

IDIS LIVE

...for the Integrated Disbursement and Information System

U.S. Department of Housing and Urban Development

Office of Community Planning and Development

IDIS ENTERS A NEW AGE *A Note from Ed Winkler*

In *As You Like It*, Shakespeare wrote that a man has seven ages in his life. I don't know how many ages IDIS will have in its life, but it is now at least in its third age. First, we spent several months designing and developing the system. There weren't any systems to buy and there were few models to follow of systems recording grant activities and disbursing funds. In fact, HUD management was extremely leery of allowing people not on the HUD payroll into a HUD system. But with guidance from field staff, Headquarters program staff, and grantees, we plodded through.

In the second age, we all had to do the hard work of bringing the grantees into the system. By choosing to spread out implementation and convert past data, HUD created an enormous job for itself. But think about how it would have been if grantees had been responsible for converting their data themselves or if we had brought every community onto the system at the same time! Sometimes contentiously, sometimes amicably, we worked together so that we now have 858 communities on line, two States, and more than 9,000 individual users. From beginning to end, all of this has been accomplished in little more than three years. If this seems slow to you, think about how long it takes just to implement a regulation or issue a handbook!

We have now entered a third age. HUD is making further refinements to the system to make it easier to use. We now have 27 standard reports where we once had four. We will one day implement a graphical user interface so that IDIS will have a Windows look and feel. Some day, grantees may choose to transmit files

electronically from their systems to HUD's. We also continue to train users and reach out (page 2)

MARCH MADNESS À LA IDIS

Four Users Groups met during the month of March, in Atlanta, San Francisco, Virginia Beach, and Pittsburgh.

Atlanta (submitted by Anita B. Crosby): The Atlanta CPD Office sponsored (page 2)

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A NOTE FROM ED, CONT'D.

to the user community with Users Group meetings and special interest group meetings, such as the Big

Cities Conference (see page 16 for more information about the recent Big Cities Conference). As we progress through this third age, the system looks better, feels better to the user, and begins to fulfill its potential.

As CPD's project manager for IDIS, I've seen it grow from a sketch on a flip chart into a system that disburses billions of dollars for thousands of activities. I've seen it grow from a system used by one grantee (bless you, Chester County, Pennsylvania) to the HUD system with the largest number of users. It's been a great honor for me to work with the hundreds of managers, developers, trainers, technicians, and users who have helped to make IDIS a working system. I have no doubt that in a couple of years working with IDIS will be so commonplace that users will forget the pain of conversion and what a sea change IDIS brought about in the way community development is reported.

Like IDIS, I am moving into a different age in my life. On Friday, April 3, I will retire from HUD. In my 25 years of federal service—20 of them at HUD—I've had the wonderful fortune of working with many fine people in the communities, non-profit organizations, our field offices, and our offices here in Washington. I am impressed by the skill, intelligence, and dedication that I see all around me in the field of community development. I have been blessed to work with such fine people. I wish you all good luck and happy computing. May God bless you all. ■

MARCH MADNESS, CONT'D.

a Users Group meeting that was held on March 2 in Decatur, Georgia. Moderating the meeting was the knowledgeable and talented Lincoln Burruss. Assisting Lincoln was Vivian Baldwin of the Technical Assistance Unit. Approximately 75 people attended, representing all the Georgia grantees save one, along with grantees from Atlanta and North and South Carolina. The Atlanta Field Office was represented by the Deputy Director, who welcomed the group; several CPD Representatives; and the Financial Analyst.

The chief issue of concern, particularly for those grantees with January 1 Program Year start dates was, needless to say, End-of-Year Reporting. A great

deal of time and discussion was given to this agenda item.

Lincoln Burruss, with the assistance of Vivian Baldwin, gave the group a guided tour of the IDIS Web site. The importance of grantees obtaining Internet access was discussed and emphasized. Some grantees seemed surprised to discover that the information was out on the Web and available to all with Internet access. Some even said that they had not previously received *IDIS Live*. It was at this point that the Georgia grantees were informed that the field office sends out a copy of each issue shortly after issuance to their Local IDIS Administrators. Local Administrators who were present were reminded that they should copy and disseminate such information to all their users.

Concern was also voiced regarding the rapidity with which IDIS changes. It was also noted that the *IDIS User Manual*, while carrying a great deal of information, was just not user-friendly or "how-to-ish" enough to assist a novice. This is an enormous concern given the high rate of staff turnover that some grantees experience.

In an aside conversation with one of the CPD Representatives, grantees voiced the need to have report identification numbers listed next to report names in the Reports Submenu. Grantees would also like to know from which areas in IDIS the various report fields pull information. Some are obvious, but others are not.

Inquiry was also made about future plans for IDIS training. The group was informed that the emphasis on training was now shifting to the States in preparation for bringing them into IDIS, but a few slots would still be available on a first-come, first-served basis to other grantees.

As usual when in the Atlanta area, a good time was had by all.

San Francisco (submitted by Millie Dusha): The City of San Francisco and the San Francisco CPD Office co-sponsored an IDIS Users Group meeting on March 6, for which the city obtained space in the San Francisco War Memorial Building. Nearly 95 participants attended, representing 42 grantees—including several from Arizona.

Most of the issues and questions focused on program income, drawdowns, activity setup (especially CDBG rehab.), and reports. Some grantees had heard that users would be required to set up a separate activity in IDIS for each property being rehabilitated under the Single-Family Rehabilitation program. The grantees were advised that for CDBG activities they have the option of either setting up a separate activity for each property being rehabilitated or setting up one activity and maintaining internal records on each property. (For HOME activities, each address must be set up as a separate activity.) They were also advised that as soon as CDBG switches to the HOME rule IDIS will be revised so that grantees can enter information for each property being rehabilitated. However, it was emphasized that data regarding ethnicity, income levels, and other information on each address should **not** be made available to the general public, as doing so would violate the Privacy Act.

Grantees were very concerned that since January they have been unable to either revise or cancel program income receipts if a mistake had been made when entering the amount, even when no drawdown requests had been applied against the amount. (*Editor's Note: This problem has been reported to the IDIS developers for resolution.*)

At the conclusion of the day-long meeting, grantees made the following recommendations:

- San Francisco Users Group meetings should be held quarterly, with the next meeting scheduled for mid June.
- Grantees from Arizona want to start a quarterly Arizona Users Group meeting.
- A write-up of meetings should be made available to all IDIS users, regardless of whether they attended the Users Group meeting.
- The focus of Users Group meetings should be limited to one or two topics. For instance, grantees want a meeting that focuses just on reports (i.e., how to interpret the reports, how to modify the reports for printing, and how to download data extractions and bring the data into Access, Excel, DBase, or Lotus applications).

- Grantees want to continue to be able to receive on-site, one-on-one assistance from HUD as needed. They said that they found these sessions to be extremely beneficial.

Virginia Beach (submitted by Robert Jennings):

The Richmond, Virginia, State Office held its third quarterly Users Group meeting by the sea in Virginia Beach on March 12, 1998. The primary purpose of the meeting was to celebrate the one-year anniversary of the first Entitlement city in the jurisdiction to go Live: Fredericksburg, Virginia. Everyone enjoyed cupcakes in honor of this anniversary.

So many months ago, a local HUD representative (who shall remain nameless) assured **Wendy Kimball** of Fredericksburg that he would personally guarantee that the city would be able to get their funds out of IDIS. Not that Wendy was unwilling to be the first to go Live, but she needed a little assurance. Well, wouldn't you know it, Headquarters loaded their 1995 projects but not their 1996 projects (the result of an oversight by the same nameless HUD representative). When Wendy attempted to set up a 1996 activity and perform a drawdown, she couldn't do it! And all of their 1995 funds had already been drawn! Holy cow manure did that same (nameless) HUD representative panic when she called and asked for a check.

Wendy eventually became an IDIS advocate. She quickly became familiar with the system and was willing to accept telephone calls from the staff of other Entitlements who had questions about it. She attended a Users Group meeting in Philadelphia and came back with a report about how useful the meeting was for—if nothing else—venting. The Richmond Office began to hold monthly Users Group meetings until all of the Entitlements in the jurisdiction were Live. Now the meetings are held quarterly. From a quick survey at this most recent meeting, the Entitlement cities still consider them to be beneficial and want them to continue so that they can keep up with the improvements to IDIS.

An honored guest attended the meeting: **Roger Meredith**, from the Headquarters training team (also known as the "Roadies"). Roger did a great job of answering questions and demonstrating IDIS. The support of the Headquarters teams—trainers, hot line

and other support staff, **Ed Winkler**, **John Mayer**, **Mohni Anand**, **Anita Obarakpor**, **Lincoln Burruss**, and more than can be mentioned—has made this local HUD representative’s job much easier.

Pittsburgh (submitted by Phil Helbling): Fifty-six people attended the Users Group meeting in Pittsburgh on March 18: 52 grantees and four staff from the HUD Pittsburgh Office. **Lynn Daniels**, Pittsburgh CPD Director, extended a warm welcome to the attendees, some of whom came from as far away as Puerto Rico (in fact, **Alicia Marcaro** and **Jorge Rivera**, from the Municipality of Humacao, now hold the IDIS long-distance travel award).

Several topics were covered during the meeting: end-of-the-year reporting using IDIS, Assistant Secretary Ramirez’s memo of 2/18/98, preparing the CAPER, and the latest changes to IDIS.

The highlight of the meeting was a presentation by **Ken Pick**, Grants Director of Berks County, Pennsylvania. After reviewing IDIS reporting requirements, the steps involved in downloading a report, and the Ramirez memo, Ken spoke about his jurisdiction’s experience using IDIS to prepare its CAPER. He brought copies of Berks County’s CAPER and its 1997 performance report summaries for distribution. Pick’s “voice of experience” and his calm, reassuring manner made an impression on the grantees, adding a level of “real-life” detail and a sense of reassurance to a great meeting. Thanks Ken!

Attendees made a number of suggestions for improvements to IDIS:

1. **Revise the *IDIS User Manual*.** Users said that they found the existing manual to be unwieldy and unhelpful. I informed grantees that an effort to improve the manual is already under way.
2. **Revise the CDBG Area Benefit screen so that users may revise the census tracts.** This is a “top 10” recurring request.
3. **Don’t show “F” keys at the bottom of the screen for functions that are unavailable.**
4. **Allow for the targeting of receipted program income toward specific revolving loan fund activities.** This, too, is an oft-repeated request.

The Pittsburgh attendees represented a maturing audience of IDIS users. In fact, the people who attend User Group meetings nowadays are generally more experienced and savvy—elevating and enhancing the level of discussion. Users seem more relaxed, comfortable, and confident of their abilities and the system. This represents a real accomplishment.

Pittsburgh area grantees expressed an interest in organizing quarterly, local Users Group meetings. Allegheny County has an available resource in the Alcoa Building, which is being donated to non-profit organizations for meetings and other uses. I hope that these users will continue to meet regularly to share their experiences and expertise.

Thanks to **Bill Kauffmann** of the Pittsburgh Office for helping to organize a great meeting and to **Donna Joyce** of Allegheny County for arranging the site. Many thanks again to Ken Pick of Berks County for his presentation. ■

UNIDENTIFIED HOME FUNDS

Sometimes it becomes necessary for a Participating Jurisdiction (PJ) to return unspent HOME funds to HUD for use at a later date. For the returned funds to be credited to a PJ’s account, the funds must be properly identified! The Office of the Chief Financial Officer (CFO) has asked us to remind PJs to be certain that the following information is provided in the message that accompanies any wire transfer—or check—that returns funds to HUD:

- **For grantees in IDIS**, identify the number of the grant to which the collection should be applied; and
- **For grantees still in C/MIS**, identify the number of the grant **and** the project number to which the collection should be applied.

Without this information, CFO cannot identify where the collection should be credited. The C/MIS staff is helping CFO to track down a number of collections received prior to January 1998 without the proper identification. If you return funds to HUD and the credit is not posted to your account within 30 days, please contact **Patricia Jackson** in the Technical Assistance Unit at 1-800-273-2573.

Remember, to be sure that your funds are credited promptly, your wire transfer message must contain the proper identifier(s)! ■

TAU TOP 10 FOR 1997

The TAU handled well over 10,000 calls in 1997. Almost one-half of the calls received had to do with the HOME Cash/Management Information System, and a large portion of the remainder fell under the ubiquitous category “Other.”

Category	Total Calls
HOME C/MIS	4,016
SprintLink	809
CDBG Drawdown	609
Activity Funding	581
Passwords	565
CPS	278
Reports	268
System Errors	252
HOME Drawdown	212
Other	1,092

The SprintLink category includes calls from users who needed new SprintLink IDs and passwords. If we estimate that half of the SprintLink calls had to do with passwords (a safe estimate)—and we combine this amount with the 565 calls from users who needed to have their IDIS IDs and passwords reset—then the total number of calls regarding passwords is roughly 970. This may be a good time to remind readers to call the **User Assistance Branch** (202-708-3300) to have their IDIS ID and password reset and their **field office** for a new SprintLink ID and password.

Here are a few other items of potential interest:

- Overall, there were 842 calls regarding drawdowns (for CDBG, HOME, ESG, and HOPWA).
- Program income calls—broken down into three categories (general, CDBG, and HOME)—totaled 206.
- Activity Setup is divided into five categories (general, CDBG, HOME, ESG, and HOPWA). Three hundred twenty-one Activity Setup calls were handled in 1997.

As the years roll by, we’ll take a look back occasionally to compare trends, assess progress, and offer observations. Perhaps we’ll publish a special “year in review” issue of *IDIS Live* each January. If you happen to think of any particular items that you’d like us to monitor for such an issue, be sure to let us know. ■

REVISIONS TO THE PROPOSED PROJECT TABLE

Grantees often need to change their Proposed Project Table after their Consolidated Plan is approved. There are two methods of accomplishing this:

- **Some grantees make the changes via their CPS or C2020 software.** That is to say, they revise the data in CPS (or C2020, whichever they used for their FY98 Consolidated Plan) and send an updated disk to Headquarters. The original Proposed Project Table is then replaced with the new file. **Note:** When you submit an amended table, make certain that the project numbers in the new table match those in the existing table, or the activities that are associated with your projects may be “orphaned” (i.e., disassociated from your projects) during the uploading process. If your activities become “orphaned,” you will not be able to access them until Headquarters staff go through the somewhat lengthy process of correcting the problem.
- **Other grantees make the changes directly in IDIS.** This direct entry does not waive the requirement for getting field office approval of a major amendment to the Consolidated Plan.

Of the two methods described above, the second takes much less time for all parties concerned—especially when the change in question does not require prior approval by HUD.

Refer to Chapter 15 of your *IDIS User Manual* for instructions on how to amend your plan/project. ■

SPOTLIGHT ON ROCHESTER

The March 18, 1998, issue of *Spotlighting What Works* (a publication of HUD/CPD) focuses on Rochester, New York, a community that received a

John J. Gunther Award last year for its top-notch approach to implementing IDIS. The entire issue is available for downloading at www.hud.gov/spotww.html. A summary of some of the issue's key points is provided below.

- Rochester's goal was to implement IDIS with no significant delays in processing program documents or disbursing funds. To achieve this goal, they started out with an implementation plan that contained four broad elements: awareness, training, processing procedures and protocols, and the provision of timely information to program managers.
- With an \$18.1 million annual budget, 68 housing projects, and economic development and public service projects, recordkeeping and reporting prior to the implementation of IDIS proved to be quite a challenge. For example, it used to take Rochester six to seven weeks to prepare its GPR. This time has been reduced significantly since Rochester went Live.
- Rochester has shared its lessons learned with peers, holding a day-long conference with Buffalo, for example, to address their questions about IDIS and demonstrate Live draws.

Margie Dziwulski and **Peggy Meinel**, IDIS coordinators for the HUD Buffalo Office, give credit to two people from the City of Rochester's Department of Community Development for making that jurisdiction's transition to Live Production a smooth one. **Joe Mustico**, Associate Analyst/IDIS Coordinator, and **Wilma Wheten**, Head Account Clerk—our issue 13 *IDIS Live* Guest Columnists—are now considered a resource to the field office staff whenever they need to get a second opinion on their own work in IDIS. ■

Q&A: HOME ACTIVITIES

Q: How should I set up an activity and commit funds in IDIS under HOME to purchase, rehabilitate, and rent homes at different locations? Is there a way to set up and fund this activity without knowing the addresses of the properties? Can one activity have more than one property address? Would the same process work for a first-

time homebuyer program that provided HOME assistance at different locations?

A: Under HOME regulations, funds cannot be committed to a project until a written, legally binding agreement has been executed for the identifiable property(ies). Therefore, no HOME funds can be committed for a rental or homeownership project until address information is available.

If the scattered-site rental units do not share ownership, management, and financing, each property address will constitute a separate HOME "project" and must be set up as a separate activity in IDIS. Each activity must also be separately funded in IDIS.

Multiple scattered-site rental properties can be considered a single project under HOME and be entered as one activity in IDIS, if all properties will be under common ownership, management, and financing and are to be assisted with HOME funds as a single undertaking. At set up in IDIS, the owner's information and at least one property address must be available. The Total HOME Funds Requested field on IDIS screen C04MH02 (Homeowner/Rental Assistance Setup) must contain the total HOME funds needed to fund all scattered-site properties included in the activity. This will establish the limit on the amount that can be funded for the activity from HOME through IDIS. At completion, screen C04MH12 (HOME Rental Housing Location/Address) is used to identify all the specific scattered-site properties that constitute the single activity.

Most first-time homebuyer assistance will be considered separate projects under HOME and be recorded as separate activities in IDIS. Only when the project involves multi-unit homeownership assistance can there be a single project under HOME and one activity in IDIS to cover multiple addresses. This occurs only when assistance is provided to two or more homebuyers in a project that is on land held in single ownership prior to project completion (such as a subdivision or condominium). At completion, all the unique condominium or subdivision property addresses are entered on screen C04MH12 (HOME Multi-unit Location/Address).

This Q&A is reprinted from HomeFires, which is published by the Office of Affordable Housing

Programs for HUD staff and Participating Jurisdictions. HomeFires is available from HUD Community Connections at 1-800-998-9999. It will soon be available for downloading from the HUD Web site at www.hud.gov/cpd/home. ■

STATES, EDI, AND THE CPD INFORMATION GAP

The Office of Community Planning & Development (CPD) has comprehensive and timely data on grantees' HOME activities from the HOME Cash/Management Information System (C/MIS). Likewise, CPD's financial system contains data on the funds that are available for grantees to spend. The principal gap in CPD's information concerns the Community Development Block Grant (CDBG) program, especially regarding State funds. The information available on this program is neither comprehensive nor current.

Every CDBG city and county grantee that converted to IDIS faced the task of supplementing the information HUD had available from the GPR. States' PERs are far less detailed than the GPR, so States face a more daunting challenge in providing the supplemental information than did the cities and counties.

Keep in mind that the CDBG program started about 24 years ago—before the age of personal computers. The reporting systems used back then were appropriate for their time and the nature of the CDBG program, but now they need to be updated for an “on-line” and “real-time” world. One of the reasons why more “electronic” information is available about HOME than CDBG is that the HOME program started in the early 1990s, when computerization was expected. (In addition, the HOME program was based on the Rental Rehab. program, which held detailed data on its projects.)

We at the Department recognize that one way of facilitating the process of getting this “missing” information into IDIS—for States, in particular—is to provide a means by which the data can be exchanged by file transfer between State information systems and IDIS. We have therefore provided States with the opportunity to use Electronic Data Interchange (EDI) during their conversion to Live

Production. We will be expanding EDI opportunities for all grantees as we continue to enhance IDIS.

States have the choice of submitting their CDBG data in one of three EDI formats: a database, a spreadsheet, or a word processing file. These formats have already been given to field offices for distribution to States upon request. While some States may choose to key their CDBG information directly into the template of their choosing, others may opt to write a computer program to extract the data from their existing information systems. This second option will save States the trouble of having to re-key information that is already stored in their databases.

For States that are not prepared to use EDI, the option of keying the CDBG information directly into IDIS—after conversion—is available, as well.

Once States are Live, they will need to be able to record the results of their competitions and formula distribution methods. Once again, EDI will prove invaluable to States that have these data in their existing information systems. Rather than key the information directly into C2020 or IDIS, States may write a computer program to extract information on successful applications and State formula award recipients and format the information to the database layout of the Community 2020 Consolidated Plan System. This data may then be submitted to the Department electronically. Of course, the option of keying the data directly into IDIS is also available.

Again, we recognize the importance of EDI to grantees—especially States—who have a lot of data to transfer into IDIS, both prior to conversion and then, periodically, after conversion. We are doing what we can to make EDI happen, as quickly as possible. Read on for a description of what it takes to implement EDI, and you will better appreciate why EDI is not yet fully available.

Each type of IDIS transaction requires a different EDI format. While some variables, such as the grantee identification code, are included in the record format of every transaction, the majority of IDIS variables apply to only one or two transaction types. For example, information on jobs created would be part of accomplishments reporting transactions but not drawdown transactions.

We are working to create EDI formats for several transaction types:

- adding or revising projects;
- setting up projects;
- revising activities (for reporting);
- reporting program income;
- committing funds;
- creating/requesting drawdowns; and
- approving drawdowns.

For each EDI format, we need to be able to check and validate the transaction records in the files submitted by grantees. Creating the transaction template or format and the data validation program for each transaction type is a time-consuming process, a process that must be completed—and completed correctly—before grantees can begin to use the EDI formats.

Before any of these formats can be created, the IDIS data structure must be stabilized. We have deliberately chosen to keep this structure flexible for the time being, so that we can respond to grantee requests for changes to the system. We don't expect to stabilize the IDIS data structure until after several States have gone Live, so that we can offer them the same measure of flexibility from which existing grantees have benefited.

Once we have stabilized the IDIS data structure and developed a method of checking and validating the data that is submitted, we will issue the EDI formats. At this point, **States and other grantees will need to design, develop, and test their own programs for extracting data from their information systems and “dumping” it into the formats.** For each grantee, the time involved in this part of the process will vary depending on the completeness of the data in their system. In other words, grantees may need to modify their information system so that they have fields for all the information deemed necessary by HUD for IDIS—and then they will need to collect and enter this data.

We've all heard the saying that “anything worth doing is worth doing well.” This is certainly true of EDI. Doing EDI well means taking the time to gain input from users at the front end before stabilizing the IDIS data structure. It means taking the time to

build, test, and test again each EDI transaction format. And it means allowing grantees the time to get their own information systems into conformance with HUD's requirements, as expressed within IDIS. We will continue to work with all grantees—and States, in particular—to ease their conversion to Live Production, and we will continue to devote our available resources to getting EDI up and running, as soon as possible. ■

USING IDIS TO MANAGE HUD/CPD GRANTEES

IDIS is a terrific resource for field office management of grantees. We've consulted the experts to learn which items in IDIS a field office representative might check occasionally. (Grantees may also be interested to know which information in IDIS is of particular interest to their field office representatives.) Here's what our experts had to say.

Take a look at how your grantees' activities have been set up. You might want to check the address or location information, for example, or the description. Is the information on proposed type and units correct? How about the actual type and units? Has the environmental assessment been performed? Has the grantee listed any accomplishments? For CDBG activities, you will want to assure that a national objective was entered.

To check your grantees' activities, take the following steps:

1. select option C (View Activity) from the Main Menu;
2. press F1 to view a list of grantees, place an “x” before the grantee whose activities you wish to view, and press Enter;
3. select a specific project and program year by flagging it with an “x,” and press Enter; and
4. the screen will show the CPS Project Number and Program Year. **If you know the HUD Activity Number** of the activity that you wish to view, Tab over to that field, key in the HUD Activity Number, and press Enter. **If you do not know the HUD Activity Number**, simply press Enter.

At this point, one of three things will happen:

- a project title will appear—and nothing else—which means that no activities have been set up under this project; or
- activity information will appear, which means that **only one** activity was set up under this project; or
- a list of activities will appear, and you may choose whichever activity you would like to view.

View your grantees' activity funding details. Have the activities been funded? From which program and grant? Have funds been disbursed? How much money remains for additional activities?

To view your grantees' activity funding information, follow these steps:

1. from the Main Menu, select option I-01 (View Activity Funding) to be taken to the Activity Funding List screen (C04MO03); and
2. to view a particular activity, enter its HUD Activity Number and press Enter to be taken to the View Activity Funding screen (C04MO04).

Here are a few items that you might check on the View Activity Funding screen:

- Is there an amount entered in the "Act. Total Funded Amt." field? (In other words, has the activity been funded?) How does this amount compare with the "Act. Total Drawn Amt."?
- Regarding grants, how much is available for funding from each one (the "Amount Avl. for Funding" is the balance of the grant amount—for all years—minus the amounts committed to subgrants and activities that have already been funded)? How does this compare with the amount that has been "Funded From This Grant" (committed through Activity Funding) and the amount that has been drawn?

View grant information. To review summary or detailed grant information, take the following steps:

1. from the Main Menu, select option D-01 (Drawdown Authorization);
2. press F1 to view a list of grantees, place an "x" before the grantee whose grant information you wish to view, and press Enter;
3. select your grantee from the list that appears and then select option 02 (View Grant Summary or Details).

What you do at this point depends upon what type of information you wish to review:

- press Enter to view information on all grant years and grants; or
- enter the program code to view grant information about a specific program; or
- enter the year to view all program grants for that year; or
- enter a program code and year to view information for that program for that grant year.

Run a report! The *IDIS User Manual* describes the many reports that are available to you. Follow these instructions to download and print a report:

1. from the Main Menu, select option E (Reports Menu) and then option 01 (Report Selection);
2. press F1 and select the grantee about whom you wish to run a report;
3. place an "x" in front of the report that you wish to run and place an "I" (for "immediate") in the priority field;
4. wait for a "Reports Submitted" message at the bottom of the screen, and press F8 when it appears;
5. place a "D" (for "download") next to the report that you want to download;
6. the status should change from "ready" to "wait" (if the status says "not ready," press F8 to go backward and forward until the status changes to "ready");
7. click on "start" (lower left-hand corner of your screen);
8. choose "Programs";
9. choose "Accessories";
10. choose the MS-DOS prompt;
11. change the drive from "c" to "g";
12. enter IDISDNL, (space) your IDIS User ID, (space) your password, (space) P and press Enter;
13. IDIS will tell you that the "process appeared successful";
14. now to go Word and locate the file on your "c" drive (it will have an .rpt extension); and
15. open the file.

To format the report, take the following steps:

1. from the Edit pull-down menu, choose Select All (your entire file should become highlighted);
2. from the Format pull-down menu, select Font;
3. change the font to Courier and the size to 8;
4. from the File pull-down menu, select Page Setup;

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5. choose the tab that reads “Paper Size”;
 6. change the Orientation from “Portrait” to “Landscape”; and
 7. click OK.

You can print either the whole report or several pages (if you are just checking to be certain that your grantee is entering information). ■

IDIS HOURS OF OPERATION

We have received many requests to extend the IDIS hours of operation into the night—and to weekends. Some users have even asked that the system be available 24 hours per day, 365 days of the year. There are some good reasons, however, why IDIS operates only from 8:00 AM to 8:00 PM EST Monday through Thursday and from 8:00 AM to 5:30 PM EST on Fridays.

During the evening hours, when IDIS is unavailable to users, batch cycles are run among the different systems with which IDIS communicates. For instance, every evening IDIS runs a batch cycle over to the HUD financial system that pays your vouchers. These vouchers are reviewed by the financial system and an updated status on all vouchers is sent back to IDIS. System upgrades are also run during off-hours (you may have noticed messages that reflect such upgrades, such as “IDIS version 3.2.4 has been installed”). Not only are the upgrades—with their enhancements—implemented during the so-called “down time,” but the enhancements are tested, as well.

Even if such behind-the-scenes activity were not taking place, can you imagine the cost of running IDIS 24 hours per day, 365 days per year? A whole cadre of people supports IDIS, from hotline staff to developers. The need to perform system maintenance and the bottom line both weigh heavily against extending the IDIS hours of operation. ■

INDELIBLE INK FIELD

Remember the so-called “indelible ink” field? On the Set Up Activity screen (C04MA03), it used to be the case that your answer to the question “Will activity by carried out by an entity other than grantee?” could not be changed. If you entered a “Y” when you meant to enter an “N,” you were stuck with it. You would

have to cancel the activity and set it up again—entering an “N”—to “change” your response.

This is no longer the case. Now, if you enter a “Y” where you meant to place an “N” (or vice versa), you can change your entry. It’s as simple as that. ■

IDIS PROFILE: THERESA JANIFER

Theresa Janifer has been on the staff of the Technical Assistance Unit for approximately seven months, and she’s already helping to train users (you may have met her in Chicago, Los Angeles, Milwaukee, Oceanside, or Alhambra). Is she some kind of IDIS superwoman, able to log on and navigate almost instinctively? Does she have a recessive gene for profound confusion? What’s her secret?

Two things in Theresa’s background may tell the tale: she has a master’s degree in mathematics, and she’s a former high school teacher. So, we know that she’s a rational thinker, and we know that she’s handled frustration. These skills are paying off for her on the hotline.

Theresa has handled many calls, but the most memorable one was from a user who needed to create six activities and perform six drawdowns—pretty much right away—and he’d never before used IDIS. “I walked him through the first four, and he did the last two on his own,” Theresa says, adding that “like most users, once he became comfortable with the system, he was at ease.”

What sort of advice does Theresa offer to IDIS users? “Bookmark the FAQs [the on-line searchable database, at www.hud.gov/cpd/idis/faq.html] and keep a copy of the *IDIS User Manual* handy.” These are the same resources to which Theresa refers in helping to resolve callers’ problems. And what is the greatest benefit of IDIS, in her view? “Grantees can always know their balance of funds. The View Grant Summary screen shows them their uncommitted funds by grant or by year.”

If you think about all the time and paperwork that once went into determining your current fund balance, you’ve got to admit—Theresa’s got a point.

We'll feature profiles of other "behind-the-scenes" staff in future issues of IDIS Live. ■

CORRECTION/REVISION

In the March 1998 issue of *IDIS Live*, the locations of upcoming IDIS training sessions were incorrect. The correct locations are provided below:

	Training Dates	
	Entitlements	States
April— Newark	14-15	16-17
May— Los Angeles	5-6	7-8
June— Atlanta	15-16	17-18
July— Albuquerque	28-29	30-31

August— Boston	18-19	20-21
September— Washington, D.C.	8/31-9/1	2-3

For additional information about training or to register, contact TONYA, Inc., at 202-289-8100.

Definitions of IDIS Matrix Codes, which was introduced in the March issue, has been revised. The codes have been reorganized into general categories used by the CDBG program. The revised document will soon be available for downloading from www.hud.gov/cpd/idis/idismenu.html. ■

TECHNICAL BULLETIN: HOW TO PERFORM A DRAWDOWN

THREE STEPS TO SUCCESS

A drawdown is a request for funds for an activity that has already been set up and to which funds have been obligated. A successful drawdown involves three steps:

1. **establishing authorization**, during which the user identifies the grantee or subgrantee for whom the drawdown is being performed;
2. **creating the drawdown/voucher**, during which the drawdown request is generated and IDIS performs a preliminary validation of the drawdown request, generating a voucher number; and
3. **approving the drawdown**, during which the user verifies the voucher information and indicates a date by which it must be submitted to the HUD Financial System (also known as LOCCS).

This Technical Bulletin provides an overview of these steps. For a more detailed explanation of the drawdown process, refer to Chapter 9 of your *IDIS User Manual*.

Before you attempt to perform a drawdown, check to make certain that the following “pre-drawdown” conditions have been met:

- security access for your grantee organization has been established;
- you are authorized to request a drawdown (your IDIS Local Administrator should be able to tell you whether or not you are authorized for this function);
- the activity has been set up properly;
- funding is available from a grant; and
- funding for the activity has been established through Activity Funding.

Once you’ve checked each of these items—and each condition has been met—you’re ready to establish authorization.

ESTABLISHING AUTHORIZATION

From the Main Menu, select option D to be taken to the Drawdown Menu. Select option 01, Drawdown Authorization.

The Drawdown Authorization screen (C04MD05) is where you will select the grantee or subgrantee for whom the drawdown is being performed. Up to 16 grantees/subgrantees/entities may be listed on this screen. If you have more than 16 grantees and you don’t see the name of the grantee for which you’re performing this drawdown, type the first two or three letters of their name in the “Search for Grantee Name” field, and press Enter. A new list of names will be displayed, with your grantee’s name at the top of the list.

If your grantee is a CHDO and you do not see their name on the list, this means that no activity has been set up under the CHDO. Once you set up an activity under the CHDO, the CHDO’s name will appear on the list.

When you locate your grantee, place an “x” in the “sel” column directly to the left of it, and press Enter. The screen will return with the selected grantee highlighted. Press Enter again to confirm the authorization, and you will be taken back to the Drawdown Menu. You are now ready to create the drawdown/voucher.

CREATING THE DRAWDOWN/VOUCHER

From the Drawdown Menu, select option 04 (Create Drawdowns/Vouchers). You will be taken to the Create Drawdowns screen (C04MD10). On this screen, you will enter the drawdown dollar amount for a specific activity. All of the fields on this screen are required. (Note: You can create multiple

drawdown requests for multiple programs simultaneously.)

The first step is to enter the HUD Activity Number of the activity for which the drawdown is being performed. Enter this number in the “HUD Activity” field.

If you do not know the HUD Activity Number, place the cursor in the “HUD Activity” field and press F1. Screen C04MD02 will appear. Then take the following steps:

1. enter the CPS Project Number and year;
2. press Enter, and a list of activities will appear;
3. place an “x” in the “sel” column directly to the left of the activity for which you are performing the drawdown;
4. Press Enter to return to the Create Drawdowns screen;
5. make a note of the HUD Activity Number, which will now be displayed just beneath the “Setup Date” field; and
6. press F7 until you are back at the Create Drawdowns screen.

Once you have entered the HUD Activity Number, you must enter a Program Code in the appropriate field. This code identifies the program from which the funds are being pulled. The program codes are provided below:

Code	Program
B	Community Development Block Grant
S	Emergency Shelter Grant
M	HOME
H	HOPWA

Next you need to enter a source code in the “Src Code” field. This code describes the source of the funding. The available source codes are listed below:

CDBG-Related Source Type

AA	Action Grant Metro City-Urban County
AB	Action Grant Small City
DC	State Administered-Small City
DF	State Flood
DH	State Hurricane, HUD Administered-Small City
M	State Disaster
DN	Small City Program-Nonmetro Area (outside MSA)
DS	Small City Program-Metro Area (inside MSA)

MC	Metro City
ME	Metro City-Earthquake
MF	Metro City-Flood
MH	Metro City-Hurricane
UC	Urban County
UE	Urban County-Earthquake
UP	Urban County-Flood
UH	Urban County-Hurricane
UR	Financial Settlement Grant

ESG-Related Source Type

DC	State Direct Allocation
IC	Suballocation from State to Local Government
MC	Metro City-Direct Allocation
NC	Suballocation from State to Non-Profit Organization
RL	Relocation from “MC/UC” to a Locality
RN	Relocation from “MN/UC” to a Private Non-Profit
RS	Relocation to a State
SL	Relocation from “DC” to a Locality
SO	Relocation from “DC” to a Private Non-Profit
UC	Urban County-Direct Allocation

HOME-Related Source Type

DA	Disaster
DC	Direct Formula Consortium
HO	City/County Participants
MC	Direct Formula City
SG	State
ST	Insular
UC	Direct Formula Urban County

HOPWA-Related Source Type

HH	HOPWA
HS	State

To complete the “Fund Type” field, enter one of the following codes. These fund type codes describe the type of funding being used.

Code Funding Type

AD	Admin.
CC	CHDO Capacity Building Fund
CO	CHDO Operating Expenses
CR	CHDO Reserve
EN	Entitlement
PI	Program Income
SU	Subgrant

Under the HOME Multi-Unit Completion path, there are specialized fund types. These specialized fund type codes are provided—as are the codes listed

above—in Appendix B of the *IDIS User Manual*.

Next enter the recipient type code. This code describes the grantee or subgrantee for whom the drawdown is being performed. Select from among the following recipient type codes:

Code	Recipient Type
CO	CHDO
LG	Local Government (Entitlement)
OE	Other Entity
SR	State Recipient
SE	State Entitlement

Finally, enter the amount of the drawdown, in dollars and cents (if appropriate), and press Enter to initiate the drawdown request.

IDIS performs a few checks after you press Enter. It verifies that grant dollars are available to fill the request, and it checks the codes that you've selected to be certain that they correspond with the codes that were designated in Activity Funding. If all is well, IDIS will return the message "Press Enter to confirm drawdown request." (Sometimes an error message appears instead of this "all's well" message. See the next section, "The 'Insufficient Funds' Error Message," for advice on what to do if you do not receive the "all's well" message at this point.) Once you press Enter, IDIS performs one final check, assuring that the drawdown request does not exceed the authorized amount.

The drawdown is complete when a voucher number is displayed at the bottom of the screen. You will want to make a note of this voucher number, because you will need it to approve the drawdown. Press F7 until you are back at the Drawdown Menu screen, which is where you will begin the process of approving the drawdown.

APPROVING THE DRAWDOWN

The last step in the drawdown process involves sending your request for funds to the HUD Financial System. To initiate this request, you must approve your drawdown. From the Drawdown Menu, select option 06 (Approve Drawdowns/Vouchers). You will be taken to the Approve Drawdown screen (C04MD12).

If you are working with only one voucher, simply

enter the voucher number in the appropriate field, and press Enter. The voucher will be displayed. Then, place an "A" (for "Approve") in the "sel" column directly to the left of the voucher, and press Enter. You will be taken to the Confirm Voucher Approval screen (C04MD13). On this screen, there are two voucher Approval Options, the "Voucher Submission Date" and "All Line Items?" (The default submission date is the current date, and the default response to "All Line Items?" is "N," for "no.")

The "Voucher Submission Date" field is where you enter the date by which the request must be submitted to the HUD Financial System for disbursement. You may either leave the default system date (the current date) or enter a future date. Back-dating is not permitted.

The "All Line Items?" field applies if you are approving more than one line item. If you enter a "Y" in this field, it means that you wish to process all of your line items at once. If you leave the default "N," the system will take you through the process of approving each line item separately. Since we are working with only one line item in this example, we will leave the default value of "N." Press Enter to approve this line item and then Enter again to confirm the approval.

Remember, if you do not approve your drawdown, the HUD Financial System will not wire funds to your grantee's bank—because it won't know that it is supposed to do so. Why go through the trouble of setting up an activity and drawing funds against it if you aren't going to approve the draw? It's a simple—but fundamental—step, without which very little action can occur.

We've gone through the relatively simple process of establishing authorization, creating a drawdown/voucher, and approving the drawdown/voucher. Sometimes the process is complicated by an error message along the way. The next section should help you to handle these complications.

THE "INSUFFICIENT FUNDS" ERROR MESSAGE

Error messages alert you, the user, that you've taken a step in the wrong direction. This can happen in the drawdown module as in any other module.

The most common error message in the drawdown module is the “Insufficient Funds” message, which may appear for a number of reasons: (1) if you haven’t allocated sufficient funds to an activity, (2) if you’ve used incorrect codes during the drawdown process, or (3) if the activity for which you are performing the drawdown has not been funded at all. For each type of error, there is something that you can do to remedy the situation.

- **To check your funding level**, select option I-01 (View Activity Funding). Then enter the HUD Activity Number of the activity in question, and press Enter. You will be taken to the C04MA04 screen, where you can check the funding amount. Subtract the “Actual Total Drawn Amount” from the “Actual Total Funded Amount,” and you will know how much remains to fund this activity.
- **To check whether you’ve used the correct codes**, follow the same steps as those described above, but when you get to the C04MA04 screen, look at the grant information. The grant information is provided in the bottom half of the screen. Make a note of the codes used under program code, fund type, source type, and recipient type. You should use these same codes, as appropriate, when you perform your drawdown, or the error message will appear. In

addition to using the correct codes, make sure that you place them in the appropriate fields, as well. If you place the fund type code in the source type field, which is easy enough to do, you’ll be seeing the “Insufficient Funds” error message.

- **To verify that the activity has been funded**, go to the C04MA04 screen, following the steps described above. If the amount in the “Actual Total Funded Amount” field is zero, this means that the activity has not been funded. You must fund an activity before you can perform a drawdown for it. To fund the activity, select option I-02 (Maintain Activity Funding). At the C04MA03 screen, select the activity to be funded. Then, at the C04MA04 screen, tab down to the pot of money from which the activity should be funded and select it. On the C04MA05 screen, enter the funding amount (this amount should not exceed the estimated maximum funding amount).

As always, if you encounter an error message and can’t work your way out of it, be sure to contact the TAU by phone (1-800-273-2573), fax (202-708-3222), or e-mail (idis_help@hud.gov).

IDIS LIVE GUEST COLUMN/ **FROM THE FIELD**

*This month we are doing something a bit different—we're combining our grantee "Guest Column" and "From the Field," our field office column. What follows is a review of the recent **Big Cities IDIS Users Conference**, which was held from March 19-20 in Houston, Texas. First, **Mary Owens**, of the City of Houston's Department of Housing and Community Development, contributes her thoughts from the point of view of a "big city" grantee. Then, **Liz Herron**, of the HUD Dallas Office, describes the conference from a field office representative's perspective. Thank you to both of our contributors!*

The City of Houston, Texas, went Live on March 28, 1997. In FY97, the City received combined HUD funds (CDBG, HOME, ESG, and HOPWA) in the amount of \$51,090,000. These funds are administered and reported on through the City's Housing and Community Development Department.

The Department had several reservations about going Live, especially in the middle of a fiscal year. Would our staff be able to enter all of the required information in a timely manner? How would IDIS relate to the City's financial system? How soon could we perform a drawdown? These are just some of the concerns that Houston had in common with other large cities as they faced the specter of going Live in IDIS. With the thought in mind that big cities would benefit from sharing their experiences, Houston hosted a **Big Cities IDIS Users Conference**.

The conference proved useful and informative in that it allowed everyone to share experiences with the group as a whole and then to discuss individual issues in break-out sessions. Attendees discussed a number of issues during these break-out sessions, including activity set up, drawdowns, program management, and reconciliation and reporting.

During each break-out session, attendees discussed

their experiences using IDIS, in addition to enhancements that would make IDIS more user-friendly. With the help of **Lincoln Burruss**, the conference facilitator from HUD, and **Liz Herron**, our local HUD IDIS representative, many of the issues raised, including enhancements, were either addressed at the conference or noted so that they may be further discussed at HUD Headquarters by CPD program and IDIS technical staff—and by big cities in future Users Group meetings.

Several attendees shared some "tricks of the trade" regarding the conversion process:

- Prior to conversion, reduce the number of proposed projects in the Action Plan to simplify the data-entry process.
- If your city prefers to convert from ENTERS, use the Pre-Production phase to view and record IDIS activity numbers. (Most cities present would have preferred to enter their own activity information rather than convert from ENTERS, because not much information was converted.)
- Many attendees found that it was best to have the people who are most familiar with the regulations and Action Plan information perform the data entry.
- Nearly everyone present had used screen prints or the *IDIS User Manual* to create forms that showed the required activity set-up information.

The conference ended on a high note, with many questions answered and the realization that we were not alone in addressing the challenges that are inherent to using IDIS. We hope that these meetings will continue on a quarterly basis to further assist us as we continue working with IDIS.

—*Mary Owens*

Large cities face unique challenges when it comes to IDIS, for two main reasons: the sheer volume of their activities and the program complexities involved in managing three or perhaps four Entitlement grants. The first Big Cities IDIS Users Conference was so successful that HUD and the big cities have agreed to meet on a quarterly basis. The next meeting will be hosted by the City of Los Angeles—date to be determined.

Staff from the City of Houston made a presentation on their “operational planning phase,” during which they developed a strategy for managing nearly 700 accounts in IDIS. The staff also made presentations on grants management and the difficulties of reconciling the cash-based IDIS system with the City’s Accrual Accounting System. **Mike Loftin**, Assistant Director of the Department of Housing and Community Development, made specific recommendations for changes to IDIS that would make it more user-friendly for large cities.

Cathy Marcinko, Manager of Research and Development with the Memphis Division of Housing and Community Development, provided an overview of how that city is managing its programs using IDIS. She explained that Memphis reduced its Action Plan from 50 proposed projects to 12 and that this simplified their data entry process, but that the challenge of coordinating and processing such a large volume of data is still a concern.

Joe Mustico, Associate Analyst/IDIS Coordinator for the Rochester, New York, Department of Community Development, made a presentation on how Rochester implemented and coordinated its transition to IDIS and currently manages its IDIS transactions. (See page 6 for an article on Rochester’s Best Practice Award.)

Thomasina Tucker, Urban Development Coordinator with the City of Detroit, made a presentation in which she identified specific issues relevant to large grantees, providing recommendations for resolving these issues.

Lincoln Burruss, from HUD Headquarters, responded to the questions raised by the presenters. He also gave a presentation of his own regarding planned enhancements to IDIS that will enable users

automatically to complete data fields by copying information from previous entries—which should save data-entry time—and also to reassign project numbers. Lincoln also talked about the multiyear funding of activities and the concept of “rolling up activities,” which would involve consolidating information in such a manner that repetitively funded activities (activities that many users consistently fund from one year to the next, such as “CDBG Housing Rehabilitation”) could be combined into one line item, thereby saving data-entry time.

During day two there were break-out sessions during which attendees discussed not only the particular topics of the sessions, but also enhancements that would improve the “user-friendliness” of IDIS. During the general operations session, for example, suggested enhancements focused on grantees’ ability to get data into IDIS and then modify it, as necessary. The level of detail of suggestions was impressive and reflected grantees’ growing use and knowledge of IDIS.

The break-out sessions also offered attendees the opportunity to share tips with one another. During the reconciliation sessions, for example, grantees shared advice regarding the conversion process, in addition to discussing the uses of particular system reports.

Many of the issues discussed and changes recommended have been raised before. While some are new and perhaps unique to big city users, the majority of the enhancements recommended by the big cities will help **all** IDIS users. All those who participated are to be congratulated for their efforts in helping to improve the “user-friendliness” of IDIS. The job facing the Big Cities Working Group is to prioritize items on their “enhancements” wish list and translate general items into specific requirements, keeping in mind that some of the items require program policy changes.

—Liz Herron

If you would like to submit an IDIS Live Guest Column, contact Jennifer Stanley by phone (202-708-0614, ext. 4411) or cc:Mail (Jennifer_C._Stanley@hud.gov). ■

FUTURE MEETINGS: SAVE THE DATES!

USERS GROUP—NEWARK

There will be a Users Group meeting in Newark, New Jersey, on **Thursday, April 23, 1998**, at the following site:

New Jersey Transportation Planning Authority
One Newark Center, 17th floor

For lodging, contact the Robert Treat Travelodge (at 973-622-1000) or the Gateway Hilton (at 973-622-5000). If you wish to attend the meeting, contact **A.J. Evans** at 973-622-7900, ext. 3319, or **Sharon Lee-Thomas** at 202-708-0614, ext. 2985.

USERS GROUP—MEMPHIS

On **Friday, May 15, 1998**, a Users Group meeting will be held in Memphis. Though the meeting site is still being negotiated, a block of rooms has been set aside at the following hotel:

Holiday Inn
2490 Mount Moriah Road
901-362-8010

Make your reservation no later than April 21. For information about the meeting or to register, contact **Tracee Stills**, Accountant B with the Shelby County Department of Housing, at 901-387-5734 or **Sharon-lee Thomas** at 202-708-0614, ext. 2985.

USERS GROUP—OMAHA

There will be a Users Group meeting in Omaha, Nebraska, on **Thursday, May 21, 1998**. The meeting will be held at the following location (where **a block of rooms has been reserved** for attendees):

Holiday Inn Northwest
655 N. 108th Avenue
402-496-0850

If you wish to attend the meeting, contact **Barry**

Linstrom, Financial Analyst, at 402-492-3161 or **Sharon Lee-Thomas** at 202-708-0614, ext. 2985.

IDIS TA TO STATES

Technical assistance is currently being scheduled for Group 1 States for the month of April. If you have not yet scheduled your visit or received written confirmation of the dates, please call **Jon Kunz** of TONYA, Inc., at 202-289-8100.

IDIS TRAINING

Tentative training dates and sites through September 1998 are listed below. Contact TONYA, Inc. (202-289-8100), for specific information about each meeting.

	Training Dates	
	Entitlements	States
April— Newark	14-15	16-17
May— Los Angeles	5-6	7-8
June— Atlanta	15-16	17-18
July— Albuquerque	28-29	30-31
August— Boston	18-19	20-21
September— Washington, D.C.	8/31-9/1	2-3

FOR MORE INFORMATION

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

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

Internet: Lincoln_Burruss@hud.gov
Philip_B_Helbling@hud.gov
Roger_E_Merideth@hud.gov

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

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