The form fields are: Address of Property * (with a text input and a '0 of 30' character count), City, State, Zip Code * (with separate inputs for city, state, and zip code), Previous Owner * (with a text input), New Owner * (with a text input), Type of Transaction * (with a dropdown menu), and Type of Acquisition * (with a dropdown menu). On the right side of the interface, there is a user profile section for 'Jane PD' with a red status indicator. Below the profile are icons for a clock, a speech bubble, and a document. At the bottom right, there is a navigation bar with the following options: 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

▼ Forms

Performance Report Selection

Performance Report

Group A

▼ Status Options

▼ Tools

Landing Page

Add/Edit People

Status History

Attachment Repository

Modification Summary

Document Validation

Notes

Print Document

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 *

Select handy smurf.png 119.52 KB

Section 3 Service Area map *

Select handy smurf.png 119.52 KB

Fair Housing Activities *

Select handy smurf.png 119.52 KB

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%



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**

Performance Report

Group B

▼ Status Options

Performance Report Submitted

Performance Report Cancelled

▼ Tools

Landing Page

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. *

Select Drag Files Here

Select Drag Files Here

Calendar icon

TxCDBG Program

Other



TxCDBG Start Up Documents

Grant Overview

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

Award	
Agreement Certification	☒
Grant Overview	☐



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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