Chapter 4: Setting Up the Activity Common Path

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4.1 What's in This Chapter?

4.1.1 Overview

Setting up an activity in IDIS is a prerequisite to committing and drawing down funds and reporting on the progress of your program initiatives throughout the year.

This chapter describes how to set up and maintain (or *revise*) activities in IDIS. You can use the options described in this chapter to set up and revise activities once your approved project plan exists in IDIS (see Chapter 14).

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

- You use the IDIS on-line screens to add one or more plan years and to enter your project data

- You use the IDIS EDI application to add one or more plan years and your project data

- The Headquarters staff of HUD transfers your approved Action Plan data from the CPMP System into IDIS for you.

See Chapter 14 if you need help setting up or approving your project plan.

> **NOTE:**
>
> If you will be funding an activity from a subfund, you must create the subfund before you can create the new activity. Similarly, if you are funding an activity from a subgrant, for example for a CHDO or a subrecipient, you must set up the subgrant before setting up the activity. Chapter 6 describes the Subfunding and subgranting process in IDIS.

4.1.2 Review of Activities Concepts

In IDIS, you *implement* a project by creating one or more activities under the project. The activity is used to record all (or a portion) of the work being performed under the project. This work *may* include administration and planning activities.

Before setting up your activities in IDIS, you should:

- Review your overall project and activity framework; and

- Ensure that your approved projects have been saved to IDIS either directly through data entry or via an automated transfer performed by the HUD Headquarters staff.

> **SEE:**
>
> Chapter 2 of the Reference Manual, Section 2.2, Creating IDIS Project and Activity Structure.

4.2 What Is the Common Path for Activity Setup?

All four CPD formula grant programs use the same four screens to set up an activity. Hence, these four screens are often referred to as the *Common Path*.

The chart below provides an overview of each common path screen. Each CPD grant program has different requirements as to what data is required on these screens, particularly when entering accomplishments.

Four Screen Activity Setup Common Path

Screen	Purpose:
Setup Activity Screen (C04MA01)	• Establish your new activity by linking it to an existing approved project for a plan year • Briefly describe the purpose of the activity
Process Activity Screen (C04MA03)	• Describe the community development needs being met by the activity and indicate whether the activity will be carried out by another entity or CHDO.
Accomplishment Narrative and Status Screen (C04MA04)	• Change the status of the activity as it progresses to completion, or is canceled • Maintain proposed versus actual accomplishments as the activity progresses towards completion for the people or communities benefited • Maintain current and historical information on the progress of the activity
Money Screen (C04MA08)	• Give the activity a budget based on the estimated amount of funds it will receive from all CPD formula grant programs combined and any program income that you expect to receive • Indicate which program(s) will be funding this activity, and then go to program-specific activity screens. Effective with IDIS Version 6.3, if you do not select at least one program that will fund the activity and complete any required program-specific setup information; you will see limited funding choices on the Activity Funding screen (CO4MO04).

The graphic on the next page shows the setup activity common path as Step 1. Once you setup an activity in IDIS, you may conduct Activity Funding based on these program-related guidelines:

• If you are setting up activities under the CDBG programs you *must* fill in any required information on the program-specific screens before you can proceed to Activity Funding.

• If you are setting up HOME activities, you *must* complete at least one additional setup screen (option E on the HOME menu screen for AD/CO/CC only funded activities) before you can fund the activity using the Activity Funding options. Otherwise you will need to perform the SET UP ACTIVITY functions A, B, C, or D. These screens are found in the HOME path (see Chapter 9)

4.3 Choosing Set Up Activity from the IDIS Main Menu

Activity Setup is the first option listed (Option A) on the IDIS Main Menu.

Getting To the Setup Activity screen:

- On the IDIS Main Menu, select **A**, Set Up Activity.

  The system displays the first Setup Activity screen (C04MA01). You must complete a sequence of four screens, indicate which program(s) will be funding the activity, and fill in any program-specific required information before you can fund the activity using the Activity Funding options.

- For HOME activities, you *must* complete at least one additional setup screen (option E on the HOME menu screen for AD/CO/CC only funded activities) before you can fund the activity using the Activity Funding options. Otherwise you will need to perform the SET UP ACTIVITY functions A, B, C, or D. These screens are found in the HOME path (see Chapter 9).

4.3.1 Identifying the Activity (C04MA01)

Purpose: On this screen, you identify the activity by relating it to a project, giving it a name, and entering its location and a brief description. Some of the information you enter will be carried forward to other screens associated with the activity. For more information on setting up projects in IDIS, see Chapter 14.

After you complete this screen, IDIS assigns an Activity Number that you will use to track this activity.

NOTE:

Effective with Version 6.7, CDBG entitlement activities must contain a valid Address/Location, Locality, State, Zipcode, and Description before the activity can be funded.[*]

How To Complete This Screen:

Where appropriate, type in the requested 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 the fields on this screen press **<Enter>** to save the information and display the Process Activity screen (C04MA03).

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[*] This requirement does not apply to: 1) State Activities; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4.

CURRENT OWNER

1. If you are not the owner of the activity, for example you are an HQ or field office user - or a State recipient, press **<F1>** to choose the correct owner. Recipients will see a list of States or grantees who have given them permission to view, setup, or revise activities. Field offices will see a list of grantees under their jurisdiction. HQ users will need to enter the Region and Field Office assigned to the grantee, then select the grantee from the list displayed.

CPS PROJECT NUMBER/ PROGRAM YEAR

2. Type the CPS Project Number and Program Year (if you know it); or press **<F2>** to select a project from a list of projects already established on your CPS project table and active in IDIS. The screen will refresh with information for the selected project.

GRANTEE ACTIVITY NUMBER

3. If this field is blank or you want to change what is displayed, you may define and type in any reference number you wish. Some grantees use it to relate IDIS activities to their local financial and reporting systems; other grantees may divide up the number in this field into several identifiers.

   If the field is pre-filled, the number displayed came from one of the following sources; you may type over what appears to change it.

   - For HOME, if the activity was converted from CMIS, this field displays the project number.

ACTIVITY NAME

4. Type in an appropriate activity name.

ADDRESS/ LOCATION

5. Type the street address or location description of where this activity is being carried out.

LOCALITY

6. Type the city name of the community where the activity is being performed.

STATE ZIP

7. Type in the state abbreviation, press **<Tab>** and type in a 5-digit Zipcode, plus optional 4-digit Zipcode.

DESCRIPTION

8. Type a brief description of the activity. Required for CDBG activities prior to funding. For other programs, while this field is not a system requirement, it will make your reports more comprehensive.

   If your description exceeds one line of text, add extra spaces to the end of the line to force the cursor to the beginning of the next line (IDIS does not have word wrap).

```
04/25/02  09:27              SETUP  ACTIVITY                 C04MA01
CURRENT OWNER:  BERKS COUNTY
CPS PROJECT NUMBER:  ____      PROGRAM YEAR: ____

PROJECT TITLE:  _____

GRANTEE ACTIVITY NBR: _____   HUD ACTIVITY NBR: _____


ACTIVITY NAME: _____

ADDRESS/LOCATION: _____
                  _____
                  _____
         LOCALITY: _____  STATE: __  ZIP: ____ - ___

DESCRIPTION:  _____
              _____
              _____



F1 = OWNER HELP  F2 = PROJ HELP  F3 = VALDT    F4 = MAIN MENU
F5 = PROJ INFO   F8 = NEXT       F9 = SAVE
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
CPS Project Number/ Program Year	✓	Type the CPS Project Number and Program Year (if you know it); or press **<F2>** to select a project from a list of projects already established on your CPS project table and active in IDIS.	4 numeric characters/ yyyy
Project Title		After IDIS displays the CPS Project Number and Program Year, the screen will refresh with the project title carried forward from the project table.	Protected field
Grantee Activity Number		If this field is blank or you want to change what is displayed, you may define and type in any reference number you wish. Some grantees use it to relate IDIS activities to their local financial and reporting systems; other grantees may divide up the number in this field into several identifiers.	18 alphanumeric characters
HUD Activity Number		After you press **<F9>** to save the data on this screen, the screen will refresh with a unique Activity Number for this activity. You will use this number extensively: to fund the activity, to do drawdowns, and to reference the activity.	Protected field
Activity Name	✓	Type in an appropriate activity name. The name can be the same or different than the Project Name.	40 alphanumeric characters

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Address/Location	✓	Type the street address or location description of where this activity is being carried out.	45 alphanumeric characters x 3 lines
Locality	✓	Type the name of the community where the activity is being performed.	20 alphanumeric characters
State/ Zip	✓	Type in the state abbreviation, press **<Tab>** and type in the 5-digit Zipcode, plus optional 4-digit Zipcode.	2 alphanumeric characters/ 9 numeric characters
Description	✓	Type a brief description of the activity. If your description exceeds one line of text, add extra spaces to pad the line (IDIS does not have word wrap).	120 alphanumeric characters
Press **<Enter>** to save the information and display the Process Activity screen (C04MA03).			

4.3.1.1   Looking Up Projects - Project Query screen (C04MF07)

Purpose: Use this screen to view a list of projects that the grantee has established on the system and that you may associate with an activity. To help you tell one project from another, the screen also displays the Unit of Government Code and Number, Project ID, Program Year and Project Title relevant to your grantee organization.

Getting to the Project Query screen: [selection column]	1. On the Setup Activity screen (C04MA01), with the cursor in the CPS Project Number field, press **<F2>**. The system displays the Project Query screen (C04MF07). 2. Use **<Tab>** to move the cursor to the desired project with the correct plan year. 3. Type **X** to select the correct project, then press **<Enter>**. The system redisplays the Setup Activity screen (C04MA01) with the Project ID and Plan Year you selected.

```
03/26/99   08:58              PROJECT QUERY                C04MF07

                  UOG-CODE 429011    UOG-NUMBER 00001

     Project  Program
       ID      Year      Project Title
   _   0001    1999     GENERAL ADMINISTRATION
   _   0002    1999     PUBLIC SERVICES
   _   0003    1999     PLANNING
   _   0004    1999     SECTION 108 PAYMENT
   _   0005    1999     OPERATIONS & MAINTENANCE
   _   0006    1999     RENTAL HOUSING
   _   0007    1999     RENTAL ASSISTANCE
   _   0008    1999     CHDO OPERATING
   _   0009    1999     SEWER COLLECTION SYSTEMS
   _   0010    1999     CURB RAMPS & ADA IMPROVEMENTS
   _   0011    1999     ROAD/STREET IMPROVEMENTS
   _   0012    1999     STORM SEWER
   _   0013    1999     ACQUISTION
   _   0014    1999     RELOCATION



F7 = PREV  F17 = UP    F18 = DOWN
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
UOG-Code		System generated from Grantee Add screen (C04MU06).	Protected field
UOG-Number		System generated from Grantee Add screen (C04MU06).	Protected field
Project ID		Carried forward from the Add Project screen (C04MK01).	Protected field
Program Year		Carried forward from the Add Project screen (C04MK01).	Protected field
Project Title		Carried forward from the Add Project screen (C04MK01).	Protected field
[selection column]		Use **<Tab>** to move the cursor to the desired project with the correct plan year, then type **X** to select the correct project.	X
Press **<Enter>** to redisplay the Setup Activity screen (C04MA01) with the Project ID and Plan Year you selected.			

4.3.2 Describing the Purpose of the Activity (C04MA03)

Purpose: On this screen, you answer questions related to the purpose of the activity. You also indicate whether the activity will be carried out by another entity or CHDO. If you see pre-filled data, the values were carried forward from the approved project that is the basis for this activity.

How To Complete This Screen:

Where appropriate, type in the requested 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 the fields on this screen, press **<Enter>** to display the next Setup Activity screen (C04MA04).

HUD MATRIX CODE

1. Verify that the pre-filled code used to classify expenditures of grant funds is correct. If not, type over what appears.

   If you do not know the correct code, press **<F1>** with the cursor in this field to display the HUD Matrix Code table. Also refer to Appendix B for a list of Matrix Code definitions.

HELP PREVENT HOMELESSNESS

2. Type **Y** if the purpose of this activity is to prevent homelessness; otherwise, type **N**.

HELP THE HOMELESS

3. Type **Y** if the purpose of this activity is to help the homeless; otherwise, type **N**.

HELP THOSE WITH HIV/AIDS

4. Type **Y** if the purpose of this activity is to help persons with HIV/AIDS; otherwise, type **N**.

PRIMARILY HELP PERSONS WITH DISABILITIES

5. Type **Y** if the purpose of this activity is primarily to help persons with disabilities; otherwise, type **N**.

GENERATE PROGRAM INCOME

6. Type **Y** if this activity is expected to generate program income, otherwise, type **N**. For entitlement activities, this field must contain a valid entry before you can save the screen. [*]

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[*] This requirement does not apply to: 1) State Activities; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4.

**ENVIRONMENTAL
ASSESSMENT CODE**

7. Enter the correct code from the following list:

    A Exempt

    C Completed

    D Underway

    Note: For HOME activities, the environmental review must be complete or exempt before setting up a HOME activity.

    Note: effective with Version 6.7, the code B, Categorically Excluded, is no longer a valid entry. Activities that had a value of B in this field were updated to A, Exempt.

**WILL ANOTHER ENTITY OR
CHDO HAVE ACCESS TO
THE ACTIVITY?**

8. If you are setting up this activity for another entity or a CHDO who will be carrying out this activity, enter **Y**.

    If you enter **Y**, the system will display the Subrecipient List screen (C04ML03) where you will select the subgrantee.

```
    04/23/02   11:10              PROCESS ACTIVITY                       C04MA03


    PROJECT TITLE:   GENERAL ADMINISTRATION


    GRANTEE ACTIVITY NBR:                      HUD ACTIVITY NBR:  000000001641


    ACTIVITY NAME:  TEST FOR NEW CDBG ADMIN ACTIVITY


    HUD MATRIX CODE: 14H   Rehabilitation Administration



    IS THE PURPOSE OF THIS ACTIVITY TO:
      HELP PREVENT HOMELESSNESS? (Y/N):  N
              HELP THE HOMELESS? (Y/N):  N
        HELP THOSE WITH HIV/AIDS? (Y/N):  N
        PRIMARILY HELP PERSONS WITH DISABILITIES? (Y/N):   _
    GENERATE PROGRAM INCOME? (Y/N): N    INITIAL FUNDING DATE: __ / __ / ____


    ENVIRONMENTAL ASSESSMENT CODE:  A    EXEMPT
    WILL ANOTHER ENTITY OR CHDO HAVE ACCESS TO THE ACTIVITY? (Y/N):       N
    THIS ACTIVITY IS SET UP FOR:


    F1 = HELP   F3 = VALDT   F4 = MAIN MENU   F5 = PROJ INFO
    F7 = PREV   F8 = NEXT    F9 = SAVE                           ▸
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Project Title		Carried forward from the Add Project screen (C04MK01).	Protected field
Grantee Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
HUD Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity screen (C04MA01).	Protected field
HUD Matrix Code	✓	Verify that the pre-filled code used to classify expenditures of grant funds is correct. If not, type over what appears. If you do not know the correct code, press **<F1>** with the cursor in this field to display the HUD Matrix Code table. Also refer to Appendix B for a list of Matrix Code definitions.	3 alphanumeric characters
Help Prevent Homelessness?	✓	Type **Y** if the purpose of this activity is to prevent homelessness; otherwise, type **N**.	Y or N
Help the Homeless?	✓	Type **Y** if the purpose of this activity is to help the homeless; otherwise, type **N**.	Y or N
Help Those With HIV/AIDS?	✓	Type **Y** if the purpose of this activity is to help persons with HIV/AIDS; otherwise, type **N**.	Y or N
Primarily Help Persons with Disabilities?	✓	Type **Y** if the purpose of this activity is primarily to help persons with disabilities; otherwise, type **N**.	Y or N
Generate Program Income?	✓	Type **Y** if this activity is expected to generate program income; otherwise, type **N**.	Y or N

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Initial Funding Date		The date the activity was first funded in activity funding.	Protected field
Environmental Assessment Code	✓*	Review the default code displayed (**A** Exempt) and correct it, as necessary: **A** Exempt **C** Completed **D** Underway Note: effective with Version 6.7, B, Categorically Excluded, is no longer a valid entry. Activities with a status of Funds Budgeted or Underway that had a value of B in this field were updated to A, Exempt.	A, C, or D
Will Another Entity or CHDO Have Access To the Activity?	✓	Type **Y** if another entity or CHDO will be carrying out this activity. If you enter **Y**, the system will display the Subrecipient List screen (C04ML03) where you will select the subgrantee.	Y or N
Press **<Enter>** to save the information and display the next Setup Activity screen (C04MA04).			

4.3.3 Entering Activity Status and Accomplishment Data (C04MA04)

Purpose: This screen serves two purposes. The top third of the screen identifies the current status of the activity and lets you complete or cancel an activity, as appropriate. Use the bottom two thirds of this screen to enter Accomplishment Data for each report year over which the activity spans. Depending on program requirements, this screen lets you enter proposed and actual accomplishment "units" as well as a short or long narrative description of the activity's progress for each report year of a multi-year activity.

Refer to the following documents, issued by the respective program offices, for specific guidance on entering proposed and actual accomplishments. (The HOME program does not require proposed and actual accomplishments on this screen; use the HOME-path screens).

CDBG, http://www.hud.gov/offices/cpd/communitydevelopment/cleanup/guidance/ma04.cfm
ESG, http://www.hud.gov/offices/cpd/homeless/library/esg/esgdeskguide/section5.cfm

NOTE:

Effective with Version 6.7, for CDBG and HOPWA activities, you must enter Proposed Accomplishments (Type and Units) on this screen for the latest report year before you can fund the activity.* For multi-year

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* Required for all CDBG Entitlement activities before activity can be funded. This requirement does not apply to: 1) State Activities; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4.
* This requirement does not apply to: 1) admin and planning activities with a matrix code of 19A, 19B, 19F, 19G, 19H, 20, 21*, 22, 31B, or 31D; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4; 3) Activities for which

activities, if the newest report year has no proposed accomplishments, you will need to explicitly enter "0" Proposed Accomplishments and the Accomplishment Type before you can fund the activity.

CDBG Accomplishment Types for entitlement activities will now be limited to: 1 - People, 4 – Households, 8 - Businesses, 9 - Organizations, 10 - Housing Units, 11 - Public Facilities, 13 - Jobs. IDIS will display an error message if any other Accomplishment Type is entered. Effective with Version 8.3, the accomplishment type code must be valid for the Matrix Code and National Objective Code specified for the activity.

Effective with Version 8.3, CDBG Accomplishment Types for State activities will now be limited to: 1 - People, 4 - Households, 8 - Businesses, 9 - Organizations, 10 - Housing Units, 13 - Jobs, 14- Loans. IDIS will display an error message if any other Accomplishment Type is entered.

HOPWA Accomplishment Types will now be limited to: 1 - People, 9 - Organizations, and 10 – Housing Units. IDIS will display an error message if any other Activity Type is entered.

You can update any missing proposed accomplishment information at any time using the Revise Activity option. Additionally, throughout the program year, you will enter actual accomplishments as they are achieved also using the Revise Activity option.

Effective with Version 8.3, all CDBG activities must have a record entered for each program year the activity is open.

How To Complete This Screen:

Where appropriate, type in the requested 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 the fields on this screen, press **<Enter>** to save the information and go to the next Setup Activity screen (C04MA08).

ACTIVITY STATUS CODE/ COMPLETION DATE

1. Verify the default Activity Status Code displayed (4, Funds Budgeted). Effective with the 4.8 Release of IDIS, you can no longer manually change the status of an activity from Funds Budgeted to Underway. After you draw down funds for the activity, IDIS will automatically update the status to Underway.

    1 Canceled   For activities funded with HOME, ESG, or HOPWA funds, you can only cancel an activity if its current status is Funds Budgeted. You cannot cancel an activity once funds have been drawn for it (status = Underway). If you need to cancel an activity with drawn funds, you must first revise or cancel the draw, manually change the status of the activity back

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the grantee has answered a new question on the MA04 screen that accomplishments for the activity are being reported under another activity.

		to Funds Budgeted, then change the status to Canceled. You may cancel activities that have been funded with CDBG money only effective with Version 8.4.
2	Completed	You can only complete an activity that has had funds drawn (status = Underway). For HOME activities, you cannot complete an activity unless ALL HOME setup and completion screens have been completed and their $ amounts agree. Refer to Section 4.4.1.3 for a description of which files are subject to an edit check.
3	Underway	IDIS automatically updates the status of an activity to Underway after the first successful draw down.
4	Funds Budgeted	This is the initial status assigned to an activity.

ACCOMPLISHMENTS FOR THIS ACTIVITY REPORTED AT ANOTHER ACTIVITY (Y/N)

2. Change this field to **Y** to indicate that accomplishments for this activity are being reported under another activity. (You should include the activity number where they are reported in the Accomplishment Narrative.)

    If you enter a **Y** in this field, for CDBG and HOPWA entitlement activities, IDIS will not require that you enter Proposed Accomplishments before you can maintain Activity Funding.

ACCOMPLISHMENT DATA/REPORT YEAR

For a new activity, when you first see this screen, it displays the report year of the project under which you created the activity. This may or may not be correct, for example when you create a new activity under an existing project from an earlier year. To change the year, type the new year over the year that appears on the screen. If you know that the activity will be spanning multiple years, report the proposed and actual accomplishments for each year on a separate MA04 screen (do not report all accomplishments cumulatively). To add accomplishment data for a new year, press <Shift-F11>, type the year, and enter the accomplishments. To view older years, press <F17>; to view newer years, press <F18>.

Effective with Version 8.3, for CDBG activities, you must enter a year for each year the activity is open.

PROPOSED TYPE/UNITS[*]

3. Type the proposed Accomplishment Type your activity is providing or press **<F1>** to select the accomplishment type from a list.

   CDBG Accomplishment Types for entitlement activities are limited to: 1 - People, 4 – Households, 8 - Businesses, 9 - Organizations, 10 - Housing Units, 11 - Public Facilities, 13 - Jobs. Effective with Version 8.3, accomplishment type code is further limited by the matrix code/national objective code specified for the activity.

   Effective with Version 8.3, CDBG Accomplishment Types for State activities will now be limited to: 1 - People, 4 - Households, 8 - Businesses, 9 - Organizations, 10 - Housing Units, 13 - Jobs, 14- Loans. IDIS will display an error message if any other Accomplishment Type is entered.

   HOPWA Accomplishment Types are limited to: 1 - People, 4 – Households, 9 - Organizations, and 10 – Housing Units. IDIS will display an error message if any other Activity Type is entered.

4. Type the proposed Number of Units (of the Accomplishment Type) that you expect to serve with this activity. (For example, persons, households, etc.)

ACTUAL TYPE/UNITS

5. As each year's accomplishments are completed, fill in the *Actual* Type and Units of Accomplishment.

ACCOMPLISHMENTS NARRATIVE/ LONG NARRATIVE

6. IDIS lets you create an audit trail of Accomplishment Data spanning multiple reporting years. The first time you use the *Accomplishment Data* portion of this screen, it defaults to the report year in which the activity was created.

   This screen lets you enter up to six lines of free-form text to describe the activity's accomplishments. Add extra spaces to the end of each line of text to force the cursor to the beginning of the next line (IDIS does not have word wrap)

   If you need to enter a narrative longer than six lines for a program year, press **<F9>** to save the MA04 screen, then press **<F14>**. IDIS will display a Large Narrative screen where you can enter as much text as you need. (Press **<F9>** to save the Long Narrative, press **<F11>** to add another Long Narrative screen; then press **<F7>** to return to the MA04 screen when you are finished.)

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[*] This requirement does not apply to: 1) admin and planning activities with a matrix code of 19A, 19B, 19F, 19G, 19H, 20, 21*, 22, 31B, or 31D; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4; 4) Activities for which the grantee has answered a new question on the MA04 screen that accomplishments for the activity are being reported under another activity.

To add Accomplishment Data for a *different* report year, press **<Shift-F11>**. IDIS will re-display the screen, ready for you to enter a new Report Year and an additional short and, optionally, long narrative.

Once Accomplishment Data has been entered for more than one year, use **<F18>** to scroll to higher report years, **<F17>** to scroll to earlier report years.

If you need to delete accomplishment data for a particular report year, press **<F13>** while you are viewing the data. IDIS will prompt you to confirm the deletion.

```
04/22/02   11:08              SETUP  ACTIVITY                    C04MA04

GRANTEE ACTIVITY NBR:                    HUD ACTIVITY NBR:  000000000280

ACTIVITY NAME:  TEST FOR LMH WITH 18B FOR FUNDING
ACTIVITY STATUS CODE: 4 FUNDS BUDGETED    COMPLETION DATE: __ / __ / ____

ACCOMPLISHMENTS FOR THIS ACTIVITY REPORTED AT ANOTHER ACTIVITY (Y/N): N
ACCOMPLISHMENT DATA:                      REPORT YEAR: 2001
          TYPE                                  UNITS
PROPOSED  __   _____           _____
ACTUAL    __   _____           _____

ACCOMPLISHMENTS NARRATIVE:
          _____
          _____
          _____
          _____
          _____
          _____
          _____



     F1 = HELP  F3 = VALD  F4 = MAIN  F5 = PROJ INFO  F7 = PRV  F8 = NXT  F9 = SAVE
     F10 = MA09  F11 = INSRT  F13 = DELET  F14 = UPD LG NARR  F17 = BACK  F18 = FWD
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
HUD Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Activity Status Code	✓	Typically, for a new activity, you will not need to change the default activity status code of Funds Budgeted. IDIS will automatically update the status of the activity to Underway once you draw down funds for the activity.	1, 2, 3, or 4

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
		1 Canceled **2** Completed **3** Underway **4** Funds Budgeted	
For a new activity, when you first see this screen, it displays the report year of the project under which you created the activity. This may or may not be correct, for example when you create a new activity under an existing project from an earlier year. To change the year, type the new year over the year that appears on the screen. If you know that the activity will be spanning multiple years, report the total proposed and actual accomplishments for each year on a separate MA04 screen (do not report all accomplishments cumulatively). To add accomplishment data for a new year, press <Shift-F11> type the year, and enter the accomplishments. To view older years, press <F17>; to view newer years, press <F18>.			
Report Year	✓	Program year of the activity's accomplishment data that you are documenting on this screen. If this is not the correct year, press **<F11>** to insert a new year.	YYYY
Proposed Type/Units	✓	Type the proposed Accomplishment Type your activity is providing or press **<F1>** to select the accomplishment type from a list. CDBG Accomplishment Types for entitlement activities are limited to: 1 - People, 4 – Households, 8 - Businesses, 9 - Organizations, 10 - Housing Units, 11 - Public Facilities, 13 - Jobs. Effective with Version 8.3, accomplishment type code is further limited by the matrix code/national objective code specified for the activity. Effective with Version 8.3, CDBG Accomplishment Types for State activities will now be limited to: 1 - People, 4 - Households, 8 - Businesses, 9 - Organizations, 10 - Housing Units, 13 - Jobs, 14- Loans. IDIS will display an error message if any other Accomplishment Type is entered. HOPWA Accomplishment Types are limited to: 1 - People, 4 – Households, 9 - Organizations, and 10 – Housing Units. IDIS will display an error message if any other Activity Type is entered. Type the proposed Number of Units of the Accomplishment Type that you expect to serve with this activity. (For example, persons, households, etc.)	Type = 2 numeric characters Units = 9 numeric characters
Actual Type/Units		Once the activity has actual accomplishments to report, enter the *Actual* Type and Units.	Type = 2 numeric characters Units = 9 numeric characters
Accomplishments Narrative/		IDIS lets you create an audit trail of Accomplishment Data spanning multiple reporting years. The first time you use	Accomp Narrative:

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Long Narrative		the *Accomplishment Data* portion of this screen, it defaults to the report year in which the activity was created. This screen lets you enter up to six lines of free-form text to describe the activity's accomplishments. Add extra spaces to the end of each line of text to force the cursor to the beginning of the next line (IDIS does not have word wrap) If you need to enter a narrative longer than six lines for the same program year, press **<F9>** to save the MA04 screen, then press **<F14>**. IDIS will display a Long Narrative screen where you can enter as much text as you need. (Press **<F9>** to save the Long Narrative, press **<F11>** to add another Long Narrative screen; then press **<F7>** to return to the MA04 screen when you are finished.) To add Accomplishment Data for a *different* report year, press **<Shift-F11>**. IDIS will re-display the screen, ready for you to enter a new Report Year and an additional short and, optionally, long narrative. Once Accomplishment Data has been entered for more than one year, use **<F18>** to scroll to higher report years, **<F17>** to scroll to earlier report years. If you need to delete accomplishment data for a particular report year, press **<F13>** while you are viewing the data. IDIS will prompt you to confirm the deletion.	6 lines of alphanumeric text per reporting year Long Narrative: 15 lines per screen x unlimited screens per reporting year
Press **<Enter>** to save the information and display the next Setup Activity screen (C04MA08).			

4.3.4 Establishing an Activity Budget on the Money Screen (C04MA08)

Purpose: This screen serves two purposes: use the top third of the screen to give your activity a budget; use the bottom portion of the screen to select the program(s) that will be funding the activity and to go to a program-specific completion path for CDBG, ESG, HOME, or HOPWA.

On this screen, you enter the estimated amount of grant funds and program income that your activity will receive from *all* CPD formula grant programs.

This screen marks the end of the activity setup *common path*. For CDBG, once you have completed this screen, you will need to enter any required program information before you can fund the activity.

For HOME activities, you *must* complete at least one additional setup screen (option E on the HOME menu screen for AD/CO/CC only funded activities) before you can fund the activity using the Activity Funding options. Otherwise you will need to perform the SET UP ACTIVITY functions A, B, C, or D. These screens are found in the HOME path (see Chapter 9).

You will do the actual commitment of funds to an activity using the Activity Funding option of IDIS (see Chapter 5). You must fund (or commit) the activity before you can draw down funds (see Chapter 7).

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 the fields on this screen, press **<Enter>** to go to the program-specific path that you selected; or press **<F9>** to save your information then **<F4>** to return to the Main Menu.

TOTAL ESTIMATED AMOUNT

1. Type the estimated sum, in dollars and cents, of funding your activity will receive from *all* CPD formula programs. (You can use dollar signs but not commas.)

ENTER (X) TO SELECT PROGRAM

2. Type **X** next to the CPD formula grant program funding this activity, press **<Enter>** to continue on to the program screens. (If the activity is being funded by more than one CPD formula grant program, after you process the program-specific screens, you will see this screen again; select another CPD program to complete.)

3. Type **D** to delete the existing program path.

```
01/06/00    14:50              SETUP  ACTIVITY                    C04MA08


 GRANTEE ACTIVITY NBR: H99-007              HUD ACTIVITY NBR:      1457


 ACTIVITY NAME:  YMCA
 TOTAL ESTIMATED AMOUNT: _        $32,500.00


 INDICATE PROGRAM(S) TO BE ADDRESSED

 ENTER (X) TO SELECT PROGRAM


            _    CDBG


            _    ESG


            _    HOME


            _    HOPWA




 F1 = HELP    F3 = VALDT  F4 = MAIN MENU  F5  = PROJ INFO
 F7 = PREV    F8 = NEXT   F9 = SAVE       F10 = GO REVISE ACTIVITY
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		System generated from the Setup Activity screen (C04MA01).	Protected field
HUD Activity Number		System generated from the Setup Activity screen (C04MA01).	Protected field
Activity Name		System generated from the Setup Activity screen (C04MA01).	Protected field
Total Estimated Amount	✓	What is the estimated total amount in dollars and cents that your activity will receive *from all CPD formula programs*? (When you use the Activity Funding options, IDIS will not let you *fund* more dollars for the activity than the amount you enter on this screen.)	$nnnnnnnnnn.nn
Enter (X) to Select Program	✓	Type **X** next to the CPD formula grant program funding this activity, press **<Enter>** to continue on to the program screens. (If the activity is being funded by more than one CPD formula grant program, after you process the program-specific screens, you will see this screen again; select another CPD program to complete.)	X
Enter (D) to Select Program	✓	Type **D** to delete the existing program path.	D
Press **<Enter>** to return to go to the program-specific completion path that you selected; or press **<F9>** to save your information then press **<F4>** to return to the Main Menu.			

4.3.4.1   Looking Up Project Funding on the Project Information Screen (C04MF07)

Purpose: Use this screen to view the project's estimated budget.

Getting To the Project Information screen:	1. On the Setup Activity screen, press **<F5>**. The system displays the Project Information screen (C04MA11). 2. When you are finished viewing this screen, press **<Enter>** to return to the Setup Activity screen.

```
03/26/99    09:07      PROJECT INFORMATION              C04MA11

   PROJECT INFORMATION ORIGINATION - CONSOLIDATED PLANNING SYSTEM (CPS)

 CPS PROJECT NUMBER : 0006

 PROJECT TITLE:   RENTAL HOUSING

 LAST UPDATED/ENTERED:  12/14/1998

                      ESTIMATED FUNDING AND SOURCES

              ESG  :           $0         HOME :      $244000

              CDBG :           $0         HOPWA:          $0




PROJECT DETAILS DISPLAYED
           F4 = MAIN MENU  F7 = PREV
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Project Information Origination		This field displays Consolidated Planning System (CPS) if your project was transferred from CPS to IDIS. If you enter a Project ID that was not transferred the system will display an error message.	Protected field
CPS Project Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Project Title		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Last Updated/Entered		The date this project was entered into the Project Table or the last time it was amended using the Amendment to the Plan Project screen (C04MK05).	Protected field
Estimated Funding and Sources		The estimated budget for the activities you may potentially set up under this project from *each* CPD formula grant program.	Protected field
Press **<Enter>** to return to the Setup Activity screen.			

4.4 Revising Activity Data

In addition to letting you revise data for an existing activity, IDIS lets you copy or move an activity, then revise it, if necessary.

- You can copy an existing activity to:
  - ⇒ a new activity for the same project year
  - ⇒ a new activity for a different project and/or a different project year
  - ⇒ Section 4.4.2 explains which setup and program-specific fields are copied using this function.
- You can move an existing activity to a different project or a different project year. All setup and program-specific data from the source activity is moved.

Using the revise option, you can change any missing or incomplete data on the four set up activity common path screens or change the estimated funding amount. You may make changes to an activity at any time during the program year, particularly to update its status and accomplishment data as the activity progresses toward completion and when it is completed (or canceled).
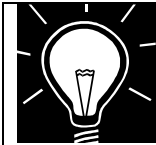
	TIP: Fields that you can change are displayed in green. Protected fields always appear in blue.

4.4.1 Selecting an Activity to Revise, Copy, or Move (C04MA09)

Purpose: This screen displays activities for a specific project ID and program year. From this list, you select the one activity that you want to revise, copy, or move.

How To Complete This Screen:	Where appropriate, type in the requested data. (If the data typed does not fill the field, or you do not need to complete the field, press **<Tab>** to go to the next field.)
	When you have completed the fields on this screen, press **<Enter>** to go to the next screen.
CURRENT OWNER	1. If you are not the owner of the activity, for example you are an HQ or field office user - or a State recipient, press **<F1>** to choose the correct owner. Recipients will see a list of states or grantees who have given them permission to view, setup, or revise activities. Field offices will see a list of grantees under their jurisdiction. HQ users will need to enter the Region and Field Office assigned to the grantee, then select the grantee from the list displayed.

HUD ACTIVITY NUMBER

2. If you know the HUD Activity Number assigned to the activity and you type it here, then press **<Enter>**, you will go directly to the Revise Activity screen (C04MA10) or the Copy/Move Activity screen (C04MA12).

GRANTEE ACTIVITY NUMBER

3. If you know the local identifying number you (as the grantee) assigned to the activity and you type it here then press **<Enter>**, you will go directly to the Revise Activity screen (C04MA10) or the Copy/Move Activity screen (C04MA12).

CPS PROJECT NUMBER/ PROGRAM YEAR

4. Type the Project Number and Program Year for the activity, or press **<F2>** to select the Project Number/Program Year from the list displayed.

    After the list appears:

    Type **X** next to the one activity you want to revise

    Type **C** next to the one activity you want to copy

    Type **M** next to the one activity you want to move

    then press **<Enter>**.

    If you selected X, the system displays the Revise Activity screen (C04MA10).

    If you selected C or M, the system displays the Copy/Move Activity screen (C04MA12). This process is described in Sections 4.4.2 and 4.4.3.

```
 01/06/00   14:53              REVISE ACTIVITY                    C04MA09


 CURRENT OWNER:   BERKS COUNTY
 CPS PROJECT NUMBER:      4       PROGRAM YEAR:  1999


 PROJECT TITLE:   SECTION 108 PAYMENT


 GRANTEE ACTIVITY NBR: _____    HUD ACTIVITY NBR: _____


 SELECTION:    X - REVISE ACTIVITY     C - COPY ACTIVITY    M - MOVE ACTIVITY


 SEL  HUD ACTIVITY     GRANTEE ACT        ACTIVITY NAME        ACTIVITY
 ONE    NUMBER           NUMBER                                STATUS
  _    000000001410 C99-009           SECTION 108 LOAN - CD OFFI  COMPLETED








 F1 = OWNER HELP   F2 = PROJ HELP   F4 = MAIN MENU   F5 = PROJ INFO
 F7 = PREV   F8 = NEXT   F17 = UP    F18 = DOWN
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Current Owner		The grantee currently logged into IDIS.	Protected field
CPS Project Number/ Program Year		Type the Project Number and Program Year for the activity, or press **<F2>** to select the Project Number/Program Year from the list displayed. After the list appears, type **X** next to the one activity you want to revise, then press **<Enter>**. The system displays the Revise Activity screen (C04MA10).	4 numeric characters/ yyyy
Project Title		Carried forward from the Add Project screen (C04MK01).	Protected field
Grantee Activity Number		If you know the local identifying number you (as the grantee) assigned to the activity, type it here, then press **<Enter>**, and you will go directly to the Revise Activity screen (C04MA10).	18 alphanumeric characters
HUD Activity Number		If you know the HUD Activity Number assigned to the activity and you type it here then press **<Enter>**, you will go directly to the Revise Activity screen (C04MA10).	12 numeric characters

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Select One		Type **X** next to the activity that you want to revise. Type **C** next to the activity that you want to copy. Type **M** next to the activity that you want to move.	X, C, or M
Activity Data			
Select One		Type **X** next to the activity that you want to revise.	X
HUD Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Grantee Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Activity Status		Carried forward from the Setup Activity screen (C04MA01). **1** Canceled **2** Completed **3** Underway **4** Funds Budgeted	Protected field

Press **<Enter>** to go to the Revise Activity screen (C04MA10) or the Copy/Move Activity screen (C04MA12) based on whether you entered and X (revise), C (copy), or M (move).

4.4.1.1   Revising Activity Information (C04MA10)

Purpose: On this screen, you may revise, as necessary, the identification data for the activity, originally entered on the Setup Activity screen (C04MA01).

	NOTE: Effective with Version 6.7, CDBG entitlement activities must contain a valid Address/Location, Locality, State, Zipcode, and Description before the activity can be funded.[*]

How To Complete This Screen: 	Where appropriate, type in the requested 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 the fields on this screen, press **<Enter>** to display the Process Activity screen (C04MA03).

[*] This requirement does not apply to: 1) State Activities; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4.

GRANTEE ACTIVITY NUMBER

1. If this field is blank or you want to change what is displayed, you may define and type in any reference number you wish. Some grantees use it to relate IDIS activities to their local financial and reporting systems; other grantees may divide up the number in this field into several identifiers.

    If the field is pre-filled, the number displayed came from the following sources; you may type over what appears to change it.

    - You entered an identifier on the Setup Activity screen (C04MA01).

    - For HOME, if the activity was converted from CMIS, this field displays the project number.

ACTIVITY NAME

2. Verify the activity name and change it, if incorrect.

ADDRESS/ LOCATION

3. Type the street address or location description of where this activity is being carried out.

LOCALITY

4. Type the city name of the community where the activity is being performed.

STATE ZIP

5. Type in the state abbreviation, press **<Tab>** and type in the Zipcode.

DESCRIPTION

6. Type a brief description of the activity. Required for CDBG activities prior to funding. For other programs, while this field is not a system requirement, it will make your reports more comprehensive.

    If your description exceeds one line of text, add extra spaces to pad the line (IDIS does not have word wrap).

```
04/25/02   09:34              REVISE ACTIVITY                    C04MA10

CPS PROJECT NUMBER:   0006        PROGRAM YEAR:  1999

PROJECT TITLE:   RENTAL HOUSING

GRANTEE ACTIVITY NBR: H99-007             HUD ACTIVITY NUMBER:  000000001457


ACTIVITY NAME:  YMCA

ADDRESS/LOCATION: 631 WASHINGTON STREET
                  _____
                  _____
         LOCALITY: READING              STATE:  PA   ZIP: 19601 -

DESCRIPTION:  RENOVATION OF BUILDING TO CONSTRUCT 32 TRANSITIONAL HOUSING
              UNITS WITH 1 HOME ASSISTED UNIT.
              _____



F1 = HELP   F3 = VALDT  F4 = MAIN MENU  F5 = PROJ INFO
F7 = PREV   F8 = NEXT   F9 = SAVE
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
CPS Project Number/ Program Year		The CPS Project Number and Program Year of the project.	Protected field
Project Title		The project title carried forward from the project table.	Protected field
Grantee Activity Number		If this field is blank or you want to change what is displayed, you may define and type in any reference number you wish. Some grantees use it to relate IDIS activities to their local financial and reporting systems; other grantees may divide up the number in this field into several identifiers.	18 alphanumeric characters
HUD Activity Number		The Activity Number assigned on the Setup Activity screen (C04MA01) when the activity was created.	Protected field
Activity Name	✓	Type in an appropriate activity name. The name can be the same or different than the Project Name.	40 alphanumeric characters
Address/Location	✓	Type the street address of where this activity is being carried out.	45 alphanumeric characters x 3 lines

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Locality	✓	Type the name of the community where the activity is being performed.	20 alphanumeric characters
State/ Zip	✓	Type in the state abbreviation, press **<Tab>** and type in the Zipcode.	2 alphanumeric characters/ 9 numeric characters
Description	✓	Type a brief description of the activity. If your description exceeds one line of text, add extra spaces to pad the line (IDIS does not have word wrap).	120 alphanumeric characters
Press **<Enter>** to save the information and display the Process Activity screen (C04MA03).			

4.4.1.2   Revising the Purpose of the Activity (C04MA03)

Purpose: On this screen, you may revise the purpose(s) being met by the activity. You also indicate whether another entity or CHDO will have access to view or update the activity.

NOTE:

If an existing project or activity was set up with an incorrect Matrix Code, type over what appears, then press **<F9>** to save your changes.

Before changing the Matrix Code for another activity, be sure to press **<F4>** to return to the Main Menu (not just pressing <F10> or <F7> to return to the Revise Activity screen). Otherwise, IDIS will accidentally keep the first Matrix Code you changed in memory.

How To Complete This Screen:

Where appropriate, type in the requested 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 the fields on this screen, press **<Enter>** to display the next Setup Activity screen (C04MA04).

HUD MATRIX CODE

1. Verify that the pre-filled code used to classify expenditures of grant funds is correct. If not, type over what appears.

    If you do not know the correct code, press **<F1>** with the cursor in this field to display the HUD Matrix Code table. Also refer to Appendix B for a list of Matrix Code definitions.

HELP PREVENT HOMELESSNESS

2. Type **Y** if the purpose of this activity is to prevent homelessness; otherwise, type **N**.

HELP THE HOMELESS

3. Type **Y** if the purpose of this activity is to help the homeless; otherwise, type **N**.

HELP THOSE WITH HIV/AIDS	4. Type **Y** if the purpose of this activity is to help persons with HIV/AIDS; otherwise, type **N**.
PRIMARILY HELP PERSONS WITH DISABILITIES	5. Type **Y** if the purpose of this activity is primarily to help persons with disabilities; otherwise, type **N**.
GENERATE PROGRAM INCOME	6. Type **Y** if this activity is expected to generate program income; otherwise, type **N**.
ENVIRONMENTAL ASSESSMENT CODE	7. Review the code displayed and correct it, as necessary:

> **A** Exempt
>
> **C** Completed
>
> **D** Underway
>
> This field must contain a valid entry before you can save the screen.[*]
>
> Note: effective with Version 6.7, the code B, Categorically Excluded, is no longer a valid entry. Activities that had a value of B in this field were updated to A, Exempt.

WILL ANOTHER ENTITY OR CHDO HAVE ACCESS TO THE ACTIVITY?	8. If you are setting up this activity for another entity or a CHDO who will be carrying out this activity, enter **Y**.

> If you enter **Y**, the system will display the Subrecipient List screen (C04ML03) where you will select the subgrantee.

```
04/23/02   11:10            PROCESS ACTIVITY                 C04MA03

PROJECT TITLE:   GENERAL ADMINISTRATION

GRANTEE ACTIVITY NBR:                    HUD ACTIVITY NBR:  000000001641

ACTIVITY NAME:  TEST FOR NEW CDBG ADMIN ACTIVITY

HUD MATRIX CODE: 14H   Rehabilitation Administration


IS THE PURPOSE OF THIS ACTIVITY TO:
  HELP PREVENT HOMELESSNESS? (Y/N):  N
          HELP THE HOMELESS? (Y/N):  N
    HELP THOSE WITH HIV/AIDS? (Y/N):  N
     PRIMARILY HELP PERSONS WITH DISABILITIES? (Y/N):   _
GENERATE PROGRAM INCOME? (Y/N): N    INITIAL FUNDING DATE: __ / __ / ____

ENVIRONMENTAL ASSESSMENT CODE:  A    EXEMPT
WILL ANOTHER ENTITY OR CHDO HAVE ACCESS TO THE ACTIVITY? (Y/N):       N
THIS ACTIVITY IS SET UP FOR:

F1 = HELP   F3 = VALDT   F4 = MAIN MENU   F5 = PROJ INFO
F7 = PREV   F8 = NEXT    F9 = SAVE
```

---

[*] This requirement does not apply to: 1) Activities being carried out by States; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4.

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Project Title		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Grantee Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
HUD Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity screen (C04MA01).	Protected field
HUD Matrix Code	✓	Verify that the pre-filled code used to classify expenditures of grant funds is correct. If you do not know the correct code, press **<F1>** with the cursor in this field to display the HUD Matrix Code table. Also refer to Appendix B for a list of Matrix Code definitions.	3 alphanumeric characters
Help Prevent Homelessness?	✓	Type **Y** if the purpose of this activity is to prevent homelessness; otherwise, type **N**.	Y or N
Help the Homeless?	✓	Type **Y** if the purpose of this activity is to help the homeless; otherwise, type **N**.	Y or N
Help Those With HIV/AIDS?	✓	Type **Y** if the purpose of this activity is to help persons with HIV/AIDS; otherwise, type **N**.	Y or N
Primarily Help Persons with Disabilities?	✓	Type **Y** if the purpose of this activity is primarily to help persons with disabilities; otherwise, type **N**.	Y or N
Generate Program Income?	✓	Type **Y** if this activity is expected to generate program income; otherwise, type **N**.	Y or N
Initial Funding Date	✓	The date the activity was first funded in activity funding.	Protected field
Environmental Assessment Code	✓	Review the default code displayed (**A** Exempt) and correct it, as necessary: **A** Exempt **C** Completed **D** Underway Note: effective with Version 6.7, B, Categorically Excluded, is no longer a valid entry. Activities with a status of Funds Budgeted or Underway that had a value of B in this field were updated to A, Exempt.	A, C, or D

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Will Another Entity or CHDO Have Access To the Activity?	✓	Type **Y** if another entity or CHDO will be carrying out this activity. If you enter **Y**, the system will display the Subrecipient List screen (C04ML03) where you will select the subgrantee.	Y or N
Press <**Enter**> to save the information and display the next Setup Activity screen (C04MA04).			

4.4.1.3　　Revising Activity Status & Accomplishment Data (C04MA04)

Purpose: This screen serves two purposes. The top third of the screen identifies the current status of the activity and lets you complete or cancel an activity, as appropriate. Use the bottom two thirds of this screen to enter Accomplishment Data for each report year over which the activity spans. Depending on program requirements, this screen lets you enter proposed and actual accomplishment "counts" as well as a short or long narrative description of the activity's progress for each report year.
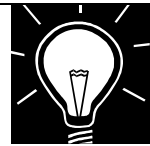
	NOTE: Effective with Version 6.7, for CDBG and HOPWA activities, you must enter Proposed Accomplishments (Type and Units) on this screen for the latest report year before you can fund the activity.[*] For multi-year activities, if the newest report year has no proposed accomplishments, you will need to explicitly enter "0" Proposed Accomplishments and the Accomplishment Type before you can fund the activity. CDBG Accomplishment Types for entitlement activities will now be limited to: 1 - People, 4 – Households, 8 - Businesses, 9 - Organizations, 10 - Housing Units, 11 - Public Facilities, 13 - Jobs. IDIS will display an error message if any other Accomplishment Type is entered. CDBG Accomplishment Types for State activities will now be limited to: 1 - People, 4 - Households, 8 - Businesses, 9 - Organizations, 10 - Housing Units, 13 - Jobs, 14- Loans. IDIS will display an error message if any other Accomplishment Type is entered. HOPWA Accomplishment Types will now be limited to: 1 - People, 9 - Organizations, and 10 – Housing Units. IDIS will display an error message if any other Activity Type is entered. You can update any missing proposed accomplishment information at any time using the Revise Activity option. Additionally, throughout the program year, you will enter actual accomplishments as they are achieved also using the Revise Activity option.

---

[*] This requirement does not apply to: 1) admin and planning activities with a matrix code of 19A, 19B, 19F, 19G, 19H, 20, 21*, 22, 31B, or 31D; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4; 3) Activities for which the grantee has answered a new question on the MA04 screen that accomplishments for the activity are being reported under another activity.

NOTE:

Effective with Version 4.8, a grantee cannot update the status of a HOME activity to "complete" until all required data have been entered into IDIS.

Effective with Version 8.0 for a HOME activity:

- Rental data must be completed on the HR03 screen, cost data must be completed on the HR04/HR05 screens, and beneficiary data must be entered on the HR06 screen.

- Homebuyer data must be completed on the HB03 screen cost data must be completed on the HB04 /HB05/HB06 screens, and beneficiary data must be entered on the HB07 screen.

- Homeowner Rehab data must be completed on the HO03 screen, cost data must be completed on the HO04/HO05 screens, and beneficiary data must be entered on the HO06 screen.

- TBRA data must be completed on the TBRA screen

- Activity Funded only with AD/CO/CC data must be completed on the HM00 screen

When you first see this screen during a session, it displays the newest report year's accomplishment data. To view older years, press **<F17>**; to view newer years, press **<F18>**.

To add accomplishment data for a new year, press **<Shift-F11>**.

How To Complete This Screen:

Where appropriate, type in the requested 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 the fields on this screen, press **<Enter>** to go to the next Setup Activity screen (C04MA08).

ACTIVITY STATUS CODE

1. Change the Activity Status Code, as appropriate.

    1 Canceled   You can only cancel an activity if its current status is Funds Budgeted. You cannot cancel an activity once funds have been drawn for it (status = Underway). If you need to cancel an activity with drawn funds, you must first reverse the draw, manually change the status of the activity back to Funds Budgeted, then change the status to Canceled. You may cancel CDBG activities that have been funded with CDBG money only effective with Version 8.4.

    2 Completed   You can only complete an activity that has had funds drawn (status = Underway). For HOME

---

activities, you cannot complete an activity unless ALL HOME setup and completion screens have been completed.

3 Underway   IDIS automatically updates the status of an activity to Underway after the first successful draw down.

4 Funds Budgeted This is the initial status assigned to an activity.

IDIS will not let you draw down funds for an activity that has a status of Completed or Canceled. If necessary, change the Activity Status Code back to 3, Underway, to be able to do more drawdowns against an activity.

COMPLETION DATE

2. When you change the Activity Status to complete, IDIS automatically uses today's date as the completion date.

    You may change this to any date between when the activity was funded and today. To do this, change the activity status code to **2**, then press **<F9>**. (Do not press <Enter>.)

    The Completion Date field becomes unprotected. Type in the corrected Completion Date and press **<F9>**.

    To change the Completion Date on any activity that has a status of Complete, you will need to first change the Activity Status Code back to **3**, Underway, then change the Completion Date.

ACCOMPLISHMENTS FOR THIS ACTIVITY REPORTED AT ANOTHER ACTIVITY (Y/N)

3. Change this field to **Y** to indicate that accomplishments for this activity are being reported under another activity. (Include the activity number where they are reported in the Accomplishment Narrative.)

    If you enter a **Y** in this field, for CDBG and HOPWA entitlement activities, IDIS will not require that you enter Proposed Accomplishments before the activity can be funded.

ACCOMPLISHMENT DATA/REPORT YEAR

When you first see this screen during a session, it displays the newest report year's accomplishment data. To view older years, press <F17>; to view newer years, press <F18>. To add accomplishment data for a new year, press <Shift-F11>.

PROPOSED TYPE/UNITS[*]

4. CDBG Accomplishment Types for entitlement activities are limited to: 1 - People, 4 – Households, 8 - Businesses, 9 - Organizations, 10 - Housing Units, 11 - Public Facilities, 13 - Jobs. Effective with Version 8.3, accomplishment type code is further limited by the matrix code/national objective code specified for the activity.

    Effective with Version 8.3, CDBG Accomplishment Types for State activities will now be limited to: 1 - People, 4 - Households,

---

[*] Required for all CDBG activities and all HOPWA activities before the activity can be funded. This requirement does not apply to: 1) admin and planning activities with a matrix code of 19A, 19B, 19F, 19G, 19H, 20, 21*, 22, 31B, or 31D; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4; 4) Activities for which the grantee has answered a new question on the MA04 screen that accomplishments for the activity are being reported under another activity.

8 - Businesses, 9 - Organizations, 10 - Housing Units, 13 - Jobs, 14- Loans. IDIS will display an error message if any other Accomplishment Type is entered.

HOPWA Accomplishment Types are limited to: 1 - People, 4 - Households, 9 - Organizations, and 10 – Housing Units. IDIS will display an error message if any other Activity Type is entered.

5. Type the proposed Number of Units (of the Accomplishment Type) that you expect to serve with this activity. (For example, persons, households, etc.)

ACTUAL TYPE/UNITS

6. As each year's accomplishments are completed, fill in the *Actual* Type and Units of Accomplishment.

ACCOMPLISHMENTS NARRATIVE/ LONG NARRATIVE

7. IDIS lets you create an audit trail of Accomplishment Data spanning multiple reporting years. The first time you use the *Accomplishment Data* portion of this screen, it defaults to the report year in which the activity was created.

This screen lets you enter up to six lines of free-form text to describe the activity's accomplishments. Add extra spaces to the end of each line of text to force the cursor to the beginning of the next line (IDIS does not have word wrap)

If you need to enter a narrative longer than six lines for the same program year, press **<F14>** to save the MA04 screen, then press **<F14>**. IDIS will display a Long Narrative screen where you can continue typing. (Press **<F9>** to save the Long Narrative, then press **<F7>** to return to the MA04 screen.)

To add Accomplishment Data for a *different* report year, press **<Shift-F11>**. IDIS will re-display the screen, ready for you to enter a new Report Year and an additional short and, optionally, long narrative.

Once Accomplishment Data has been entered for more than one year, use **<F18>** to scroll to higher report years, **<F17>** to scroll to earlier report years.

If you need to delete accomplishment data for a particular report year, press **<F13>** while you are viewing the data. IDIS will prompt you to confirm the deletion.

```
    04/22/02   11:08            SETUP  ACTIVITY                    C04MA04

    GRANTEE ACTIVITY NBR:                    HUD ACTIVITY NBR:  000000000280

    ACTIVITY NAME:  TEST FOR LMH WITH 18B FOR FUNDING
    ACTIVITY STATUS CODE: 4 FUNDS BUDGETED    COMPLETION DATE: __ / __ / ____

    ACCOMPLISHMENTS FOR THIS ACTIVITY REPORTED AT ANOTHER ACTIVITY (Y/N): N
    ACCOMPLISHMENT DATA:                     REPORT YEAR: 2001
          TYPE                                     UNITS
    PROPOSED  __  _____      _____
    ACTUAL    __  _____      _____

    ACCOMPLISHMENTS NARRATIVE:
         _____
         _____
         _____
         _____
         _____
         _____
         _____
         _____

    F1 = HELP  F3 = VALD  F4 = MAIN  F5 = PROJ INFO  F7 = PRV  F8 = NXT  F9 = SAVE
    F10 = MA09  F11 = INSRT  F13 = DELET  F14 = UPD LG NARR  F17 = BACK  F18 = FWD
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
HUD Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Accomplishment Data			
Activity Status Code	✓	Verify the Activity Status Code displayed and change it, as appropriate. **1** Canceled **2** Completed **3** Underway **4** Funds Budgeted IDIS will not let you draw down funds for an activity that is Completed or Canceled. Change the ACTIVITY STATUS CODE back to 3, Underway, to be able to process more drawdowns against an activity.	1, 2, 3, or 4
Report Year	✓	Program year of the activity's accomplishment narrative that you are documenting on this screen.	YYYY

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Proposed Type/Units	✓	Type the proposed Accomplishment Type your activity is providing or press **<F1>** to select the accomplishment type from a list. CDBG Accomplishment Types for entitlement activities are limited to: 1 - People, 4 – Households, 8 - Businesses, 9 - Organizations, 10 - Housing Units, 11 - Public Facilities, 13 - Jobs. Effective with Version 8.3, accomplishment type code is further limited by the matrix code/national objective code specified for the activity. CDBG Accomplishment Types for State activities will now be limited to: 1 - People, 4 - Households, 8 - Businesses, 9 - Organizations, 10 - Housing Units, 13 - Jobs, 14- Loans. IDIS will display an error message if any other Accomplishment Type is entered. HOPWA Accomplishment Types are limited to: 1 - People, 4 - Households, 9 - Organizations, and 10 – Housing Units. IDIS will display an error message if any other Activity Type is entered. Type the proposed Number of Units of the Accomplishment Type that you expect to serve with this activity. (For example, persons, youth, households, etc.)	Type = 2 numeric characters Units = 9 numeric characters
Actual Type/Units		Once the activity has actual accomplishments to report, enter the *Actual* Type and Units.	Type = 2 numeric characters Units = 9 numeric characters
Accomplishments Narrative		IDIS lets you create an audit trail of your accomplishments data spanning multiple reporting years. The first time you see the *Accomplishment Data* portion of this screen, it defaults to the report year the activity was created. Initially, this screen allows for six lines of free-form text where you can describe the activity accomplishments based on program requirements. Add extra spaces to the end of each line of text to force the cursor to the beginning of the next line (IDIS does not have word wrap) If you need more room to enter a narrative for the same program year, press **<F9>** to save the MA04 screen, then press **<F14>**. IDIS will display a Long Narrative screen where you can continue typing. (Press **<F9>** to save the Long Narrative, press **<F11>** to add another Long Narrative screen; then press **<F7>** to return to the MA04 screen when you are finished.) To add Accomplishment Data for a different report year,	6 lines of alphanumeric text

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
		press **\<Shift-F11\>**. IDIS will re-display the screen, ready for you to enter a new Report Year and an additional short or long narrative. Once Accomplishment Data has been entered for more than one year, use **\<F18\>** to scroll to higher report years, **\<F17\>** to scroll to earlier report years. If you need to delete accomplishment data for a particular report year, press **\<F13\>** while you are viewing the data. IDIS will prompt you to confirm the deletion.	
Press **\<Enter\>** to save the information and display the next Setup Activity screen (C04MA08).

4.4.1.4   Revising the Budget on the Money screen (C04MA08)

Purpose: This screen serves three purposes: use the top third of the screen to give your activity a budget; use the bottom portion of the screen to select the program(s) that will be funding the activity and to go to a program-specific completion path for CDBG, ESG, HOME, or HOPWA. Type a **D** next to HOME to delete the existing path records.

On this screen, you enter the estimated amount of grant funds and program income that your activity will receive from *all* CPD formula grant programs.

This screen marks the end of the activity setup *common path*. For CDBG, once you have completed this screen, you will need to enter any required program information before you can fund the activity.

If you are setting up HOME activities, you *must* complete at least one additional setup screen (option E on the HOME menu screen for AD/CO/CC only funded activities) before you can fund the activity using the Activity Funding options. Otherwise you will need to perform the SET UP ACTIVITY functions A, B, C, or D. These screens are found in the HOME path (see Chapter 9).

You will do the actual commitment of funds to an activity using the Activity Funding option of IDIS (see Chapter 5). You must fund (or commit) the activity before you can draw down funds (see Chapter 7).

How To Complete This Screen:

Where appropriate, type in the requested 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 the fields on this screen, press **\<Enter\>** to go to the program-specific path that you selected; or press **\<F9\>** to save your information then **\<F4\>** to return to the Main Menu.

TOTAL ESTIMATED AMOUNT	1. Verify the estimated budget for the activity (in dollars and cents) and change it, if it is incorrect. (You can use dollar signs and decimals, but not commas.)
	Effective with Version 9.0, when the budgeted amount is increased for CDBG activities with a national objective code of LMA*, if the Low/Mod data for the service area has changed since the activity was started, the area must meet the most current Low/Mod % before the increase in budget will be allowed.
ENTER (X) TO SELECT PROGRAM	2. Type **X** next to the CPD formula grant program funding this activity, press **<Enter>** to continue on to the program screens. (If the activity is being funded by more than one CPD formula grant program, after you process the program-specific screens, you will see this screen again; select another CPD program to complete.)

```
 01/06/00   14:50              SETUP  ACTIVITY                   C04MA08


 GRANTEE ACTIVITY NBR: H99-007              HUD ACTIVITY NBR:     1457


 ACTIVITY NAME:  YMCA
 TOTAL ESTIMATED AMOUNT: _       $32,500.00


 INDICATE PROGRAM(S) TO BE ADDRESSED


 ENTER (X) TO SELECT PROGRAM


                _     CDBG


                _     ESG


                _     HOME


                _     HOPWA




 F1 = HELP    F3 = VALDT  F4 = MAIN MENU  F5  = PROJ INFO
 F7 = PREV    F8 = NEXT   F9 = SAVE       F10 = GO REVISE ACTIVITY
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		System generated from the Setup Activity screen (C04MA01).	Protected field

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
HUD Activity Number		System generated from the Setup Activity screen (C04MA01).	Protected field
Activity Name		System generated from the Setup Activity screen (C04MA01).	Protected field
Total Estimated Amount	✓	What is the estimated total amount in dollars and cents that your activity will receive *from all IDIS programs*? (When you use the Activity Funding options, IDIS will not let you *fund* more dollars than the amount you entered on this screen.)	$nnnnnnnnnn.nn
Enter (X) to Select Program	✓	To go the program-specific activity screens, type **X** next to the CPD formula grant program funding this activity. (If the activity is being funded by more than one CPD formula grant program, after you process the program-specific screens, you will see this screen again; select another CPD program to complete.)	X
Enter (D) to Delete Program Path	✓	Type **D** to delete the existing program path.	D
Press **<Enter>** to return to go to the program-specific path that you selected or press **<F9>** to save your data then **<F4>** to return to the Main Menu.			

4.4.2 Copying an Activity (C04MA12)

Purpose: When you select C, for Copy, on the Revise Activity screen (C04MA09), IDIS displays the Copy/Move Activity screen (C04MA12). On this screen, you indicate the new CPS Project Number and new CPS Project Year for the copied activity. The "new" project number and project year may be the same as the existing activity - this creates a new activity under the same project and year; or you can enter a different project and/or a different year. (The "new" project number and "new" project year must already exist in IDIS.)

When you use the Copy function, IDIS copies the following data from the source activity to the new activity. Once copied, you can use the Revise Activity function to modify information that was copied from the common path screens, or you can enter new information, for example, accomplishments that were not copied.

When you copy a canceled or completed activity using the Copy/Move Activity screen (C04MA12), the newly created activity will have an initial status of 4, Funds Budgeted and the Initial Funding Date and Completion Date will be blank.

	Screen	Copy (Y/N)
Common Path	C04MA10, Revise Activity	Y
	C04MA03, Process Activity	Y
	C04MA04, Setup Activity status, project year and accomplishments	Only Status & Proj Year copied
CDBG	CDBG01, CDBG National Objective screen	Only National Objective copied
HOME TBRA	C04MS64, Tenant-Based Rental Assistance Setup	Y
HOME Rental Setup	C04MS42, Rental Setup	Y
HOME Rental Completion	C04MS47, Rental Completion	Y
HOME Homeowner Rehab Setup	C04MS30, Homeowner Rehab Setup	Y
HOME Homeowner Rehab Completion	C04MS32, Homeowner Rehab Completion	Y
HOME Homebuyer Setup	C04MS02, Homebuyer Setup	Y
HOME Homebuyer Completion	C04MS32, Homebuyer Completion	Y
HOME Activity Funded only with AD/CO/CC	C04MS26, Home Menu (AD/CO/CC Setup)	Y
ESG	No program-specific data copied	
HOPWA	No program-specific data copied	

How To Complete This Screen:

Where appropriate, type in the requested data. (If the data typed does not fill the field, or you do not need to complete the field, press **<Tab>** to go to the next field.)

When you have completed the fields on this screen, press **<Enter>** to process the copy request. You will see a message that the activity was copied at the bottom of your screen. Press **<F7>** to return to the Revise Activity screen or press **<F4>** to return to the Main Menu.

NEW CPS PROJECT NUMBER

1. To copy the activity to the same project, type the same Project Number that appears in the "Old" field.

   To copy the activity to a different (existing) project, if you know the CPS project number, you may type it in. To see a list of all projects, press **<F1>**, then select the project from the list displayed.

NEW PROJECT YEAR

2. To copy the activity to the same project year, type the same Project Year that appears in the "Old" field.

   To copy the activity to a different (existing) Project Year, type the new year.

3. Press **<Enter>** to process the Copy request.

```
04/29/99   10:53            COPY/MOVE ACTIVITY                    C04MA12


OLD CPS PROJECT NUMBER:    4          OLD PROJECT YEAR: 1999
NEW CPS PROJECT NUMBER: ____          NEW PROJECT YEAR: ____

PROJECT TITLE:    SECTION 108 PAYMENT

GRANTEE ACTIVITY NBR: C99-009              HUD ACTIVITY NUMBER:  000000001410

ACTIVITY NAME:  SECTION 108 LOAN - CD OFFICE

     SITE ADDRESS: 633 COURT STREET
         LOCATION:

         LOCALITY: READING                STATE:  PA   ZIP: 19601 -

DESCRIPTION:   REPAYMENT OF SECTION 108 LOAN TO CARRY OUT BLIGHT REMOVAL AC
               TIVITIES AT SECTION II OF THE READING REGIONAL AIRPORT INDUS
               TRIAL PARK.



    F1 = HELP   F3 = VALDT  F4 = MAIN MENU  F5 = PROJ INFO  F7 = PREV
```

4.4.3 Moving an Activity (C04MA09)

Purpose: When you select M, for Move, on the Revise Activity screen (C04MA09), IDIS displays the Copy/Move Activity screen (C04MA12). On this screen, you indicate the CPS Project Number and/or CPS Project Year where you want to move the activity. (The "new" project number and "new" project year must already exist in IDIS.)

When you use the Move function, IDIS moves all four common path screens and any program-specific screens to the new project and/or new project year.

How To Complete This Screen:	Where appropriate, type in the requested data. (If the data typed does not fill the field, or you do not need to complete the field, press **<Tab>** to go to the next field.)
	When you have completed the fields on this screen, press **<Enter>** to process the move request. You will see a message that the activity was moved at the bottom of your screen. Press **<F7>** to return to the Revise Activity screen or press **<F4>** to return to the Main Menu.
NEW CPS PROJECT NUMBER	1. To move the activity to the same project for a different year, type the same Project Number that appears in the "Old" field.
	To move the activity to a different (existing) project, if you know the CPS project number, you may type it in. To see a list of all projects, press **<F1>**, then select the project from the list displayed.

NEW PROJECT YEAR

2. To move the activity to the same Project Year, type the same Project Year that appears in the "Old" field.

   To move the activity to a different (existing) Project Year, type the new year.

3. Press **<Enter>** to process the Move request.

```
04/29/99   10:53              COPY/MOVE ACTIVITY                    C04MA12


OLD CPS PROJECT NUMBER:    4           OLD PROJECT YEAR: 1999
NEW CPS PROJECT NUMBER: _____          NEW PROJECT YEAR: _____


PROJECT TITLE:    SECTION 108 PAYMENT


GRANTEE ACTIVITY NBR: C99-009              HUD ACTIVITY NUMBER:   000000001410


ACTIVITY NAME:  SECTION 108 LOAN - CD OFFICE


    SITE ADDRESS: 633 COURT STREET
         LOCATION:


         LOCALITY: READING                STATE:  PA   ZIP: 19601 -


DESCRIPTION:   REPAYMENT OF SECTION 108 LOAN TO CARRY OUT BLIGHT REMOVAL AC
               TIVITIES AT SECTION II OF THE READING REGIONAL AIRPORT INDUS
               TRIAL PARK.




F1 = HELP   F3 = VALDT  F4 = MAIN MENU  F5 = PROJ INFO  F7 = PREV
```

4.5 Viewing Activity Data

The IDIS View Activity screens (Option 3 on the IDIS Main Menu) let you view data on the four-screen activity setup common path. The data fields on these screens are identical to those on the Setup Activity and Revise Activity options. However, none of the information displayed can be changed.

Purpose: This screen displays all activities for a specific project ID and program year. From this list, you select the one activity that you want to view.

How To Complete This Screen:	Where appropriate, type in the requested data. (If the data typed does not fill the field, or you do not need to complete the field, press **<Tab>** to go to the next field.)
	When you have completed the fields on this screen, press **<Enter>** to go to View Activity screen (C04MA60).
HUD ACTIVITY NUMBER	1. If you know the HUD Activity Number assigned to the activity and you type it here then press **<Enter>**, you will go directly to the View Activity screen (C04MA60).
GRANTEE ACTIVITY NUMBER	2. If you know the local identifying number you (as the grantee) assigned to the activity and you type it here then press **<Enter>**, you will go directly to the View Activity screen (C04MA60).
CPS PROJECT NUMBER/ PROGRAM YEAR	3. Type the Project Number and Program Year for the activity, or press **<F2>** to select the Project Number/Program Year from the list displayed. Press **<Enter>**. If the project has only one activity, you see it displayed on the View Activity screen (C04MA60).
	If a list appears, type **X** next to the one activity you want to view, then press **<Enter>**. The system displays the View Activity screen (C04MA60) for the selected activity.

```
 01/11/00   08:36            VIEW   ACTIVITY                    C04MA59
 CURRENT OWNER:   BERKS COUNTY
 CPS PROJ NBR:   6   PGM YR: 1999   UOG CD: 429011   UOG NBR: 00001


 PROJECT TITLE:   RENTAL HOUSING


 GRANTEE ACTIVITY NBR: _____    HUD ACTIVITY NBR: _____



 SEL  HUD ACTIVITY      GRANTEE ACT         ACTIVITY NAME         ACTIVITY
 ONE    NUMBER            NUMBER                                   STATUS
  _   000000001468  H99-008       TRANSITIOANL HOUSING      FUNDS BDG
  _   000000001457  H99-007       YMCA                      UNDERWAY
  _   000000001455  H99-005       RENTAL HOUSING - EASY DOES  UNDERWAY
  _   000000001454  H99-004       RENTAL HOUSING - BERKS HOU  FUNDS BDG







 BOTTOM OF DATA REACHED
 F1 = OWNER HELP   F2 = PROJ HELP    F4 = MAIN MENU   F5 = PROJ INFO
 F7 = PREV         F8 = NEXT         F17 = UP         F18 = DOWN
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Current Owner		The grantee currently logged into IDIS.	Protected field
CPS Project Number/ Program Year		Type the Project Number and Program Year for the activity, or press **<F2>** to select the Project Number/Program Year from the list displayed. After the list appears, type **X** next to the one activity you want to view, then press **<Enter>**. The system displays the View Activity screen (C04MA60).	4 numeric characters/ yyyy
UOG Code		The grantee's Unit of Government Code.	Protected field
UOG Number		The grantee's Unit of Government Number.	Protected field
Project Title		Carried forward from the Add Project screen (C04MK01).	Protected field
Grantee Activity Number		If you know the local identifying number you (as the grantee) assigned to the activity and you type it here then press **<Enter>**, you will go directly to the View Activity screen (C04MA60).	18 alphanumeric characters

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
HUD Activity Number		If you know the HUD Activity Number assigned to the activity and you type it here then press **<Enter>**, you will go directly to the View Activity screen (C04MA60).	12 numeric characters
Activity Data			
Select One		Type **X** next to the activity that you want to view.	X
HUD Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Grantee Activity Number		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity screen (C04MA01).	Protected field
Activity Status		Carried forward from the Setup Activity screen (C04MA01). **1** Canceled **2** Completed **3** Underway **4** Funds Budgeted	Protected field
Press **<Enter>** to display the View Activity screen (C04MA60).			

4.5.1 Viewing the Activity screens

To proceed through the four common path activity screens, press **<Enter>** to go to the next screen. You may exit the view screens at any time by pressing <**F4**> to return to the IDIS Main Menu.

For a description of the fields on the View Activity screens, refer to Sections 4.3.1 through 4.3.4.

```
05/07/02   09:19              VIEW   ACTIVITY                      C04MA60

CPS PROJECT NUMBER:   0006       PROGRAM YEAR:  1999

PROJECT TITLE:   RENTAL HOUSING

GRANTEE ACTIVITY NBR: H99-007              HUD ACTIVITY NUMBER:        1457


ACTIVITY NAME:  YMCA

     SITE ADDRESS/ 631 WASHINGTON STREET
         LOCATION: _____
                   _____
         LOCALITY: READING               STATE:  PA   ZIP: 19601 -

DESCRIPTION:  RENOVATION OF BUILDING TO CONSTRUCT 32 TRANSITIONAL HOUSING
              UNITS WITH 1 HOME ASSISTED UNIT.
              _____



F4 = MAIN MENU   F5 = PROJ INFO   F7 = PREV    F8 = NEXT
```

```
05/07/02   09:21              PROCESS ACTIVITY                    C04MA53


PROJECT TITLE:   RENTAL HOUSING

GRANTEE ACTIVITY NBR: H99-007              HUD ACTIVITY NBR:        1457


ACTIVITY NAME:  YMCA


HUD MATRIX CODE: 14B   Rehab; Multi-Unit Residential
CDBG REGULATION CITATION:  570.202


IS THE PURPOSE OF THIS ACTIVITY TO:
  HELP PREVENT HOMELESSNESS? (Y/N):   N
          HELP THE HOMELESS? (Y/N):   N
   HELP THOSE WITH HIV/AIDS? (Y/N):   N
    PRIMARILY HELP PERSONS WITH DISABILITIES? (Y/N):    N
GENERATE PROGRAM INCOME? (Y/N): N    INITIAL FUNDING DATE: 01 / 01 / 1999


ENVIRONMENTAL ASSESSMENT CODE:  A    EXEMPT
WILL ACTIVITY BE CARRIED OUT BY AN ENTITY OTHER THAN GRANTEE? (Y/N):    N
THIS ACTIVITY IS SET UP FOR:


F4 = MAIN MENU   F5 = PROJ INFO   F7 = PREV   F8 = NEXT
```

```
05/07/02   09:22               SETUP  ACTIVITY                    C04MA54


GRANTEE ACTIVITY NBR: H99-007              HUD ACTIVITY NBR:        1457


ACTIVITY NAME:  YMCA
ACTIVITY STATUS CODE: 2 COMPLETED       COMPLETION DATE: 12 / 30 / 00


ACCOMPLISHMENTS FOR THIS ACTIVITY REPORTED AT ANOTHER ACTIVITY (Y/N): N
ACCOMPLISHMENT DATA:                       REPORT YEAR: 2000
        TYPE                                UNITS
PROPOSED  10   HOUSING UNITS                000000001
ACTUAL    10   HOUSING UNITS                000000001


ACCOMPLISHMENTS NARRATIVE:
    REHABILITATION COMPLETED WITH 1 HOME ASSISTED UNIT.
    _____
    _____
    _____
    _____
    _____



F4 = MAIN  F5 = PROJ INFO  F7 = PREV  F8 = NEXT  F10 =MA09
F14 = VIEW LARG NARR  F17 = BACK  F18 = FWD
```

```
05/07/02   09:25              SETUP  ACTIVITY                      C04MA58

GRANTEE ACTIVITY NBR: H99-007            HUD ACTIVITY NBR:       1457

ACTIVITY NAME:   YMCA
TOTAL ESTIMATED AMOUNT:        $32,500.00

INDICATE PROGRAM(S) TO BE ADDRESSED

ENTER (X) TO SELECT PROGRAM

                =     CDBG

                _     ESG

                _     HOME

                _     HOPWA




F4 = MAIN   F5 = PROJ INFO   F7 = PREV   F8 = NEXT
```