

IDIS RELEASE NOTES FOR VERSION 6.9

CPD plans to release the following IDIS items to production as IDIS Version 6.9 the evening of Thursday, September 26, 2002. They will be available for use on Friday morning, September 27, 2002.

1. DRAWDOWNS:

Problem: On the Approve Drawdown screen (CO4MD12), grantees do not always see Program Income draws in their list of draws pending approval.

Solution: Effective with Version 6.9, this problem has been fixed. IDIS was failing to list PI draws pending approval when there wasn't an existing EN grant for the same year. (Users often need to receipt and draw PI for a program year before they receive their EN grant).

2. ACTIVITY SETUP:

Problem: Currently, if a grantee selects an incorrect program path on the Setup Activity screen (CO4MA08), there is no way for the grantee to delete the action and select another path. Instead, the IDIS programmers have to manually delete the path and any data entered. Grantees should be allowed to delete any program path so long as its net funding is zero.

Solution: Effective with Version 6.9, the Setup Activity screen (CO4MA08) contains a new "F13 Delete" option. To delete a path, a user enters a "D" (for Delete) next to the incorrect path, and then presses <F13>. IDIS prompts for the user to press <F13> again to confirm the deletion or <F7> to cancel. If the activity is already funded or the path does not exist, IDIS will display an appropriate message. Once a path is deleted, all program-specific data entered will also be deleted.

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09/09/02  10:48                SETUP  ACTIVITY                C04MA08
GRANTEE ACTIVITY NBR:                HUD ACTIVITY NBR: 000000000713
ACTIVITY NAME:  TEST FOR FACIL BASED NON HOUSING
TOTAL ESTIMATED AMOUNT:  _          $25.00
INDICATE PROGRAM(S) TO BE ADDRESSED
ENTER (X) TO SELECT PROGRAM, (D) TO DELETE EXISTING PROGRAM PATH

          _  CDBG
          _  ESG
          _  HOME
          d  HOPWA

F3 = UALDT  F4 = MAIN MENU  F5 = PROJ INFO  F7 = PREU  F8 = NEXT
F9 = SAVE   F10 = MA09     F13 = DELETE
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2. RECEIPTS:

Problem: IDIS will not allow grantees to create a receipt for program income, for a new program year if a grant doesn't already exist for the same year. As a consequence, grantees are forced to receipt the PI to a prior fiscal year. The HUD programmers then need to manually correct the error after that year's grant is entered into IDIS.

Solution: Effective with Version 6.9, grantees can receipt PI and other types of receipt funds for a new program year as long as the new program year has begun. They no longer need to wait for their grant funds to be entered into IDIS.

3. HOPWA

Problem: Currently, if a grantee selects an incorrect completion path on the HOPWA Activity screen (CO4MP01), there is no way for the grantee to delete the action and select another HOPWA path. Instead, the IDIS programmers have to manually delete the path and any data. Grantees should be allowed to delete an existing HOPWA completion path and its data.

Solution: Effective with Version 6.9, to delete an incorrect HOPWA path, a user enters an "X" next to the correct (new) path, and then presses <Enter>. IDIS prompts the user to press <F13> to confirm the deletion or <F7> to cancel the request. Once a path is deleted, all HOPWA-specific data entered will also be deleted. We recommend printing the screens from the old path before deleting it so that data can be copied to the new path.

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08/09/02                HOPWA ACTIVITY                C04MP01
  11:16

PROJECT NUMBER:  35   PROGRAM YEAR: 1997   ACTIVITY NBR: 00000000546
PROJECT TITLE:  HOPWA

ACTIVITY NAME:  DOH / AHA REGIONAL RESOURCE COORDINATION

PLEASE SELECT ONE:

      X  FACILITY-BASED HOUSING
      -  FACILITY-BASED NON-HOUSING
      -  SCATTERED-SITE HOUSING
      X  HOUSING INFORMATION/RESOURCE ID/ADMINISTRATION
      -  SUPPORTIVE SERVICES

NEW PATH SELECTED; OLD PATH WILL BE DELETED. ARE YOU SURE?
PRESS F13 KEY FOR "YES"; PRESS F7 KEY FOR "NO"

F4 = MAIN MENU  F5 = PROJ INFO  F7 = PREU  F8 = NEXT  F10 = MA09
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Problem: The HOPWA program office has requested that the five completion paths available for selection on the HOPWA Activity screen HOPWA paths be modified to reflect the true purpose of the activity. (See example of new HOPWA Activity screen.) In turn, the screens displayed within each path should relate only to information that needs to be collected for the particular type of activity.

Solution: Effective with Version 6.9, the old paths Facility-Based Housing with Supportive Services and Scattered-Site Housing with Supportive Services have been removed and two new paths, Facility-Based Non-Housing and Housing Information/Resource ID/Administration have been added.

08/09/02 11:20	HOPWA ACTIVITY	C04MP01
PROJECT NUMBER: 35	PROGRAM YEAR: 1997	ACTIVITY NBR: 00000000546
PROJECT TITLE: HOPWA		
ACTIVITY NAME: DOH / AHA REGIONAL RESOURCE COORDINATION		
PLEASE SELECT ONE:		
<input type="checkbox"/>	FACILITY-BASED HOUSING	
<input type="checkbox"/>	FACILITY-BASED NON-HOUSING	
<input type="checkbox"/>	SCATTERED-SITE HOUSING	
<input checked="" type="checkbox"/>	HOUSING INFORMATION/RESOURCE ID/ADMINISTRATION	
<input type="checkbox"/>	SUPPORTIVE SERVICES	
F4 = MAIN MENU F5 = PROJ INFO F7 = PREV F8 = NEXT F10 = MA09		

Existing activities for the Facility-Based Housing with Supportive Services path and Scattered-Site Housing with Supportive Services path have been mapped to either the Facility-Based Housing Path, Scattered-Site Housing Path, or Supportive Services path depending on the specific details of the activity and whether it was primarily a supportive services activity. In addition, IDIS mapped existing activities (no matter what path) with a matrix code of 31B or 31D to the Housing Information/Resource ID/Administration path. Existing activities with the phrase “Housing Information,” “Resource ID,” “Resource Identification,” or “Administration” in the Activity Name or the Activity Description have also been mapped to this new path. Grantees who feel that IDIS mapped their existing activity to an incorrect new path may use the new Delete Path option to select the correct path themselves. Chapter 11 of the IDIS Reference Manual has been updated to include these changes.

Problem: A number of HOPWA path screens do not display a color scheme consistent with the IDIS color rules.

Solution: Effective with Version 6.9, all HOPWA screens now display a color scheme consistent with the IDIS color rules.

4. CDBG

Problem: Users are unable to save a value of 0 to fields on the CDBG Direct Benefit Continued screen (CO4MC02) after they press <F9> or <Enter> to save the screen. IDIS converts the 0’s to blank spaces. The fields affected are: Total Low/Mod Beneficiaries, Total Low Income Beneficiaries, and Total Extremely Low Income Beneficiaries.

Solution: Effective with Version 6.9, if a user enters a 0 in any of the above fields, IDIS will save and display a 0.

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09/16/02  09:15          DIRECT BENEFIT CONTINUED          C04MC02
GRANTEE ACTIVITY NBR: 01102000G228993      HUD ACTIVITY NUMBER: 000000002826
ACTIVITY NAME:  GREATER PGH COMMUNITY FOOD BANK

TOTAL BENEFICIARIES:      0 / COUNTS BY PERSONS

TOTAL LOW/MOD BENEFICIARIES      0
PERCENTAGE OF LOW/MOD BENEFICIARIES  _____

TOTAL LOW INCOME BENEFICIARIES      0
TOTAL EXTREMELY LOW INCOME BENEFICIARIES  0

F1 = HELP  F3 = VALDT  F4 = MAIN MENU  F5 = PROJ INFO
F7 = PREU  F8 = NEXT  F9 = SAVE

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5. HOME

Problem: On the Multi-Address Homeowner*Homebuyer Rehab Completion Activity Location/Address view screen (CO4MH62) users get a SQL error message when they attempt to select an address to view. They should see the Multi-Address Homeowner*Homebuyer Rehab Completion Cost Data view screen (CO4MH66).

Solution: Effective with Version 6.9, users will see the same sequence of screens and data in view mode as in revise mode.

6. REPORTS:

Problem: When a State user requests the Status of CHDO Funds by Fiscal Year report (PR25), the report fails to include CHDO Reserved (CR) funds in the Amount Reserved calculation.

Solution: Effective with Version 6.9, the PR25 report includes CHDO Reserved (CR) funds in the Amount Reserved calculation if CR funds were given to the CHDO. In addition, CPD improved the overall formatting of the report and now includes CR, CO and CC funds not subgranted to a CHDO.

Problem: IDIS currently offers no preformatted reports to assist HOPWA grantees in preparing their annual reports. HOPWA grantees are forced to prepare their reports from the IDIS online data screens.

Solution: Effective with Version 6.9, IDIS has added the new HOPWA Project Activity Summary report (CO4PR72) to the list of available reports. Sorted by project, the report contains both common path and HOPWA path data for each activity within a project. The report lists the contents of each HOPWA path screen for the activity, followed by a Summary section at the end of the report that totals the accomplishments by HOPWA screen across the report. Activities are included on the report if they were funded and open in the requested program year (status = Funds Budgeted or Underway) or were completed in the requested program year.

Problem: Users have reported a number of problems with the ESG Grantee Activity Summary report (PR20):

- On the second through last page of the report, the first line displayed on the page is often the fifth line from the previous page.
- Both Homeless Prevention and Homeless Activities should be included in the calculations used to determine the project level total amounts and the detail line amounts for the four dollar amount fields that are displayed on the report.

- The dollar amounts for the Project Totals and the Grand Totals should include the Committed Amounts and the Drawn Amounts for both the Homeless Prevention and Homeless Activities categories.
- The column label “Percent Comm/Drawn” should be changed to “Percent Drawn/Comm” and the percents displayed to the tenth of a percent.
- The calculations for “Committed Minus Drawn” and “Percent Drawn/Comm” should include all the categories displayed for each individual project.

Solution: Effective with Version 6.9, the above problems have been corrected and the report now includes both Homeless Prevention and Homeless Activities in its calculations.

6. UTILITIES

Problem: On the Program Year Start and End Dates screen (C04MU57), field office system administrators cannot enter a new Program Year unless the Plan Year already exists in IDIS. The Program Year should not be dependent upon the existence of a Plan Year.

Solution: Effective with Version 6.9, field office system administrators can enter a new Program Year as long as it isn't more than one year greater than the current calendar year. The Plan Year does not have to exist in IDIS. Note: IDIS automatically calculates the Start Date of a program year as the End Date of the previous year.

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 SAVE
 F1=LIST GRANTEES F3=VALIDATE F4=MAIN F7=PREV F9=SAVE F17=UP F18=DOWN

Problem: On the “Program Year Start And End Dates” screen (C04MU57), field office system administrators should be able to select any year stored in IDIS to view or change. Currently, they cannot select any year two or more years in the future, or scroll back if IDIS contains more than ten years of history. Additionally, HUD HQ staff should be able to view (but not change) any Program Year saved for the grantee.

Solution: Effective with Version 6.9, field office system administrators can select any previously entered Program Year for update or review. Program Years newer than the current year will not display in the list on the lower portion of the screen but can still be reviewed and updated by entering the year at the top of the screen. Users will need to scroll back (F17) to review dates older than ten years. In addition (1034), the message when an invalid year is entered has been changed from “Plan Year Not Found” to “Program Year Not Saved in IDIS for This Grantee.”

7. SYSTEM AND EDI

Problem: The following EDI records do not correspond to the IDIS online screens and need to be modified:

- Record I06, EDI Activity. For CDBG non-Entitlement communities, allow a blank Regulation Citation.
- Record type I08, CDBG LMA activity. Add fields for Counts by Person/Household, Total Low/Mod Beneficiaries, Total Low Income Beneficiaries, and Total Extremely Low Income Beneficiaries.
- Record I12, CDBG SBA activity. Add fields for Counts by Person/Household, Total Low/Mod Beneficiaries, Total Low Income Beneficiaries, and Total Extremely Low Income Beneficiaries.
- Record I27, EDI HOPWA Activity. Add five fields to collect race data: NUM-WHITE-BEN, NUM-BLACK-BEN, NUM-HISP-BEN, NUM-ASIAN-BEN, NUM-NA-BEN.

Solution: Effective with Version 6.9, the above EDI records have been modified.

Problem: EDI Record I19 (HOME Activity Setup) contains a number of processing errors:

- IDIS is incorrectly saving the 504 Accessible (Y/N) response to the FHA Insured (Y/N) field. This has corrupted data for those activities where the FHA Insured field should be populated.
- IDIS is incorrectly saving the Mixed Income (Y/N) response to the Mixed Use (Y/N) field. This has corrupted data for those activities where the Mixed Use field should be populated.
- The Number of 504 Units field won't accept a zero in update mode.

Solution: Effective with Version 6.9, EDI logic has been modified to fix the above problems. Grantees should send update records to correct the responses to the following fields: Accessible_504, Num_504_Units, FHA_Insured, Mixed_Incm_Flag, Mixed_Use_Flag.

Problem: Currently, IDIS only downloads data from the Grants Management Program (GMP) for entitled grantees that have a "year + 1" in the Report Dates table. Instead, IDIS should download all entitled grantees regardless of whether they have a current year much less a "year + 1" in the Report Dates table.

Solution: Effective with Version 6.9, IDIS has been modified to fix the above problem.