

IDIS LIVE

...for the Integrated Disbursement and Information System

U.S. Department of Housing and Urban Development

Office of Community Planning and Development

PSEUDO ALERT

STATES : PRACTICING IN PSEUDO

We noted in last month's issue of *IDIS Live* that all data from the Production region of IDIS would be periodically copied and placed in Pseudo (or Pre-Production), allowing users to practice new features with their own data. This happened on January 21, 1999 and the information will be updated on a quarterly basis in: May, August, November and February.

At the same time, the old practice data in Pre-Production was deleted to prevent a slowdown of the system. This means there are no data in Pre-Production for states who have not yet gone "live." The only exception is for those states who have indicated that they intend to convert to IDIS and have asked that their data be converted in the Pseudo region. We will do a conversion of their data and they will be able to get into Pre-Production to try things out. Otherwise, states will not be able to get into Pre-Production.■

PASSWORD TO PRACTICE

One of our grantees wrote in and asked about being able to go into the Pre-Production region to have the opportunity to test and practice with data in the system. She wanted to know what ID and password to use since IDIS did not accept her Production region password.

Here is my response. The one ID you have for IDIS can be used for both regular, Production IDIS and for the practice part of IDIS, what we call "Pre-" or "Pseudo-Production". These two aspects of IDIS, Production and Pre-Production, are two separate computer systems that are not ordinarily connected

with one another. Just as you almost always use the same name, regardless of what you are doing whether attending high school or going to work, IDIS always identifies you by your IDIS ID; whether you use it for Pre-Production or Production.

But there are time limits. If you haven't used Pre-Production for more than six months, it doesn't allow you in - too much time has passed, and your ID has been dropped from non-use. To get you back into your high school for some "continuing education", we'd have to get you specially registered. That's what I do in Pre-Production IDIS - get you specially registered so it will let you in for continuing education.

Since I know your entire IDIS ID, usually the only data I need is your whole Social Security Number (for quite a few of you all I have is the last five digits) and whether you're still working for the same grantee. That's all the information I need to get our security people to "re-register" you in Pre-Production. It usually takes only a couple of days.....continued on page 2

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PASSWORD TO PRACTICE (continued)

for them to do that. Of course, it may take longer depending on their and my workload and other priorities and whether your ID is also "dead" in Production.

If you send me an email request to be restored to Pre-Production and you haven't heard from me in a week, try this: change the Sprint SETUP so that the "IDIS Region to login" points at "Pre-Production", use your regular IDIS ID, and use the last six digits of your Social Security Number as the password. You'll know you've been "re-registered" in Pre-Production when it works and lets you in. Make sure you change the Sprint setup back to Production when you are done, particularly if you aren't the only person using that PC. The next person behind you may not be able to get into Pre-Production, and wouldn't know why IDIS doesn't recognize him/her.

If difficulties persist, email me. ■ *John Mayer*

IDIS PSEUDO RELEASE NOTES FOR VERSION 4.3 P 1

The following features were released to the Pseudo region of IDIS as of February 10, 1999. We encourage users to take the time to test them out before we upgrade Production. (If you do find "bugs" that need to be worked out, please contact the Technical Assistance Unit at 1-800-273-2573. They will forward the information to the developers for investigation.) Grantees will be notified via the web and IDIS News when these items will be released into Production.

1. Modified the titles on the Subgrant screens (C04MG03 and C04MG05) for consistency.
2. Increased the size of the Accomplishment Report number field from 4 to 8 characters on the Setup Activity screen (C04MA04).
3. Revised the selection and draw criteria to allow a zero dollar amount in the Estimated Activity Amount field for the Summary of Activities report (C04PR23).

4. Allowed for selection of multiple reports on the Reports Selection screen.
5. Corrected the problem of screen C04MA07 overlaying screen C04MD02.
6. Corrected a problem with the cancellation of Program Income receipts on the Update/Cancel Program Income Receipt screen (C04MI02).
7. Allowed the entry of decimals when canceling a Program Income Receipt on the Update/Cancel Program Income Receipt screen (C04MI02).
8. Added phase III of the HOME download process.
9. Corrected the problem of the Security report PR30 aborting on download.
10. Added date edits to the Setup Activity screen (C04MA03) and the CDBG Activity screen (C04MC01).
11. Corrected the problem of the system locking up when logon grantee is not in the GRANTEE_MAP table.
12. Corrected the problem of allowing the user to enter a UOG of a Field Office or regional office that is different from the user's.
13. Added field edits to the Program Income screens (C04MI01, C04MI02, and C04MI03).
14. Corrected the ASRA abend when processing the F7 function key on the C04MU16 screen.

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15. Corrected the F1 (owner help) and the F2 (project owner) function key display processing on the C04MO03 screen.■

EDI: PHASE I FUNCTIONING IN LOUISIANA

The State of Louisiana has been working diligently for the past months and their hard work has paid off. They are successfully transferring information from their database to IDIS using Electronic Data Interchange (EDI). Louisiana's successful completion of EDI Phase I, which allows for the update and amendment of existing projects and activities, offers an example for other states to follow.

A functional Phase I was a prerequisite for the states to start in IDIS. Other states can join Louisiana on the "paperless" path by implementing these basic requirements.

- **Grantee Mapping** - Use the IDIS Data Dictionary to establish a relationship between grantee data and IDIS tables and fields (i.e., relationships, field sizes, data types, etc.).
- **Program Configuration** - Develop a systematic way of compiling and formatting data to meet the standards set forth by the EDI formats.
- **VAN/Internet Connection** - Establish a means of transmitting the data to the HUD Value Added Network (VAN) mailbox by purchasing either a VAN contract or an EDI-accredited Internet service provider and software.
- **Connectivity Testing** - The grantee and HUD first test the EDI data flow to ensure it has been sent and received correctly. They then test the integrity of the data to verify accurate EDI format requirements.

Now that the basic requirements have been outlined, how do you go about formatting your data and purchasing a VAN to meet these requirements? There are many vendors who provide the software necessary to match the technical specifications required. One such vendor is the Mitas Group, Inc. They do business with many of CPD's grantees and there have been many inquiries from users about them. We recently provided Mitas with technical specifications pertaining to the EDI process and procedures that let IDIS grantees create batch files of IDIS accomplishment data using their own software and then ship them to IDIS via the Internet. The information provided to Mitas is available to any other vendor upon request and to any grantee who wants to create its own EDI process instead of going through a third-party vendor.

The Mitas Group plans to modify its software so that its customers have the opportunity to use the EDI interface to IDIS. Based on what Mitas has told us, they expect to have their IDIS-EDI feature enabled next month. They will be contacting HUD when they have a pilot grantee ready to use their EDI interface to IDIS. (They expect to pilot with a state and a county.)

HUD is committed to making EDI work and will cooperate with anyone who is trying to use the file transfer process of EDI. The Office of Community Planning and Development (CPD) at headquarters is eager to help any state meeting these requirements. Technical assistance will be provided for those states desiring to extract their data and send it to CPD for testing with IDIS.

For more information or help on implementing EDI, please contact your Field Office, Bob Meehan at 202/708-0790 ext.4412, Sam Walker at 202/708-0790 ext.3883, or James Kyle Farris at 202/708-0614 ext.4691.■

LOCAL ADMINISTRATOR TECHNICAL BULLETIN

The information contained in the Local Administrator Technical Bulletin is supplied by our HUD Security Administrator, John Mayer. He can be reached at 202-708-0790, ext. 4866 or emailed at John_Mayer@hud.gov.

AVOIDING TROUBLE

The cover story in the February 1999 edition of *IDIS LIVE* noted that IDIS password and SprintLink trouble calls together accounted for more than one out of eight trouble calls in 1998. Here's why SprintLink trouble calls and IDIS password troubles are more related than you might think.

When you upgrade hardware or software and re-install SprintLink, it is very likely IDIS will seem to "forget" you ever existed. You may get through SprintLink just fine, only to be rejected by IDIS. Even after you call 202-708-3300 option 3 and get your IDIS password reset, you still can't get in.

WHY?

Unless you tell SprintLink otherwise after you re-install it, it takes you to the Pseudo area of IDIS. Most of you using IDIS do not want practice, you want the real thing. But unless you tell SprintLink to use the Production region, SprintLink takes you into "Pre-Production" - the practice area, where your ID has long since lapsed. When you call and get your IDIS password reset, your PRODUCTION password is reset unless you specify Pre-Production. So, when SprintLink has taken you to Pre-Production, your IDIS PRODUCTION password won't do you any good. You have the right ID, the right password, but you've gone to the wrong "private club" - it doesn't have a clue who you are.

DO THIS:

If IDIS "suddenly" doesn't remember you, particularly if you have recently reinstalled SprintLink, make sure that SprintLink is pointing where you want it to be pointed. Directly under where you would enter your SprintLink ID and password, click on "Setup" to open the telecommunications setup window. Check to make sure that the "IDIS Region to login" shows where you really want to go - ordinarily "Production". If you need to change it, do so, then click on "Save".

SprintLink will prompt you to enter the Area Code and the Local Exchange (first three digits of your phone number) if they aren't already there. Enter them if needed, then save the setup. SprintLink will take you where you want to go now and IDIS will very likely "remember" you.

SOMETHING ELSE TO KNOW:

The SprintLink error message "Invalid Sprint ID or password" is inaccurate most of the time. Nearly all the time Sprint says you have an invalid Sprint ID or password. What it means is "Sprint phone lines are busy now, try again in a few minutes." I recommend you don't take "No" for an answer. Try again. Patience and persistence pay off.

If your SprintLink ID and password CONSISTENTLY don't work, get a "spare" from your local CPD Field Office. One SprintLink ID and password can serve lots of people, even simultaneously, as long as NOBODY CHANGES THE SPRINTLINK PASSWORD.

Since we've gone this far, here's a few "spares" just checked out last month:

Sprint ID	Password
CPD.062334.005	125265
CPD.120492.005	170175
CPD.340672.005	112567

Please share this information with other people who use IDIS; you will help them avoid having to make a trouble call and reduce their frustration. Knowledge is more powerful when shared.■

TAU TOTALS FOR JANUARY

The TAU handled 779 calls on a variety of topics ranging from inquiries on drawdowns and activity funding to explanations for the FIFO concept and system error messages. Questions on the HOME C/MI System and HOPE 3 program combined for 51% of the calls received. The remaining 49% of calls were from users requesting IDIS assistance. (HOME serves 43 grantees while IDIS serves 1,000 grantees.)

The categories of IDIS calls which raised the most questions are listed below:

Rank	Category
1	Drawdowns
2	Passwords
3	SprintLink
4	Activity Funding
5	Reports
6	Activity Set-up
7	Program Income
8	Subgranting
9	Internet
10	Plan/Project

The top categories for January are the same categories that were found for the top ten categories of calls for 1998. Drawdowns led the list as callers continued to inquire about drawdown procedures and the tracking of funds. Password and SprintLink calls again combined to compose a significant number of inquiries - 20% of the IDIS calls. Users were clamoring to get into the system. Activity Funding was of great interest to grantees. It ranked fourth on the list over Reports and Activity Set-up, which tied for fifth and sixth place. A need for clarification of the Program Income function continued to induce IDIS users to call in. Questions about the Internet and on adding plans and projects rounded out the list.

Voice mail calls during the month of January were returned within one hour of their receipt. The TAU continues to make courtesy calls to ensure quality customer assistance. These calls reveal a steady increase in the customer satisfaction rate, which is now at 98%. However, the TAU will not be satisfied until each and every customer is!■

IDIS PROFILE: SHANDA WYCKOFF

March 1999 marks the 25th issue of the publication of *IDIS Live*. During that time we have profiled many members of the IDIS team who provide technical support to users all over the country. We are happy this month to spotlight the contributions of Shanda Wyckoff.

Shanda has been at HUD for approximately six years and has been a member of the Technical Assistance Unit (TAU) for three of those years. She started in the Systems Operations Branch providing technical support for the Cash Management Information System (C/MI System). Shanda parallels that experience with working on the IDIS hotline. "I consider the Systems Operations Branch to be the forerunner to the TAU – with one big difference. When users called in with questions on CMIS, they were working from hard copies of their data while we had access to all the screens. What IDIS does is give grantees access to their screens while the hotline provides guidance on how to carry out certain functions. Users are in control of what is input while we help them navigate through the system."

Shanda feels that her experience working on the HOPE 3, HOME, and Rental Rehab programs certainly helped her as she moved into her role as a member of the TAU. Many calls are received on activities associated with these programs. Shanda's understanding of the program information makes her fully equipped to aid grantees and to provide assistance to other members of the TAU.

Shanda has found that one of the positive aspects of working in an interactive position like the hotline is the rapport that is developed with the customers. There are some grantees that call into the hotline every day. Strong alliances have been built. Some callers working from their home have provided their home telephone number so that they can be called back with answers to questions.

Shanda also notes that the callers into the hotline have become more knowledgeable about IDIS. "I think our users are really trying to understand the system and they are willing to work at it. However, there are still those problems that come up that are a

little out of the ordinary or that do not quite fit into one category, so they have to call in.”

Shanda says that, “Each and every call is a priority for the TAU and each and every call is treated as such.”■

NOTICE: IDIS_HELP EMAIL

As you have been made aware via the ListServe and the IDIS Chat Room, the IDIS_Help email address is not accessible. (The IDIS_Help email is a “group” mailbox where IDIS users post messages asking for help/guidance from the TAU). Since the conversion from cc:mail to Lotus Notes, we have experienced a disconnect that prevents messages from being accepted and delivered. Headquarters is working to correct this problem.

In the meantime, do not hesitate to call the TAU at: 1-800-273-2573 or fax them at: 202-708-3222. Notices will be posted on the ListServe and in the IDIS Chat Room when access to the mailbox is restored.■

LIVE UPDATE



The list of entitlement grantees that have gone “live” in IDIS has grown with the addition of

**Clayton County, GA and
Montgomery County, TX**

Welcome to the IDIS family!

IDIS Q&A

(The questions in this issue's Q&A respond to inquiries that are CDBG related.)

in a memo dated 9/29/98 sent to all CPD Field Office Division Directors.)

CDBG RETURN OF EXCESS PROGRAM INCOME

Q: How do I return excess CDBG Program Income funds to HUD?

A: The CDBG regulation at 24 CFR 570.504(b)(2)(iii) provides that at the end of the program year, Program Income on hand (with some exceptions) in excess of one-twelfth of the most recent grant must be returned to HUD to be placed in the recipient's line of credit. The Line of Credit and Control System (LOCCS) cannot accept returned funds for a grant year unless that amount has already been drawn from the grant year. Because of this, excess Program Income will often need to be returned to a grant year other than that for which the Program Income is collected. The following is the procedure for handling the return of the excess Program Income.

1. Fund activity 2 for the amount of excess Program Income being returned if it was not previously received. It must be funded from the EN fund type. Any fund year can be used.
2. Receipt the Program Income in the year for which you want credit for the receipt of Program Income. This should be the one and only time that this Program Income is received.
3. Immediately draw the excess Program Income by creating an EN draw for activity 2 for the amount received in step 2.
4. Return the excess Program Income to the Treasury via wire transfer, to a year that has at least as much drawn as the excess Program Income being returned. *(Guidance on the wire transfer of excess Program Income was included*

5. Once the returned excess Program Income shows up in IDIS as being returned to the grant year specified in step 4, contact the Technical Assistance Unit (TAU). An adjustment will need to be made at HUD headquarters to make the commitment credit for activity 2. (This step will be automated in IDIS in a future release.)

Once step 5 is complete and the HUD headquarters adjustment has been made, both IDIS and LOCCS will show the returned excess Program Income as being available to both commit and draw. Activity 2 will show a net commitment and draw of \$0 from this return of excess Program Income. It will have an EN entry for a negative commitment and draw, and a positive commitment and draw for the Program Income entry. These cancel each other out and effect the transfer of the funds from the Program Income account to the EN account.■

INCREASING AN ACTIVITY'S FUNDING

Q: I set up a CDBG activity but now I realize that the funding needs to be increased. What procedures do I follow to accomplish this?

A: You will be able to increase the activity's funding by following a few simple steps. First, remember that the total funded amount for activities in a grant cannot exceed the Estimated Maximum Funding amount budgeted for the grant. Go to Setup Activity screen C04MA08 to verify that the Total Estimated Amount will support the increase you want to make. Revise the Total Estimated Amount, if needed.

To increase funding: at the IDIS main menu, select option I - Activity Funding. Then, select option 2 which is Maintain Activity Funding. The next screen you see is the Activity Funding List, screen

C04MO03. Type in the activity number of the activity whose funding you intend to increase and press ENTER.

You are now at the Maintain Activity Funding screen (C04MO04). Choose the funding source or “pot of money” from which the activity was originally funded (e.g., B for CDBG) with an “X” in the SEL column and press ENTER.

This brings you to screen C04MO05. Enter the correct amount of funding for the activity and press ENTER.■

CHANGING THE PROGRAM YEAR

Q: Can you please verify the procedure for changing the program year? Also, who has authority to make the change?

A: The Field Office Representative is authorized to change the program year for its grantees. They are the first point of contact for this operation.

The procedure to make the change to the program year is as follows. Select option F, Utilities, from the Main Menu. On the Utilities Menu, select option 01-Grantee ID/Exceptions and press ENTER. On screen C04MU07, enter the grantee’s UOG code and UOG number and press ENTER. Screen C04MU06, the Grantee Inquire/Update/Add screen, will be displayed. Tab down to the Program Year field and enter the new data. Press F9 to save the data.■

Tracey, HUD-TAU

IDIS LIVE GUEST COLUMN

This month's IDIS Live Guest Column was submitted by Kenneth Pick, Community Development Director from Berks County, Pennsylvania. Ken is one of our most proactive grantees. We always welcome his insight. Thanks, Ken!

MY TURN

Consider the name: "Integrated Disbursement and Information System (IDIS)." What a wonderful and exciting concept! An automated system not only for getting your funds from HUD but also for keeping track of the information needed to generate reports. Who out there in the field can honestly disagree with this idea?

IDIS became operational in Berks County on October 3, 1996. Yes, it was not without pain and suffering. Yes, we too cursed the system and HUD for developing the system. Over time we have learned to live with it, work with it, and use it to help with several administrative tasks.

Does IDIS represent a major advancement in community development technology as stated by the Department? Well, that's a stretch in almost anyone's book. We find IDIS to be helpful and successful on the disbursement side. Funds can easily be drawn down. Corrections can be made to mistakes in vouchers. Tracking of expenditures by individual activities is uncomplicated. Hats off to the Department!

The information side of the system is less than successful. So where did this train get derailed? Doctor Bill Cosby said: "I don't know the key to success, but the key to failure is trying to please everybody." The Department seems to be attempting to please Congress, the grantees, themselves, the non-profits, etc. As a result, progress on the information

component is painfully slow and the results are less than acceptable.

As one of the founding members of the IDIS Advisory Group, I have a genuine concern for making the system as functional and user-friendly as possible. I suggest the Department stop, take a breath and refocus on just what this system is trying to accomplish. The sophistication and success of IDIS may be enhanced by its simplification. Let's all stop looking for perfection and focus on developing a system that is easy to use and produces the basic information needed to show the great and important achievements being made with funds from the federal programs.■

Get the Word Out

*Let other users in the IDIS community know how IDIS works for you. Entitlement grantees and HUD Field Office staff are invited to submit an **IDISLive "Guest Column"** or a **"From The Field"** article. Please contact Vera Pérez by phone at (202)708-0614 ext. 4786 or by email at Vera_A._Perez@hud.gov.*

**THE NEXT ISSUE OF *IDISLIVE* WILL BE
PUBLISHED ON APRIL 1, 1999.**

TRAINING AND TECHNICAL ASSISTANCE

“EXPLORING IDIS FOR ENTITLEMENTS” TRAINING

As we announced previously, HUD’s Office of Community Planning and Development has brought back the popular "Exploring IDIS for Entitlements" workshop. The workshop is valuable for those IDIS users who are new or need more experience on the system. Its purpose is to make participants more confident in their ability to navigate in IDIS as they report accomplishments to HUD, set up activities, add projects, etc. All relevant functions of IDIS are covered, including setting up and revising activities, adding projects, drawing down funds, reporting program income, and downloading and formatting reports. For HOME program staff, using administration funds and subgranting are also discussed.

This month’s session is scheduled for March 17-18, 1999 in Atlanta, GA. Participants who work with IDIS on one or more of the **CDBG, ESG, and/or HOPWA** programs but **not** HOME funds may sign up for the one-day session. Participants who work with IDIS **directly on the HOME** program or participants who work with the **CDBG, ESG, and/or HOPWA** programs **in addition to the HOME** program may sign up for the two-day session.

WORKSHOP DATES		
	HOME/CDBG/ ESG/HOPWA	CDBG/ESG/ HOPWA
Atlanta, GA	3/17-3/18	3/17 or 3/18

The workshop will be held at the following site:

Atlanta, GA
Hyatt Regency Atlanta
265 Peachtree Street, NE
Atlanta, GA 30303
404/577-1234

Hotel accommodations for the Atlanta workshop have been arranged with the Atlanta Marriott Marquis, 265 Peachtree Center Avenue, Atlanta, GA 30303. The telephone number is 404/521-0000 and it is located across the street from the workshop site at the Hyatt Regency Atlanta.

To register for this interactive workshop, download the fax-back registration form from the IDIS website (<http://www.hud.gov/cpd/idisweb.html>). If you do not have access to the Internet, call TONYA, Inc. at (202) 289-8100 to request a registration form. The TONYA team is also available for any other questions you may have about the session. See you there!■



FOR INFORMATION ON.....	
Your IDIS Users Group contacts are Tracey Peterson and Vivian Baldwin at CPD. You may contact them via the following:	
Telephone:	202-708-0614, ext. 4859 (Tracey) 202-708-0614, ext. 4693 (Vivian)
Internet:	Tracey_R._Peterson@hud.gov Vivian_C._Baldwin@hud.gov
Mail:	HUD/CPD Systems Development and Evaluation Division 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 ID and password reset , call HUD Security at 202-708-3300.	