

# **IDIS RELEASE NOTES FOR VERSION 7.0**

CPD plans to release the following IDIS items to production as IDIS Version 7.0 the evening of Thursday, December 12, 2002. They will be available for use on Friday morning, December 13, 2002.

## **1. RACE & ETHNICITY REPORTING:**

Following OMB revised standards for reporting Federal data on race and ethnicity, IDIS is being modified to give grantees the ability to enter race and ethnicity data about activity beneficiaries into a new Hispanic ethnic category and ten race categories.

The five new single-race categories will be White, Black/African American, Asian, American Indian/Alaskan Native, and Native Hawaiian/Other Pacific Islander. When reporting to HUD, grantees will also be able to classify responses using five new multi-race categories: American Indian/Alaskan Native & White, Asian & White, Black/African American & White, American Indian/Alaskan Native & Black/African American, and Other Multi-racial.

The changes will have two significant impacts on grantee data collection and reporting: (1) Hispanic will no longer be a race category but instead will be the sole ethnicity category; and (2) Asian/Pacific Islander will split into two new categories of Asian and Native Hawaiian/Other Pacific Islander.

Inputting ethnicity and race data into the new categories will be mandatory for all grantees. For activities entered into IDIS after Version 7.0, the requirement will start immediately. Grantees will only see the new race/ethnicity categories when they come to an IDIS screen with data fields for race/ethnicity.

For activities already entered into IDIS prior to the release of Version 7.0, grantees should begin collecting race/ethnicity using the new categories as soon as possible. However, they will be given until 4/1/04 to complete the entry of data for the existing categories.

We realize that grantees often have agreements with non-profits on how to collect race and ethnicity data and it may not be feasible to change that process for a few months. The last date that grantees will be able to enter data into the current "Asian/Pacific Islander" or "Hispanic" race categories, which are not included in the new classification, will be 3/31/04. As of 4/1/04, these two race fields will be locked.

To better track beneficiaries, for new activities funded by more than one CDBG entitlement program, IDIS will now contain a separate beneficiary record for each program funding the activity. For existing multi-funded activities, a one-time program concurrent with the 7.0 release will create multiple beneficiary records.

Grantees will not be required to convert any racial data they have already saved to IDIS for the existing five race categories. The current race categories will continue to display in IDIS and appear on IDIS reports. For CDBG, ESG, and HOPWA, IDIS will copy any existing value for Hispanic race to the new Hispanic ethnicity field. For HOME, IDIS will convert the existing one-digit race codes to their new two-digit counterparts while retaining any existing race counts. In addition, for HOME, if an existing activity contains data for the Hispanic race, IDIS will populate the new "Hispanic" ethnicity field with a value of "Y." Existing HOME racial data for all other races will be populated with an "X" to indicate it predates Version 7.0.

IDIS currently collects race/ethnicity data on the following screens. Examples of each screen, as modified for Version 7.0 are provided, below. The [IDIS Reference Manual](#) has been updated to provide examples of these new screens and directions for how to enter race and ethnicity data on them.

- CDBG Direct Benefit (MA05/MH55) and the CDBG Displacement screen (MC03/MC53)
- ESG Racial/Ethnic Characteristics (ME07/ME57)

- HOPWA Racial/Ethnic Characteristics (MP12/MP62)
- HOME Rental Completion Characteristic Data (MH13/MH63), Single Address Completion Characteristic Data (MH14/MH64), Multi-Address Characteristic Data (MH13/MH63), and Tenant-Based Rental Setup (MH06/MH56)

## CDBG DIRECT BENEFIT

12/13/02 09:12		DIRECT BENEFIT		C04MA05	
GRANTEE ACTIVITY NUMBER:		HUD ACTIVITY NUMBER: 000000001648			
ACTIVITY NAME: DENTAL PROGRAM					
COUNTS BY HOUSEHOLDS OR PERSONS? (H/P): P		# FEMALE-HEADED HH: _____			
TOTAL NUMBER BENEFITTING FROM ACTIVITY: 100					
		# TOTAL	# HISPANIC		
	WHITE:	33	10		
	BLACK/AFRICAN AMERICAN:	67	15		
	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:	_____	_____		
	TOTAL:	100	25		
PRESUMED BENEFIT? (Y/N): N					
NATURE/LOCATION? (Y/N): Y					
F3 = VALDT F4 = MAIN F5 = PROJ F7 = PREV F8 = NEXT F9 = SAVE					

## CDBG DISPLACEMENT

12/13/02 09:01		CDBG DISPLACEMENT				C04MC03	
GRANTEE ACTIVITY NBR: 023482		HUD ACTIVITY NUMBER: 000000001675					
ACTIVITY NAME: WEST SQUARE MANOR - CDBG							
CENSUS TRACT OR CITY: 0001.00		TRACT/CITY#: 001 OF 007					
----- R A C E -----	-DISPLACD-	-REMAIN IN-	-RELCTD TO-	-ACTIVITY-			
	TOTL# #HISP	TOTL# #HISP	TOTL# #HISP	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		
F3 = VALDT F4 = MAIN MENU F5 = PROJ INFO F7 = PREV F8 = NEXT F9 = SAVE							
F11 = INSERT F13 = DELETE F17 = UP F18 = DOWN							

## ESG RACIAL/ETHNIC CHARACTERISTICS

12/13/02 07:58		RACIAL/ETHNIC CHARACTERISTICS		C04ME07	
GRANTEE ACTIVITY NUMBER: E98-002		HUD ACTIVITY NUMBER: 000000001369			
ACTIVITY NAME: YOUTH SERVICES - SHELTER CARE					
AVERAGE NUMBER SERVED YEARLY BY RESIDENTIAL SERVICES:		300			
		#TOTAL	#HISPANIC		
	WHITE:	100	20		
	BLACK/AFRICAN AMERICAN:	100	15		
	ASIAN:	50	0		
	AMERICAN INDIAN/ALASKAN NATIVE:	0	0		
	NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER:	0	0		
	AMERICAN INDIAN/ALASKAN NATIVE & WHITE:	0	0		
	ASIAN & WHITE:	0	0		
	BLACK/AFRICAN AMERICAN & WHITE:	0	0		
	AM. INDIAN/ALASKAN NATIVE & BLACK AFRICAN AM.:	0	0		
	OTHER MULTI-RACIAL:	0	0		
	ASIAN/PACIFIC ISLANDER:	0	0		
	HISPANIC:	50	50		
	TOTAL:	300	85		
F4 = MAIN MENU F5 = PROJ INFO F7 = PREV F8 = NEXT F9 = SAVE					

# HOPWA RACIAL/ETHNIC CHARACTERISTICS

12/13/02 06:27		FACILITY-BASED HOUSING		C04MP12	
PROJECT NUMBER:	31	PROGRAM YEAR:	1998	ACTIVITY NBR:	00000000634
PROJECT TITLE:	HOPWA				
ACTIVITY NAME:	0H0030 RAP, INC.				
DEMOGRAPHICS - RACE/ETHNICITY	TOTAL NUMBER OF PERSONS -				
RECEIVING HOUSING ASSISTANCE:	25				
		# TOTAL		# HISPANIC	
	WHITE:	5		1	
	BLACK/AFRICAN AMERICAN:	5		2	
	ASIAN:	0		0	
	AMERICAN INDIAN/ALASKAN NATIVE:	0		0	
	NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER:	0		0	
	AMERICAN INDIAN/ALASKAN NATIVE & WHITE:	0		0	
	ASIAN & WHITE:	5		2	
	BLACK/AFRICAN AMERICAN & WHITE:	0		0	
	AM. INDIAN/ALASKAN NATIVE & BLACK/AFRICAN AM.:	0		0	
	OTHER MULTI-RACIAL:	0		0	
	ASIAN/PACIFIC ISLANDER:	0		0	
	HISPANIC:	10		10	
	TOTAL:	25		15	
F3 = VALDT F4 = MAIN MENU F5 = PROJ INFO F7 = PREV F8 = NEXT F9 = SAVE					

# HOME RENTAL COMPLETION CHARACTERISTIC DATA

12/13/02 09:21		RENTAL COMPLETION CHARACTERISTIC DATA		C04MH13							
GRANTEE ACTIVITY NBR:	026342 / 026502	HUD ACTIVITY NUMBER:	00000004277								
ACTIVITY NAME:	PROV WESTSIDE DEV										
STREET ADDRESS:	PROVIDENCE WESTSIDE HOUSING DEVELOPMENT FUND										
CITY:	ROCHESTER	STATE:	NY	ZIP:	14624 -						
UNIT NUMBER	BDRM CODE	UNIT OCUP	TEN CONT	SUBS ANT	TOT RENT	% MED	HISP	RACE	SIZE HHLD	HEAD HHLD	RENT ASST
1	2	1				1	X	21	1	1	1
2	2	2				1	Y	22	1	1	1
3	2	9									
4	2	9									
5	2	9									
6	2	9									
7	2	9									
8	2	9									
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											

# SINGLE ADDRESS COMPLETION CHARACTERISTIC DATA

12/13/02 09:24		SINGLE-ADDRESS HOMEBUYER*HOMEOWNER REHAB COMPLETION CHARACTERISTIC DATA		C04MH14							
GRANTEE ACTIVITY NBR:	025156	HUD ACTIVITY NUMBER:	00000004090								
ACTIVITY NAME:	84 ROXBOROUGH RD										
STREET ADDRESS:	84 ROXBOROUGH ROAD										
CITY:	ROCHESTER	STATE:	NY	ZIP:	14619 -						
UNIT NUMBER	BDRM CODE	UNIT OCUP	TEN CONT	SUBS ANT	TOT RENT	% MED	HISP	RACE	SIZE HHLD	HEAD HHLD	RENT ASST
1	3	2				4	X	11	2	3	4
2	1	1				1	Y	22	1	1	1
3	1	9									
F1 = HELP F3 = VALDT F4 = MAIN MENU F5 = PROJ INFO											
F7 = PREV F8 = NEXT F9 = SAVE											

# MULTI-ADDRESS CHARACTERISTIC DATA

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12/13/02 MULTI-ADDRESS HOMEBUYER*HOMEOWNER REHAB COMPLETION C04MH13
09:38 CHARACTERISTIC DATA

GRANTEE ACTIVITY NBR: HUD ACTIVITY NUMBER: 00000004650

ACTIVITY NAME: MAYBERRY APARTMENT REHAB

STREET ADDRESS: 123 HOGENHILL TERR
CITY: ANY CITY STATE: MD ZIP: 12345 - ____

UNIT BDRM UNIT TEN SUBS TOT % SIZE HEAD RENT
NUMBER CODE OCUP CONT AMT RENT MED HISP RACE HHLD HHLD ASST
1 1 1 1 1 1 N 13 1 1 1
2 2 2 1 Y 11 2 2 2
3 1 9 1 1 1 1 1 1 1
____ - - - - - - - - - -

SELECT ANOTHER ADDRESS? _

F1 = HELP F3 = VALDT F4 = MAIN MENU F5 = PROJ INFO
F7 = PREU F8 = NEXT F9 = SAUE
    
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# TENANT-BASED RENTAL SETUP

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12/12/02 TENANT-BASED RENTAL ASSISTANCE (TBRA) SETUP C04MH06
03:49

GRANTEE ACTIVITY NBR: HUD ACTIVITY NUMBER: 00000004644

ACTIVITY NAME: TBRA - CITYWIDE CONT
END
DATE
LAST BDRM TEN SUBS TOT HISP HHLD HHLD HHLD CNTR
NAME CODE CONT AMT RENT MED (Y/N) RACE SIZE HEAD TYPE STAT (MMYY)
0001 KITTE 1 20 200 220 1 N 11 1 1 1 T 1 1003

F1 = HELP F3 = VALDT F4 = MAIN MENU F5 = PROJ INFO F7 = PREU
F8 = NEXT F9 = SAUE F10 = INSERT F13 = DELETE F17 = UP F18 = DOWN
    
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## 2. REPORTS:

**Problem:** The CDBG Activity Summary Report (GPR) for Program Year (PR03), ESG Statistics for Projects (PR19), and HOPWA Project Activity Summary for Report Year (PR72), which all report racial and ethnicity data, need to be modified so they include the new race and ethnicity codes used on the IDIS online screens.

**Solution:** Effective with Version 7.0, the above reports were modified to include the new race and ethnicity codes used on the IDIS online screens. The IDIS [Report Catalog](#) contains updated examples of the revised reports.

## 3. DRAWDOWN:

**Problem:** Currently, IDIS checks to see if an activity has enough funds available to draw when the user enters an activity number on the Create Drawdown (MD10) screen. In rare circumstances, if two users for the same grantee both have rights to create drawdowns and if they both attempt to create a drawdown at the same moment in time, IDIS allows the creation of both draws and assigns a voucher number on the MD14 screen even though the total of both invoices exceeds the amount funded.

**Solution:** Effective with Version 7.0, IDIS will check for available funds both at the start of a draw request on the MD10 screen and again on the MD14 screen when the request is completed and a voucher number issued. In the above example, the first draw request would be processed. If the second draw request exceeded the available funding, the user would have to abandon the request or create a request for only the amount of funding available.

## 4. SYSTEM AND EDI

**Problem:** Records for Electronic Data Interchange (EDI) that report race and ethnicity data need to be modified so they include the new race and ethnicity codes used on the IDIS online screens.

**Solution:** Effective with Version 7.0, the following records have been modified to reflect the Version 7.0 changes to IDIS for race and ethnicity. [EDI record layouts](#) have been updated to reflect this change.

I09, EDI CDBG LMC Activity	I18, EDI ESG Activity
I10, EDI CDBG LMH Activity	I27, EDI HOPWA Activity
I11, EDI CDBG LMJ Activity	I24, EDI HOME Location Beneficiaries
I14, EDI CDBG Area Displacement	I25, EDI HOME Tenant-Based Beneficiaries

**Problem:** When the IDIS online screen C04MP11, Expenditures of HOPWA Funds, was updated to include a new “Resource ID” field, the I29 EDI record, EDI HOPWA Expense, was not modified so that Resource ID was a valid entry.

**Solution:** Effective with Version 7.0, the I29 EDI record has been modified to accept a TYPE\_CD value of “15” (Resource ID).

**Problem:** IDIS Data Extract Files which include race and ethnicity data need to be modified so they include the new race and ethnicity codes used on the IDIS online screens.

**Solution:** Effective with Version 7.0, the following files have been modified to reflect the Version 7.0 changes to IDIS for race and ethnicity: BEN, E-BEN, M-BEN, M-TBRA-BEN, and C-DSPLC. [Appendix D](#) of the IDIS Reference Manual, Data Extract File Layouts has been updated to reflect this change.

**Problem:** IDIS is not adjusting activity funding properly when it receives an adjustment from LOCCS.

**Solution:** Effective with Version 7.0, IDIS logic was corrected to ensure activity funding is updated properly when an adjustment transaction is received from LOCCS.