

IDIS LIVE

...for the Integrated Disbursement and Information System

U.S. Department of Housing and Urban Development

Office of Community Planning and Development

DGMS PROJECT PUT ON HOLD

CDBG ACTIVITIES WITH MISSING DATA CONTINUE TO DECLINE; STEP 2, MATRIX CODE CLEANUP, BEGINS TODAY

CPD posts a weekly status report that contains the baseline and current count of CDBG activities with missing accomplishment data. To date, over 73.5% of all entitlement grantees have corrected at least some of their activities. Thanks! We appreciate the effort!

A number of grantees have contacted the Data Cleanup Team asking what to do about special situations where they cannot provide the missing accomplishment data requested on their spreadsheet. If you encounter this situation, contact the Data Cleanup Team. They will advise you if your situation is already covered in the written Guidance. If it isn't, the Team will forward your query to the CDBG Program Office for resolution. In the near future, CPD will be publishing a list of documented special situations. Watch the [Step 1](#) Cleanup web page.

The Step 1 cleanup of activities with missing accomplishment data will continue concurrent with Step II which begins Feb. 1. Initially, [Step 2](#) asks grantees to review those activities where the Matrix Code and National Objective code combination violate CDBG program rules.

A number of CDBG grantees have asked why the count of their activities with missing accomplishment data has gone up from earlier status reports. If you have added activities to IDIS since the start of the cleanup and you failed to enter all accomplishment data based on the [Guidance](#) published by the CDBG Program Office, IDIS includes these activities in that week's count.

The funding for development of a Departmental Grants Management System (DGMS) for FY02 has been placed into a reserve account. CPD has consistently requested additional funds for IDIS enhancements and, with the change of status of DGMS, CPD has more aggressively pursued funding in FY02 and FY03. However these funds have not been approved for FY02. If CPD's funding request is approved we plan to:

- Streamline activity processing by utilizing newer technology, enforcing data edits, allowing HUD and grantees to report accurate and complete accomplishments, and simplifying and significantly reducing the data entry burden on grantees
- Create a robust reporting platform using new technology that will improve existing canned reports, simplify the execution and downloading of these reports, and create a new ad hoc reporting capability
- Enhance program income processing to allow subgranting of program income, enforcement of programmatic rules, and better reporting tracking of multi-level subgrants
- Capture geographic changes to eligible grantees to facilitate proper identification of urban counties and consortia.

CPD appreciates the support grantees and the public interested groups have given in lobbying for increased funding for IDIS enhancements.

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WATCH FOR A “THANK-YOU” E-MAIL FROM OAHP IN FEBRUARY

As the 2001 IDIS data cleanup comes to an end, the Office of Affordable Housing Programs (OAHP) has begun sending “thank-you” e-mails to all HOME Participating Jurisdictions. Believe us when we say your efforts – though time consuming – have made a difference in the affordable housing statistics HUD reports to Congress – statistics that ultimately affect grant funding in future years.

Those PJs who have been told by the Data Cleanup Team that their HOME data is *certified* “complete” will receive just a congratulatory message. For now, no further changes need to be made to IDIS data.

PJs who still have outstanding IDIS data issues will be receiving a message recognizing their efforts, along with an updated spreadsheet. The updated spreadsheet will be similar in appearance to the previous spreadsheets posted to the web. Six categories of questionable data will appear at the top of the spreadsheet. Activity numbers are listed on the left side of each row. Each asterisk (*) indicates the category of questionable data that applies to the listed activity.

Activity numbers highlighted in yellow indicate activities from the 2001 cleanup that have still not been resolved with HUD. PJs may also see activities

not highlighted in yellow that were added to IDIS since the start of the 2001 cleanup. Our automated computer program flagged these newer activities as questionable using the same logic applied to the original cleanup. Grantees should give the highlighted activities first priority, then go back and clean up the other activities listed.

In addition to the spreadsheet, each e-mail will contain two other attachments:

- Tips to help pinpoint which IDIS screen contains the questionable data
- A list of Helpful Hints reprinted from the January 2002 issue of *IDIS Live*.

The HOME Data Cleanup Team is eager to provide PJs with any assistance needed, including one-on-one help. Your Data Cleanup Team contact is listed at the bottom of the e-mail. Be sure to call your contact to tell HUD you have reviewed and corrected the yellow-highlighted activities. To assure that all PJs have a chance to discuss any issues or concerns with HUD, we will be personally contacting those PJs who don't contact us first.

Once again, our sincere thanks to all HOME PJs.

IDIS RELEASE NOTES FOR VERSION 6.5.2A

The following IDIS items were released to production as IDIS Version 6.5.2a on Friday morning, January 18, 2002.

Security Update

Problem: A number of IDIS users have reported that when they select Drawdown Option D01 to authorize a grantee, they see a list of entities that do not belong to them. This is a security violation.

Solution: Effective with Version 6.5.2a, IDIS processing has been modified so that if a user times out while viewing the Drawdown Authorization screen (CO4MD05), no other grantee will ever be able to inadvertently view the first grantee's data.

Subgrant Module

Problem: IDIS is assigning inconsistent recipient type values to state CDBG subgrants. This could prevent a user from being able to revise a draw from one activity to another (if the recipient type has been mislabeled) and may cause duplicate records when making changes in Activity Funding. While this problem was intended to be fixed with Version 6.5.2, it was inadvertently left out of the release

Solution: Shortly after the release of Version 6.5.2a, IDIS will run a one-time program for all IDIS grantees that populates the recipient type with the correct value. IDIS logic has been modified so that all newly created subgrants will consistently be assigned the correct recipient type.

GRANTEES SHOULD FOLLOW EXISTING GUIDELINES FOR 2001 CAPER REPORTING

Grantees of all four CPD entitlement programs, CDBG, HOME, ESG, and HOPWA are required to submit an annual performance report – referred to as the CAPER – within 90 days of the end of their program year. For example, grantees with a December 31, 2001 year end are required to submit their CAPER to HUD by March 31, 2002. Grantees are also required to share their CAPER findings with their local citizens.

For the 2001 Program Year, grantees should use the guidelines established in the Ramirez Memo which call for IDIS to be used “to track disbursements and report performance for the report year.”

The [Ramirez Memo](#) also provides for a program-by-program identification of all necessary [narrative requirements](#).

NEXT HOPWA FORMULA GRANTEES MEETING APRIL 24- 26 IN WASHINGTON, DC

The Office of HIV/AIDS and AIDS Housing of Washington (AHW) will be sponsoring the next HOPWA formula grantees meeting in Washington, DC on April 24-26. Mark your calendar now. Complete information will be posted to the [calendar section](#) of AHW's web site and to the [Technical Assistance Provider](#) page of the HOPWA web site.

TAU TOTALS FOR DECEMBER

A total of 592 calls were received by the TAU during the month of December, 2001. A little more than 1% percent of the calls (8) concerned non-IDIS problems, while 98.6 percent of the calls (584) were associated with IDIS. 57 callers (9.6%) left voice messages which were returned during IDIS business hours.

IDIS has the ability to run most of the [reports](#) necessary to generate summary accomplishments and performance information for the CAPER.

The IDIS Reference Manual contains a [Report Catalog](#) that provides a sample of each report and a detailed description of each field on the report.

Work has resumed on creating State CDBG reports in IDIS to eventually replace paper PER submissions. In the meantime, States should continue to follow the instructions in CPD Notice 94-23 (PER instructions), the original December 1996 State CAPER instructions memo, and (for narrative portions of the CAPER) the Ramirez memo.

OOPS! HERE'S THE CORRECT INFO ON PRESUMED BENEFIT

A number of alert grantees have pointed out that the new CDBG Guidance for cleaning up presumed benefit activities differs from what the Reference Manual says. The Reference Manual is wrong!

The correct information should say that grantees do not need to collect the number of beneficiaries that are low/mod, low-, and extremely low-income on the Direct Benefit Continued (MC02) screen. You still need to report the number benefiting from the activity and their racial breakout on the Direct Benefit (MA05) screen. For more background, read the [CDBG Guidance](#) for completing the MA05 screen.

Monitor the Progress of Your Data Cleanup Efforts...

LATEST HOPWA IDIS DATA REPORTS FOR 2000 AND 2001 ON THE WEB IN FEB.

The Office of HIV/AIDS housing is currently uploading [baseline data reports](#) for the 2000, 2001, and 2002 program years. These reports provide a snapshot of HOPWA IDIS beneficiary and financial data as of December 31, 2001 and should be used by grantees to verify that the activity data they have entered into IDIS is correct. These new reports supercede the reports dated September 30, 2001. We expect new reports for all grantees to be fully loaded by the end of February.

Grantees should verify the data in the reports against the HOPWA cleanup [checklist](#) posted on the web. In addition, grantees need to update and verify that each HOPWA activity listed is for report years 2000, 2001, and 2002 (if applicable). This information provides the HOPWA program office with a baseline of current activities for each of the active program years.

Grantees also need to check each activity against the data cleanup [priorities](#). This will help ensure that each activity meets the HOPWA guidelines. In brief, the priorities are:

1. Correct all Matrix Codes using 31, 31A, 31B, 31C, 31D only.
2. Review and update all activities with Underway or Completed Activity Status Codes.
3. Update Proposed and Actual Accomplishment Data on the Setup Activity (MA04) screen.
4. Update HOPWA Path Program screens.

The HOPWA web page contains more detailed information on the [data cleanup](#) effort.

Once grantees have completed their cleanup and verification, they should [e-mail](#) the HOPWA Data Cleanup Team. Include the grantee's name and state and "HOPWA Data Cleanup" in the subject line.

Cleanup Checklist

- ❑ Make certain that the activities included in the baseline activities represent the year-end activities for 2000 and 2001. Activities should correspond with the CAPER report period.
- ❑ Use only the matrix codes in the 31 series (31A, 31B, 31C, 31D). Do not use matrix code "31" alone which is used to identify projects
- ❑ Enter proposed accomplishment data at the time the activity is set up in IDIS. Completed non-administrative activities should have proposed and actual accomplishment data.
- ❑ For accomplishment data, enter the type. The type of data should be classified as "people" (code 1), "housing units" (code 10), or "organizations" (code 9). Admin activities should be kept blank.
- ❑ Avoid using "Support Services Only" as a HOPWA path screen. Instead, use "Facilities Based with Supportive Services."
- ❑ Make sure that the status is correct for your Underway activities. Once all activity funds have been committed and drawn, within 90 days you should enter "actual" accomplishment information into IDIS and close the activity by changing its status to "Complete."
- ❑ Take advantage of the services of the Technical Assistance Unit (TAU) at 1-800-273-2573 for assistance with technical IDIS issues or [e-mail](#) the IDIS Data Cleanup team.

For Your Information:

Your IDIS contact is:

Vivian Baldwin 202-708-0614, x4693
e-mail: Vivian_C_Baldwin@hud.gov

Your Consolidated/C2020 Plan contact is:

Sheila Burr 202-708-0614, x4686
e-mail: Sheila_H_Burr@hud.gov

Mail: HUD/CPD
Systems Development and Evaluation Division
451 Seventh St., S.W., Room 7226
Washington, DC 20410

For technical information, contact your field office or the CPD
Technical Assistance Unit at 1-800-273-2573 or
idis_help@hud.gov.

To have your IDIS ID and password reset, call HUD Security at
202-708-3300.

For Web390 ID and password information, contact your local
HUD field office or the TAU at 1-800-273-2573

**IDIS WILL BE AVAILABLE ON THE FOLLOWING
FEDERAL HOLIDAY:**

February 18 President's Day
THE TAU WILL BE CLOSED!

**NEW HUD CONTACTS FOR
C2020 CON PLAN SOFTWARE**

With the retirement of Gene Hix, Gail Scott and Eric Stout have assumed responsibility for C2020 Consolidated Plan software. Grantees who have questions about C2020 software, should contact Gail or Eric.

Gail Scott, gail_g_scott@hud.gov, 202-708-4210,
x8061

Eric Stout, eric_m_stout@hud.gov 202-708-0614
x6261