IDIS LIVE

IDIS Celebrates 1997: A Year of Success and Change

What a long way IDIS has come. Since the beginning of 1997, 926 grantees have gone Live in IDIS…an amazing accomplishment for the year. At the beginning of 1997, only 25 grantees were Live, and, indeed, the audience for this publication was small. Many thanks go to you, the grantee community, for helping to make IDIS a success.

As you've faced the new technical challenges associated with IDIS, your perseverance has made the difference. Thanks and kudos also go to HUD field office and Headquarters staff. Without their support, IDIS would not be the success it is today. CPD professionals who staff the help desk, conduct training sessions, and answer your questions have provided additional support. The implementation of IDIS has truly been a team effort.

During 1997, we passed several milestones:

- 951 grantees are now Live;

- $15 billion in grant funds is being administered;

- 27 reports are now available; and

- Activity Funding now allows users to commit funds, designate a Fund Year, and fund an activity from multiple sources.

Thanks again to everyone for making 1997 a successful year for IDIS!

What's in store for 1998? IDIS keeps growing! In December, the First State became the first state to go Live in IDIS: Congratulations to Delaware. Other states will go Live throughout the year. And that's not all:

⇒ EDI (electronic data interchange) is on the horizon, as well. EDI will enable large grantees that have their own databases to communicate directly with the IDIS mainframe.

⇒ More grant programs will be absorbed by IDIS. The Continuum of Care competitive assistance programs as well as other CPD competitive programs are slated for incorporation into IDIS. *(cont'd. on next page)*

As 1998 progresses, we will be looking again at input and feedback from you, the IDIS user, to help make IDIS even better. User Group meetings are scheduled throughout 1998 (see next article), as is IDIS training. The IDIS Advisory Committee (made up of seasoned IDIS grantees) continues to meet quarterly to provide suggestions and feedback on how we are doing.

We, too, at *IDIS Live*, will continue to seek and publish your words of wisdom and helpful tips. If you have an idea for an article or you'd like to contribute a Guest Column, let us know! ■

USER GROUP MEETING SCHEDULE FOR 1998

Due to popular demand and the evolving nature of IDIS, User Group meetings will continue to be held throughout 1998, at the rate of about one per month. In some months, two meetings will be offered.

If you have not yet attended a Users Group meeting, plan to attend one in 1998. All IDIS users are encouraged to attend. These one-day meetings are great opportunities for you to brush up on IDIS, learn about the latest enhancements, meet other grantees, and talk to staff from HUD Central about **your** suggestions for IDIS.

Unfortunately, we will not be able to get to every jurisdiction over the course of 1998, but the list of meeting sites probably includes one near you. If your jurisdiction is near one of the cities listed on the schedule, and you know of a site at which a User Group meeting could be held, contact either Lincoln Burruss (202-708-0614, ext. 4570) or Phil Helbling (202-708-0614, ext. 4410).

General information about User Group meetings can be found on the Web at www.hud.gov/cpd/idis/calendar.html.

For historical reference, we have listed the sites of 1996 and 1997 IDIS User Group meetings. We hope to see you at a User Group meeting this year!

1998 User Group Meetings	
January	Columbus, OH (27th)
February	Los Angeles (24th & 26th)
	San Diego
March	Atlanta
	Pittsburgh
April	Newark
May	Memphis
	Omaha
June	Dallas
July	Seattle
	New York
August	Minneapolis
September	Denver
	Boston
October	New Orleans
November	Philadelphia
	Los Angeles
December	Chicago

Past User Group Meetings	
October 1996	Washington, D.C.
November	Washington, D.C.
January 1997	Ft. Worth
February	Denver
March	Philadelphia
April	Chicago
May	Louisville
	Danville, VA
June	Lansing, MI
	Mt. Vernon, NY
	Tampa
July	Rock Hill, SC
	Little Rock
August	Oakland, CA
	Milwaukee
September	Buffalo
	Portland, OR
October	Hartford
November	Ft. Myers
December	San Antonio

SAN ANTONIO USERS GROUP

On Monday, December 15, 1997, IDIS users attended the final User Group meeting for 1997 in San Antonio, Texas. Grantees came prepared with their questions and concerns.

Julia Wong, of the HUD San Antonio office, welcomed grantees. The meeting got off to a rocky start. Due to heavy holiday mailing and shipping traffic, materials for the User Group meeting (including handouts and the overhead projector) did not arrive until the following day. You would think that grantees would be upset. Instead, what could have ended up being a big flop was turned into a great exchange of information.

Liz Herron, of the HUD Ft. Worth office, explained how her grantees are submitting their GPRs and end-of-year reports using IDIS. **Cathy Marcinko**, from the City of Memphis, Tennessee, did a **live** demonstration and explanation of IDIS Activity Funding.

The San Antonio User Group meeting provided a great opportunity for grantees to exchange information and resolve problems. Thanks again to everyone for helping to make San Antonio a success! ∎

IDIS MATRIX CODES

Have you ever been concerned that you selected an incorrect HUD "matrix code" for your activity? Many users have commented that there are not specific matrix codes for ESG homelessness activities, for instance.

Remember that matrix codes (or "activity codes") are not program specific. You may have noticed that sometimes, when you select a matrix code, a CDBG "regulation citation" will appear—even though your activity may not be a CDBG activity. Do not worry about the regulation citation. Simply pick the matrix code that most closely describes an activity. For ESG homelessness activities, you may choose one of several codes that apply to different types of assistance offered to homeless individuals.

The Office of Community Planning and Development will soon publish a reference guide specifically for IDIS that will define each matrix code, making it easier for you to select the correct code for a particular activity. A future issue of *IDIS Live* will provide additional details on the publication of this important guide. In the meantime, the addition of new matrix codes is in the works. ∎

SPRINTLINK AND MODEMS

Our experience shows that certain modems are trickier than others when it comes to accessing IDIS. The U.S. Robotics Sportster Winfax Modem (Model 1125), for example, didn't seem to work for certain users in Massachusetts. **Laura Schiffer**, with HUD/Boston, noted that it says on the Sportster Winfax box that "the Sportster works only with Windows-based communications software."

You may want to steer clear of modems that have a similar "warning" on their label. You may have problems using such modems to access IDIS. ∎

Q&A: PASSWORDS

Q: Suppose a user is made "inactive" and then six months down the road, she is made "active" again. Will she be able to gain immediate access to IDIS with her old password? Will she need a new password? Does Headquarters need to become involved, or can the Local Administrator handle it all?

A: If a user stays out of IDIS for more than six months, their ID will be "turned off," and John Mayer—at Headquarters—is the only person who can turn it back on (the six-month clock runs regardless of whether a user is active or inactive). The best way to get John involved is to go through your local CPD representative. If not much more than six months has elapsed, John can get the same ID turned back on again, but if too much time has passed (and John doesn't know exactly how much is too much, just now), he'll have to get fresh paperwork from the user in order to establish an entirely new ID.

If a user has been out of IDIS for fewer than six months and wants to become "active," the Local Administrator marks the ID as "active." The user then calls the User Assistance Branch (UAB) and asks them to "unsuspend" the ID and reset the password. (The phone number for the UAB is

202-708-3300, and you'll want to select option 3.)

Why is any of this necessary? After 21 days of non-use, IDIS "flips a switch" that says "next time this person logs in, get him/her to change the password." On the 46th day of non-use, IDIS flips another switch that says "suspend the ID of this person." Both actions are easily reversible up until six months of non-use; simply call the UAB to have the ID and password reset. After six months of non-use, the user must contact John Mayer to have the ID reinstated or, if too much time has elapsed, to have a brand new ID issued. ■

FEDERAL HOLIDAYS: 1998

Remember that IDIS is unavailable on Federal holidays. A list of the dates on which Federal holidays will be observed in 1998 is provided below.

DATE	HOLIDAY
January 1	New Year's Day
January 19	Martin Luther King Jr.'s Birthday
February 16	Presidents' Day
May 25	Memorial Day
July 3	Independence Day
September 7	Labor Day
October 12	Columbus Day
November 11	Veterans' Day
November 26	Thanksgiving Day
December 25	Christmas Day

CDBG FLOAT-FUNDED ACTIVITIES IN IDIS

IDIS handles float-funded activities much like other activities. When money is drawn to fund a float-funded activity, the activity is given a budget, its funds are committed (through Activity Funding), and a voucher is created and approved.

When the money loaned comes back to the program, it is returned to the system using the Program Income module. The user receipts the "floated" funds to bring them back into the appropriate program (CDBG). Thus, the net effect—even though the activity has a record of the money going out—is neutral: The money goes out through Activity Funding and Drawdowns, and it comes back into the system through the Program Income module. The funds, now tagged as Program Income, will be used on the very next draw.

Keep in mind that with a float-funded activity there is no way to "zero out" the activity's budget or funded amount once the money has been drawn. Nor is there a need to do this. The activity will always reflect that it was funded and that the money was drawn.

In order to document that the funding effect was neutral, simply record this fact in the Accomplishments Narrative section of the activity (using Revise). At the same time, you may want to change the status of the activity to "Canceled" if it is found that the activity, for whatever reason, was ineligible. You will also want to change its status to "Complete" once the activity has been completed. ■

COMMUNITY 2020 AND LOW/MOD SERVICE AREAS

Did you know that you can use Community 2020 to determine the percentage of low/mod households residing within a particular service area? Simply follow the steps below (submitted by **Jade Santoro**, of the Denver field office).

1. Select a map containing census data for the community in question. One way to do this is to select MAP from the menu and then FIND. Then type in the entitlement City.

2. Often, the map does not include census block groups, so it is necessary to add this layer. Using the Map Layers button—the three sheets over one another—bring up the Layers dialog box and select "Add Layer." If you are using the LAN, select the 2020 drive. If you are using a CD, select your compact disk drive with the appropriate data disk loaded. From the list of "Geographic Files" select the very first in the list: "ccbg.cdf" or "Caliper Census Block Group." Click OKAY to return to the LAYERS dialog box and then highlight the block group layer that has now been added. Select the LABELS button, click on the down arrow next to the FIELD

button, and select ID. Click OKAY. Click CLOSE to exit the map layer window.

3. Make the block group layer active (or census tract layer, if you are dealing with entire tracts). Do this by clicking on the down arrow next to the white box on the button bar. This box contains the title of the working layer.

4. Next, activate the SELECT BY POINTING tool (third button down on the left-hand side of the TOOLS toolbar). With the crosshairs, select the first block group in your service area, and then **hold the SHIFT key down** and click on all the other block groups contained in the service area to highlight them.

   If you accidentally click on a service area that should not be included, continue to hold the shift key and click on that area to deselect it.

5. Open the dataview window for the selected service area by clicking on the New Dataview button (just to the right of the working layer down arrow on the button bar).

6. Click on the down arrow (working layer box) of the button bar once again, and change from ALL RECORDS to SELECTION.

7. On the top menu bar, choose DATAVIEW, STATISTICS. Save the statistics as a .dbf table (this is the default). Call it something like "stats.dbf" and save it in a subdirectory like "c:\mydata\."

8. Arrow down on the list of records until you see [Lowmod Income] and [Lowmod Univ]. The third column will contain the sum of these sets for the selected block groups. Divide the [Lowmod Income] sum by the [Lowmod Univ] sum (do this on a calculator). The result will be the percentage of low/mod households residing in the selected service area. ■

TAU PROFILE: JAMES CANNON

James Cannon is relatively new to the Technical Assistance Unit (TAU) staff. He's been making a gradual transition away from working with HOME/CMIS documentation—which he's been doing for nearly two years—to working on the hotline. Due to his experience with HOME completion set-up reports and CMI and End-of-the-Day Status reports, James is particularly knowledgeable about the HOME program. When asked to compare the old CMI system with IDIS, James said the major difference is "paperwork."

"Since we aren't doing so much data entry for people anymore, there's not such a need for paper," James said, adding that "because people are entering their own data, they have more control overall." He's views this "decentralization of control" as one of the greatest benefits of IDIS.

What advice does James have for people who call the hotline? "Be precise," he says, adding that it's important to "describe your problem in as much detail as possible."

James says that he enjoys dealing with people over the phone, and that he's done it for most of his career. "Most people are very nice," he says. Before beginning his tenure with HOME and the CMI system, James worked in the financial sector, dealing with brokers, bankers, and accountants. "I worked with figures and numbers, balancing accounts…things of that nature," he says. These "number skills" should come in handy as he moves onto the hotline staff full-time.

We'll feature profiles of other TAU staff members in future issues of IDIS Live. ■

FROM THE FIELD

From the Field is a regular feature of IDIS Live *in which Field Office Representatives share their thoughts about IDIS.*

This month's columnist is Wayne Paulsen, from the HUD Jacksonville Office.

QUESTIONS, QUESTIONS!
WHERE CAN I FIND THE ANSWERS?

Remember those first days of IDIS when our "complete" resources were the *Student Guide* and *User Manual* from Fairfax, Virginia? The question was not where to find the information, but which book would be the least frustrating. Well now we

have a wealth of resources to help us answer our IDIS-related questions.

The Internet, *IDIS Live*, and the listserv group, among other things, make it easy to find the answer to almost any question.

When I'm looking for answers, I start with the *User Manual*. I scan the index for the screen number. The manual defines the data requested and lists the valid entries. If the question is more theoretical in nature, I look in *IDIS Live* for advice and tips. *IDIS Live* 14 provides a subject index of all prior issues (as does the *IDIS Live* Web site). This is very helpful if you are like me and remember that you read **something** but you forget where and when you read it. The easiest way to find the answer to a general question is to jump on the Internet. Go to the IDIS FAQ (Frequently Asked Questions) page (www.hud.gov/cpd/idis/faq.html), and let the search engine find the answer for you.

I used the FAQ to find information about the drawdown error message "Insufficient grant funds available" and got a list of links. The first link went to a page that posed the question "Why do I get an error message saying that I have "Insufficient Funds" or that "Grant Dollars Are Not Available?" On that page was a complete answer to the question. The FAQ is easy to use once you get used to it.

Some important sources of information are described below:

1. IDIS home page (www.hud.gov/cpd/idisweb.html).

2. *IDIS Live* on line (www.hud.gov/cpd/idis/idislive.html).

3. IDIS FAQ search page (www.hud.gov/cpd/idis/faq.html).

The information age has definitely come to IDIS. It is just a matter of finding the resource that works best for you.

Remember, too, that the Hotline, at 1-800-273-2573 and idis_help@hud.gov, and your local field office representative are always eager to help! ■

IDIS LIVE GUEST COLUMN

A ROLLER COASTER RIDE WITH IDIS

The city of Terre Haute, Indiana, is an Entitlement City for receipt of community development funds. The city annually receives around $2.3 million in CDBG funds, $500,000 in HOME funds, and $63,000 in Emergency Shelter funds. The program is administered by the city's Department of Redevelopment. I am the Bookkeeper for that department. It is my responsibility to implement IDIS, with assistance from Phil Kesner, a Redevelopment Specialist for the department.

Phil and I began our roller coaster ride when we attended our first IDIS training session in February 1996 in Virginia. I was hired as bookkeeper in December 1995 and so had been on the job for only a few months. During the training session, I felt like I was in a fog. I was concerned that I couldn't absorb all the necessary information in a week. Phil and I reviewed what we had learned at the end of each day. Eventually, my nervousness subsided, and I felt calmer about the task at hand. Two plus two seemed to equal four again.

After completing the IDIS training, I began getting on the system and practicing whenever I could get a spare moment. Each time I entered the system, I felt a rush just like you feel when you are about to drop over the first hill on a roller coaster ride. I put information about our activities into the practice area to get a more realistic experience. These practice sessions continued for about a year, and I felt more comfortable with the system.

We were notified by the HUD Indianapolis Area Office in April 1997 that we would be going Live in June 1997. I felt panic again. It once again seemed

that I was about to drop over the first hill of a roller coaster ride. We weren't sure what to expect over the next hill. Phil and I decided that additional training would be helpful, since over a year had passed since we completed the Fairfax, Virginia, workshop. We attended another HUD training program in Dallas, Texas, during May 1997 to refresh our skills. The training staff were very helpful in answering our questions. The pieces appeared to be falling into place. The roller coaster hills seemed to be getting smaller.

In June 1997, we began checking all the information that had been loaded. We realized that the 1995 Grantee Performance Report (GPR) had been loaded into IDIS rather than the 1996 report. The last thing we wanted to do was to enter the last 15 months of data by hand before we could make our first draw. We asked HUD to extend our date for going Live to July to make sure that the correct GPR had been loaded. Our area representative was very helpful, and the request was granted.

On July 1, 1997, we went Live. We began on the first day of the month so that we could more easily coordinate the starting balances and dates between IDIS and our local records.

The first problem we encountered was in getting a clear picture of the funds budgeted and the activity funding. Our Program Income was the source of the confusion. We developed a form for each activity that listed changes in the funding amount and the budgeted amount and provided a narrative area for explaining the changes. The form clarified the transactions that occurred and has worked very well for us. The form provides a clear paper trail to explain the changes. We found that it was easier to list administration first on each draw and to apply Program Income to that account every time we made a draw. This routine lessens any confusion.

We devised another form that we call a "voucher request form." The forms lists the program, office account number, project name, project number, funding year, IDIS activity number, and the amount to be drawn from each activity. When we attended

the IDIS Users Group meeting in Fort Myers, Florida, in November 1997, we shared the form with other meeting participants. They seemed interested in using the form to identify more clearly the accounts from which they'd be drawing funds. I think the User Group meetings provide good opportunities for IDIS users to share techniques and other information.

IDIS seems to be working fairly well for us at this time. There are always bugs to be worked out in any new program. We have had our share of frustrations, but we have found the hotline staff to be very helpful. IDIS is more time consuming than our previous system. We hope that this up front use of time will be offset by easier reporting in the future.

I have several recommendations to make to others who are beginning to use IDIS for cash management. First, obtain as much training as possible through HUD workshops. Second, work as a team with someone in your office to see the problems and solutions from more than one perspective. Third, network to learn from the experiences of other IDIS users. Finally, remain calm, don't panic, and enjoy the roller coaster ride.

If IDIS has inspired you, too, contact Jennifer Stanley by phone (202-708-0614, ext. 4411) or cc:Mail (Jennifer_C._Stanley@hud.gov) to discuss your idea for an IDIS Live *Guest Column.* ∎

FUTURE GROUP MEETINGS: SAVE THE DATES!

USERS GROUP—COLUMBUS

The first national Users Group meeting of 1998 will be held on **January 27 in Columbus, Ohio**, at the following location:

Mid-Ohio Regional Planning Commission
285 East Main Street
Columbus, Ohio 43215

Contact **Susan Tsen** at 614-233-4139 or **Sharon Lee-Thomas** at 202-708-0614, ext. 2985 if you wish to attend.

USERS GROUP—LOS ANGELES

Two Users Group meetings will be held in Los Angeles in February. Information about the meetings is provided below.

Tuesday, February 24, 1998:
Almansor Court (Banquet Room)
700 South Almansor Street
Alhambra, CA 91801
Contact: **Scott Whyte** at 213-890-7168

Thursday, February 26, 1998:
City of Oceanside Civic Center
Community Room (next to the Library)
300 North Coast Highway
Oceanside, CA 92054
Contact: **May Lee-Samaniego** at 213-894-8037

If you wish to attend either meeting, call the contact person listed or **Sharon Lee-Thomas** at 202-708-0614, ext. 2985.

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Tentative dates and sites for upcoming Users Group meetings:

March—Pittsburgh, Pennsylvania, and Atlanta, Georgia

IDIS TRAINING

Tentative training dates and sites for 1998 are listed below.

January 26–30, 1998—Kansas City, Missouri
February—San Diego, California
March—Chicago, Illinois
April—New Orleans, Louisiana

SPECIAL REMINDERS

Reminder to **IDIS Advisory Committee** members: there will be a meeting of the IDIS Advisory Committee on Friday, January 30, 1998, in Washington, D.C., at HUD Headquarters.

IDIS Training for the **IDIS State Task Force** members will be held on Thursday and Friday, January 29 and 30, at the

Kansas City Marriott Downtown
200 W. 12th St.
Kansas City, MO 64105
816-421-6800

FOR MORE INFORMATION

Your IDIS Users Group contacts are **Lincoln Burruss**, **Phil Helbling**, and **Roger Merideth** at CPD. You may contact them via the following:

Telephone: 202-708-0790, ext. 4570 (Lincoln)
202-708-0614, ext. 4410 (Phil)
202-708-0614, ext. 4691 (Roger)

Internet: Lincoln_Burruss@hud.gov
Philip_B._Helbling@hud.gov
Roger_E._Merideth@hud.gov

Mail: HUD/CPD
Office of Executive Services
451 Seventh St., S.W., Room 7226
Washington, D.C. 20410

For technical information, contact your field office or the CPD Technical Assistance Unit (at 1-800-273-2573). **For SprintLink ID and password information**, contact your local HUD field office. **To have your IDIS password reset**, call HUD Security at 202-708-3300.