A gray rectangular box containing the word "Chapter" in a bold, black, sans-serif font at the top. Below it, the number "15" is written in a very large, white, bold, sans-serif font.

Chapter 15: HUD Grantee Local Administrator, Field Office, and HQ Options

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15.1.1 Overview

This chapter describes the options available to HUD HQ personnel, Field Office System Administrators, and Grantee Local Administrators on the IDIS Utility Menu. Most Field Office System Administrators and Grantee Local Administrators see these options listed on the IDIS Utilities Menu; however, some screens can only be accessed by designated HQ personnel.

IDIS HQ Menu Options:

Option 1 Grantee ID/Exceptions	Allows designated HQ personnel to record an address, tax number, phone numbers, and other data to identify an organization to IDIS.
Option 02 Program Contacts	Allows designated HQ personnel to enter grant contact information in twelve different categories for key personnel associated with the various CPD formula programs.
Option 03 User Information/ Profile	Allows designated HUD personnel to identify grantee personnel to IDIS and indicate which IDIS functions each is authorized to access. The HUD HQ System Administrator creates profiles for new IDIS users. However, Grantee Local Administrators can modify a grantee's access to one or more IDIS areas or totally block a grantee from accessing IDIS.
Option 4 Grantee Table Maintenance	Allows Grantee Administrators to create and maintain the CDBG CDFI and Strategy Area tables. Both tables are used in tracking data relating to the CDBG program and are discussed in Chapter 8 of this Manual.
Option 5 Conversion Request	This option is not available to Field Offices and Grantee Local Administrators. It lets HUD HQ personnel initiate, hold, or cancel a conversion request for grantee data to be converted into IDIS.
Option 6 Conversion Status	This option is not available to Field Offices and Grantee Local Administrators. It lets HUD HQ personnel check on the conversion status of their conversion request.
Option 7 Block/Unblock Grantee	This option is not available to Field Offices and Grantee Local Administrators. This screen allows authorized HUD headquarters personnel to block a grantee from IDIS processing (or unblock a blocked grantee and make the grantee active again).
Option 8 Block/Unblock Grant	This option is not available to Field Offices and Grantee Local Administrators. This screen allows authorized HUD headquarters personnel to block (and unblock) a grantee from obtaining a grant

Option 9 Consolidated Plan Load Status	This option is not available to Field Offices and Grantee Local Administrators. It lets HUD HQ personnel check on the status of their data upload.
Option 10 Reserved	Reserved for future use.
Option 11 IDIS News	Option 11 on the Utilities Menu lets users view IDIS News messages. This section also describes IDIS Main Menu Option L, which lets designated HQ users post messages to IDIS News.
Option 12 LOCCS Interface	This option is reserved for future use.
Option 13 Match Liability	This option allows the HUD HQ System Administrator or Field Office Administrators to establish a grantee's HOME match obligation for a given fiscal year, 1991 and on. The match obligations entered on this screen are used in the calculation of the HOME Match Liability Report (C04PR33).
Option 14 Report Period Dates	This option allows Field Office Administrators to maintain the starting and ending dates for a grantee's Plan Year.

15.2 Selecting an Option on the Utilities Menu

SCREEN: Utilities Menu (C04MM01)

PURPOSE: This screen allows HUD HQ staff, Field Office System Administrators, and Grantee Local Administrators to select an option from the Utilities Menu. Remember that not all users will have access to all options.

How To Complete This Screen:

- Type the two-digit number for the option you want to use, then press <Enter>.



```
05/04/00      THE INTEGRATED DISBURSEMENT AND INFORMATION SYSTEM      C04MM01
13:51:09

                                UTILITIES MENU

                                01  GRANTEE ID/EXCEPTIONS
                                02  PROGRAM CONTACTS
                                03  USER INFORMATION/PROFILE
                                04  TABLE MAINTENANCE
                                05  CONVERSION REQUEST
                                06  CONVERSION STATUS
                                07  BLOCK/UNBLOCK GRANTEES
                                08  BLOCK/UNBLOCK GRANTS
                                09  CPDTS DATA UPLOAD STATUS
                                10  RESERVED
                                11  IDIS NEWS
                                12  LOCCS INTERFACE
                                13  MATCH LIABILITY
                                14  REPORTS PERIOD DATES

TYPE SELECTION AND PRESS ENTER   F 00

F4 = MAIN MENU   F7 = PREU
```

15.3 Maintaining Grantees

15.3.1 Identifying a Grantee to Add or View (C04MU07)

SCREEN: **Grantee Inquire/Update/Add** **(C04MU07)**

PURPOSE: This screen allows HUD HQ staff, Field Office System Administrators, and Grantee Local Administrators to identify a grantee organization to IDIS by the Unit of Government code and Unit of Government Number assigned to the grantee.

How To Complete This Screen:



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

When you have completed the fields on this screen, press <Enter> to save the information and go to the Grantee Inquire/Update/Add Screen (C04MU06).

UOG CODE

1. Type the grantee's Unit of Government Code.

UOG NUMBER

2. To view or update grantee information, type the grantee's Unit of Government number.

To add a grantee (HUD Field Offices and HQ), leave this field blank.

```

03/03/99  16:14:46          GRANTEE INQUIRE/UPDATE/ADD          C04MU07

UOG CODE:  _____

      TO INQUIRE OR UPDATE ENTER UOG NUMBER;  TO ADD LEAVE BLANK.

UOG NUMBER:  _____

F1 = HELP   F4 = MAIN MENU   ENTER = PROCESS
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
UOG Code	✓	What is the grantee's Unit of Government code?	6 numeric characters
UOG Number		To view or update grantee information, enter the grantee's Unit of Government number. For HUD Field Offices and HQ, if you want to add a grantee, leave this field blank.	5 numeric characters
Press <Enter> to save the information and go to the Grantee Inquire/Update/Add Screen (C04MU06).			

15.3.2 Adding or Updating Grantee Information (C04MU06)

SCREEN: Grantee Inquire/Update/Add Screen (C04MU06)

PURPOSE: This screen allows HQ personnel and Field Office System Administrators to add new grantees to IDIS, to view or update grantee information, and to *block* grantees or subgrantees from accessing IDIS. Grantee Local Administrators use this screen to view or update grantee information and to *block* grantees or subgrantees from accessing IDIS. (They cannot add new grantees to IDIS.)

How To Complete This Screen:



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

When you have completed the fields on this screen, press <Enter> to display the Associate Grant(s) with Grantee Screen (C04MU17).

- | | |
|--|--|
| NAME | 1. Type the grantee's organization name. |
| REGION | 2. Type the grantee's HUD region number. |
| FIELD OFFICE | 3. Type the grantee's assigned Field Office number. |
| ADDRESS | 4. Type the grantee's office address, using up to 3 lines. |
| CITY/STATE/ZIP | 5. Type the grantee's city, state, and Zipcode. |
| CONTACT NAME/
TELEPHONE/FAX | 6. Type the first name, middle initial, and last name of the grantee's contact person. |
| | 7. Type the contact person's phone number, including the area code. |
| | 8. Type the contact person's FAX number, including the area code. |
| GRANTEE IS NON-
PROFIT? | 9. Type Y if the grantee is a non-profit organization; otherwise, type N . |
| BLOCK GRANTEE? | 10. Type Y to block this grantee from using IDIS.
Type N to give this grantee access to IDIS. |

LOCCS BANK ACCOUNT STATUS FOR:

12. Type **X** next to Master if the grantee has a Master/Default bank account in LOCCS; or type **X** next to each program for which the grantee has a bank account established in LOCCS.

HOME

CDBG

HOPWA

ESG

ORG TYPE

13. Type **X** next to the grantee's organization type:

LG Local government

ST State

SA State agency

OT Other

ENTLD FLAG

14. Indicate whether this grantee is an *entitlement* grantee that receives a grant directly from HUD.

States Are entitlement grantees

Local governments May be entitlement grantees

State agencies and Other Are not entitlement grantees

Type **Y** if the grantee is an entitlement grantee and receives grants directly from HUD.

Type **N** if the grantee is not an entitlement grantee.

CHDO FLAG

15. Type **Y** if the grantee is a CHDO subgrantee under the HOME program.

A CHDO is a subgrantee with special rules setup by the HOME program. State, local government, and state agency organizations *cannot* be CHDO subgrantees. Only, *Other* organizations can be CHDO subgrantees.

Type **N** if the grantee is not a CHDO subgrantee.

CDBG SMALL CITY FLAG

16. Type **Y** if the grantee receives a CDBG subgrant from a state or a HUD administered CDBG state (NY and HI); otherwise, type **N**.

**CDBG EXCEPTION
PERCENTAGE**

17. If the grantee is a CDBG exception grantee, type the exception percentage for the grant.

HUD notifies CDBG Grantees that they qualify under the *exception criteria* and provides the exception percentage (less than 51%). Ordinarily, to receive a CDBG grant, 51% or more residents in the populated block groups in a community's jurisdiction must be low/mod income. Because so many activities fall under the national objective of benefiting low/mod income residents on an area basis, the statute and regulations provide for these communities to use a percentage other than 51% for this purpose.

**PROJECT AMEND
THRESHOLD
PERCENTAGE**

18. You can establish an Over and Under threshold percentage that controls the maximum percent a project's total dollars can be increased or decreased when a grantee amends project funding on the Amendment to the Plan Project Screen (C04MK05).

(The project's total dollar amount is the estimated sum of the CDBG, ESG, HOME, and HOPWA grants funding the project.)

If the threshold is exceeded, the grantee sees a warning message.

OVER (Increase): Type the maximum percent a project's total can be increased.

UNDER (Decrease): Type the maximum percent a project's total can be decreased.

```

09/20/02 15:41:08          GRANTEE INQUIRE/UPDATE/ADD          C04MU06

NAME: MARYLAND

UOG CODE: 240001          UOG NUMBER: 00001 REGION: 03  FIELD OFFICE: 06

ADDRESS LINE 1: 100 COMMUNITY PLACE
LINE 2: ROOM #2.611
LINE 3: _____
CITY: CROWNSVILLE          STATE: MD  ZIP: 21032 - 2023
CONTACT NAME: _____
                FIRST              M  LAST
TELEPHONE: ___ - ___ - _____  FAX NUMBER: ___ - ___ - _____

CURRENT PROG YEAR  START: 2002 / 07 / 01  END: 2003 / 06 / 30  (MAIN MENU)
                                                (F14 TO EDIT)

GRANTEE IS NON-PROFIT? : N  BLOCK GRANTEE? : N
LOCCS BANK ACCOUNT STATUS FOR: MASTER Y  HOME _  CDBG _  HOPWA _  ESG _
ORG TYPE: LG _  ST X  SA _  OT _
ENTLD FLAG (Y/N) Y  CHDO FLAG (Y/N) N  CDBG SMALL CITY FLAG (Y/N) N
CDBG EXCEPTION PERCENTAGE, IF ANY: ___
PROJECT AMEND THRESHOLD PERCENTAGE:  OVER: 50.0  UNDER: 50.0

F4 = MAIN MENU  F9 = SAVE  ENTER = PROCESS
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Name	✓	Type the grantee's organization name.	70 alphanumeric characters
UOG Code		The Grantee's UOG code.	Protected field
UOG Number		The Grantee's UOG Number.	Protected field
Region	✓	Type the HUD Region responsible for the grantee.	2 numeric characters
Field Office	✓	Type the HUD Field Office Number responsible for the grantee.	2 numeric characters
Address	✓	Type the grantee's office address, using up to 3 lines.	3 lines, 35 alphanumeric characters each

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
City, State, Zip	✓	Type the grantee's city, state, and Zipcode.	Alphanumeric characters: City = 15 State = 2 Zip = 9 numeric
Contact Name/ Telephone/FAX		Type the first name, middle initial, and last name of the grantee's contact person. Type the contact person's phone number, including the area code. Type the contact person's FAX number, including the area code.	First Name = 20 Initial = 1 Last Name = 30
Current ProgrYear		The starting and ending date of the current program year. Field Office Administrators maintain these dates using Option F15, Report Period Dates.	Protected Field
Grantee is Non-Profit?	✓	Type Y if the grantee is a non-profit organization; otherwise, type N .	Y or N
Block Grantee?	✓	This field allows Grantee Local Administrators to block a Grantee's access to IDIS (or restore access if the Administrator previously blocked it.) Type Y to block this grantee from using IDIS. Type N to give this grantee access to IDIS.	Y or N
LOCCS Bank Account Status for:		Type X next to Master if the grantee has a Master/Default bank account in LOCCS; or type X next to each program for which the grantee has a bank account established in LOCCS. HOME CDBG HOPWA ESG	X
Organization Type	✓	Type X next to the grantee's organization type: LG Local government ST State SA State agency OT Other	LG, ST, SA, or OT

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Entitlement Flag	✓	<p>Indicate whether this grantee is an entitlement grantee that receives a grant directly from HUD.</p> <ul style="list-style-type: none"> States are entitlement grantees Local governments <i>may</i> be entitlement grantees State agencies and Other <i>are not</i> entitlement grantees.) <p>Y The grantee is an entitlement grantee and receives grants directly from HUD.</p> <p>N The grantee is not an entitlement grantee.</p>	Y or N
CHDO Flag	✓	<p>Type Y if the grantee is a CHDO subgrantee under the HOME program. (A CHDO is a subgrantee with special rules setup by the HOME program. State, local government, and state agency organizations <i>cannot</i> be CHDO subgrantees. Only, <i>Other</i> organizations can be CHDO subgrantees.</p> <p>Type N if the grantee is not a CHDO subgrantee.</p>	Y or N
CDBG Small City Flag	✓	Type Y if the grantee receives a CDBG subgrant from a state or a HUD administered CDBG state (NY and HI); otherwise, type N .	Y or N
CDBG Exception Percentage, if Any	✓	If the grantee is a CDBG exception grantee, type the exception percentage for the grant.	3 numeric characters

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Project Amend Threshold Percentage	✓	<p>You can establish an Over and Under threshold percentage that controls the maximum percent a project's total can be increased or decreased when a grantee amends project funding on the Amendment to the Plan Project Screen (C04MK05).</p> <p>(The project's total amount is the estimated sum of the CDBG, ESG, HOME, and HOPWA grants funding the project.)</p> <p>If the threshold is exceeded, the grantee see a warning message showing the percent the changed project totals have exceeded the threshold, either over or under.</p> <p>OVER (Increase): Type the maximum percent a project's dollar total can be increased.</p> <p>UNDER (Decrease): Type the maximum percent a project's dollar total can be decreased.</p>	nn.nn
Press <Enter> to save the information and display the Associate Grant(s) with Grantee Screen (C04MU17).			

15.4 Associating Grant(s) with Grantees (C04MU17)

SCREEN: Associate Grant(s) with Grantee (C04MU17)

PURPOSE: This screen allows the Grantee Local Administrator and Field Office System Administrators to associate one or more CPD formula program grants with the grantee who was identified on the previous screen, Grantee Inquire/Update/Add (C04MU07). Note that IDIS will verify that the grant number(s) you enter are valid. However, once entered, IDIS will not display any valid numbers already entered on this screen the next time you view it. Field Office System Administrators can use Option 08, Block/Unblock Grants, to view all grants currently assigned to a grantee.

How To Complete This Screen:



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

When you have completed the fields on this screen, press <F9> to save the information and <F7> to return to the Grantee Inquire/Update/Add screen (C04MU06).

PROGRAM CODE

1. Type the letter that corresponds to the CPD formula grant program that funded the grant.

B CDBG

S ESG

M HOME

H HOPWA

GRANT NUMBER

2. Type the grant number assigned to this grant by the CPD program.
-

05/04/00 14:24:37 ASSOCIATE GRANT(S) WITH GRANTEE C04MU17

NAME: MARYLAND

UOG CODE: 240001 UOG NUMBER: 00001
 REGION: 03 FIELD OFFICE:

OPTIONAL ENTRIES. ENTER PROGRAM CODE AND GRANT NUMBER

PROGRAM CODE	GRANT NUMBER
-	_____
-	_____
-	_____
-	_____
-	_____
-	_____
-	_____
-	_____
-	_____
-	_____

F7 = PREV F9 = SAVE

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Name		The grantee's organization name.	Protected Field
UOG Code		The Grantee's UOG code.	Protected Field
UOG Number		The Grantee's UOG Number.	Protected Field
Region		The HUD Region responsible for the grantee.	Protected Field
Field Office		The HUD Field Office Number responsible for the grantee.	Protected Field
Program Code	✓	Type the letter that corresponds to the CPD formula grant program that funded the grant. B CDBG S ESG M HOME H HOPWA	B, S, M, or H

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grant Number	✓	Type the grant number(s) assigned to this grant by the CPD program.	13 alphanumeric characters
<p style="text-align: center;">Press <F9> to save the information and <F7> to return to the Grantee Inquire/Update/Add screen (C04MU06).</p>			

15.5 Adding and Maintaining Program Contacts

IDIS lets grantees maintain program contact information in twelve different categories for key personnel associated with the various CPD formula programs.

You use a sequence of two screens to identify each program contact:

- The first screen identifies the contact's area of responsibility
- The second screen contains address and phone information for the contact or "Other."

To identify multiple program contacts, repeat the process starting at the Utilities Menu.

15.5.1 Selecting a Program Contact's Area of Responsibility (C04MU08)

SCREEN: Program Contacts screen (C04MU08)

PURPOSE: On this screen, you define the contact person's area of responsibility.

How To Complete This Screen:



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

When you have completed the fields on this screen, press <Enter> to go to the Program Contacts screen (C04MU09).

ENTER (X) FOR RESPONSIBLE PERSON(S)

1. Type **X** next to one of the following areas of responsibility. If no category fits the contact, select **Other**; then type a description of the category in the next field.

CDBG PROGRAM DIRECTOR

CDBG CONTACT

ESG DIRECTOR/ADMINISTRATOR

ESG CONTACT

HOPWA PROGRAM DIRECTOR

HOPWA CONTACT

HOME PROGRAM DIRECTOR

HOME CONTACT

CEO

CONSOLIDATED PLAN CONTACT

ESMA (HOPWA)

OTHER

After you press **<Enter>**, the system displays the Program Contact Information Screen (C04MU09). Directions for completing this screen are provided in the next section.

OTHER DESCRIPTION

2. If you entered **X** in the Other field, enter a short description of the area of responsibility.

PROGRAM CONTACTS		C04MU08
GRANTEE NAME: BERKS COUNTY		
ENTER (X) FOR RESPONSIBLE PERSON(S)		
=	CDBG PROGRAM DIRECTOR	- CDBG CONTACT
-	ESG DIRECTOR/ADMINISTRATOR	- ESG CONTACT
-	HOPWA PROGRAM DIRECTOR	- HOPWA CONTACT
-	HOME PROGRAM DIRECTOR	- HOME CONTACT
-	CEO	- CONSOLIDATED PLAN CONTACT
-	ESMA (HOPWA)	- OTHER
		OTHER DESCRIPTION: _____
F4 = MAIN MENU F9 = SAUF		

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Name		The Grantee currently logged into IDIS.	Protected field
Enter (X) For Responsible Person(s)	✓	<p>Type X next to one of the following areas of responsibility. If no category fits the contact, select Other; then type a description of the category in the next field.</p> <p>Type only one X at a time.</p> <p>CDBG PROGRAM DIRECTOR CDBG CONTACT ESG DIRECTOR/ADMINISTRATOR ESG CONTACT HOPWA PROGRAM DIRECTOR HOPWA CONTACT HOME PROGRAM DIRECTOR HOME CONTACT CEO CONSOLIDATED PLAN CONTACT ESMA (HOPWA) OTHER</p>	X
Other Description		If you entered X in the Other field, type a short description of the area of responsibility.	25 alphanumeric characters
Press <Enter> to save the information and display the Program Contacts screen (C04MU09).			

11:33:59	PROGRAM CONTACTS	C04MU09
GRANTEE NAME: BERKS COUNTY		
RESPONSIBLE PERSON FOR: CDBG PROGRAM DIRECTOR		
SALUTATION: MR		
CONTACT: KENNETH	L PICK	
FIRST	M LAST	
ADDRESS:		

	COUNTY SERVICES CENTER - 14TH FLOOR	
	633 COURT STREET	
CITY: READING	STATE: PA	ZIP: 19601
PHONE: 610 4786325	FAX: 610 4786326	INTERNET: _____
F4 = MAIN MENU F7 = PREV F9 = SAVE		

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Name		The Grantee currently logged into IDIS.	Protected field
Salutation		Type the appropriate salutation (such as Mr., Mrs., Ms.) for the contact.	5 alphanumeric characters
Contact		Type the first name, middle initial, and last name of the contact.	Alphanumeric characters: FN = 20 MI = 1 LN = 30
Address		Type the contact's street address, using up to three lines.	35 alphanumeric characters per line
City/State/Zip		Type the contact's city, state, and Zipcode.	Alphanumeric characters: City = 20 State = 1 Zip = 30

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Phone		Type the contact's phone number, including the area code.	10 numeric characters
Fax		Type the contact's FAX number, including the area code.	10 numeric characters
Internet		This prompt contains two fields: one three characters and the other seven characters. If the contact's e-mail address will fit into this limited space, you may enter it. Otherwise, these fields are too limited and you will have to save this information elsewhere.	10 numeric characters
Press <Enter> to save the information and return to the Utilities Menu.			

15.6 Creating & Maintaining User Profiles

This series of four screens allows the HUD HQ System Administrator, Field Office System Administrators, and Grantee Local Administrators to identify which IDIS functions an IDIS user is authorized to use.

The **HUD HQ System Administrator** uses these screens (after receiving completed access forms) to give *new* users to IDIS their initial access privileges. These users may be HUD HQ staff, HUD Field Office staff, or Grantees.

Field Office System Administrators and **Grantee Local Administrators** can modify access privileges established by the HUD HQ System Administrator.

Complete Four Screens to Give a User IDIS Access Privileges:

User Information Screen (C04MU05)	Identifies the user to IDIS with a unique six character alphanumeric user ID.
Grantee List (C04MA20)	If the HQ user has more than one IDIS profile, identifies which profile to view or update.
User Information Screen (C04MU01)	Identifies the user's name, organization, telephone number, supervisor, and whether the user's IDIS access privileges are Active or Blocked (inactive).
User Information Screen (C04MU02) Field Office User Profile (C04MU03) HQ User Profile (C04MU04)	Identifies which IDIS functions the user can access.

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
UOG Code		The Grantee's Unit of Government Code.	Protected field
UOG Number		The Grantee's Unit of Government Number.	Protected filed
[selection field]	✓	Type X next to the user profile you want to view or update.	X
Press <Enter> to save the information and go to the User Information Screen (C04MU01).			

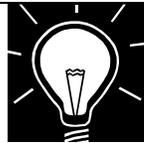
15.6.2 Viewing User Information/Deactivating a User (C04MU01)

SCREEN: User Information Screen (C04MU01)

PURPOSE: The HUD HQ System Administrator establishes the data on this screen to identify the user to IDIS. Field Office System Administrators and Grantee Local Administrators use this screen to review the user information and, when necessary, to inactivate a user's access to IDIS (or reactivate an inactivated user).

The Office of the Inspector General (OIG) has requested that IDIS add a new user access status to indicate when an IDIS user ID should be marked for deletion. Once a user's status has been changed to "D," only the IDIS HQ system administrator can change the status to Active or Inactive.

Effective with Version 6.7, a local administrator, field office administrator, or the HUD HQ administrator can all change a user's status to D, Deleted. However, only the HQ Admin, can reactivate the user to Active or Inactive.



NOTE:

When Field Office System Administrators or Grantee Local Administrators use this screen to inactivate a user, IDIS will let them reactivate the same user, as necessary. If the HUD HQ System Administrator inactivates a user, only the HUD HQ System Administrator can reactivate the user.

How To Complete This Screen:



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

When you have completed the fields on this screen, press <Enter> to save the information and go to the User Information Screen (C04MU02), the Field Office User Profile (C04MU03), or the HQ User Profile (C04MU04).

ACTIVE/INACTIVE/DELETED USER? (A/I/D)

- Type **A** to activate the user. (This is the default value assigned to each user.)
- Type **I** to inactivate the user. The user will no longer be able to log in to IDIS.
- Type **D** to mark the user for deletion. Once a user's status has been changed to "D," only the IDIS HQ system administrator can change the status to Active or Inactive.

09/23/02 09:22:04	USER INFORMATION	C04MU01
USER ID: C12470	ACTIVE/INACTIVE/DELETED USER? (A/I/D): A	
USER'S NAME: SHERRI	KITTER	
FIRST	M	LAST
USERS ORGANIZATION - HEADQUARTERS, FIELD OFFICE, GRANTEE (H/F/G): G		
FO/UOG CODE: 429011	FO/UOG NUM: 00001	DEPARTMENT:
TELEPHONE:	FAX NUMBER:	
SUPERVISOR'S ID:		
INITIAL INSERT DATE: 02/09/1999		
ACTIVE ON: 03/22/1999	INACTIVE ON: 12/31/9999	DELETED ON: 12/31/9999
F4 = MAIN MENU F7 = PREV F8 = NEXT F9 = SAVE		

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
User ID		System generated from the User Information Screen (C04MU05)	Protected field
Active/Inactive/Deleted User? (A/I/D)	✓	Type A to activate the user. (This is the default value assigned to each user.) Type I to inactivate the user. The user will no longer be able to log in to IDIS. Type D to mark the user for deletion. Once a user's status has been changed to "D," only the IDIS HQ system administrator can change the status to Active or Inactive.	A, I, or D
User's Name		Created/maintained by the HUD HQ System Administrator using this screen.	Protected field

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Users Organization - Headquarters, Field Office, Grantee		Created/maintained by the HUD HQ System Administrator using this screen.	Protected field
FO/UOG Code		Created/maintained by the HUD HQ System Administrator using this screen.	Protected field
FO/UOG Number		Created/maintained by the HUD HQ System Administrator using this screen.	Protected field
Department		Created/maintained by the HUD HQ System Administrator using this screen.	Protected field
Telephone		Created/maintained by the HUD HQ System Administrator using this screen.	Protected field
FAX Number		Created/maintained by the HUD HQ System Administrator using this screen.	Protected field
Supervisor's ID		Created/maintained by the HUD HQ System Administrator using this screen.	Protected field
Active On		Created/maintained by the HUD HQ System Administrator using this screen.	Protected field
Inactive On		Created/maintained by the HUD HQ System Administrator using this screen.	Protected field
Deleted On		Created/maintained by the HUD HQ System Administrator using this screen.	Protected field
Press <Enter> to save the information and go to the User Information Screen (C04MU02).			


```

09/23/02  10:07:15                USER INFORMATION                C04MU02
USER ID: C12470                    ACTIVE/INACTIVE/DELETED USER? (A/I/D): A
USER'S NAME: SHERRI                KITTER

      ENTER (X) FOR FUNCTIONS TO BE GRANTED TO USER

      X  SET UP ACTIVITY              X  UPDATE/CANCEL/COMPLETE ACTIVITY
      X  UPDATE ACTIVITY              X  VIEW ACTIVITY
      X  REQUEST DRAWDOWN             X  PROGRAM CONTACTS/EXCEPTIONS
      X  TABLE MAINTENANCE           X  ADMINISTRATION (LOCAL)
      X  REPORTS                      X  DRAWDOWN APPROVAL
      X  CDBG PROGRAM                 X  ESG PROGRAM
      X  HOME PROGRAM                 X  HOPWA PROGRAM

      F4 = MAIN MENU   F7 = PREV   F8 = NEXT   F9 = SAVE
    
```

DATA FIELD	REQ'D	DESCRIPTION
Functions To Be Granted To User		
Setup Activity		Allows the user to set up the activities using the four-screen Common Path (C04MA01, C04MA03, C04MA04, C04MA08).
Update/Cancel/ Complete Activity		Allows the user to revise an activity by selecting it on the Revise Activity Selection Screen (C04MA09), then updating it on C04MA03, C04MA04, or C04MA08. The user can also update the Status field on screen C04MA04 to cancel or complete the activity.
Update Activity		Allows the user to revise an activity by selecting it on the Revise Activity Selection Screen (C04MA09), then updating it on C04MA03, C04MA04, or C04MA08. The user cannot update the Status field on screen C04MA04 to cancel or complete the activity.
View Activity		Allows the user to view the activity data by selecting it on the View Activity Selection Screen (C04MA59), then viewing it on C04MA53, C04MA54, or C04MA58.

DATA FIELD	REQ'D	DESCRIPTION
Request Drawdown		Allows the user to use the authorize, view, create, and maintain drawdown processes (Options 1-5 on the Drawdown Menu). The user cannot approve drawdowns using the Approve Drawdown Screen (C04MD12).
Program Contacts/ Exceptions		Allows the user to add and maintain program contact information using the Program Contacts Screens (C04MU08) and (C04MU09).
Table Maintenance		Allows the user to access screen C04MU10 to process the subsequent table utility screens.
Administration (Local)		Allows the IDIS Local System Administrator and other designated persons to access screen C04MU02 (this screen).
Reports		Allows the user to process the report screens and request reports.
Drawdown Approval		Allows the user to use Option 6 on the Drawdown Menu (Approve Drawdowns/Vouchers).
CDBG Program		Allows the user to access the CDBG grants for viewing and updating.
ESG Program		Allows the user to access the ESG grants for viewing and updating.
HOME Program		Allows the user to access the HOME grants for viewing and updating.
HOPWA		Allows the user to access the HOPWA grants for viewing and updating.
Press <Enter> to save the information and return to the Utilities Menu.		

15.6.3.1 Updating the Functions an HQ User Can Access (C04MU04)

SCREEN: Headquarters User Profile screen (C04MU04)

PURPOSE: This screen allows the HUD HQ System Administrator to view or update an IDIS HQ user's access privileges.

How To Complete This Screen:

- Type **X** next to each IDIS processing privilege that you want to grant to this user and press **<Enter>** to save the information and return to the Utilities Menu.



```

09/23/02  10:08:47          HEADQUARTERS USER PROFILE          C04MU04

USER ID: C12470              ACTIVE/INACTIVE/DELETED USER? (A/I/D): A

USER'S NAME: SHERRI                KITTER

      ENTER (X) FOR FUNCTIONS TO BE GRANTED TO USER

      X  VIEW ACTIVITY              X  VIEW DRAWDOWN
      X  HQ TABLE MAINTENANCE      X  PRODUCE AD HOC REPORTS
      X  REPORTS                    X  USER ADMINISTRATION
      X  IDIS NEWS AUTHOR

      F4 = MAIN MENU  F7 = PREU  F8 = NEXT  F9 = SAVE
    
```

DATA FIELD	REQ'D	DESCRIPTION
Functions To Be Granted To User		
View Activity		Allows the user to view the activity data by selecting it on the View Activity Selection Screen (C04MA59), then viewing it on C04MA53, C04MA54, and C04MA58.
HQ Table Maintenance		This option is reserved for future use.
View Drawdown		Allows the user to view options on the Drawdown menu.
Produce Ad Hoc Reports		This option is reserved for future use.
User Administration		Allows the user to view or update a grantee's IDIS functions on the User Information screen C04MU02.
Press <Enter> to save the information and return to the Utilities Menu.		

15.6.3.2 Updating the Functions a Field Office User Can Access (C04MU03)

SCREEN: Field Office User Profile screen (C04MU03)

PURPOSE: This screen allows the HUD HQ System Administrator and Field Office System Administrators to view or update an IDIS field office user's access privileges.

How To Complete This Screen:

- Type **X** next to each IDIS processing privilege that you want to grant to this user and press **<Enter>** to save the information and return to the Utilities Menu.



```

09/23/02  10:09:46          FIELD OFFICE USER PROFILE          C04MU03

USER ID: C12470          ACTIVE/INACTIVE/DELETED USER? (A/I/D): A

USER'S NAME: SHERRI          KITTER

          ENTER (X) FOR FUNCTIONS TO BE GRANTED TO USER

X  VIEW ACTIVITY          X  BLOCK/UNBLOCK FUTURE DRAWDOWNS
X  VIEW DRAWDOWN          X  VIEW PROGRAM CONTACTS/EXCEPTIONS
X  REPORTS          X  ADMINISTRATION (LOCAL)

          F4 = MAIN MENU  F7 = PREV  F8 = NEXT  F9 = SAVE
    
```

DATA FIELD	REQ'D	DESCRIPTION
Functions To Be Granted To User		
View Activity		Allows the user to view the activity data by selecting it on the View Activity Selection Screen (C04MA59), then viewing it on C04MA53, C04MA54, and C04MA58.
View Drawdown		Allows the user to view options on the Drawdown menu.
Reports		Allows the user to process the report screens and request reports.
Block/Unblock Future Drawdowns		Allows the user to use Utility Menu Option 7, Block/Unblock Grantee and Utility Menu Option 8, Block/Unblock Grant.
View Program Contacts/ Exceptions		Allows the user to view program contact information from Utilities Menu Option 2.
Administration (Local)		Allows the Field Office Administrator access to this screen (C04MU03) to update the access rights of his/her peers. This option also lets the Field Office Administrator update the access rights on screen C04MU02 for grantee's under his/her jurisdiction.
Press <Enter> to save the information and return to the Utilities Menu.		

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Hold/Cancel Until		<p>To initiate, hold, or cancel a conversion request, enter the appropriate date or leave the date blank and the system will initiate the request on the current (today's) date.</p> <p>If you want to hold the conversion request, enter a future date. When that date arrives the conversion request becomes active.</p> <p>If you need to cancel the conversion request that has a status of hold or pending, enter a date in the past.</p>	mm/dd/yyyy
<p>Press <Enter>. The system prompts you to press <Enter> again to confirm your request. When you are finished, press <F4> to return to the Main Menu.</p>			

15.8 Checking the Status of a Conversion Request

SCREEN: Conversion Status (C04MO02)

PURPOSE: This screen allows designated HQ personnel to check on the conversion status of their conversion request. This option is not available to Field Offices and Grantee Local Administrators.

How To Complete This Screen:



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

When you are finished viewing this screen, press <F4> to return to the Main Menu.

GRANTEE ID

1. Enter the grantee's UOG Code and UOG Number.

HOLD/CANCEL UNTIL

2. Enter the date the conversion request was initiated.

Press <Enter> to process the request. The screen redisplay with the status of the conversion request:

C	Request has been completed.
P	Request is still pending.
R	Request has been sent to LOCCS.
H	Request has been placed on hold.

CONVERSION STATUS	C04MO02
<p>GRANTEE ID: _____ - _____ REQUEST DT: __/__/____ STATUS: __</p>	
<p>F1 = HELP F4 = MAIN MENU F10 = CANCEL</p>	

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee ID	✓	Enter the grantee's UOG Code and UOG Number.	6 numeric characters/ 5 numeric characters
Request Date	✓	Enter the date the conversion request was initiated.	Mm/dd/yyyy
Press <Enter>. The system displays the conversion status.			
		C Request has been completed. P Request is still pending. R Request has been sent to LOCCS. H Request has been placed on hold.	
Press <F4> to return to the Main Menu.			


```

03/03/99  16:35          BLOCK\UNBLOCK GRANTEE          C04MJ03

REGION NUMBER:  03          FIELD OFFICE NUMBER:  26          page: 0001

      UOG      GRANTEE
SEL  CODE  BLK/UNBLK  GRANTEE NAME          CITY          STATE
-   100001  ACTIVE   DELAWARE          DOVER          DE
-   100024  BLOCKED  BLADES           BLADES         DE
-   100030  BLOCKED  BOWERS           BOWERS         DE
-   100036  BLOCKED  BRIDGEVILLE    BRIDGEVILLE  DE
-   100048  BLOCKED  CAMDEN           CAMDEN         DE
-   100054  BLOCKED  CHESWOLD        CHESWOLD       DE
-   100066  BLOCKED  CLAYTON         CLAYTON        DE
-   100084  BLOCKED  DELMAR          DELMAR         DE
-   100090  ACTIVE   DOVER           DOVER          DE
-   100090  ACTIVE   DOVER HOUSING DEVELOPMENT, INC  DOVER          DE
-   100108  BLOCKED  ELLENDALE       ELLENDALE      DE
-   100120  BLOCKED  FARMINGTON      FARMINGTON     DE
-   100126  BLOCKED  FELTON          FELTON         DE
-   100138  BLOCKED  FRANKFORD       FRANKFORD      DE

IF YOU WISH TO CHANGE THE STATUS OF GRANTEE, ENTER "X"
F4 = MAIN MENU  F7 = PREV  F17 = UP  F18 = DOWN
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Region Number	✓	Type the Region Number who has jurisdiction for the grantee to be blocked/unblocked.	2 numeric characters
Field Office Number	✓	Type the Field Office Number who has jurisdiction for the grantee to be blocked/unblocked.	2 numeric characters
Press <Enter> to display all IDIS grantees in this Region and Field Office.			
Sel		Type X next to each grantee whose status you want to change. Blocked grantees will become Active; Active grantees will become blocked.	X
UOG Code		The Grantee's Unit of Government Code.	Protected field
Grantee Block/Unblock		The current IDIS status of this grantee: Active: Grantee can access IDIS Blocked: Grantee is blocked from IDIS access	Protected field
Grantee Name		The Grantee's Name; carried forward from the Grantee Add Screen (C04MU06).	Protected field
City		The Grantee's City; carried forward from the Grantee Add Screen (C04MU06).	Protected field

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
State		The Grantee's State; carried forward from the Grantee Add Screen (C04MU06).	Protected field
Press <Enter> to save the information and return to the Utilities Menu.			


```

03/03/99 16:38                BLOCK/UNBLOCK GRANTS                C04MJ04

UOG CODE: 100001  UOG NUMBER: 00001                PAGE: 01

GRANTEE NAME: DELAWARE
      CITY: DOVER                                STATE: DE
FIELD OFFICE NAME: PHILADELPHIA

      GRANT   GRANT   FISCAL   SOURCE   AUTHORIZED   AMOUNT AVAILABLE
SEL  BLK/UNBLK PROGRAM  YEAR     TYPE     AMOUNT      TO DRAWDOWN
-    ACTIVE   CDBG    1988    DC        $1,416,000.00  $0.00
-    ACTIVE   CDBG    1989    DC        $1,474,000.00  $0.00
-    ACTIVE   CDBG    1990    DC        $1,444,000.00  $0.00
-    ACTIVE   CDBG    1991    DC        $1,610,000.00  $0.00
-    ACTIVE   CDBG    1992    DC        $1,712,000.00  $0.00
-    ACTIVE   CDBG    1993    DC        $1,862,000.00  $0.00
-    ACTIVE   CDBG    1994    DC        $1,875,000.00  $0.00
-    ACTIVE   CDBG    1995    DC        $1,992,000.00  $0.00
-    ACTIVE   CDBG    1996    DC        $1,949,000.00  $0.00
-    ACTIVE   CDBG    1997    DC        $1,932,000.00  $0.00

IF YOU WISH TO BLOCK/UNBLOCK GRANTS, ENTER 'X'
F1 = HELP  F4 = MAIN MENU  F7 = PREV  F17 = UP  F18 = DOWN
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
UOG Code/ UOG Number	✓	Type the grantee's UOG Code and UOG number and press <Enter>. Type the grantee's UOG Code and UOG number. Or, press <F1> to select a grantee from a displayed list.	
Press <Enter>. The screen refreshes with a list of all grants assigned to this grantee.			
Selection		Type X next to each Active grant that you want to block (make inactive); and each Inactive grant that you want to make active.	
Press <Enter> to save the information and return to the Utilities Menu.			

15.11 Checking the Consolidated Plan Load Status

This set of two screens lets designated HUD HQ personnel check on the status of a data upload. This option is not available to Field Offices and Grantee Local Administrators.

15.11.1 Entering Selection Parameters (C04MJ01)

SCREEN: Selection Parameter screen (C04MJ01)

PURPOSE: This screen lets HUD HQ personnel enter identifying information about the loaded plan.

How To Complete This Screen:



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

When you have completed the fields on this screen, press <Enter> to save and display Data Loaded For screen.

- | | |
|---------------------------------|---|
| ENTER LOAD DATE YEAR | 1. Enter the year you uploaded the data. |
| MONTH | 2. Enter the month you uploaded the data. |
| ENTER REGION OFFICE CODE | 3. Enter the Region Office Code. |
| ENTER FIELD OFFICE CODE | 4. Enter the Field Office Code. |

CONSOLIDATED PLAN LOAD STATUS SELECTION PARAMETER SCREEN	C04MJ01
ENTER LOAD DATE ==> YEAR: ___ MONTH: ___	
ENTER REGION OFFICE CODE: ___	
ENTER FIELD OFFICE CODE: ___	
F4=MAIN MENU	

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Enter Load Data Year	✓	Enter the year you uploaded the data.	4 numeric characters
Month	✓	Enter the month you uploaded the data.	2 numeric characters
Enter Region Office Code	✓	Enter the Region Office Code.	2 numeric characters
Enter Field Office Code	✓	Enter the Field Office Code.	2 numeric characters
Press <Enter> to save the information. The system displays the Data Loaded For screen with the requested data.			

15.11.2 Viewing Loaded Data (C04MJ02)

SCREEN: Data Loaded For (Date) (C04MJ02)

PURPOSE: This screen displays the status data requested on the prior screen. You should see the term **PASS** associated with the data. If your upload failed, repeat the upload process.

CONSOLIDATED PLAN LOAD STATUS							C04PJ02	
DATA LOADED FOR 04 1996								
UOG CD	UOG NM	PLAN YR	SEQ NM	RO CD	FO CD	PASS FAIL	LOAD DT	
—	000001	00001	1996	0001	01	01	PASS	1996-04-01
—	000002	00002	1996	0001	01	01	PASS	1996-04-02
—	000003	00003	1996	0001	01	01	FAIL	1996-04-03
—	000004	00004	1996	0001	01	01	PASS	1996-04-04
—	000005	00005	1996	0001	01	01	PASS	1996-04-05
—	000006	00006	1996	0001	01	01	PASS	1996-04-06
—	000007	00007	1996	0001	01	01	PASS	1996-04-07
—	000008	00008	1996	0001	01	01	PASS	1996-04-08
—	000009	00009	1996	0001	01	01	PASS	1996-04-09
—	000010	00010	1996	0001	01	01	PASS	1996-04-10
—	000011	00011	1996	0001	01	01	FAIL	1996-04-11
—	000012	00012	1996	0001	01	01	FAIL	1996-04-12
—	000013	00013	1996	0001	01	01	FAIL	1996-04-13
—	000014	00014	1996	0001	01	01	PASS	1996-04-14
—	000015	00015	1996	0001	01	01	PASS	1996-04-15
—	000016	00016	1996	0001	01	01	FAIL	1996-04-16

F7=PREV SCREEN F4=MAIN MENU F17=UP F18=DOWN

Press <F7> to return to the Consolidated Plan Load Status. Press <F4> to return to the Main Menu.

15.12 IDIS News

IDIS lets designated CPD personnel post messages to the *News* function of IDIS. These informational messages are displayed to all IDIS users (or HQ only users if so designated) after a user successfully signs on to IDIS and before the IDIS menu is displayed.

For CPD staff personnel to be able to post and maintain messages, the HQ System Administrator must designate them an IDIS News Author on the Headquarters User Profile screen (C04MU04). Section 15.12.2 describes how IDIS News Authors can post and maintain IDIS News messages.

All other IDIS users can only read or print IDIS news messages. In addition to automatically seeing a contents list of all current IDIS News Items at logon, during a session, general users can also view messages by:

- Selecting Option L from the IDIS Main Menu
- Selecting Option 11 on the Utilities Menu.

The next section describes how to view or print IDIS News Items. This process is identical for both IDIS News Authors and for general users.

15.12.1 Viewing or Printing IDIS News Messages (C04MR52)

SCREEN: IDIS News -- Table of Contents (C04MR52)

PURPOSE: This screen lets IDIS users view news items relating to IDIS that were posted by an IDIS News Author.

How To Complete This Screen:



(Select Column)

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

1. To view a News Item, type **V**, then press <Enter>. The News Item will display on your screen. Press <F7> to return to the News - Table of Contents screen or <F4> to go to the IDIS Main Menu.
2. To print a News Item, open either Notepad or MS Word. Toggle to the IDIS News Item to be printed, then press Shift + Print screen. Then toggle back to Notepad or Word and press the right mouse key and select Paste. You can now print the item from your word processor.

```

05/04/00  ===== IDIS NEWS - TABLE OF CONTENTS ===== C04MR52
13:55                AVAILABLE - NEWS                          PAGE:  1

AUD ITEM NUM  PUBLISHED  EXPIRES   TITLE
<-> <-----> <-----> <-----> <----->
= A 000000067 02-24-2000 06-02-2000 TEMPORARY CHANGE IN IDIS START UP TIME
- A 000000029 11-16-1999 08-23-2000 YOU CAN USE INTERNET TO ACCESS IDIS NOW

<-> <-----> <-----> <-----> <----->
PLACE 'V' TO VIEW OR 'P' TO PRINT NEWS ITEM
F4 = MAIN MENU   F9 = GOTO PAGE 1                F17 = UP    F18 = DOWN
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
[Selection Column]		To view a News Item, type V , then press <Enter>. The News Item will display on your screen. Press <F7> to return to the News - Table of Contents screen or <F4> to go to the IDIS Main Menu. To print a News Item, open either Notepad or MS Word. Toggle to the IDIS News Item to be printed, then press Shift + Print screen. Then toggle back to Notepad or Word and press the right mouse key and select Paste. You can now print the item from your word processor.	V or P
Audience		HQ users will see an A or H that indicates whether the message is intended for All or HQ-only users.	Protected field
Item Number		The item number assigned by IDIS to this News Item.	Protected field
Published		The date the News Item was approved by its author and published.	Protected field

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Expires		The date the News Item expires. Users will no longer see an item after its expiration date.	Protected field
Title		A short description of the News Item.	Protected field
Press <Enter> to view or print the selected item. Press <F4> to return to the Main Menu.			

15.12.2 Adding, Updating, and Deleting IDIS News Items (HQ only)

When an HQ user is designated as an IDIS News Author, selecting Option L on the IDIS News Menu displays the IDIS News Menu instead of the Available News - Table of Contents screen. This section describes how the designated IDIS News Author can add, update, or delete News Items.

The prior section described how to view or print News Items. That process works the same for all users. The only difference is that an IDIS News Author can request that IDIS display items of certain *types*:

- **Approved** displays all News Items with an approved status. This screen is similar to what most users see as their Table of Contents. However, it may contain an approved news item with a future Release Date.
- **Unapproved** items are drafts of news items that have not yet been approved or whose approval has been revoked.
- **Expired** items are approved items that are past their expiration date and no longer display. Over time, you will probably want to delete expired items that will never be reused.

```
05/05/00      THE INTEGRATED DISBURSEMENT AND INFORMATION SYSTEM  C04MM01
11:26:26

                                IDIS NEWS MENU

                                01  ADD/UPDATE/DELETE NEWS
                                02  VIEW/PRINT APPROVED NEWS
                                03  VIEW/PRINT UNAPPROVED NEWS
                                04  VIEW/PRINT EXPIRED NEWS

TYPE SELECTION AND PRESS ENTER  L 00

F4 = MAIN MENU   F7 = PREU
```

15.12.2.1 Adding, Modifying, or Deleting a News Item (C04MR51)

SCREEN: IDIS News - Draft Screen (C04MR51)

PURPOSE: This screen allows an IDIS News Author to add a new News Item or to modify or delete an existing item.

How To Complete This Screen:



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

When you have completed the fields on this screen, press <Enter> to save the information and return to the Utilities Menu.

ITEM NUMBER

1. To add a new item, leave blank. The system will assign the Item Number for the news item after you press <Enter>.

To modify or delete an item, enter its Item Number, then press <Enter>.

The screen refreshes with so that you can enter new information or change what appears.

To delete this News Item, press <F13>. The system prompts to press <F13> again to confirm the deletion.

RELEASE DATE

2. Enter or modify the Release Date for the news item. (This date must not be earlier than the current date.) An Approved item will not display until its release date.

EXPIRE DATE

3. Enter the Expiration Date of the news item. (If this date is not entered, the Expire Date is automatically three days after the Release Date. Also, this date cannot be prior to the Release Date.) An Approved item will not display after its expiration date.

TITLE

4. Enter a brief functional title of the IDIS News Item.

NEWS APPROVED?

5. The system defaults to N, not approved until you or another News Author approves it by entering a Y.

To revoke approval and stop an approved item from being displayed (but not deleted), enter N.

CREATOR

6. The name of the News Author who created the message.

APPROVER

7. The name of the News Author who approved the message.

AUDIENCE

8. Enter an "X" into one of the following fields.

- HUD This news item is displayed only for IDIS Field Office and Headquarters personnel.
- ALL This news item is displayed for IDIS grantee, Field Office, and Headquarters personnel.

MESSAGE

9. Enter the text of the News Item. You may enter up to 16 lines on this page. Remember that IDIS does not word wrap. You must manually space out the appearance of the text.

MORE LINES

10. If you need an additional page, enter Y. Your News Item has a maximum length of two pages.

```

05/05/00            ===== IDIS NEWS - DRAFT SCREEN =====            C04MR51
ITEM NUM: 000000022 RELEASE DT: 02 / 24 / 2000    EXPIRE DT: 06 / 03 / 2000
TITLE: TEMPORARY CHANGE IN IDIS START-UP TIME    NEWS APPROVED? (Y/N) Y
CREATOR: SAM WALKER    APPROVER: SAM WALKER            AUDIENCE: _ HUD X ALL
***** MESSAGE ***** PAGE NO : 1 *****

-
BEGINNING MARCH 1, 2000, IDIS WILL START-UP AT 8:00 AM EASTERN STANDARD
TIME (EST) RATHER THAN 7:00 AM EASTERN STANDARD TIME.    THIS TEMPORARY
CHANGE IS NECESSARY IN ORDER TO ACCOMMODATE THE INCREASED WORKLOAD OF
CONVERTING STATES TO IDIS DURING THE MONTHS OF MARCH, APRIL AND MAY.    WE
WILL REVERT TO THE 7:00 AM EST START-UP TIME ON JUNE 1, 2000 WHEN WE HAVE
COMPLETED THE STATE CONVERSIONS.

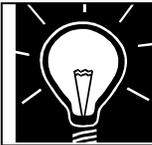
***** MORE LINES? (Y/N) N
THIS NEWS ITEM CAN BE MODIFIED OR DELETED
F4 = MAIN MENU                    F7 = PREV                    F13 = DELETE
    
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Item Number		To add a new item, leave blank. The system will assign the Item Number for the news item after you press <Enter> To modify or delete an item, enter its Item Number, then press <Enter>. The screen refreshes with so that you can enter new information or change what appears.	9 numeric characters
Release Date		Enter the Release Date for the news item. (This date must not be earlier than the current date.)	MM/DD/YYYY
Expiration Date		Enter the Expiration Date of the news item. (If this date is not entered, the Expire Date is automatically, three days after the Release Date. Also, this date cannot be prior to the Release Date.)	MM/DD/YYYY
Title		Enter a brief functional title of the IDIS News Item.	40 alphanumeric characters
News Approved		Enter one of the following values. To approve the news item for release, enter Y. To revoke approval and stop an approved item from being displayed (but not deleted), enter N.	Y or N
Audience		Enter an "X" into one of the following fields. HUD This news item is displayed only for IDIS Field Office and Headquarters personnel. ALL This news item is displayed for IDIS grantee, Field Office, and Headquarters personnel.	X
Message		Enter the text of the News Item. You may enter up to 16 lines on this page. Remember that IDIS does not word wrap. You must manually space out the appearance of the text.	16 lines of text
More Lines		If you need more lines for the IDIS News Item, enter a "Y" and press <Enter>. Another page appears for you to enter your message. (Note, you can only perform this operation once. Messages can have no more than two pages.)	Y
Press <Enter>. The screen returns with the Item Number for the added news item. Press <F7> to return to the IDIS News Menu.			

15.13 Entering Match Liability Rates (C04MU20)

SCREEN: Match Liability Rates Screen (C04MU20)

PURPOSE: This screen allows the HUD HQ System Administrator or Field Office Administrators to establish a grantee's HOME match obligation for a given fiscal year, 1991 and on. For example, if a match rate is 12.5%, for every dollar HUD contributes, the grantee contributes \$.125. The match obligations entered on this screen are used in the calculation of the HOME Match Liability Report (C04PR33).



NOTE:

You must know the grantee's UOG Code and UOG Number before using this screen; there is no <F1> lookup provided.

How To Complete This Screen:



UOG CODE/UOG NUMBER

YEAR/%

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

When you have completed the fields on this screen, press <Enter> to save the information and return to the Utilities Menu.

1. Type the grantee's UOG Code and UOG Number and press <F3> to validate your entry.
2. Enter each fiscal year and % match for the year. Valid match rates are:
00.0 12.5 25.0
3. Press <F9> to save your entries and blank the screen. You may enter match rates for additional grantees or press <F4> to return to the Main Menu.

15.14 Maintaining Period Dates

SCREEN: **Program Year Start and End Dates** **(C04MU57)**

PURPOSE: IDIS uses the values on this screen to determine the start and end period to use for reports that are generated based on a Program Year, for example, the Summary of Accomplishments report.

Field Office Administrators can modify a grantee's Program Year end date on the CO4MU57 screen for the current and prior years; or enter a new Program Year End Date as long as it isn't more than one year greater than the current calendar year. (IDIS automatically calculates the Start Date of a program year, except for the first year, based on the End Date of the previous year.)

If changes are made for the current year on this screen, they will be reflected on the Grantee Inquire/Update/Add screen (CO4MU06).

All changes to a grantee's Program Year start and end dates must now be made on this screen, not the Grantee Inquire/Update/Add screen (CO4MU06). For a grantee's first year in IDIS, Field Office Administrators will be able to change both the start and end dates. For all other years, they will only be able to change the end dates; the system will automatically adjust the next year's start date.

Grantees and HUD HQ staff can use this screen to view Program Year start and end dates saved in IDIS. HUD HQ staff should press <F1> to select the appropriate grantee.

How To Complete This Screen:



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

When you have completed the fields on this screen, press <F9> to save the information, then press <F7> to return to the Utilities Menu.

ADD/MODIFY YR

1. To change the end dates for an existing year, enter the Year, then press **<Enter>**. The year does not need to be displayed on the screen. If you enter a year older or newer than what is displayed and it exists for the grantee, the screen will refresh with that year's dates.

The screen will refresh with the current start and end date. For a grantee's first year in IDIS, you can change both the start and end dates. For all other years, when you change the end date, the system will automatically adjust the next year's start date.

To add a new year, enter the Year, and then press **<Enter>**. The screen will refresh with a start date based on the previous year's end date; you cannot change this. Enter the End Date for the year you are adding then press **<F9>** to save your changes. You can only enter a new year that is one year beyond the current calendar year.

Note: IDIS is programmed so that the end date can be no earlier than Dec. 31 of the Plan Year and no later than Sept. 30 of the next Plan Year. If a grantee has a program year outside this range, contact the TAU for assistance. If you enter other than the last day of the month as the End Date, IDIS will automatically change your entry to the last day of the month.

09/13/02 09:32 THE INTEGRATED DISBURSEMENT AND INFORMATION SYSTEM			C04MU57
PROGRAM YEAR START AND END DATES			
UOG CODE / NO 240066 / 00001 BALTIMORE			
YEAR	START DATE	END DATE	
ADD/MODIFY YR: 2003	2003 - 07 - 01	2004 - 06 - 30	

PROGRAM YEAR	PROGRAM START DATE	PROGRAM END DATE	
2002	2002 - 07 - 01	2003 - 06 - 30	
2001	2001 - 07 - 01	2002 - 06 - 30	
2000	2000 - 07 - 01	2001 - 06 - 30	
1999	1999 - 07 - 01	2000 - 06 - 30	
1998	1998 - 07 - 01	1999 - 06 - 30	
1997	1997 - 07 - 01	1998 - 06 - 30	
1996	1996 - 07 - 01	1997 - 06 - 30	
1995	1995 - 07 - 01	1996 - 06 - 30	
1994	1994 - 07 - 01	1995 - 06 - 30	
CHANGE END DATE -- THEN ENTER PF9 TO SAUE			
F1=LIST GRANTEEES F3=VALIDATE F4=MAIN F7=PREU F9=SAUE F17=UP F18=DOWN			

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
UOG Code/UOG Number		The UOG Code and Number of the logged in grantee.	Protected Field
Add/Modify Year		<p>To change the start/end dates for an existing year, enter the Year, then press <Enter>.</p> <p>For Field Office Administrators, the screen will refresh with the current start and end date. For a grantee's first year in IDIS, you can change both the start and end dates. For all other years, when you change the end date, the system will automatically adjust the next year's start date.</p> <p>To add a new year, enter the Year, and then press <Enter>. The screen will refresh with a start date based on the previous year's end date; you cannot change this. Enter the End Date for the year you are adding then press <F9> to save your changes.</p>	YYYY
Program Year		The fiscal year associated with this report period.	Protected Field
Program Start Date		The starting date for this report period in YYYY MM DD format. The start date can be no earlier than Jan. 1 of the Plan Year and no later than Oct. 1 of the Plan Year and must be the first day of the month.	Protected Field
Program End Date		The ending date for this report period in YYYY MM DD format. The end date can be no earlier than Dec. 31 of the Plan Year and no later than Sept. 30 of the next Plan Year and must be the last day of the month.	Protected Field
<p>Press <F9> to save your changes. Repeat these steps for each Plan Year that you want to review or change. Press <F7> to return to the Utilities Menu.</p>			