

# IDIS LIVE

...for the Integrated Disbursement and Information System

U.S. Department of Housing and Urban Development

Office of Community Planning and Development

## VER 7.0 RELEASE ON DEC. 13 UPDATES IDIS SCREENS & REPORTS FOR NEW RACE/ETHNICITY CLASSIFICATIONS

As described in the [last two issues](#) of IDIS Live, Version 7.0 of IDIS will implement new data collection requirements for race and ethnicity data mandated by the Office of Management and Budget (OMB).

Grantees will have the ability to enter racial/ethnicity data about activity beneficiaries into a new Hispanic ethnicity category and ten racial categories.

IDIS data entry and display screens for activities created before Version 7.0 will show any existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.

For activities that existed prior to Version 7.0, IDIS will copy any value in the Hispanic race category to the new Hispanic ethnic category. Grantees will have the option of revising any existing racial data for "Asian/Pacific Islander" and "Hispanic" until March 31, 2004.

Although IDIS collects racial and ethnicity data on eight different screens, there are just three new *flavors* of screens users will need to complete:

- The CDBG Direct Benefit (MA05/MH55), the ESG Racial/Ethnic Characteristics (ME07/ME57) and the HOPWA Racial/Ethnic Characteristics (MP12/MP62) all request data in a similar format. IDIS will display an error message if the "# Total" racial breakdown does not equal the number of beneficiaries at the top of the screen. This field varies by program:

- CDBG Total Number Benefiting from Activity
- ESG Average Number Served Yearly
- HOPW Total Number of Persons Receiving Housing Assistance

Additionally, IDIS verifies that the number entered in the "# Hispanic" column is not greater than the "# Total" in the corresponding racial column and the "Total # Hispanic" is not greater than the "Total" racial count.

12/02/02 08:26	DIRECT BENEFIT		C04MA05
GRANTEE ACTIVITY NUMBER: 023482		HUD ACTIVITY NUMBER: 00000001675	
ACTIVITY NAME: WEST SQUARE MANOR - CDBG			
COUNTS BY HOUSEHOLDS OR PERSONS? (H/P): H		# FEMALE-HEADED HH: _____	
TOTAL NUMBER BENEFITTING FROM ACTIVITY: 124			
	WHITE:	# TOTAL	# HISPANIC
	BLACK/AFRICAN AMERICAN:	107	_____
	ASIAN:	_____	_____
	AMERICAN INDIAN/ALASKAN NATIVE:	_____	_____
	NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER:	_____	_____
	AMERICAN INDIAN/ALASKAN NATIVE & WHITE:	_____	_____
	ASIAN & WHITE:	_____	_____
	BLACK/AFRICAN AMERICAN & WHITE:	_____	_____
	AM. INDIAN/ALASKAN NATIVE & BLACK/AFRICAN AM.:	_____	_____
	OTHER MULTI-RACIAL:	_____	_____
	ASIAN/PACIFIC ISLANDER:	_____	_____
	HISPANIC:	17	17
	TOTAL:	124	17
PRESUMED BENEFIT? (Y/N): N			
NATURE/LOCATION? (Y/N): N			
F3 = VALDT F4 = MAIN F5 = PROJ F7 = PREV F8 = NEXT F9 = SAVE			

Race/Ethnicity Screen Type 1

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- Effective with Version 7.0, CDBG grantees need to complete a separate CDBG Displacement screen (MC03/MC53) for *each* census tract and city that is included in an activity involving displacement, i.e., any household, business, farm, or nonprofit organization that moved permanently from real property as a direct result of rehabilitation, demolition, or acquisition of any CDBG-assisted activity.

(You indicate an activity includes displacement when you X the “Displacement” field on the CDBG Activity screen, C04MC01.)

A displacement activity must contain at least one Census Tract Displacement screen where you indicate the number of persons by racial category who were displaced by the activity and the number of persons who remain in the same Census Tract after relocation. If persons from one or more racial categories were relocated to another Census Tract or city, you will need to complete one or more additional Displacement screens.

When a displacement activity involves more than one Census Tract or city, complete information for the first Census Tract or city, press <F9> to save the data, then press <F11> to insert an additional Census Tract or city.

A new field on the top right of the screen displays the number of existing Displacement screens for this activity. (Use the <F18> key to scroll forward; <F17> to scroll backwards.) Two new columns to the far right of the racial/ethnic data will display the cumulative totals for *all* Displacement screens for this activity. This value will automatically update when you press <F9> to save data on any Displacement screen for the activity.

Edits have been added to the Displacement screen so that for a Census Tract’s racial category, the value for “Remain In” must not be greater than “Displaced From.” Second, taking into account *all* Census Tracts and city records for an activity, the sum of “Remain In” and “Relocated To” for a racial category must equal “Displaced From” for that racial category.

If any fields are *out of balance* after you press <F9> or <Enter>, IDIS will display a new screen, CDBG Displacement Balance Resolution screen (C04MC07) that shows “Displaced From,”

“Remain In,” and “Relocated To” counts by Census Tract or City for a single racial category.

R A C E		-DISPLACD- TOTL# #HISP	-REMAIN IN- TOTL# #HISP	-RELCTD TO- TOTL# #HISP	-ACTIVITY- TOT# #HISP
WHITE:	4	1	1		4 / 1
BLACK/AFRICAN AMERICAN:	10		1		10 / 0
ASIAN:	2				2 / 0
AM INDIAN/ALASKAN NATIVE:					0 / 0
NAT. HAWAIIAN/OTH. PACIFIC ISL:					0 / 0
AM. INDIAN/ALASKAN NAT. & WHITE:					0 / 0
ASIAN & WHITE:	1	1			1 / 1
BLACK/AFRICAN AM. & WHITE:					0 / 0
AM. INDIAN/ALSKN & BLCK/AFRCN:					0 / 0
OTHER MULTI-RACIAL:					0 / 0
ASIAN/PACIFIC ISLANDER:					0 / 0
HISPANIC:	2	2	1	1	2 / 2

Race/Ethnicity Screen Type 2

CENSUS TRACT OR CITY	-DISPLACD FR- TOTAL# #HISP	-REMAIN IN- TOTAL# #HISP	-RELCTD TO- TOTAL# #HISP
0001.00	4	1	
0002.00			
CITY			1
GATES			
GREECE			1
HENRIETTA			
OUT OF STATE			
TOTALS:	0004	0001	0002

- If you indicate a unit is vacant in the “Unit Ocup” field on the HOME Rental Completion Characteristic Data (MH13/MH63), Single Address Completion Characteristic Data (MH14/MH64), or Multi-Address Characteristic Data (MH13/MH63), you no longer need any data in the fields to the right of “Unit Ocup.” (Of course, you still need to come back and update the activity with actual beneficiary data once the unit is occupied.)

These two screens and the Tenant-Based Rental Setup (MH06/MH56) now contain a new “Hisp” column. PJs should enter “Y” if the occupant is of Hispanic ethnicity. Otherwise, enter “N.” For activities that existed prior to IDIS Version 7.0, a “Y” appears in this field if the tenant was identified in the Hispanic racial category. For activities that existed prior to IDIS Version 7.0, an “X” appears in this field if the occupant was identified in any racial category other than Hispanic.

The "Race" column now uses a two-character code to represent race instead of a one-character code. PJs need to type the number that corresponds to the race of the household receiving assistance or press <F1> to select the race from a list.

- 11 White
- 12 Black/African American
- 13 Asian
- 14 American Indian/Alaskan Native
- 15 Native Hawaiian/Other Pacific Islander
- 16 American Indian/Alaskan Native & White
- 17 Asian & White
- 18 Black/African American & White
- 19 American Indian/Alaskan Native & Black African American
- 20 Other Multi-Racial
- 21 Asian/Pacific Islander\*
- 22 Hispanic\*

## WATCH FOR NEW HOME SETUP AND COMPLETION FORMS

The HOME program office is currently revising its setup and completion forms, now in HUDCLIPS, so that they reflect the new race and ethnicity changes coming to IDIS this December and use terminology consistent with the IDIS screens. PJs are no longer required to submit these forms to HUD since the information is entered directly into IDIS. For your convenience, once revised, the new forms (no longer official HUD forms) will be published in Chapter 9 of the IDIS Reference Manual. We are providing the revised forms as a convenience since many PJs and their subrecipients still use the forms internally. Once they are available in the reference manual, the old CMIS HUD forms 40094, 40096, 40097, 40096-M, 40095, 40095-B, 40094-B will no longer be available on HUDCLIPS.

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12/02/02          RENTAL COMPLETION          C04MH13
08:34             CHARACTERISTIC DATA

GRANTEE ACTIVITY NBR: 000189          HUD ACTIVITY NUMBER: 00000005537

ACTIVITY NAME: CRA: CASA RAMPART

STREET ADDRESS: 401, 512 S. RAMPART
CITY: LOS ANGELES          STATE: CA  ZIP: 90057 -

UNIT  BDRM  UNIT  TEN  SUBS      TOT  %      SIZE  HEAD  RENT
NUMBER CODE  OCUP  CONT  AMT      RENT  MED  HISP  RACE  HHLD  HHLD  ASST
102   1     1     296          296  2   X   21   1     1     4
201   0     1     296          296  2   X   21   2     2     4
202   0     1     296          296  2   Y   22   2     5     4
203   0     1     296          296  2   Y   22   2     5     4
204   0     9          -          -    -   -   -    -    -    -
205   0     1     296          296  2   X   12   1     1     4
206   0     1     296          296  2   Y   22   1     1     4
207   0     1     296          296  2   X   21   2     2     4

ADDITIONAL UNITS AT THIS ADDRESS? -  SELECT ANOTHER ADDRESS? -

F1 = HELP  F3 = VALDT  F4 = MAIN MENU  F5 = PROJ INFO
F7 = PREV  F8 = NEXT   F9 = SAVE      F17 = UP      F18 = DOWN

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Race/Ethnicity Screen Type 3

\* You may not select this race code for activities created after Version 7.0. Grantees will have the option of revising any existing racial data for "Asian/Pacific Islander" and "Hispanic" until March 31, 2004.

# COMMENTS ROLL IN ON HOME ROCS! PROPOSED SCREEN REDESIGNS

HOME ROCS! (Re-engineering Our Computer System) is the HOME Program Office's model of a smarter and easier-to-use IDIS. The model includes screens and screen flows redesigned to ensure that the entry of HOME data is clean, accurate and complete.

Since September, the HOME ROCS! Team has been posting modules to the HOME web site of how they'd like to redesign the IDIS HOME screens by HOME activity tenure type.

Because we are optimistic about getting funding in next year's budget to redo the HOME screens, we need our field office and PJ users to tell us if we got the redesign right. By soliciting comments now, we can incorporate the recommendations into the redesign and be ready to start development as soon as the funds are approved.

To date, seven modules of proposed screens have been posted to the [HOME](#) web page:

- HOME Menu
- Homeowner Rehab – Single Address
- Tenant-Based Rental Assistance (TBRA)
- Rental – Single Address (Non-CHDO)
- Homebuyer – Single Address (Non-CHDO)
- CHDO Loan Activity
- Multi-Address Activity

The HOME ROCS! Team requested feedback from HOME PJs and field reps – the folks who live and work with IDIS everyday. Your response has been tremendous and overwhelmingly favorable. Here are just a few of the many comments that have been received:

*“I like the changes, they will make the screens easier to complete, especially for those new to the system.”*

*“The changes will make data input easier and save time by not needing to go back to the*

*general menu each time one needs to revise or update information.”*

*“I like the separation of types of HOME activities and separation of data entry within an activity.”*

*“The Homeowner Rehab screens are greatly improved, especially with the decreased need for duplicate inputting. Good job!”*

*“The changes will be great on my job. I won't have to enter information over and over. It will automatically carry over or it is automatically entered from previous information that I enter.”*

The HOME ROCS! Team personally responds to everyone who comments to let folks know we received their feedback. We review all questions as a team to determine the best answer, and then send the reviewer a response. (Sometime, a question requires research so it takes us a little longer before we can answer it.)

We also review comments related to our proposed screen redesigns to determine if we should include the user's suggestion. HOME ROCS! is currently compiling a master list of answers to the questions, issues, and suggestions that PJs and field staff raised and will post these responses to the HOME web site soon. Based on your comments and suggestions, HOME ROCS! plans to revise a number of their proposed screen redesigns to accommodate new fields users have requested.

If you have already reviewed the proposed HOME screen redesigns and sent your feedback to HOME ROCS!, we greatly appreciate your effort. If you have not yet reviewed the proposed screen redesigns, there's still a few weeks left to do so.

# CDBG DATA CLEANUP

## STEP 3 IS UNDERWAY

Step 3 of the CDBG data cleanup initiative asks grantees to correct data previously entered in IDIS. As with Steps 1 and 2, the data selected for review includes all activities with a status of Funds Budgeted and Underway, as well as all activities completed on or after October 1, 1998. Every other Friday starting Nov. 22, CPD will provide grantees with an [updated workbook](#) that lists CDBG activities with missing accomplishment data (Step 1), activities with national objective codes that do not match matrix codes (Step 2), and activities with incorrect data (Step 3). The completion date for Step 3 is January 10, 2003. For those grantees that have not already done so, Steps 1 and 2 should also be completed by that date.

Grantees should check their worksheets regularly to ensure their data stays "clean" as new activities are added to IDIS and other activities are completed. Grantees should refer to the [Guidance for Reporting CDBG Accomplishments in IDIS](#) for assistance in completing Step 3. Grantees will find this guidance prepared by the CDBG Program Office essential in determining whether their performance data is complete and accurate. In addition, the Community Development web site contains [help](#) on how to interpret each of the three worksheets contained in each workbook.

The Office of Block Grant Assistance thanks grantees for their commitment to this most important effort.

### FOR YOUR INFORMATION

**Your IDIS contact is:**

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**Your data cleanup contact is:**

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**Your Consolidated/C2020 Plan contacts are:**

Technical Help  
Mark Mitchell 202-401-3797

Help with Electronic Submission of Conplans and Data Disks  
(the preferred method of transmission)  
Sharon Becton 202-401-3365

Street Address: 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](mailto:idis_help@hud.gov).

To have your IDIS ID and password reset, call HUD Security at 202-708-3300, opt. 3 or 202-401-2637.

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