

# IDIS LIVE

...for the Integrated Disbursement and Information System

U.S. Department of Housing and Urban Development

Office of Community Planning and Development

## STATES NEED TO FINALIZE IDIS CONVERSION PLANS BY YEAR END

All States are required to be “live” in IDIS by year end. The move toward 100% State participation in IDIS continues to advance. Through the combined efforts of the Office of Community Planning and Development (CPD) and the Office of Information Technology (IT), the prerequisites for States to go “live” are only months away from being satisfied. As we have reported in prior issues of *IDIS Live*, Congress requested that HUD correct some problems with IDIS before requiring States to implement the system. Those problems included the lack of a fully functioning Electronic Data Interchange (EDI), full Internet capacity, and complete reporting abilities.

Ongoing dialogue with grantees and special interest groups has aided in the upgrade and stabilization of the system. In a letter from **Cardell Cooper**, Assistant Secretary of CPD, to the Director of the Council of State Community Development Agencies (COSFDA), an update on the progress of the IDIS stabilization effort is addressed. It states:

*March 10, 1999*

*Dear Mr. Sidor:*

*The Office of Community Planning and Development (CPD), together with the Department’s Office of Information Technology,*

*has been working for several months to resolve issues and concerns your organization has raised concerning our Integrated Disbursement and Information System (IDIS). CPD has been keeping your staff up to date about our progress in stabilizing IDIS and met with the state representatives at the COSFDA Winter Conference on February 17<sup>th</sup> to brief them on the status of their IDIS issues.*

*We achieved a major milestone of our effort to stabilize IDIS in mid-February when CPD made the IDIS Electronic Data Interchange (EDI) procedure available for use by any grantee. This feature eliminates the duplication of effort that comes from keying data into both IDIS and a State’s information system. EDI has been rated as the most important enhancement needed to make IDIS work.....continued on page 2*

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for the States. Louisiana is using it already and we are looking forward to helping other grantees take advantage of this tool.

The Department is working diligently to address all other outstanding issues and concerns about IDIS and we expect to complete our work by the end of the year. At that time, all States will be required to convert to IDIS and to use the system to draw their funds and report on their accomplishments. They should start now to update their work plans for converting to IDIS.

Bob Meehan, IDIS Project Manager, will be happy to provide additional details regarding our progress in making improvements to the system. His phone number is (202) 708-0790, extension 4412.

Thank you for your interest and for your ongoing efforts to help us make IDIS work more effectively and efficiently.

Sincerely,

Cardell Cooper  
Assistant Secretary

As the Assistant Secretary's letter states, steady input from both sides of the table has resulted in a fully functioning Phase One of EDI (grantees can update and amend existing projects and activities). Also, Internet access to IDIS will be available by the end of the year, and report fixes are currently in the testing/quality assurance stages.

There are some States that have opted to go "live" in anticipation of the enhancements to the system. They realize that 100% utilization of IDIS by all grantees is not very far from becoming a reality. To make the transition run more smoothly, CPD has authorized that every State's data be converted into the Pseudo region of IDIS so that they may begin practicing on the system using their own projects and activities. The Field Offices will be contacted when a conversion is completed for a State in their jurisdiction. The Field Office will then notify that State so they can begin practicing in Pseudo.■

## STATUS OF STATES IN IDIS

### On-Line Live:

Alaska	Colorado
Delaware	District of Columbia
Idaho	Louisiana
Maryland	Maine
Minnesota	Mississippi
West Virginia	

### Data Converted to Pseudo:

Alabama	Arizona
Georgia	Illinois
Indiana	Missouri
Montana	Nebraska
New Hampshire	New Jersey
Nevada	New York
Oregon	Puerto Rico
South Dakota	Utah
Vermont	Virginia
Washington	Wisconsin
Wyoming	

## EDI PHASE ONE: ITS TRUE IMPLICATIONS

Information from many sources has gone out about the effect that Phase One of the Electronic Data Interchange (EDI) will have on IDIS users. HUD has emphasized that the purpose of implementing EDI is to ease the burden on grantees of transferring data from their information systems to IDIS. Phase One of this process provides for the update and amendment of grantees' existing projects and activities. We have found it necessary to clarify exactly what impact the utilization of Phase One of EDI will have.

Some clients of special interest groups have been erroneously advised that the time and error-reducing effect of Phase One of EDI is relatively small compared to the next phase of EDI. Just the opposite is true.

Phase One gives grantees the ability to transfer information for projects and activities already created in IDIS. Phase Two adds the ability to create brand new project and activity records. Very little data entry work is involved in creating new project and activity records.

The required fields to create a new project record in IDIS are the Consolidated Plan Program Year, the name of the project, the HUD Matrix Code, and three Yes/No questions: Help Prevent Homelessness, Help the Homeless, Help Those with HIV or AIDS. The grantee staff person would enter these, then the system will generate the Project Number.

The Project Number is the only identifier that the State needs to associate with the data it is feeding in through the Phase One EDI transaction file. Address/location, narrative description, and all other items can be updated if they already exist. If they do not exist, they can be created.

The only feature that will be added for Phase Two of EDI is the ability to generate new project numbers. This does not involve a lot of keying.

Regarding activities, the required fields to create a new activity record in IDIS are the project number, the Program Year, and the name of the activity. The system will generate the activity number. The activity number is the only identifier that a state needs to associate with the information it is feeding in through the Phase One EDI transaction file: address/location, narrative description, beneficiary data, and all other items needed in IDIS may be created or revised using Phase One of EDI.

**Bottom Line:** Phase One of EDI is the tool for avoiding "heavy keying and its associated time, cost, and potential for errors." ■

## PSEUDO USAGE STATS

Grantees asked to have a more active role in the upgrade of IDIS. We heard your request. As such, a lot of effort and money is being expended to improve the Psuedo Region of IDIS, the practice and testing area. Grantees have the capability to go in and try out proposed enhancements before they are put into Production. However, it is not being used. There are approximately 1,000 grantees in IDIS. See for yourselves the Pseudo region usage statistics for four random days in March.

3/10	16
3/15	16
3/22	11
3/23	12

We need you to go into Pseudo to test the enhancements before they are released into Production. We will continue to bring you usage statistics in future issues of *IDIS Live*. ■

## REPORT DOWNLOADS IN PSEUDO

There have been numerous requests for clarification of the steps for downloading reports in the Pseudo region of the system.

### Field Office steps for downloading:

1. After selecting the grantee, place an "x" by the report desired and an "i" for the priority.
2. Enter the Program Year (4 digits) and press F9.
3. Press F8 to advance to the next screen.
4. Follow the same procedures for downloading a report in the Production region. **However**, at the MS DOS prompt, remember to use "r" rather than "p" to indicate the Pre-Production region.

### Grantee steps for downloading:

1. Place an "x" by the report desired and an "i" for the priority.
2. Enter the Program Year (4 digits) and press Enter.
3. Press F9 to submit report(s).
4. Press F8 to advance to the next screen.
5. Enter "D" in the Activity field associated with the report to be downloaded to the PC.
6. Leave the Destination field blank and press ENTER.
7. Open the report in MS Word (or other word processing application) and follow the same procedures as you would when downloading a report in the Production region. Remember to use "r" rather than "p" to indicate the Pre-Production region.

If you encounter any problems, please contact the TAU at 1-800-273-2573. ■

**DATE**                      **# LOGGED IN PSEUDO**

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# THE HOPWA PAGES

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*The HOPWA Pages spotlight issues pertinent to the HOPWA program. Rusty Bennett, PMI/CPD Specialist for the Office of HIV/AIDS Housing, is available at (202) 708-1934 Ext. 4619 or at [Russell\\_L.\\_Bennett@hud.gov](mailto:Russell_L._Bennett@hud.gov) to answer your questions.*

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## HOPWA HIGHLIGHTS

### **HUD Announces the 1999 SuperNOFA with \$22.275 Million for HOPWA**

Secretary Cuomo announced the FY 1999 SuperNOFA making available \$2.8 billion in grants to fund HUD programs in communities across the nation. Under this year's SuperNOFA, \$22.275 million is available in two categories, Special Projects of National Significance and Long-Term Projects. The Special Projects of National Significance category is for model or innovative projects serving persons living with HIV/AIDS and their families. The Long Term category is designed to provide grants to States and localities that do not qualify for HOPWA formula allocations to devise long-term comprehensive strategies for meeting the needs of persons with HIV/AIDS. Also, this year through HUD's Community Development Technical Assistance NOFA, \$2.25 million will be made available for projects conducting HOPWA national technical assistance.

In last year's competitive process, HUD awarded \$20.15 million in grants to 20 community-based organizations. It is estimated that these resources will reach an estimated 6,106 persons with housing assistance and 10,206 persons with supportive services.

For more information on HUD's 1999 SuperNOFA process check the HUD's web site at ([www.hud.gov/cpd/hopwahom.html](http://www.hud.gov/cpd/hopwahom.html)), your local HUD Field Office, or for technical assistance, contact Community Connections Information Center at 1-800-998-9999. Application kits may be obtained by contacting the SuperNOFA Information Center at 1-800-HUD-8929.

### **Program Reporting CHANGED!**

In the February 1999 edition of *IDIS Live* we addressed the issue of accounting for proposed and actual units of housing made available to persons living with HIV/AIDS in your community. As a part of that guidance, the original reporting requirement to update accomplishment data 90 days after a draw down was replaced with the following:

**At a minimum, the collection of IDIS data must be completed within 90 days of the completion of an activity (i.e., no additional HOPWA funds will be spent on this activity) and within 90 days of the completion of the program year.**

This change was implemented to reduce the burden of reporting on each drawdown and places the focus of data collection on the actual performance in completing activities or, at least, reviewing performance once each year. Accomplishment data **must** be entered and reported. The data collected in IDIS will match the HOPWA Annual Progress Reports currently being utilized by grantees not using IDIS. Together, these sources of information will provide an accurate annual "snapshot" of the number of units of housing produced/supported by this federal program and allow comparison to planned efforts for each discrete activity. The short descriptions of the HOPWA activities will also provide useful information to the public on the design and operation of these community programs. The data can be used in evaluating program performance.■

## **HOPWA and IDIS**

### ***Questions & Answers:***

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This month's Q & A will focus on accounting for HOPWA Housing Assistance on the C04MP05 screen.

**Q:** How does HOPWA define and report Housing Assistance?

**A:** A basic definition for housing assistance is any activity which uses HOPWA funds to provide housing to clients. For the HOPWA program,

housing assistance includes costs associated with facility based projects such as acquisition, rehabilitation, new construction, and operating costs of community residences and SRO dwellings. The term also covers rental assistance such as scattered-site tenant-based rental assistance and short-term rent, mortgage, and utilities. When counting the numbers of individuals receiving housing assistance, include all individuals receiving housing and related supportive services. Individuals who receive no type of housing assistance but do receive supportive services should be counted as receiving supportive services only. This distinction is important as a focus to the goals in using resources for this “housing” program. Grantees and sponsors must collect demographic information on their clients who are receiving some form of housing assistance. Given the ranges of supportive services by type and intensity, this detailed client information is not required for beneficiaries of services only. (See HOPWA regulations: 24 CFR 574.300)

**Q:** How does HOPWA calculate the number of individuals “Receiving Housing Assistance” for both “Persons with HIV/AIDS” and “Other Persons in Family Units”?

**A:** Following the HOPWA definition of Housing Assistance, you should count all individuals with HIV/AIDS and their family members who are living in HOPWA assisted housing. Remember, these totals represent individuals and not family units. Family Units will be captured later under “Total Family Units Assisted with Housing Assistance”.

For example, your organization is providing scattered-site tenant based rental assistance to a family of four (two adults, two children). One adult and one child are known to be HIV positive. You would enter the following information into IDIS:

	Receiving Housing Assistance
Persons with HIV/AIDS	2
Other persons in family units	2
<b>Total</b>	<b>4</b>

For this project, the total persons receiving housing assistance would be four, as this represents the number in the family benefiting from this assistance.

**NOTE:** The total of persons receiving housing assistance is an important number. It is this total which you will use to complete the age/gender and income information on the C04MP06 screen and the recent living situation on the C04MP08 screen.

**Q:** How does HOPWA define supportive services?

**A:** The HOPWA regulations (24 CFR 574.300 (7)) defines supportive services as including, but not limited to, health, mental health assessment, permanent housing placement, drug and alcohol abuse treatment and counseling, adult day care, personal assistance, nutritional services, intensive care when required, and assistance in gaining access to local, State, and Federal government benefits and services, except that health services may only be provided to individuals with acquired immune deficiency syndrome or related diseases and not to family members of these individuals. HOPWA resources cannot be used to replace programs that cover medical costs that can be reimbursed through other government subsidies or under private benefits. Other activities may include transportation, child care, or employment counseling.

**Q:** How do I calculate the estimated number of individuals “Receiving Supportive Services Only”, found on screen C04MP05, for both “Persons with HIV/AIDS” and “Other Persons in Family Units”?

**A:** Following the HOPWA definition of supportive services, you would count only those individuals who are receiving supportive services but are not known to be recipients of HOPWA supported housing assistance. Please do not count persons who are living in HOPWA assisted housing and receiving supportive services on this screen, as more detailed information is needed on the beneficiaries of housing assistance; they should be counted on the screens for persons receiving housing assistance. The Supportive Service Only field measures the extended scope of this program, so you should count individuals receiving **only supportive services**. Given the nature of some services (i.e., family counseling), please use your best judgment to estimate the number of individuals who benefit in this manner.

For example, you are providing case management to family of five. Three persons are HIV positive and two are not. You would complete IDIS screen C04MP05 as follows:

Receiving

	Supportive Services Only
Persons with HIV/AIDS	3
Other persons in family units	2
<b>Total</b>	<b>5</b>

**Q:** How does HOPWA define the “Total Family Units Assisted with Housing Assistance”?

**A:** In the HOPWA regulations (24 CFR 574.3), **family** means a household composed of **two or more related persons**. The term family also includes one or more eligible persons living with another person or persons who are determined to be important to their care or well being, and the surviving member or members of any family described in this definition who were living in a unit assisted under the HOPWA program with the person with AIDS at the time of his or her death.

**Q:** How do I calculate the “Total Family Units Assisted with Housing Assistance”?

**A:** This total should equal the number of family units as defined above receiving HOWPA housing assistance. Do not count single person households in this total.

For example:

	Family Size: Persons	# of Family Units
	1	0
	2	1
	3	1
<b>Total</b>	<b>6</b>	<b>2</b>

In this example, you would enter “2” for the “Total Family Units Assisted with Housing Assistance”.

**Q:** How does HOPWA define “Housing Information”?

**A:** HOPWA regulations (24 CFR 574.300) define housing information services as including, but not limited to, counseling, information, and referral services to assist an eligible person to locate, acquire, finance and maintain housing. This may also include

fair housing counseling for eligible persons who may encounter discrimination on the basis of race, color, religion, sex, age, national origin, familial status, or perceived handicap (including HIV/AIDS).

**Q:** How does HOPWA calculate the “Estimated Persons Receiving Housing Information”?

**A:** This number is the estimated total number of individuals to whom you have provided HOWPA funded housing related information as defined above. For example, you may count phone calls or walk-ins inquiring about such things as fair housing laws, referrals to housing assistance in the community, or desiring housing counseling. Enter into IDIS the estimated total persons receiving housing information that is funded through the HOPWA program.

**LIVE UPDATE**



Five more entitlement grantees have been added to those “live” in IDIS!

- Los Angeles County, CA**
- Margate, FL**
- Millcreek Township, PA**
- Canovanas Municipio, PR**
- Rio Grande Municipio, PR**

**Bienvenidos and welcome aboard.**

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# LOCAL ADMINISTRATOR TECHNICAL BULLETIN

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USE IT OR LOSE IT.....

# GO INTO IDIS AT LEAST ONCE A MONTH

I see a pattern. The grantee people who most often let their IDIS IDs die from lack of use are financial people and managers who think they don't have a need to go into IDIS often - only when they need to get money (urgently), or (urgently) need to look at some data or get a report. Since they think they don't have a need to go into IDIS often, they don't go in at all, and when they DO need to get in, their ID has lapsed and they CAN'T GET IN!

How do we work with human nature? We build habits.

The habit I want ALL IDIS users hooked on is logging into IDIS once a month. For just a minute or two, just enough to keep their ID from dying. So they avoid urgently needing John Mayer to get ADP Security to restore their ID or issue a new ID - it always consumes a day or two that those IDIS users may not be able to afford. Such a hassle. Such an avoidable hassle.

Please help IDIS users understand that if they let a car sit in a driveway for more than six months without driving it, then when they need it the battery will probably be dead, the gas all siphoned away into lawnmowers, no air in the tires, and no John Mayer to "make it work, we've got to get to the bank right now!"

Please tell every IDIS user you can reach to

**GO INTO IDIS AT LEAST ONCE A MONTH TO KEEP YOUR ID ACTIVE!**

You'll be doing yourself a favor.■

*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.*

**IDIS PROFILE: DAVID  
SCHULTZ**



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This month's profile features David Schultz, a member of the IDIS training team. David has provided IDIS training and technical assistance to grantees all over the United States – from the State of Alaska to entitlement communities in Puerto Rico. He feels that the size of the community he is dealing with doesn't matter because they all have individual concerns that must be given prompt attention. "Individual grantees often seem overwhelmed with the system, but once they receive proper training, they are able to use IDIS confidently and effectively," David says.

His most gratifying experience has come from dealing with states as they prepare to go "live" in IDIS. "The management training that we have provided has given me the opportunity to work with the state administrators as they begin to incorporate IDIS into the state system," David said. "And, once the state staff members have an opportunity to be trained in IDIS in their own offices, they are ready to begin utilizing the system."

David's goal is to assist grantees achieve success in IDIS. "Grantees do not need to be computer experts, although being a little familiar with the keyboard does help," admits David. "I explain to the grantees that much of IDIS is knowing the proper menu item to select, then knowing how to move the cursor from field to field to enter information they already know."

Having worked in the field of Community and Economic Development before becoming an IDIS trainer, David possesses a great deal of knowledge of HUD program regulations. As a trainer, he teaches others how to utilize their program knowledge as they work in IDIS. "My job is to instill confidence in them so when they are using IDIS back in their office, they feel comfortable performing functions such as drawing down funds or setting up activities."

David realizes that IDIS is only one aspect of each user's job responsibilities. He does believe, however, that the training provided empowers people with the tools necessary to help them concentrate on their primary job - providing services to low- and moderate-income persons. ■

### *Share the Wealth*

*Tell us what you think. Share your secrets for making IDIS work for you. All entitlement grantees and HUD Field Office staff are encouraged 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](mailto:Vera_A._Perez@hud.gov).*

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# IDIS Q&A

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## DRAWDOWN VOUCHER DATES

*Block Grant Assistance, Entitlement Communities  
Division*

**Q:** We ran a Drawdown Voucher Summary report this morning for our locality and, for some reason, various drawdown transactions reflected a voucher date of 0001-01-01. Has anyone else experienced this problem or is this something that is being corrected? *Sandra Stewart, Chesapeake Redevelopment and Housing Authority, Chesapeake, VA*

**THE NEXT ISSUE OF *IDISLIVE* WILL BE  
PUBLISHED ON MAY 3, 1999.**

**A:** Do not be alarmed when you see this date. When a drawdown is created, the system automatically applies a default date of 0001-01-01. All vouchers will default to this date until the drawdown has been approved. After you go in and approve the draw, the date will reflect the approval date.■

## LOW/MOD BENEFITS

**Q:** I received the following error message while working in the Direct Benefit screen: SUM OF LOW & VERY LOW INCM>TOTAL LOW/MOD BENEFICIARIES. Is there a reason why the Sum of Low and Very Low Income cannot be greater than the Total Low Mod Beneficiaries ?

**A:** Yes. Low- and extremely-low income are sub-sets of the total low/mod beneficiaries; therefore, when added together, they cannot exceed the total low/mod. The total low/mod beneficiaries represent everyone assisted by the activity whose income does not exceed 80% of median. That total is then broken down to show the number of those persons/households that are low-income (those whose income is between 30 - 50% of median) and extremely-low income (those whose income is less than 30% of median).

You may have received the error message because the activity information has not been properly input. It is possible that the total number of beneficiaries can be greater than the total low/mod beneficiaries, but the total number of low and extremely low cannot be greater than the total low/mod.■ *CPD Office of*

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# TRAINING AND TECHNICAL ASSISTANCE

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## TAU TOTALS FOR FEBRUARY

Seven hundred five calls were received in the Technical Assistance Unit (TAU) during the month of February. Inquiries from grantees on the HOME C/MI System and HOPE 3 program combined for 44% of the calls, while requests for assistance with IDIS issues accounted for 56% of calls handled. The categories of IDIS calls received are ranked in the table below:

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

## Y2K READINESS VIDEO AND WORKBOOK

HUD will re-air a video designed to help housing authorities and managers of HUD-subsidized housing update their computer systems and embedded microchip devices to avoid problems when the Year 2000 (Y2K) arrives. The 30 minute video is called "Six Steps to Year 2000 Readiness". The satellite broadcast will air on Thursday, April 1, from 3-5 pm EST and on Monday, April 5, from 11 am - 1 pm EDT. A lively, taped question/answer session from a panel of Y2K and public housing experts will follow the video. In addition to the satellite broadcast, HUD will "webcast" the video on its Internet site: <http://www.hud.gov/webcasts>.

Thousands of these videos, along with a 50 page companion workbook, will be sent out to public housing authorities and multi-family agents across the country. The video will be made available to various governors and mayors. HUD grantees may

find the information in the video and workbook helpful as they update their computer systems. Those who are interested in obtaining these resources may send an email to [Team\\_2000@hud.gov](mailto:Team_2000@hud.gov). The workbook can also be downloaded from HUD's website at <http://www.hud.gov/cio/year2000>.■

## IDIS\_HELP EMAIL

We are happy to inform you that the IDIS\_Help email address is now available. We had reported to you earlier that this "group" mailbox (where IDIS users post messages asking for guidance from the TAU) had experienced a disconnect and was not functioning. As of 3/10/99, the connection problems have been corrected. We are able to receive your inquiries and are ready to assist you.

This site can be accessed from the IDIS Resources web page or you may send an email. The email address is: [idis\\_help@hud.gov](mailto:idis_help@hud.gov). Please feel free to utilize this email as an option for obtaining IDIS technical assistance. Also, remember that assistance is available via telephone at 1-800-273-2573 and via fax at 202-708-3222.■

### FOR YOUR INFORMATION .....

Your IDIS 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](mailto:Tracey_R_Peterson@hud.gov)  
[Vivian\\_C\\_Baldwin@hud.gov](mailto: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. **For IDIS training**, contact TONYA, Inc. at 202-289-8100.