

Chapter 14: Adding Plan Years - Setting Up, Approving, and Revising Projects

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14.1.2 Overview

This chapter begins with a discussion of adding plan years and projects to IDIS. This is followed by a discussion of approving, revising, and amending projects.

Your projects and plan years can be entered into IDIS two ways:

- You use the IDIS on-line screens to add one or more plan years and to enter your project data
- The Headquarters staff of HUD transfer your approved Action Plan data from the C2020 System into IDIS for you. This option is only available to grantees who have an approved Action Plan in the C2020 System.

14.2 Adding Plan Years

If the Headquarters staff of HUD transfer your approved Action Plan data from the C2020 System into IDIS for you, you do not need to use IDIS to add a new plan year for each approved project.

Use Option 4 on the Plan/Project Menu to determine whether the required plan year has already been entered into the IDIS system. If you need to add an additional plan year, the steps in this section describe how to do it.

How To Get To the Add Plan Screen:



1. From the IDIS Main Menu, select Option **J**, Plan/Project Menu.

The system displays the Plan/Project Menu.

2. On the Plan/Project Menu, type **03** to select Add Plan, then press **<Enter>**.

The system displays the Add Plan Screen (C04MK08).

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04/20/99      THE INTEGRATED DISBURSEMENT AND INFORMATION SYSTEM      09:49:43

                                PLAN/PROJECT MENU

                                01  ADD PROJECTS
                                02  MAINTAIN PROJECTS
                                03  ADD PLANS
                                04  MAINTAIN PLANS

TYPE SELECTION AND PRESS ENTER      J 00

F4 = MAIN MENU      F7 = PREV

```

14.2.1 Adding a Plan Year and Contact Information to IDIS (C04MK08)

SCREEN: Add Plan Screen (C04MK08)

PURPOSE: This screen allows you to add a plan *year* to IDIS. It also lets you add grantee and field office contact information.

How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed all fields on the screen, press **<Enter>** to save your information and return to the Plan/Project Menu.

PLAN YEAR

1. Type the new plan year.

FIELD OFFICE CONTACT NAME

2. Type the name of your HUD Field Office contact.

TELEPHONE

3. Type the HUD Field Office contact's phone number.

GRANTEE CONTACT NAME

4. Type the name of your Grantee contact.

TELEPHONE

5. Type the Grantee contact's phone number.

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03/08/99  10:42                ADD PLAN                C04MK08

GRANTEE:  BERKS COUNTY

UOG CODE:  429011                UOG NUMBER:  00001

REGIONAL OFFICE:  03                FIELD OFFICE:  26                STATE:  PA

      PLAN YEAR:  ____                PLAN VERSION:  1

      FIELD OFFICE CONTACT NAME:  _____
                        TELEPHONE:  ____  _____

      GRANTEE CONTACT NAME:  _____
                        TELEPHONE:  ____  _____

F1 = HELP      F4 = MAIN MENU      F6 = CLEAR      F7 = PREVIOUS      F9 = SAVE
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee		System generated from Grantee Add Screen (C04MU06).	Protected field
UOG Code/Number		System generated from Grantee Add Screen (C04MU06).	Protected field
Regional Office		System generated from Grantee Add Screen (C04MU06).	Protected field
Field Office		System generated from Grantee Add Screen (C04MU06).	Protected field
State		System generated from Grantee Add Screen (C04MU06).	Protected field
Plan Year	✓	What is the Plan Year?	4 numeric characters
Plan Version		The current version of the Plan. 0001 is the original version; if the plan was amended, this field will display 0002 or higher.	Protected field

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Field Office Contact Name	✓	What is the name of your Field Office contact?	30 alphanumeric characters
Telephone	✓	What is the phone number of your Field Office contact?	10 numeric characters
Grantee Contact Name	✓	What is the name of the HUD contact in your grantee organization?	30 alphanumeric characters
Telephone	✓	What is the HUD contact's phone number?	10 numeric characters
Press <Enter> to save the information and return to the Plan/Project Menu.			

14.3 Adding Projects to IDIS

If HUD HQ did not load your approved projects from the C2020 System, once you have established one or more plan years in IDIS, you are ready to set up projects on the system. To add a project in IDIS, you complete from three to five data entry screens:

Complete This Screen Sequence to Add Projects to IDIS:

Screen	Purpose
Add Project (C04MK01)	Give the project a name and enter background information.
Add/Revise Address Information (C04MK07)	If the project location is an address or census tract, contains the address or census information.
Add Project Information (C04MK02)	Estimate the amount of funds from each CPD grant program that will be used by this project and whether this project's activities will be setup and/or carried out by the project owner (you) or one or more subrecipients.
Sub-Recipient List (C04ML03)	If another subgrantee will be given on-line access to IDIS to enter activities, contains the subgrantee information.
Revise/Add Project Description (C04MK03)	Contains a narrative description of the project.

How To Get To the Add Plan Screen:



1. From the IDIS Main Menu, select Option J, Plan/Project Menu.
The system displays the Plan/Project Menu.
2. On the Plan/Project Menu, type **01** to select Add Project, then press **<Enter>**.

The system displays the Add Project Screen (C04MK01).

14.3.1 Entering the Project Title and Background Information (C04MK01)

SCREEN: Add Project Screen (C04MK01)

PURPOSE: This screen allows you to associate (or add) a project to a plan year that has already been entered into the system. The project data you enter includes the project title, purpose of the project, and what the project proposes to accomplish.

How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed all fields on the screen, press **<Enter>** to go to the next screen.

PLAN YEAR

1. Type in a previously established plan year. This associates the project with the plan year.

PROJECT TITLE

2. Type in an appropriate title based on how you have defined your project structure, e.g. setting up projects by recipient, function etc.

LOCAL CODE

3. Use this optional field to relate IDIS activities to your own financial and reporting systems, for any other purpose, or leave it blank.

HUD MATRIX CODE

4. Type the HUD Matrix code, or press **<F1>** to select from a list of valid codes. Refer to Appendix B for a list of Matrix Code definitions.

CDBG REG. CITATION

5. When you select a HUD Matrix Code, after you press **<F9>**, the system places the associated citation number in this field. You may change it if it is incorrect.

IS THE PURPOSE OF THIS PROJECT TO:

6. Type **Y** or **N**, as appropriate if the purpose of this project is to:

Help Prevent Homelessness

Help the Homeless

Help Those with HIV/AIDS

TYPE OF SUBRECIPIENT	<p>7. Type X if this grant has no subrecipient; or if this grant has a subrecipient, to indicate its type:</p> <p style="margin-left: 40px;">No Subrecipient</p> <p style="margin-left: 40px;">Non-Section 204</p> <p style="margin-left: 40px;">Section 204</p>
ACCOMPLISHMENT TYPE	<p>8. Press <F1> to review a list of accomplishment types and select the most appropriate choice.</p>
ACCOMPLISHMENT NUMBER	<p>9. Type the number of units (of the accomplishment type selected above) you expect to accomplish under this project.</p>
LOCATION TYPE	<p>10. Type the one digit code that corresponds to the location where this project will be performed:</p> <p style="margin-left: 40px;">1 Address When the project will be performed at a specific address. After you press <Enter> on this screen, the system will display the Add/Revise Project Information Screen (C04MK07) where you must enter at least one associated address.</p> <p style="margin-left: 40px;">2 Community Wide Project will have community-wide impact.</p> <p style="margin-left: 40px;">3 CT and BG When the project location encompasses a Census Tract or Block Group within a Census Tract. After you press <Enter> on this screen, the system will display the Add/Revise Project Information Screen (C04MK07) where you must enter at least one census tract.</p> <p style="margin-left: 40px;">4 Suppressed When you wish to maintain the privacy of the location, i.e., a battered spouse shelter.</p> <p style="margin-left: 40px;">5 NA A location is not available for this project.</p>

```

09/11/98  14:42                ADD PROJECT                C04MK01

PLAN YEAR:  ___      PLAN VERSION:  ___      CPS PROJECT ID:  ___

PROJECT TITLE:  _____
LOCAL CODE:    _____
HUD MATRIX CODE :  ___      _____
CDBG REG. CITATION:  _____

IS THE PURPOSE OF THIS PROJECT TO :
HELP PREVENT HOMELESSNESS? (Y/N):  _
HELP THE HOMELESS? (Y/N):          _
HELP THOSE WITH HIV/AIDS? (Y/N):   _

TYPE OF SUBRECIPIENT: (PLACE AN "X" NEXT TO ONE ENTRY)
NO SUBRECIPIENT:          _
NON-SECTION 204:         _
SECTION 204:              _

ACCOMPLISHMENT TYPE :  ___      _____
ACCOMPLISHMENT NUMBER:  ___      LOCATION TYPE:  _      _____

F1 = HELP  F4 = MAIN MENU  F7 = PREV  F9 = SAVE
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Plan Year	✓	What is the previously established plan year of this project?	4 numeric characters
Plan Version		The current version of the Plan. 0001 is the original version; if the plan was amended, this field will display 0002 or higher.	Protected field
CPS Project ID		After you press <F9> to save the information on this screen, the system will refresh with a system-generated ID number for the project.	Protected field
Project Title	✓	What is the title of this project?	60 alphanumeric characters
Local Code		The optional user-defined Local Code for the project.	18 alphanumeric characters
HUD Matrix Code	✓	Type the HUD Matrix code, or press <F1> to select from a list of valid codes. Refer to Appendix B for a list of Matrix Code definitions.	3 numeric characters

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
CDBG Regulation Citation		When you select a HUD Matrix Code, the system places the associated citation number in this field. You may change it if it is incorrect.	13 alphanumeric characters
Help Prevent Homelessness	✓	Type Y if the purpose of the project is to help prevent homelessness; otherwise, type N .	Y or N
Help the Homeless	✓	Type Y if the purpose of the project is to help the homeless; otherwise, type N .	Y or N
Help those with HIV/AIDS	✓	Type Y if the purpose of the project is to help persons with HIV/AIDS; otherwise, type N .	Y or N
Type of Subrecipient	✓	Type X if this grant has no subrecipient; or if this grant has a subrecipient, to indicate its type: No Subrecipient Non-Section 204 Section 204	X
Accomplishment Type		Press <F1> to review a list of accomplishment types and select the most appropriate choice.	2 numeric characters
Accomplishment Number		Type the number of units (of accomplishment type selected above) you expect to accomplish under this project. If you enter a value in this field, you must have filled in the previous field.	4 numeric characters

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Location Type	✓	<p>Type the one digit code that corresponds to the location where this project will be performed:</p> <p>1 Address When the project will be performed at a specific address. After you press <Enter> on this screen, the system will display the Add/Revise Project Information Screen (C04MK07) where you must enter at least one associated address.</p> <p>2 Community Wide Project will have community-wide impact.</p> <p>3 CT and BG When the project location encompasses a Census Tract or Block Group within a Census Tract. After you press <Enter> on this screen, the system will display the Add/Revise Project Information Screen (C04MK07) where you must enter at least one census tract.</p> <p>4 Suppressed When you wish to maintain the privacy of the location, i.e., a battered spouse shelter.</p> <p>5 NA A location is not available to this project.</p>	1, 2, 3, 4, or 5
Press <Enter> to save the information and move to the next screen.			

14.3.1.1 Adding/Revising Address Information (C04MK07)

SCREEN: Add/Revise Address Information (C04MK07)

PURPOSE: If you indicated on the Add Project Screen (C04MK01) that this project will be performed at one or more addresses; or within a census tract (Location Type = 1 or 3), use this screen to enter address or census tract information for the project.

How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

This screen lets you enter up to four addresses or census tract fields. You must enter data into at least one set.

When you have completed all fields on the screen, press <Enter> to save your information and go to the Add Project Screen (C04MK02).

ADDRESS/ CITY/ STATE

1. If you selected Address for Location Type on the Add Project Screen (C04MK01), type the street address, city, and state for at least one location.

CENSUS TRACT NUMBER, BLOCK GROUP NUMBER, and COUNTY FIPS CODE

2. If you selected CT and BG for Location Type on the Add Project Screen (C04MK01):

If the location encompasses one or more entire census tracts, enter each tract number. If the location encompasses a block group within a census tract, enter both the Census Tract Number and Block Group Number.

If the project is associated with a state project, enter the county code where the project is located. For a list of FIPS state/county codes, use your internet browser to go to: www.epa.gov/enviro/html/rcris/fips_code.html

```

09/29/98  09:21      ADD/REVISE ADDRESS INFORMATION      C04MK07

PLAN YEAR:  1993      PLAN VERSION:  0001      CPS PROJECT ID:  0002

PROJECT TITLE: JANE'S PLAN
LOCAL CODE:                                     PAGE: 0001

ADDRESS: _____ CENSUS TRACT NUMBER: _____
CITY: _____ BLOCK GROUP NUMBER : _
STATE: ___ COUNTY FIPS CODE : _____

ADDRESS: _____ CENSUS TRACT NUMBER: _____
CITY: _____ BLOCK GROUP NUMBER : _
STATE: ___ COUNTY FIPS CODE : _____

ADDRESS: _____ CENSUS TRACT NUMBER: _____
CITY: _____ BLOCK GROUP NUMBER : _
STATE: ___ COUNTY FIPS CODE : _____

ADDRESS: _____ CENSUS TRACT NUMBER: _____
CITY: _____ BLOCK GROUP NUMBER : _
STATE: ___ COUNTY FIPS CODE : _____

PLEASE ENTER ADDRESS
F4 = MAIN MENU  F7 = PREV  F9 = SAVE  F17 = UP  F18 = DOWN
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Plan Year		System generated from the Add Plan Screen (C04MK01).	Protected field
Plan Version		The current version of the Plan. 0001 is the original version; if the plan was amended, this field will display 0002 or higher.	Protected field
CPS Project ID		System generated from the Add Plan Screen (C04MK01).	Protected field
Project Title		System generated from the Add Plan Screen (C04MK01).	Protected field
Local Code		System generated from the Add Plan Screen (C04MK01).	Protected field
Address/ City/ State	✓ (if location)	Type the location street address, city, and state.	Alphanumeric chars: Address = 40 City = 25 State = 2

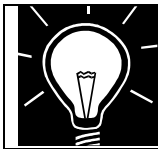
DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Census Tract Number	✓ (if CT or BG)	If you selected CT and BG for Location Type on the Add Project Screen (C04MK01, if the location encompasses one or more entire census tracts, enter each tract number.	nnnn.nn
Block Group Number	✓ (if CT or BG)	If you selected CT and BG for Location Type on the Add Project Screen (C04MK01), if the location encompasses a block group within a census tract, enter both the Census Tract Number and Block Group Number.	1 numeric character
County FIPS Code		If you selected CT and BG for Location Type on the Add Project Screen (C04MK01), if the project is associated with a state project, enter the county code where the project is located. For a list of FIPS state/county codes, use your internet browser to go to: www.epa.gov/enviro/html/rcris/fips_code.html	5 numeric characters
Press <Enter> to save the information and to save your information and go to the Add Project Screen (C04MK02).			

14.3.2 Entering Funding Estimates from Grants (C04MK02)

SCREEN: Add Project (C04MK02)

PURPOSE: On this screen you estimate the amount of funds from each CPD grant program that will be used by this project and whether this project's activities will be setup and/or carried out by the project owner (you) or one or more subrecipients.

If you indicate that another grantee can set up activities, either you or the designated grantee will be allowed to set up activities under this project. However, if you set up the activity, then on the Process Activity screen (C04MA03) enter "N" to the "Will Another Entity Or CHDO Have Access To The Activity?" prompt, you will stop the grantee from being able to setup or view the activity.



CAUTION

Be sure to enter all dollar amounts as whole dollars, rounded to the nearest dollar. Do not use commas.

How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed all fields on the screen, press <Enter> to go to the next screen.

**ESTIMATED AMOUNT:
FOR
CDBG
HOME
ESG
HOPWA**

1. Type in the estimated amount of new funds that the project will receive from *each* CPD grant program. (**Do not** include any prior year funds.)

The amounts you enter here serve as the estimated budget for the activities you will accomplish under this project.

**FUND REQUEST FOR
PUBLIC HOUSING
ADMINISTRATION**

2. Type the estimated amount of funds for the project provided by the Public Housing Administration.

**FUND REQUEST FOR
ASSISTED HOUSING**

3. Type the estimated amount of funds for the project provided by Assisted Housing.

**WILL PRIOR YEAR
MONEY BE SPENT ON
THIS PROJECT?**

4. If prior year funds will be spent on this project, type **Y**; otherwise, type **N**.

WILL ANOTHER GRANTEE SET UP ACTIVITIES UNDER THIS PROJECT?

- If activities under this project will be carried out by one or more subgrantees who will enter and update those activities using IDIS, type **Y**; otherwise, type **N**.

If you enter **Y**, the system will display the Sub-Recipient List Screen (C04ML03) where you must select a subgrantee. These steps are described in the next section.

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04/19/99  15:41                ADD PROJECT                C04MK02

PLAN YEAR:  1999          PLAN VERSION:  0001          CPS PROJECT ID:  0019

PROJECT TITLE: TEST
LOCAL CODE:

ESTIMATED AMOUNT FOR:
NEW CDBG      : _____
NEW HOME      : _____
NEW ESG       : _____
NEW HOPWA     : _____
TOTAL NEW     : _____

FUND REQUEST FOR PUBLIC HOUSING ADMINISTRATION: _____
FUND REQUEST FOR ASSISTED HOUSING: _____

WILL PRIOR YEAR MONEY BE SPENT ON THIS PROJECT? (Y/N):  _

WILL ANOTHER GRANTEE SETUP ACTIVITIES UNDER THIS PROJECT? (Y/N):  _

F4 = MAIN MENU  F7 = PREV  F9 = SAVE
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Plan Year		System generated from the Add Plan Screen (C04MK01).	Protected field
Plan Version		The current version of the Plan. 0001 is the original version; if the plan was amended, this field will display 0002 or higher.	Protected field
CPS Project ID		System generated from the Add Plan Screen (C04MK01).	Protected field
Project Title		System generated from the Add Plan Screen (C04MK01).	Protected field

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Local Code		System generated from the Add Plan Screen (C04MK01).	Protected field
Estimated Amount For: New CDBG New HOME New ESG New HOPWA	✓	Type in the estimated amount of new funds that the project will receive as a grant from each CPD grant program. (Do not include any prior year funds.) Make sure you budget for all grants from which you plan to commit funds to activities under this project.	\$nnnnnnnnnn
Total New		After you press <F9> to save the data on this screen, the system totals the dollar amount of funding for the project from all four grant programs.	Protected field
Fund Request for Public Housing Administration		Type the estimated amount of funds provided for the project by the Public Housing Administration.	\$nnnnnnnnnn
Fund Request for Assisted Housing		Type the estimated amount of funds provided for the project by Assisted Housing.	\$nnnnnnnnnn
Will Prior Year Money Be Spent on this Project?	✓	If prior year funds will be spent on this project, type Y ; otherwise, type N .	Y or N
Will Another Grantee Setup Activities under this Project?	✓	If activities under this project will be carried out by one or more subgrantees, type Y ; otherwise, type N . If you answer Y , the system will display the Sub-Recipient List Screen (C04ML03) where you must select at least one subgrantee from the list of grantees that was created for you by your Field Office.	Y or N
Press <Enter> to save the information and move to the next screen.			



NOTE:

This screen shows subgrantee name, UOG Code and Numbers city, and state. The first grantee appearing on this list is the grantee logged into IDIS.

If the list does not contain the names of all subgrantees who need on-line IDIS access, you should request that your HUD Field Office make additions to your Subgrantee List.

UOG		GRANTEE NAME	CITY	STATE
CODE	NUMBER			
429011	00001	BERKS COUNTY	READING	PA
429011	00002	BERKS COMMUNITY ACTION PROGRAM	READING	PA
429011	00003	BERKS HOUSING OPPORTUNITIES, INC.	READING	PA

03/08/99 10:31 SUB RECIPIENT LIST C04ML03
 GRANTEE: N/A
 UOG CODE: N/A UOG NUMBER: N/A
 BOTTOM OF DATA
 F7 = PREV F17 = UP F18 = DOWN

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee		<p>If you enter the name of a grantee or subgrantee and press <Enter>, the system displays the closest matching name in the selection area.</p> <p>If this is not the correct name, continue searching by using the Shift <F7> or <F8> keys.</p> <p>If you enter a grantee name, the UOG Code and UOG Number fields are ignored.</p>	20 alphanumeric characters
UOG Code/ UOG Number		<p>If you did not enter a grantee name and want to display subgrantees by UOG Code and UOG Number, type the UOG Code and UOG Number, then press <Enter>; the system displays the closest matching name on the second line of the list.</p> <p>If this is not the correct subgrantee, continue searching by using the Shift <F7> or <F8> keys.</p>	6 numeric characters/ 5 numeric characters
[selection field]	✓	Type X next to each subgrantee that you want to give on-line access to IDIS to create or enter activities for this project.	X
Grantee Name		The name of the grantee or subgrantee. The first grantee listed is the grantee currently logged into IDIS.	Protected field
Grantee City		System generated from Grantee Inquire/Update/Add Screen (C04MU06).	Protected field
Grantee State		System generated from the Grantee Inquire/Update/Add Screen (C04MU06).	Protected field
Press <Enter> to save the information and go to the Revise/Add Project Description Screen (C04MK03).			

14.3.3 Entering a Project Description (C04MK03)

SCREEN: Add Project Description Screen (C04MK03)

PURPOSE: This screens allows you to add a description of the project.

How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed all fields on the screen, press <Enter> to save the information and return to the Plan/Project Menu.

PROJECT DESCRIPTION

1. Type in a narrative description of this project that conforms with the requirements of 24 CFR 220(c) that includes local specific objective and priority needs that will be addressed and target date for completion of the project.
2. Press <Enter> to save your work. The system displays an additional description screen where you may continue typing the narrative description, if needed.

```

03/08/99  10:33          REVISE/ADD PROJECT DESCRIPTION          C04MK03
                                           PAGE: 0001
PLAN YEAR:  1998      PLAN VERSION:  0000      CPS PROJECT ID:  0045

PROJECT TITLE: BEAVER ROAD - ROBESON TOWNSHIP
LOCAL CODE:  C98-026

PROJECT DESCRIPTION:
  Realignment of intersection to correct hazardous horizontal curve with
  shoulder grading and resurfacing of roadway and other related work.
  Estimated completion date of 12/31/98.

F4 = MAIN MENU  F7 = PREV  F9 = SAVE  F17 = UP  F18 = DOWN
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Plan Year		System generated from the Setup Project Screen (C04MK01) screen.	Protected field
Plan Version		The current version of the Plan. 0001 is the original version; if the plan was amended, this field will display 0002 or higher.	Protected field
CPS Project ID		System generated from the Setup Project Screen (C04MK01) screen.	Protected field
Project Title		System generated from the Setup Project Screen (C04MK01) screen.	Protected field
Local Code		System generated from the Setup Project Screen (C04MK01) screen.	Protected field
Description		Enter up to 13 lines describing this project. After you press <Enter>, the system displays an additional description screen where you can continue typing, if necessary.	13 lines of alphanumeric text
Press <Enter> to save the information and return to the Plan/Project Menu.			

14.4 Maintaining Projects

The IDIS Maintain Plan/Project Screen (C04MK04) contains options that allow you to approve, revoke, amend, or revise the displayed projects.

The table, below, explains when to use each option:

IDIS Options for Maintaining Projects:

Approve	When you add new projects into IDIS using the IDIS on-line screens, IDIS assigns them a default status of <i>Open</i> . The grantee must approve these open projects before any activities can be set up under the project.
Revoke Approval	This option lets you revoke the approval of a project. You can only do this if no activities have been established under the project. Once revoked, the status of the project returns to <i>Open</i> and you can use the revise option to revise the project, as needed.
Revise	You can use this option to revise project information for any project with a status of <i>Open</i> . When you select this option, the system displays the Maintain Plan Project Screen (C04MK04) where you can change any field displayed just as if you were entering the data for the first time on a new project.
Amend	<p>If you need to change information on a project that has activities set up under it, you need to <i>amend</i> the project. Using this option, you can modify the accomplishment type/number; and the estimated funding amounts for CDBG, HOME, ESG, HOPWA, Public Housing, and Assisted Housing. You can also use this option to give/revoke on-line access to IDIS for a subgrantee.</p> <p>Each time you use this function the system creates an <i>amendment</i> to the project. IDIS keeps an audit trail of amendments. You can view each amendment using the View Project or Revise Project function.</p>

14.4.1 Approving a Project (C04MK04)

Getting to the Maintain Project Plan Screen:



1. On the IDIS Main Menu, select Option **J**, Plan/Project Menu.
2. On the Plan/Project Menu, select **02**, Maintain Projects.

The system displays the Maintain Plan Project Screen (C04MK04). On this screen, you select whether you want to approve, revoke, amend, or revise a project.

SCREEN: **Maintain Plan Project** (C04MK04)

PURPOSE: When you add new projects into IDIS using the on-line IDIS screens, IDIS assigns each one a default status of *Open*. This screen allows you to approve any open projects so that activities can be set up under them.

How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed all fields on the screen, press **<Enter>** to go to the next screen.

PLAN YEAR/ CPS PROJECT ID

1. Type the Plan Year and CPS Project ID or press **<Enter>** to select a project from the list displayed. (New projects will have an *OPEN* status.)

SELECTION

2. Type **A** next to the project to approve it, then press **<Enter>**.

```

03/08/99  10:38                MAINTAIN PLAN PROJECT                C04MK04
PLAN YEAR:  _   PROJECT ID:  _   PAGE  0018
SELECTION:  A - APPROVE, K - REVOKE, M - AMEND, R - REVISE

      PLAN   CPS PROJ  PROJECT
SEL  YEAR   ID       STATUS  PROJECT TITLE
-   1998   0045   REVISED  Beaver Road - Robeson Township
-   1998   0046   APPROVED  Seidel Creek Bridge - Robeson Township
-   1998   0047   APPROVED  Skyline Drive - Upper Bern Township
-   1998   0048   APPROVED  Baldy Road - Richmond Township
-   1998   0049   APPROVED  Road Improvements - Greenwich Township
-   1998   0050   APPROVED  Road Improvements - Albany Township
-   1998   0051   APPROVED  Playground Improvements - Temple Borough
-   1998   0052   APPROVED  Heidelberg Road Bridge - Heidelberg Township
-   1998   0054   APPROVED  ADA Improvements - Bechtelsville Borough
-   1998   0055   APPROVED  Rental Housing - Berks Housing Opportunities,
-   1998   0056   APPROVED  Berks Heim Laundry - C.D. Office
-   1998   0057   APPROVED  Renovations - Literacy Council of Reading-Ber

F4 = MAIN MENU  F7 = PREV  F17 = UP  F18 = DOWN
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Plan Year/ Project ID	✓	Type the Plan Year and CPS Project ID or press <Enter> to select a project from the list displayed. (New projects will have an <i>OPEN</i> status.)	YYYY/ 4 numeric characters
Selection	✓	Type A next to the project to approve it, then press <Enter>.	A
Press <Enter> to save the information and return to the Plan/Project Menu.			

14.4.2 Revoking Approval of a Project (C04MK04)

If a project is approved but does not have activities established under it, you can revoke the approval, which then returns the project to an *open* status.

Getting to the Maintain Project Plan Screen:



1. On the IDIS Main Menu, select Option **J**, Plan/Project Menu.
2. On the Plan/Project Menu, select **02**, Maintain Projects.

The system displays the Maintain Plan Project Screen (C04MK04). On this screen, you select whether you want to approve, revoke, amend, or revise a project.

How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed all fields on the screen, press **<Enter>** to save the information and return to the Plan/Project Menu.

PLAN YEAR/ CPS PROJECT ID SELECTION

1. Type the Plan Year and CPS Project ID or press **<Enter>** to select a project from the list displayed
2. Type **K** next to the project to revoke it, then press **<Enter>**. (If the system inadvertently displays the Project Description screen, press **<F7>** to return to this screen. Notice that the status now displays *Revoked*.)

```

03/08/99  10:38                MAINTAIN PLAN PROJECT                C04MK04
PLAN YEAR:  _   PROJECT ID:  _   PAGE  0018
SELECTION: A - APPROVE, K - REVOKE, M - AMEND, R - REVISE

      PLAN   CPS PROJ  PROJECT
SEL  YEAR    ID      STATUS  PROJECT TITLE
-   1998    0045    REVISED  Beaver Road - Robeson Township
-   1998    0046    APPROVED  Seidel Creek Bridge - Robeson Township
-   1998    0047    APPROVED  Skyline Drive - Upper Bern Township
-   1998    0048    APPROVED  Baldy Road - Richmond Township
-   1998    0049    APPROVED  Road Improvements - Greenwich Township
-   1998    0050    APPROVED  Road Improvements - Albany Township
-   1998    0051    APPROVED  Playground Improvements - Temple Borough
-   1998    0052    APPROVED  Heidelberg Road Bridge - Heidelberg Township
-   1998    0054    APPROVED  ADA Improvements - Bechtelsville Borough
-   1998    0055    APPROVED  Rental Housing - Berks Housing Opportunities,
-   1998    0056    APPROVED  Berks Heim Laundry - C.D. Office
-   1998    0057    APPROVED  Renovations - Literacy Council of Reading-Ber

F4 = MAIN MENU  F7 = PREV  F17 = UP  F18 = DOWN
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Plan Year/ Project ID	✓	Type the Plan Year and CPS Project ID or press <Enter> to select a project from the list displayed.	YYYY/ 4 numeric characters
Selection	✓	Type K next to the project to revoke its approval, then press <Enter>.	K
Press <Enter> to save the information and return to the Plan/Project Menu.			

14.4.3 Revising a Project (C04MK04)

You can make changes to a project with a status of *open* just as if you were entering details for a new project. The prompts that appear on the Maintain Plan Project Screen (C04MK04) when you revise a project are the same ones that you see when you add a project.

Getting to the Maintain Project Plan Screen:



1. On the IDIS Main Menu, select Option **J**, Plan/Project Menu.
2. On the Plan/Project Menu, select **02**, Maintain Projects.

The system displays the Maintain Plan Project Screen (C04MK04). On this screen, you select whether you want to approve, revoke, amend or revise a project.

How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed all fields on the screen, press **<Enter>** to go to the next screen.

PLAN YEAR/ CPS PROJECT ID

1. Type the Plan Year and CPS Project ID or press **<Enter>** to select a project from the list displayed.

SELECTION

2. Type **R** next to the project to revise it and press **<Enter>**.
3. Press **<Enter>** again to display the Maintain Project Plan Screen (C04MK04) where you can make your changes.

You cannot revise all funding amounts to zero. At least one value must be entered into the NEW CDBG, NEW HOME, NEW ESG, or NEW HOPWA field.

Once revised, your project will need to be approved again.

```

03/08/99  10:38                MAINTAIN PLAN PROJECT                C04MK04
PLAN YEAR:  _  PROJECT ID:  _  PAGE  0018
SELECTION: A - APPROVE, K - REVOKE, M - AMEND, R - REVISE

      PLAN   CPS PROJ  PROJECT
SEL  YEAR   ID       STATUS  PROJECT TITLE
-   1998   0045   REVISED  Beaver Road - Robeson Township
-   1998   0046   APPROVED  Seidel Creek Bridge - Robeson Township
-   1998   0047   APPROVED  Skyline Drive - Upper Bern Township
-   1998   0048   APPROVED  Baldy Road - Richmond Township
-   1998   0049   APPROVED  Road Improvements - Greenwich Township
-   1998   0050   APPROVED  Road Improvements - Albany Township
-   1998   0051   APPROVED  Playground Improvements - Temple Borough
-   1998   0052   APPROVED  Heidelberg Road Bridge - Heidelberg Township
-   1998   0054   APPROVED  ADA Improvements - Bechtelsville Borough
-   1998   0055   APPROVED  Rental Housing - Berks Housing Opportunities,
-   1998   0056   APPROVED  Berks Heim Laundry - C.D. Office
-   1998   0057   APPROVED  Renovations - Literacy Council of Reading-Ber

F4 = MAIN MENU  F7 = PREV  F17 = UP  F18 = DOWN
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Plan Year/ Project ID	✓	Type the Plan Year and CPS Project ID or press <Enter> to select a project from the list displayed.	YYYY/ 4 numeric characters
Selection	✓	Type R next to the project to revise it and press <Enter>. Press <Enter> again to display the Maintain Project Plan Screen (C04MK04) where you can make your changes. You cannot revise all funding amounts to zero. At least one value must be entered into the NEW HOME, NEW ESG, or NEW HOPWA field. Once revised, your project will need to be approved again.	R
Press <Enter> to save the information and return to the Plan/Project Menu.			

14.4.4 Amending a Project (C04MK05)

Getting To the Amendment To the Plan Project Screen:



1. On the IDIS Main Menu, select Option **J**, Plan/Project Menu.
2. On the Plan/Project Menu , select **02**, Maintain Projects.

The system displays the Maintain Plan Project Screen (C04MK04). On this screen, you select whether you want to approve, revoke, amend, or revise a project.

3. Type the Plan Year and CPS Project ID or press **<Enter>** to select a project from the list displayed.
4. Type **M** next to an approved project to amend it, then press **<Enter>**.

The system displays the Amendment to the Plan Project Screen (C04MK05).

SCREEN

Amendment to the Plan Project Screen

C04MK05

PURPOSE: If you need to change the accomplishment type, funding amounts, or subrecipients with IDIS access on a project that has activities set up under it, you must *amend* the project. This screen allows you to modify the accomplishment type/number; and the estimated funding amounts for CDBG, HOME, ESG, HOPWA, Public Housing, and Assisted Housing. You can also use this option to give/revoke on-line access to IDIS so that a subgrantee can enter and update activities under the project.

If this screen displays information in the Current Amendment column, you are seeing the *latest* amended data; if this column is blank, there is no current amendment to this project.

To enter your new amended funding amounts, use the Amended column on the far right. Each time you amend a project, the system creates a numbered *amendment* to the project.

**How To Complete
This Screen:**

Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed all fields on the screen, press **<Enter>** to save the information and return to the Plan/Project Menu.

HUD MATRIX CODE

1. Type the amended HUD Matrix code, or press **<F1>** to select from a list of valid codes. Refer to Appendix B for a list of Matrix Code definitions.

**ACCOMP.
TYPE/NUMBER**

2. Press **<F1>** to review a list of accomplishment types and select the most appropriate choice.

**EST AMOUNT FOR
CDBG
HOME
ESG
HOPWA**

3. Type in the estimated amended amount that the project will receive from *each* CPD grant program. (Do not include any prior year funds.)

The amounts you enter here serve as the estimated budget for the activities you will accomplish under this project.

**WILL ANOTHER
GRANTEE SETUP
ACTIVITIES UNDER THIS
PROJECT**

4. If activities under this project will be carried out by one or more subgrantees who will enter and update those activities using IDIS, type **Y**; otherwise, type **N**.

(The screen lists all grantees and subgrantees who can currently set up activities.)

If you enter **Y**, the system will display the Sub-Recipient List Screen (C04ML03) where you can select additional subgrantees.

**DO YOU WANT TO VIEW
THE HISTORY OF
AMDENDMENTS MADE
TO THIS PROJECT?**

5. Type **Y** to view any prior amendments to this project.
-

```

03/08/99  10:35      AMENDMENT TO THE PLAN PROJECT      C04MK05

PLAN YEAR:  1998      PLAN VERSION:  0000      CPS PROJECT ID:  0045

PROJECT TITLE: BEAVER ROAD - ROBESON TOWNSHIP

                ORIGINAL      CURRENT      AMENDED
                03K           AMENDMENT
HUD MATRIX CODE:
ACCOMP. TYPE/NUMBER:  11 / 000000001  -- /  _____  -- /  _____

EST. AMOUNT FOR CDBG:      $60000      _____      _____
HOME:                     _____      _____      _____
ESG:                      _____      _____      _____
HOPWA:                    _____      _____      _____
TOTAL:                    $60000      _____      _____

PUBLIC HOUSING AMT:      _____
ASSISTED HOUSING AMT:  _____

WILL ANOTHER GRANTEE SETUP ACTIVITIES UNDER THIS PROJECT? (Y):  _
ACTIVITY SETUP ALLOWED FOR:  BERKS COUNTY
DO YOU WANT TO VIEW THE HISTORY OF AMENDMENTS MADE TO THIS PROJECT? (Y):  _

F1 = HELP  F4 = MAIN MENU  F6 = CLEAR  F7 =PREV
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Plan Year		System generated from the Add Plan Screen (C04MK01).	Protected field
Plan Version		The current version of the Plan. 0001 is the original version; if the plan was amended, this field will display 0002 or higher.	Protected field
CPS Project ID		System generated from the Add Plan Screen (C04MK01).	Protected field
Project Title		System generated from the Add Plan Screen (C04MK01).	Protected field
HUD Matrix Code		Type the HUD Matrix code, or press <F1> to select from a list of valid codes. Refer to Appendix B for a list of Matrix Code definitions.	3 numeric characters
Accomplishment Type		Press <F1> to review a list of accomplishment types and select the most appropriate choice.	2 numeric characters

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Accomplishment Number		Type the revised number of units (of accomplishment type selected above) you expect to accomplish under this project. If you enter a value in this field, you must have filled in the previous field.	4 numeric characters
Estimated Amount for: CDBG HOME ESG HOPWA TOTAL		Type in the estimated amended amount that the project will receive from <i>all</i> CPD grant programs combined. (Do not include any prior year funds.) The amounts you enter here serve as the estimated budget for the activities you will accomplish under this project.	\$nnnnnnnnnn
Will Another Grantee Setup Activities Under This Project?		If activities under this project will be carried out by one or more subgrantees who will enter and update those activities using IDIS, type Y ; otherwise, type N . (The screen lists all grantees and subgrantees who can currently set up activities.) If you enter Y , the system will display the Sub-Recipient List Screen (C04ML03) where you can select additional subgrantees.	Y or N
		Type Y to view any prior amendments to this project.	
Press <Enter> to save the information and return to the Plan/Project Menu.			