IDIS ADVISORY GROUP CONVENES

The latest meeting of the IDIS Advisory Group convened on September 28[th.] Held at HUD headquarters in Washington, DC, grantees and Office of Community Planning and Development (CPD) representatives gathered to discuss a variety of issues. The advisory group was formed to provide a forum at which IDIS users can communicate their concerns about the system directly to HUD. Group members included six grantees from around the country; *Dave Robinson* of Lake County, IL, *Steve Brudzinski* of Oakland County, MI, *Peggy Lucas* of Louisville, KY, *Cheryl Bartow* of Morris County, NJ, *Ken Pick* of Berks County, PA, *LaCree Carswell* of Jacksonville, FL and *Pam Shellenberger* of York County, PA. *Lincoln Burruss*, an IDIS consultant, moderated the session.

The meeting opened with remarks from Director of the Systems Development and Evaluation Division, *Joel Dean*, who expressed his intention of seeing IDIS stabilized to ensure functionality for all users.

A discussion ensued of those items adversely affecting the system. They included: reports, the input of duplicate project information, the inability to make fund type changes, the lack of advance notice of changes proposed for the system, the need for guidance on program issues, and handling recaptured funds.

Of the items discussed, reports were an especially "hot" topic for grantees with the occurrence of year end preparations and the malfunction of the CAPER. There was also a request to have the "sort" on the Summary of Accomplishments Report changed back

to its original format. (Systems release 3.5.3 on 9/29/98 changed the sort of information by program year and project number to a sort by project number for all years.)

Many of the grantees stated that they were required by their Field Offices to submit an original year end report and a number of hard copies of it. This was in direct contradiction to the February 18, 1998 memo sent out by Assistant Secretary Saul Ramirez. It states that: "Field Offices should not require grantees to provide paper copies of IDIS-generated reports." Peggy informed the group that her Field

IDIS ADVISORY COMMITTEE *continued*

Office also asked for a copy of what grantees were sending to their citizens. The grantees agreed that the Field Offices need more guidance from HUD on what to require of their grantees.

More discussion on reporting continued. Cheryl Bartow stated that Morris County follows the regs and uses IDIS to create reports. They have received Blue Ribbon Awards and used IDIS to do their reports. This, versus Dave Robinson's community, Lake County, who turns in a report that is accepted by HUD but does not use the IDIS reporting format. The report is legible, good-looking, makes sense, etc. The grantees wanted to know who was reporting correctly. Does HUD want the information or the format?

A number of grantee advocacy groups were in attendance at the meeting. *Chandra Western*, of the National Community Development Agency, stated that an inadequacy of IDIS lies in the tracking of information. Many grantees said that they are still using two sets of books to track their grants; their own in-house system and IDIS. In this way, IDIS has not led to less paperwork and increased the productivity as expected.

CPD officials were very receptive to the grantees' concerns.

IDIS Coordinator, *Sam Walker* stated that Congress wants to know how the money from the grants was spent. IDIS helps HUD report these data in a timely manner. He explained that headquarters aggregates the data from all grantees and reports the accomplishments on a national level. Acting Director of Policy Coordination, *Sal Sclafani*, stated that information in IDIS is scrutinized for program compliance, and for accurate and complete reporting to Congress.

Joseph D'Agosta, Acting General Deputy Secretary of CPD, agreed with the grantees that IDIS does not work as it should right now. He advised that there is a process of working on something until it is right. "There will be issues that will arise and we will work to resolve them. That is why it is important to have groups of this sort to identify and work to resolve the issues."

Ken Williams, Deputy Assistant Secretary of CPD, reiterated Joe D'Agosta's thoughts by stating, "That is why it is good to come together on the 'back-end' to see what needs to be done. Our job is to get the system fixed while keeping good programs in place. Capturing data is one of the priorities. Maintaining an open dialogue between headquarters and users is another."

Grantees were asked to formulate a "Top 10" List of what they would like to see in IDIS. They decided on the following:

Top 10 List:

1. Explain what information HUD wants; provide guidelines for what constitutes a project and what constitutes an activity.
2. Provide consistent guidance and dissemination of information.
3. Make IDIS an accrual versus a cash system.
4. Allow PI to be used for CHDOs, Admin, etc.
5. Accommodate revolving loans.
6. Fix the CAPER report.
7. Provide the Financial Summary Report.
8. Drawdown Summary Report: provide start and ending date for the vouchers; sort the information by programs.
9. Provide a larger accomplishments field for inputting units (can currently only input 4 digits).
10. Provide an Ending Total Amount column on reports and drawdown screens.

Additional suggestions included: providing more than 2 digits for housing units on the HOPWA screens, defining "extremely low" income amount, having the ability to revise fund types, doing away with subgranting, depicting low/mod percentages on the reports, making program-specific sorts for drawdowns on reports, providing more space to write accomplishments in the narrative field (MA04 screen), and adding commas to numbers.

Peggy Lucas asked for assurance that the recommendations and suggestions will be implemented. Joe reaffirmed that headquarters will make every attempt to correct the system and to provide clear guidance on what HUD requires from them. He assured the group that CPD would keep them informed on the progress of resolving all issues

brought up at the meeting and would provide the requested guidance.■

Editor's Note: A number of meetings have taken place subsequent to the Advisory Committee meeting. In their on-going effort to stabilize the system, Joel Dean and Sam Walker have met with other CPD officials and Program Office directors, grantees, advocacy groups and the Information Technology staff to prioritize concerns and set time schedules on enhancements to the system. IDIS Release version 4.0, which was available for use on October 23, 1998, addressed many issues that are a part of this stabilizing effort. {See page 16 for the web address for downloading the Release Notes.}

SYSTEMS REPORTS

As a follow-up to a request by the grantees at the IDIS Advisory Group meeting, some of the Field Offices were contacted about reports in the system. Field Office Representatives in Atlanta, Kansas City, Philadelphia, and San Francisco have expressed the following reports to be the most accurate and usable in IDIS:

- C04PR01 - Federal Entitlement Grant Funding Report
- C04PR02 - List of Activities Report
- C04PR03 - Summary of Activities-Grantee Performance Report
- C04PR08 - Grantee Summary Activity Report
- C04PR09 - Program Income Details Report

SUMMARY: RELEASE NOTES VERSION 4.0

These fixes were released to the production system environment. They were available for use on 10/23/98. Many of the corrections are self-explanatory. More detailed explanations for the others are provided.

1.   **Implemented A Correction To Allow The Setup Grantee (properly assigned by the activity owner) Could Not Setup The Activity**.

2.   **Corrected A Printing Discrepancy In The Status Of CHDO Funds Report**.

3.   **Modified Sort Sequence For The Activity View Screen To Sort On The Program Year**.

4.   **Changed The Number Of Positions In The 'Grantee Activity Number' Field From 15 To 18**.
     These changes occurred on the New Housing Construction, Float-Funded Activities, and Activities By CDFI Area reports.

5.   **Corrected The Drawdown Processing Of Unapproved Vouchers In A Multi-Voucher Batch**.

6.   **Corrected The Status Of HOME Grant Report Where Percentage Of Disbursed Amounts Exceeds 100% (And Also To Include Returned Funds)**.

7.   **Modified System Program To Get Grantee-ID From The UOG Code/Number**.

8.   **Fixed "XPROG750" Error On The Drawdown Owner Listing Screen (And Also Ensured That All Projects Are Displayed)**.

9.   **Modified System Process To Insert The Obligated Date From LOCCS Instead Of Inserting 0001-01-01**.

10. **Modified Processing To Ensure A Record Is Rejected When Grantee ID Is Invalid**.

11. **Corrected Miscellaneous Report Items**.
     Reformatted description and accomplishment sections on PR03 report. Reformatted "Date of Last Drawdown" on PR08 report. Changed percent format for "% Occupied By LOW/MOD" on PR10 report.

12. **Fixed The System Process Where The Wrong Voucher Line Item In A Voucher Batch Was Rejected**.

13. **Corrected Several Discrepancies With The Status Of HOME Grants Report**.

14. **Fixed Two Drawdown Issues**.
In the creation of a draw, we reduced the Activity Committed Amount by the appropriate Program Income amount. We also fixed a spelling mistake in an error message.

15. **Fixed Function Key F8 And Entry Key Processing At The View Activity Screen**.

16. **Modified A System Program To Refine Pay1 Level Processing**.

17. **Modified A System Message To Show That RBATCH Processing Has Occurred**.

18. **Modified The System To Stop The Banking Flag From Being Updated With A Blank**.

19. **Fixed The "Looping" In A System Program That Made IDIS Temporarily Unavailable.**

20. **Added Another Position to The Displayed Amount Field In The Summary Of Activity Report**.

STATUS OF HOME GRANTS REPORT - C04PR27

Helpful Hint: "% Disbursed" displayed on this report is calculated based on **both** pending draws which have been entered into IDIS but are not yet approved, **and** approved draws. It is easy to identify any pending draw amounts which are included in the calculation since the amount is displayed in the "Drawn Pending Approval" column. If an amount is shown in this "pending" column, it is included in the "% Disbursed" calculation.

HUD made the following changes to the calculations with Release 4.0. These changes underlie information displayed on the report:

1. HOME Projects Commitments and Disbursements: Information previously displayed on the report includes both HOME grant funds and Program Income in the calculations of Amount Committed to Activities, % Committed, Disbursed, Total Drawn, and % Disbursed. We have removed Program Income from these calculations to provide a more accurate picture of the commitment and disbursement of entitlement funds. Status of Program Income is currently displayed separately on page 3 of the report. Confirmation of this change is shown in the IDIS Release Notes for version 4.0.
2. Disbursements: We also found that returned funds were not being deducted from the calculation of Disbursements on this report. This resulted in overstatement of the actual disbursement amounts and percentages. A change to the calculation was requested and is also included in IDIS Release version 4.0.■

Submitted by Joan Morgan, Office of Affordable Housing Programs, HUD

HOME FUNDS AND DIRECT BANKING

Many grantees have asked for clarification of who is authorized to have direct banking for HOME funds.

First, a distinction must be drawn between 1) having access to HOME funds in a single HOME account, and 2) having authority to set up HOME projects and/or to request drawdown of HOME funds. Calling the Voice Response System (VRS) to request a setup or drawdown from a project deals with exercising system functions. This does not mean the requester has access to the funds once they are drawn down. A participating jurisdiction (PJ) may authorize multiple individuals to have system functions, but only a PJ, state recipient or subrecipient can have access to funds once they are drawn. And, only a PJ or state recipient can have their own local bank account. (CPD Notice 92-18:

Cash and Management Information System for the HOME Program).

In the case of the subrecipient, the subrecipient must receive authority from the PJ and provide written verification to HUD that they will be administering the program on the behalf of the PJ before an account can be established. Many units of local government (i.e., City of Rockford, IL) already have a local account for their entitlement or formula funds. C/MI allows states to determine whether a particular city, county or consortium receiving state funds will have authority to disburse funds out of the city's local account or to centralize through the state's comptroller.

A CHDO, or other non-profit organization, cannot have their own bank account (direct banking). (CPD Notice 97-11: Guidance on Community Housing Development Organizations Under the HOME Program). All funds drawn through the VRS must go to the PJ or state recipient's bank account; depending on who is directly funding the CHDO. A CHDO, other private non-profit, or public non-profit cannot be a state recipient.

The State Designation of State Recipients form, HUD-40100 (5/93), used for authorizing funds for state recipients, asks whether the recipient is being authorized to draw down funds directly from the Treasury into its own account. State recipients must complete and submit this form along with the direct deposit form in order to have direct banking.■

UPDATE: STATE OF LOUISIANA'S ELECTRONIC DATA INTERCHANGE (EDI) PROCESS

The State of Louisiana has been working diligently since their selection as CPD's pilot site to become the first grantee to utilize EDI as a vehicle to update IDIS.

They have contracted their Value Added Network (VAN) and purchased their EDI mainframe software. They are now working to create an interface from their Integrated Data Management System (IDMS) to

extract and format data for IDIS. Preliminary files have been manually submitted twice and final system integration should be completed by mid-November. Parallel testing with CPD will begin after the State of Louisiana's system has been fully integrated.■

FROM THE CONGRESSIONAL RECORD...

The Office of Information Technology (IT) and the Office of Community Planning and Development (CPD) have been working diligently to make electronic data interchange (EDI) and internet access available to all the grantees. The move toward implementation of these functions falls directly in line with findings noted recently in the Congressional Record (October 5, 1998, page H9425). The findings state:

"The conferees agree that HUD shall not require additional states to implement the Integrated Disbursement and Information System (IDIS) until problems associated with it are corrected. The problems include, but are not limited to, the lack of a fully functioning Electronic Data Interchange, full internet capacity, and complete reporting abilities. HUD shall report to Congress, no later than January 1, 1999, as to the specific corrective actions being taken to resolve existing systems problems for current state users."

Meetings with program heads, grantees and advocacy groups have resulted in recommendations that are enhancing the system and reports. The State of Louisiana, who is piloting the EDI program, is moving closer to parallel testing with CPD. (A status update on their progress can be found in the succeeding article.) Studies continue on the feasibility of internet access to IDIS, and the reporting module of the system is under constant review and update for effectiveness.

Many states have shown an interest in utilizing IDIS. Pending resolution of the items noted in the Congressional Record, CPD is available to accommodate those grantees and states which are ready to begin implementation.■

MAKING THE MOST OF IDIS

As with any new system, going "live" in IDIS has required grantees to consider the role they want IDIS to play in the overall scheme. Many grantees, especially in the beginning, chose a minimalist approach to implementing IDIS. They assigned tasks based on pre-IDIS responsibilities rather than reassessing their needs. Other communities have begun taking a more strategic approach to integrating IDIS into their daily tasks and are looking for ways to maximize what they see as the system's potential. Our thanks go out to *Sharon Segerblom*, *Sue Prescott* and the City of Las Vegas (CLV) for their willingness to share their journey with the rest of the IDIS community.

CLV went "live" in IDIS on December 18, 1997. Its conversion primarily affected two departments: the Neighborhood Services Department and the Finance and Business Services Department. Although individuals from both departments were sent to training in preparation for this event, as always, actual experience revealed new and challenging situations to be addressed.

Las Vegas' conversion to IDIS coincided with the planning and implementation of the city's new Unix-based (Oracle) system for payment processing. With two new systems coming into play, departmental staff were meeting on an on-going basis to resolve issues with both systems. During these meetings it became apparent that additional training and a detailed explanation of how IDIS worked would benefit all, and result in a more efficient and coordinated use of the system. With the assistance of *Jim Davis* from the HUD Arizona State Office in Phoenix, CLV was approved to receive on-site technical assistance. In early September, *Dionne Roberts* and *Charles Perkins*, IDIS/Organizational Development experts, set out for the bright lights of Las Vegas to assist CLV in finding better ways to utilize their systems.

Dionne and Charles met with all CLV staff involved with IDIS over a two-day period. During these sessions, staff members were asked to provide insight into the process from their perspective, and identify things that both worked and didn't work for them. The information provided by Sharon and Sue, along with *Terrie Stanfill*, *Candace Falder*, *Mary McQuoid*, *Eyline Saltz*, *Antonia Arimendez*, *Annie*

Macomber and *Lu Ann Kutch*, led to a joint meeting with all participants on the third day. Following a detailed overview of IDIS, the group mapped out the various processes required in their daily tasks, within IDIS and generally. With input and information from Dionne and Charles, both departments discovered ways to improve how CLV 'employed' IDIS. Each participant gained insight on how to improve utilization of the system in his or her own area.

Six major opportunities for change were identified, including providing IDIS access to more local program staff. By providing more staff with access and responsibilities, CLV was able to take the strain off of staff whose workload had been affected by the conversion. This also provided other staff the ability to monitor their recipients and programs more effectively. Another opportunity identified was to design standard IDIS activities that match their other systems. By coming up with a list of common activities, CLV can consistently identify like activities both within IDIS and across systems.

Other recommendations for change identified by the group included:

♦ Developing standard IDIS management reports
♦ Revising the current Chart of Accounts to work with both systems
♦ Developing written IDIS policies and procedures
♦ Providing briefings for interested non-IDIS users on program and system needs

Two of these recommendations were seized immediately following the site visit, and CLV jump-started the initiative by sending six staff members to the most recent IDIS training in Phoenix. The other four changes will require a greater time commitment, but CLV expects them to be implemented within the next six months.

"The technical support and information received was pertinent and beneficial to everyone involved with the IDIS process," Director of Neighborhood Services, Sharon Segerblom, expressed. All the participants agreed.■

RAVE REVIEWS AT FLORIDA'S

CDA WORKSHOP

Over 100 people attended the Florida Community Development Association's (FCDA) first fall workshop. Held at the Orange County Convention Center in Orlando, Florida, the workshop met on September 30 and went through October 1, 1998. It was highly anticipated with the inclusion of a hands-on IDIS session as one of its highlights.

The FCDA contracted for the leasing of thirty computers for on-site, technical training in IDIS. Grantees from throughout the State of Florida, along with a few from other states, took advantage of the opportunity for this training (which was the first held in central Florida). The workshop was a complete success! Members of the organization received rave reviews from attendees for the much needed instruction.

Special thanks go to *Lincoln Burruss*, who served as lead instructor for the training. Thanks goes out, to *Tracey Peterson*, Supervisor of the IDIS Technical Assistance Unit, and to *Linda Dresdner* and *Wayne Paulsen*, of HUD's Jacksonville Field Office - all of whom provided additional technical support.

I was assisted in the organization of the meeting by *Denise Carter*, Planner III of the Brevard County Community Development Office. In addition, special thanks go out to *Gwen Myers*, *Pat Hubbard*, *Lela Allen*, *Mike Smith*, *Rodney Rackley* and *Hampton Allen*.

The FCDA is planning its annual conference for the spring of 1999 in Orlando. We hope it will be as much of a success.■

*Submitted by **Jennifer L. Thomas**, Deputy Director, City of Daytona Beach, Community Development Department.*

If you would like to submit an *IDISLive* **Guest** column or a **From The Field** article, please contact Vera Pérez by phone at (202)708-0614 ext. 4786 or by cc:mail at Vera_A._Perez@hud.gov.

IDIS PROFILE:

LOUISE MILDER

This issue profiles the contributions of Louise Milder of the IDIS training team.

For the past 18 months, Louise has been training grantees throughout the country on IDIS, while also providing technical assistance to state and entitlement grantees in their offices. From the beginning, she feels that the work has been mutually beneficial. "I find this a very rewarding experience," Louise says. "I am meeting some very interesting people. As I provide them with the information they will need to use IDIS, I am also learning about many worthwhile community development programs that are being implemented throughout the country."

Having worked for a local Housing Authority in Virginia for more than 12 years, Louise brings in-depth background in housing and community development to the training team. "I had an active role in developing and implementing multifamily and single-family housing programs and was instrumental in obtaining financing from federal, state, local and private sources for projects," she says. "In fact, I used to say that my job description should be "begs for money" since a large part of it involved seeking out new funding sources, determining the eligibility of the projects and applying for the funds. As a result, I became very familiar with HUD's programs that provide funding for housing."

With this knowledge and experience with community development, Louise understands the concerns and issues of the people she trains. This helps her to provide a more meaningful training experience. "I particularly enjoy hearing that a trainee has benefited from the assistance and will be able to perform their IDIS functions more effectively as a result," Louise says.

Louise is truly an asset and we are fortunate to have her as a member of the IDIS team.■

LOCAL ADMINISTRATOR TECHNICAL BULLETIN

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

REASON TO KEEP PRE-PROD IDS ALIVE

I need to clarify why Field Office and grantee people WANT to keep their Pre-Production IDIS ID active.

For you in the Field Offices, the only place you can view data for a state preparing to begin using LIVE IDIS is Pre-Production. The only place you can try out new functions/features of IDIS is Pre-Production.

For entitlement people who have gone LIVE, the only place they can check out new functions/features before they are added to Production, is Pre-Production.

"PLEASE GO INTO PRE-PRODUCTION IDIS ONCE A MONTH"

just to keep your ID alive. Those in the CPD Field Offices should do this for the sake of your grantee people whose IDs are dead and cannot be revived timely enough to be useful. Perhaps you can look at data or features and tell your users about them, if they can no longer get in, themselves.

Here's the trouble: when grantee users start using Production IDIS, they may never use Pre-Production again, so their Pre-Production ID lapses. Many of you may have noticed that Pre-Production is slow (if you haven't, you can bet that people practicing in Pre-Production have). There are thousands of lines of practice data in Pre-Production for people to practice with. They "clog the gears" and slow down Pre-Production. We've begun deleting the practice data for people whose Pre-Production IDs have lapsed, to speed up Pre-Production a bit. Between April and May we deleted the practice data for four thousand people whose IDs had lapsed, and improved the processing time of Pre-Production. We'll delete more soon, in hopes of more improvement.

So, even if I restore the Pre-Production ID for a grantee person, there may be no data in Pre-Production for him/her to look at. Recreating that data often takes a week or more. There are higher priorities.

I don't have a solution. Except this. For those people who are most likely to be the ones who want to go back into Pre-Production months after they go LIVE, I recommend that they

"GO INTO PRE-PRODUCTION IDIS ONCE A MONTH"

to keep their ID from being dropped and to keep their "play data" from being dropped. I believe the people who want to check out new features before they are "official" are likely to be the sharpest and most intellectually curious of the users. I hope they can put a reminder on the calendar to go into Pre-Production IDIS once a month, to keep the door from slamming shut.

To the extent I can, I will get people back into Pre-Production so that they can check out new features, etc. It will be easier for all concerned if those sharp, talented people keep their Pre-Production IDs alive.∎

IDIS AND THE TAU WILL BE UNAVAILABLE ON THE FOLLOWING FEDERAL HOLIDAYS:

NOVEMBER 11	VETERAN'S DAY
NOVEMBER 26	THANKSGIVING DAY
DECEMBER 25	CHRISTMAS DAY
JANUARY 1	NEW YEAR'S DAY

EMPTY FIRE BUCKET

It will help some of your friends in IDIS for them to think of their IDIS ID as a fire bucket. When there's a fire, it would be great if there's water in it.

To make sure the fire bucket has water in it, check it regularly - go into IDIS at least once a month. Otherwise, when there's a fire - when you HAVE to get into IDIS to draw funds, for instance - and there's no water in the bucket - you can't get into IDIS. The ID is dead.

True, John Mayer can get an ID revived or another ID assigned. But, you have to get his attention, let him push the request through the system and get the revived or newly created ID into shape where it can be used (pointed at the right data/dollars and with the right access), and get that ID back to you. We're talking days, at best. Why not avoid that hassle by keeping the IDIS ID active? Going in once a month will do it.

Or watch the house burn, with an empty bucket in your hand.■

WHAT'S MY UOG CODE?

CPD uses a code to identify each city, county, township - in short, every "place" - that receives funds kept track of in IDIS. We call it the **UOG Code**, (**U**nit **o**f **G**overnment). When we receive a request for IDIS access from one of you, we look up the UOG Code and mark it on the form. Still sometimes we get it wrong and assign you in IDIS to the data and funds for the city in your street address rather than for the county or the state for which you actually work. Usually we can correct that, with input from our Field Offices, or from you directly, before you've gotten too far along in IDIS.

To help us get it right in the first place, you can tell us yourself what your UOG Code is. You can get it from your local CPD Representative and mark it on the IDIS Access Request Form. Use the empty space to the right of the street address on the form to tell us your UOG Code. We will double check it at the Field Office and/or here at headquarters, so don't worry about getting it wrong. We'd appreciate it.■

YEAR 2000 COMPLIANCE

Many of the grantees have asked for verification that IDIS is Year 2000 (Y2K) compliant. It is!

As stated in February's issue of IDIS*Live* #16, IDIS passed the certification test on December 19, 1997. The certification process involved "migrating" the application (IDIS) into the Year 2000 compliant test region. Certification was reached when the application achieved "successful results...for all appropriate scenarios" including those that involve leap year and non-leap year dates.

We feel secure that IDIS will not be disrupted by errors occurring as a result of date miscalculations.

Requests have been received for a copy of the memo stating the above certification information. A summary of that memo is attached on the following page. You may also obtain a copy of the original memo with the signatures of the Y2K Certification Team affixed. Go to the IDIS*LIVE* website at: http://www.hud.gov/cpd/idis/idislive.html and click on the Y2K memo which is in a pdf format.■

HOUSING AND URBAN DEVELOPMENT OFFICE

TEAM 2000

INTEROFFICE MEMORANDUM

TO: Charles Cushman
FROM: Y2K CERTIFICATION TEAM
SUBJECT: Y2K CERTIFICATION
DATE: 12/19/97
CC: FILE

The Y2K Certification Team has reviewed your Y2K test results with you.

The Y2K Certification Team is certifying C04 as Year 2000 compliant. (C04 is IDIS).

The signature below verifies that all program modifications have been successfully tested.

Programmer/Tester/Responsible Party:

___(Original signature)_____

___(Original signature)_____

___(Original signature)_____

Y2K Certification Team:

___(Original signature)_____

(This Y2K memo with original signatures may be downloaded from: http://www.hud.gov/cpd/idis/idislive.html)
_____

HOW YOUR KEYBOARD AND MODEM AFFECT THE IDIS SCREEN FUNCTION KEYS

Each screen contains various function keys to assist you in processing. The following list identifies all keys that are in use and the corresponding processing they initiate.

- **F1** = **HELP**: Provides on-line help for certain fields on selected screens.
- **F2** = **PROJ HELP**: Provides project/activity help information.
- **F3** = **VALDT**: Validates data entry without saving data and/or displays program generated totals without leaving the screen.
- **F4** = **MAIN MENU**: Returns to the Main Menu without saving current data.
- **F5** = **PROJ INFO**: Displays related project information on screens.
- **F6** = **CLEAR**: Clears the screen. (used to enter new data)
- **F7** = **PREV**: Returns to previous screen without saving current data on screen.
- **F8** = **NEXT**: Displays next screen in the path without saving the current screen's data.
- **F9** = **SAVE**: Saves the current data on the screen but does not advance to the next screen in the path.
- **F10** = **INSERT/GO TO/CANCEL**: Screen dependent. Allows additional lines of data to be entered. Allows you to go to another screen. Cancels the transaction.
- **F11** = **INSERT A SCREEN**: Inserts a screen to record new accomplishments for an activity.
- **F12** = **EXIT IDIS**: Exits IDIS but keeps you on the mainframe.
- **F17** = **BACKWARD**: Allows scrolling of the current screen backward. Pressing **Shift-F5** activates this function.
- **F18** = **FORWARD**: Allows scrolling of the current screen forward. Pressing **Shift-F6** activates this function.
- **F20** = **PROCESS DRAWDOWNS**: Use on screens C04MD10 and C04MD11. Pressing **Shift-F8** activates this function.

However, the actual keys used for the preceding function keys depend upon your keyboard. For example, for F20 - use Shift-F8 for a 12 function key keyboard and use Shift-F10 for a 10 function key keyboard. It also depends upon whether your modem acknowledges 10 or 12 function keys.∎

LIVE UPDATE
♦♦♦♦

On October 15, 1998

the **Lyon County Consortia**
(which includes Carson City, NV)

went "live" in IDIS!

**Welcome aboard.
We look forward to working with you.**

CORRECTION: DRAWDOWN STEPS

Correction to *IDISLive* issue 21, Enhanced Drawdown Process, page 16:

Step 6. Review the amounts entered for the selected combinations on the following C04MD10 screen. To revise an entered amount, press **F7** to return to screen C04MD11. Make the correction, press enter, then press **F20** once. Review the change displayed on the C04MD10 screen.∎

THE *HOPWA* PAGES

The HOPWA Pages will be a regular feature of IDIS Live spotlighting issues pertinent to the HOPWA program. Rusty Bennett, PMI/CPD Program Analyst for the Office of HIV/AIDS Housing, is available at (202) 708-1934 ext. 4619 to answer your questions.

HOPWA Highlights

▼ **The Second National Meeting of HOPWA Grantees** was held in Atlanta, Georgia. Over 80 formula grantees were in attendance from September 15th through the 16th. Many grantees were reunited with colleagues who had attended the First National HOPWA Grantees Meeting held in Arlington, Virginia. They welcomed those grantees who were first time attendees. The meeting was organized by the Office of HIV/AIDS Housing and the Office's technical assistance provider, AIDS Housing of Washington.

The two days provided a forum for grantees to gain valuable information from each other, as well as, ask specific questions of HUD staff. Discussions and meetings were held to address various issues associated with the HOPWA programs. These included: funding AIDS housing, best practices, and building local, regional, and national collaborations.

800 AIDS Housing Providers attend Meeting in Atlanta, Georgia.

The Third National AIDS Housing Conference followed the HOPWA grantees meeting. It was held from September 17th through the 20th and brought over 800 AIDS housing providers from across the country to Atlanta, Georgia. The conference was organized by the Office of HIV/AIDS Housing at HUD and the Office's technical assistance provider, AIDS Housing of Washington. It featured four days of training for organizations just entering the AIDS housing arena, as well as those who have been in housing for years. A highlight of the conference was hearing from HOPWA grantees on activities' success in their communities.

HOPWA & IDIS

David Vos, Director of the Office of HIV/AIDS Housing at HUD, and ***Lincoln Burruss,*** consultant to HUD on IDIS, offered an information session on IDIS at the conference. It focused on the utilization of IDIS for HOPWA projects. Over fifty people turned out for the session and even requested an additional session to get hands-on training on IDIS. Many great suggestions on how to improve the system came out of the two sessions.

The Office of HIV/AIDS Housing is committed to providing assistance to grantees using IDIS. The office is currently working with IDIS consultants and HUD staff to develop specific guidance in using IDIS for HOPWA projects. Through *IDIS Live*, the office will address issues with IDIS and HOPWA reporting.■

Questions & Answers:

Here are some questions we heard and these are our responses:

Q. **Where do I get HELP!**

A. For IDIS Technical Assistance, contact the CPD Technical Assistance Unit by phone (1-800-273-2573), fax (1-202-708-3222), or email (idis_help@hud.gov).

For HOPWA assistance, contact the Office of HIV/AIDS Housing at (202-708-1934).■

Q. **What does HUD want in the HOPWA data fields?**

A. The office is working on guidance to assist you when completing your accomplishment screens in IDIS. In the meantime, try using the HOPWA APR (HUD-40110-C, 11/97) to assist you in completing the data element fields. You can download a copy of the APR at: (http://www.hud.gov/cpd/hopwahom.html). Because

the IDIS HOPWA screens were designed to capture the same information as the APR, the APR should be useful.

Also, if you do not have an IDIS user's manual you can download it at:
(www.hud.gov/cpd/idis/manual.html).■

Q. **What about HOPWA & IDIS Training?**

A. The office is committed to ensuring all HOPWA grantees using IDIS receive up-to-date and comprehensive training. More HOPWA specific training and more session offerings are some of the things the office is trying to arrange.■

Q. **When do I need to report?**

A. Under guidance from former Assistant Secretary Ramirez, grantees currently using IDIS are required to report within 90 days of end of program year.■

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It is unbelievable that 1998 is almost at a close. The IDIS roller coaster has taken us through some high points and some deep lows. However, through it all, we feel that we are on the right track - to success. We have learned a major lesson this year - keep the lines of communication open. We will work to continue to do that in 1999.

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The TAU said good-bye to two of its Hotline staff, James Cannon and André Stratton. They are wished the very best in their new careers. We are fortunate to have their positions capably filled by Regina Walker and Sharon Lee-Thomas, who will be profiled in upcoming issues of IDISLive.

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Our next issue of *IDISLive* is due for publication on January 4, 1999!

The IDIS Trainers and Technical Assistance staff would like to take this opportunity to wish you a happy and healthy Holiday Season!

IDIS Q&A

SPRINTLINK ERROR MESSAGE

Q: I received the following error message before being booted back to the SprintLink sign-on menu: "Simware Emulation Not Found." What does that mean?

A: It appears that when everyone attempts to log on at around the same time, SprintLink will allow access to some and then send the Simware error message to others. If you receive the Simware error message, try logging on at a later time while Sprint continues to research the matter.

In our effort to aid SprintLink's research, please forward an e-mail with the following information to IDIS_HELP@hud.gov:

- your full name
- city and state
- your telephone number
- the line from which your modem dials
- the number used to access IDIS (i.e., 800 number or your local number including the area code)
- Important - the time you attempted to access SprintLink.■ *Tracey, HUD-TAU*

ACCOMPLISHMENTS REPORTING

Q: I downloaded the Summary of Accomplishments Report for the 1997 program year, but the accomplishments for some of the activities were not reflected. Why not?

A: If the accomplishments are not entered for the year requested, they will not appear in the report. Be sure that the accomplishments entered coincide with the program year for which you are requesting information. If the accomplishments are not shown for one year but they were input for other years, you need to update the accomplishments area for the year you are requesting.■

DRAWDOWN: "INVALID ACTIVITY"

Q: While attempting to create a drawdown, I received the following error message: "Invalid Activity." I have drawndown many times in the past. What does this message mean?

A: This message occurs when the activity's status is "Completed." When an activity's status is "Complete," no activity funding or drawdowns can be performed against it. By changing the activity's status to "Underway," you will be able to create the draw.■

DRAWDOWN: "GRANTEE NOT AUTHORIZED"

Q: I attempted to create a drawdown for a CHDO and received the following error message: "Grantee Not Authorized for Drawdown." Please explain.

A: IDIS has a feature built in that allows it to check certain information. For example, the system checks funding to ensure that an activity is funded from the correct CHDO funding source. It also goes back to the activity to ensure the subgrant has been set up correctly. This system check prompts the message, "Grantee Not Authorized for Drawdown" to come up when the activity is not set up for the CHDO that was authorized in the Drawdown Authorization Process. The activity must be set up for the CHDO.

To accomplish this, select option B (Revise Activity). At the C04MA09 screen, enter the activity number and press enter to get to the C04MA03 screen. Answer the question, "Will activity be carried out by an entity other than the grantee?" with a "Y" for yes. When the CHDO/Subrecipient List appears, select the correct entity with an "X." You can then go on to create the draw.■ *Vivian, HUD-TAU*
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TRAINING AND TECHNICAL ASSISTANCE

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IDIS RESOURCES FOR GRANTEES

Do you wish to work better with IDIS? Would you like assistance with year-end reporting? If these are your concerns then HUD has resources on the Internet for you.

A number of tools that help grantees address various IDIS topics are newly available on the IDIS Resources web site. Specifically, there are six documents designed to help address year-end reporting requirements and manage downloaded IDIS reports. Some of these documents contain easy, "how to" instructions on working with macros to automatically customize downloaded IDIS reports into Excel, WordPerfect, and Microsoft Word. Also included in the documents is a summary of the key issues regarding performance requirements outlined in the memo issued by former CPD Assistant Secretary Saul Ramirez, and samples of 12 important IDIS reports (including some that are useful for citizen participation requirements).

Also, recently available on the IDIS Resources web site is the IDIS Planning and Management Guide for States. This document helps states prepare for conversion to IDIS. Grantees that initially take time to understand how IDIS works and strategically plan for conversion are rewarded with a much smoother transition. This guide offers an array of topics to help states through this process, including Hardware and Software Requirements; Defining Projects and Activities; Staff Roles and Privileges; Managing State Recipients, and Getting Off to a Good Start.

For users who would like to perform various functions in IDIS more effectively quickly apply codes when working with the system, the IDIS *KeyStroke Saver* is available. Although not new to the IDIS Resources web site, the IDIS *KeyStroke Saver* is essential for life in IDIS. It saves time working in IDIS by providing "how to" instructions on typical day-to-day IDIS functions. The IDIS

KeyStroke Saver is available in versions for states, CDBG, and multi-funded entitlements. If you're new to IDIS or just need a refresher on how to perform functions, then you need a copy of the IDIS *KeyStroke Saver* today. If you need more assistance, get a copy of the IDIS Users Manual, which is also available at the IDIS Resources web site.

All of the materials on the IDIS Resources web site make a HUD grantee's experience in IDIS as productive as possible. Take advantage of these invaluable tools by accessing the IDIS Resources web site at:
http://www.hud.gov/cpd/idis/idismenu.html#ref.■

CD-ROM UPDATE

As promised in the last issue of IDIS Live, the IDIS CD-ROM is now available for entitlements. (We are considering the expansion of this training to include States.) The CD-ROM is HUD's latest training tool geared toward CDBG users of IDIS. For those of you in the HOME, ESG, and HOPWA programs, plans are underway to create CD-ROMs geared specifically to your program needs. Until that time, use the CDBG CD-ROM. It's helpful to all formula grant users.

The step-by-step lessons provide self-guided instructions and an interactive means to learn about and utilize IDIS. The CD-ROMs have been packaged and sent to all Field Offices. They will be forwarding them, along with instructions, to each grantee.

Be on the look out for this latest training tool. Give it a try and let us know what you think!■

IDIS TRAINING

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IDIS training will begin again after the first of the year. The first national training workshop is scheduled for Washington, D. C. during the latter half of February. Exact dates and hotel information will be available in the next issue of IDIS Live. You may also go to:
http://www.hud.gov/cpd/idisweb.html and click on IDIS TRAINING for the latest workshop information.

For further information, please contact Karen or Natasha at TONYA, Inc. at 202/289-8100.

IDIS HOME PAGE ADDRESSES

IDIS USERS GROUP
  http://www.hud.gov/cpd/idisweb.html

IDIS REFERENCE
  http://www.hud.gov/cpd/idis/idismenu.html#ref

SOFTWARE FILES (SELECTION)
  http://www.hud.gov/cpd/idis/idissoft.html

SOFTWARE FILES
  http://www.hud.gov/cpd/idis/idissoft.html#soft

USER MANUAL
  http://www.hud.gov/cpd/idis/manual.html

RELEASE NOTES
  http://www.hud.gov/cpd/idis/release.html

SPRINTLINK TECHNICAL BULLETIN
  http://www.hud.gov/cpd/idis/sprintch.html