

IDIS RELEASE NOTES FOR VERSION 8.3

New CDBG Completion Edits

CPD plans to release the following IDIS items to production as IDIS Version 8.3 the evening of Wednesday, September 15, 2004. They will be available for use on Thursday morning, September 16, 2004.

The new CDBG completion edits prevent a grantee from changing the status of an activity to complete when its accomplishment data are incorrect. Grantees will need to correct inaccurate data and supply missing data, as prompted by error messages, prior to being allowed to complete an activity. Warning messages will also make grantees aware of errors and omissions while the activity is underway. Most of these edits will be familiar to grantees since they are based on the criteria for CDBG's ongoing data cleanup initiative. These edits will ensure the accuracy of CDBG accomplishment data and will eventually eliminate the need for the current data cleanup effort.

For assistance on program related issues, please refer to the Guidance for Reporting CDBG Accomplishments in IDIS or contact Karen Pearce at (202) 708-1577. For assistance on technical IDIS issues, please contact the TAU.

Note:

- **These edits do NOT apply when the IDIS Activity ID# = 1,2,3,4**
- **These edits do NOT apply if grantee answered "Y" to question on the MA04 screen: Accomplishments for this activity reported at another activity?**

NATIONAL OBJECTIVE = LMH*

1. Counts by Households or Persons on the MA05 screen must = 'H'
2. At least one race/ethnicity field must be entered on the MA05 screen.
3. Total Low/Mod beneficiaries must be entered on the MC02 screen.
4. If an activity has a matrix code of '14B' or the Multi-Unit Housing indicator on the MC01 screen is "Y", the following edits apply:
 - The sum of the actual units for all years on the MA04 screen must equal the total number benefiting from activity on the MA05 screen and the total number completed on the MC05 screen.
 - These fields on the MC05 screen must be > zero:
Number of units completed: Total, Occupied, and Occupied Low/Mod.
Additionally, the value in "Total" should = "Occupied".
5. If activity has a matrix code of '14A' or the Multi-Unit Housing indicator on the MC01 screen is "N" or space, the sum of the actual units for all years on the MA04 screen must equal Total number benefiting from activity on the MA05 screen.
6. If the accomplishment type code on the MA04 screen = 10 (Housing Units), then the sum of actual units on the MA04 screen must = total number benefiting on the MA05 screen

NATIONAL OBJECTIVE = LMC*

1. Counts by Households or Persons on the MA05 screen must = 'P' (Exception: If the matrix code = '05R', '05S', '05T', '08', '04', '14H'.)
2. At least one race/ethnicity field must be entered on the MA05 screen.
3. Total Low/Mod beneficiaries must be entered on the MC02 screen.
4. If the accomplishment type code on the MA04 screen = 01 (People), then the sum of actual units on the MA04 screen must = total number benefiting on the MA05 screen

NATIONAL OBJECTIVE = LMJ*

1. Counts by Households or Persons on the MA05 screen must = 'P'
2. At least one race/ethnicity field must be entered on the MA05 screen.
3. Total Low/Mod beneficiaries must be entered on the MC02 screen.
4. At least one of the dollar amount fields must be entered on the MA07 screen.
5. At least one of the Expect to Create/Retain Job counts must be > zero AND at least one of the Actual Create/Retain Jobs counts must be > zero.
6. If the Actual Create/Retain PT Hours on the MA07 screen = zero, then total number benefiting from activity on the MA05 screen must = FTE Jobs on the MA07 screen.
7. If the Actual Create/Retain PT Hours on the MA07 screen > zero, then total number benefiting from activity on the MA05 screen must > FTE Jobs on the MA07 screen.
8. If the accomplishment type code on the MA04 screen = 13 (Jobs and there are no PT hours on the MA07 screen), then the sum of actual units on the MA04 screen must = total number benefiting on the MA05 screen.

NATIONAL OBJECTIVE = LMA*

1. % of Low/Mod in Service Area must be entered on the MX03 screen AND
2. At least one census tract must be entered on the MX03 screen.

NATIONAL OBJECTIVE = SBA

1. The following fields must have been entered on the MX02 screen:
Boundaries, Percentage deteriorated buildings, slum/blight designation year.

Other edits:

1. For State Grantees: accomplishment code must = 1,4,8,9,10,13,or 14.
2. For CDBG Entitlement grantees: the combination of matrix code (MA03)/national objective code (MC01)/accomplishment type (MA04) must be a valid combination as shown in the Guidance for Reporting CDBG Accomplishments in IDIS.
3. There must be a MA04 screen for each program year for the duration of an activity.
4. Once a CDBG activity has been completed, the information on the CDBG screens will be available in VIEW mode only. The grantee must reopen the activity (go to Revise Activity and change the activity status to Underway)

5. to change any data element. Also, matrix codes and accomplishment type codes (on the common path) cannot be changed if the activity is CDBG and completed. The grantee must reopen the activity to make these changes.
6. Accomplishment type codes (proposed and actual) must be the same for all years before an activity can be completed.

Report Change:

1. The PR03 Report will now display all years of proposed and actual units from the MA04 screen. Cumulative totals for proposed and actual units will be calculated and displayed.
2. At the beginning of each PR03, there will be lists of activities by program year that are missing MA04 screens and a list of activities with invalid matrix code/national objective code/accomplishment type code combinations.

*These edits apply to all national objective codes beginning with these letters.