

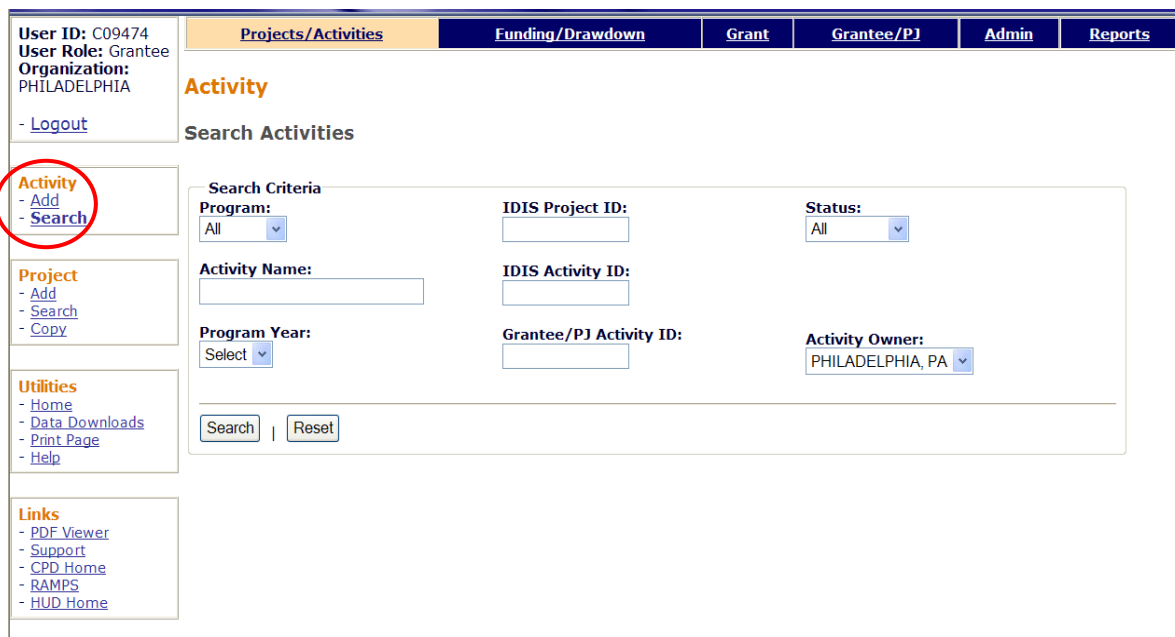
Chapter 3

THE COMMON ACTIVITY SCREENS

HOME, CDBG, ESG, and HOPWA all use the same screens to initially add a new activity, access an existing activity for update, copy an activity, or reopen a cancelled activity. These common screens are explained in this chapter.

ACCESSING THE COMMON ACTIVITY FUNCTIONS

Click the Projects/Activities tab at the top of the page you are on to display the Search Activities screen. On it and all other Projects/Activities screens, links to the activity functions you are authorized to access are listed on the left (and circled on the screen print below):



The Add link accesses the initial activity setup screen that must be filled in for every activity in IDIS OnLine. It is described starting on the next page.

The Search link displays the screen shown above, which is the starting point for processing existing activities. Turn to page 3-5 for details.

ADD ACTIVITIES

Click the Activity Add link on any Projects/Activities screen to display the Add Activity screen:

The following instructions are for HOME-funded activities.

Field	Description
Activity Owner	If the name of the grantee who owns the Action Plan project that the activity will be set up under is not shown in this field, select the correct grantee from the dropdown. If you change the ACTIVITY OWNER, also click the <Refresh Project List> button to display that grantee's projects.
Program Year	Select the program year under which the activity is to be set up.
IDIS Project ID/Title	Select the project under which the activity is to be set up.

Field	Description
Activity Name	Enter a name for the activity, following the naming conventions your organization has established.
Grantee/PJ Activity ID	This field is optional. If you wish to assign your own identifier to an activity, enter it here.
Indicate if activity will be funded with Recovery Grant Funds	Change the answer to Yes if TCAP funds will be used for the activity.
Activity	
Program	Use the third row for HOME-funded activities.
Activity Category	<p>The HOME activity categories are:</p> <p>Rental – PJs may use HOME funds to acquire, rehabilitate, or construct affordable rental housing.</p> <p>Homebuyer – HOME funds may be used to finance the acquisition and/or new construction or the acquisition and rehabilitation of homes for homebuyers.</p> <p>Homeowner Rehab – PJs may use HOME funds to assist existing homeowners with the repair, reconstruction, or rehabilitation of their homes.</p> <p>Tenant-Based Rental Assistance (TBRA) – Tenants may receive HOME funds to pay for rent, security deposits, and utility costs and deposits.</p> <p>AD/CO/CC Only – Select this for activities that will be funded <i>only</i> with Administration (AD), CHDO Operating Expenses (CO), and/or CHDO Capacity Building (CC) funds.</p>
Ready to Fund	This read-only field is always No on the Add Activity screen.
Setup Detail <Add HOME> button	Once all required data fields have been input, clicking this button displays the first HOME setup screen. The button is deactivated for AD/CO/CC Only activities.
Environmental Assessment	<p>The choices are Completed, Exempt, or Underway.</p> <p>If you leave the field blank, it is automatically set to Completed if you have selected a HOME Activity Category.</p> <p>For HOME rental, homebuyer, and homeowner rehab activities, it should always be Completed, since HOME regulations require the environmental review to be completed before the activity is funded [see 24 CFR 92.352(b)(1)].</p> <p>For TBRA activities and activities funded only with Admin (AD), CHDO Operating Expense (CO), or CHDO Capacity Building (CC) funds, it should always be Exempt.</p>

Field	Description
Allow Another Organization to Access this Activity	<p>If you do not create subgrants, ignore this field. Otherwise, if you want IDIS users at an organization that you have created a subgrant for to be able to access this activity:</p> <ol style="list-style-type: none"> 1. Click the <Select Organization> button. 2. On the Select Organization page, enter search criteria if you wish or leave the search fields blank to display a list of all the organizations you have created subgrants for. 3. Click the <Search> button. 4. To select an organization, click first on the radio button next to its name and then on the <Select> button. <p>To return to the Add Activity page without selecting an organization, click the <Cancel> button.</p>
Activity Description	A description of the activity is optional.

If you are setting up a housing activity, click the <Add HOME> button to access the HOME-specific setup screens. The rental setup screens are described in Chapters 4 and 5, the homebuyer screens in Chapters 6 and 7, the homeowner rehab screens in Chapters 8 and 9, and the TBRA screens in Chapter 10.

If you are setting up an AD/CO/CC Only activity, there are no HOME-specific screens to fill in, so just click the <Save> button. The screen is redisplayed in edit mode, and the activity is ready to be funded (see Chapter 16). Additional details about AD/CO/CC Only activities are provided in Chapter 11.

EDIT/VIEW ACTIVITIES

To view or update an existing activity (e.g., finish setting it up, modify previously entered information, add/update HOME completion data, or change its status), you must first conduct a search to retrieve it.

SEARCH ACTIVITIES SCREEN

Click the Activity [Search](#) link on any Projects/Activities screen to access the Search Activities screen:

The purpose of the screen is for you to identify the activity or activities you want to update. To do so, you can:

- Retrieve a specific activity by entering its IDIS Activity ID and clicking the <Search> button.
- Click the <Search> button to retrieve all of your activities.
- Specify criteria to limit the number of activities that will be displayed, as follows:

Search Field	Description
Program	To limit the results to a particular program, select it from the dropdown.
Activity Name	Limit the results to activities with a name containing the text string you input here.
Program Year	To limit the results to activities set up under the projects of a particular PROGRAM YEAR, select it from the dropdown.
IDIS Project ID	To limit the results to activities set up under a particular project, enter the ID here.

Search Field	Description
IDIS Activity ID	The quickest way to retrieve a particular activity is to enter its IDIS ACTIVITY ID. Since this is the unique identifier for an activity, there is no point in inputting any other search criteria.
Grantee/PJ Activity ID	Limit the results to activities with a grantee/PJ activity ID containing the text string you input here.
Status	To limit the results to activities with a particular status, select Open , Completed , or Cancelled .
Activity Owner	Most users will not be able to change this field. Those who can change it should select the grantee who owns the project that the activity to be funded is set up under.

Click the <Search> button to run the search and redisplay the screen with the search results:

The screenshot shows a web application interface for searching activities. At the top, there are navigation tabs: Projects/Activities (selected), Funding/Drawdown, Grant, Grantee/PJ, Admin, and Reports. The user's information is displayed on the left: User ID: C09474, User Role: Grantee, Organization: PHILADELPHIA, and a Logout link. The main content area is titled 'Activity' and contains a 'Search Activities' section with the following search criteria:

- Program: HOME (dropdown)
- IDIS Project ID: (text input)
- Status: All (dropdown)
- Activity Name: (text input)
- IDIS Activity ID: (text input)
- Program Year: 2008 (dropdown)
- Grantee/PJ Activity ID: (text input)
- Activity Owner: PHILADELPHIA, PA (dropdown)

Below the search criteria are 'Search' and 'Reset' buttons. The results section is titled 'Results Page 1 of 5' and contains a table with the following data:

<u>Activity Name</u>	<u>Program Year/Project ID</u>	<u>IDIS Activity ID</u>	<u>Grantee/PJ Activity ID</u>	<u>Status</u>	<u>Activity Owner</u>	<u>Action</u>
Lawrence Court	2008/2	9256		Open	PHILADELPHIA, PA	Edit View
CECIL B. MOORE PHASE III-3 (HERB CDC)	2008/2	9254	0920322	Open	PHILADELPHIA, PA	Edit View
PHDC- HRP	2008/18	9252	0920172	Open	PHILADELPHIA, PA	Edit View
SHANNON M. TANKSLEY	2008/6	9250	0920693	Open	PHILADELPHIA, PA	Edit View
FATTAH HOMES	2008/4	9249	0920322	Open	PHILADELPHIA, PA	Edit View
LIBERTY COMMUNITY INTEGRATION PROGRAM II	2008/5	9248	0920322	Open	PHILADELPHIA, PA	Edit View
LATOYA PARSON AND DWAIN E. DAWSON	2008/6	9240	0920693	Open	PHILADELPHIA, PA	Edit View

On initial display, the results are sorted by IDIS ACTIVITY ID in descending order. You can change both the sort field and the sort order (ascending or descending) by clicking on any column header that is in blue and underlined.

Select the activity you want to process by clicking its [Edit](#) or [View](#) link in the last column. Only the View link will be available for completed and cancelled activities and for users not authorized to update activities.

Depending on the link selected, the Edit Activity or View Activity screen will be displayed. The two screens are very similar except, of course, that data on the view screen cannot be changed. Only the Edit Activity screen is shown here.

EDIT ACTIVITY SCREEN

This screen is a modified version of the Add Activity screen:

Projects/Activities
Funding/Drawdown
Grant
Grantee/PJ
Admin
Reports

Activity

Edit Activity

|

***Indicates Required Field**

Activity Owner:
PHILADELPHIA, PA

IDIS Activity ID:
9256

***Program Year:**
2008

***IDIS Project ID/Project Title:**
2/HOMEOWNERSHIP NEW CONSTRUCTION (2008)

***Activity Name:**
Lawrence Court

Activity Status:
Open

Completion Date:
 [Select Date](#)
(ex: mm/dd/yyyy)

Grantee/PJ Activity ID:

Initial Funding Date:
09/21/2009

***Indicate if activity will be funded with Recovery Grant Funds:(tip)**
 Yes No

Activity

Program	*Activity Category (tip)	Ready to Fund	Funded	Setup Detail	Accomplishment	Completion Check
CDBG	None	No	No	<input type="button" value="Add CDBG"/>	<input type="button" value="Add CDBG Accomp."/>	
ESG	None	No	No	<input type="button" value="Add ESG"/>	<input type="button" value="Add ESG Accomp."/>	
HOME	Homebuyer	Yes	Yes	<input type="button" value="Edit HOME"/>	<input type="button" value="Add HOME Accomp."/>	<input type="button" value="Check HOME"/>
HOPWA	None	No	No	<input type="button" value="Add HOPWA"/>	<input type="button" value="Add HOPWA Accomp."/>	

***Environmental Assessment:**

Allow Another Organization to Access this Activity (tip)

Activity Description:

New Construction of 50 Homebuyer units. Funded with HOME and State Funding.

|

Field	Description
Activity Owner	Same as the Add Activity screen.
IDIS Activity ID	The system-generated identifier for the activity.
Program Year	Same as the Add Activity screen.
IDIS Project ID/Project Title	If you change the PROGRAM YEAR, this field is reset to Select . Choose a project from the newly selected year.
Activity Name	Same as the Add Activity screen.
Activity Status	A new activity is automatically assigned a status of Open . This can be changed to Cancelled at any time provided no HOME funds have been drawn down for the activity. For the steps required to update the status to Completed or to cancel an activity with HOME draws, turn to page 3-10.
Completion Date	If you change the status of the activity to Completed or Cancelled , enter the cancellation/completion date in this field or leave it blank to default to today's date.
Grantee/PJ Activity ID	Same as the Add Activity screen.
Initial Funding Date	The date this activity was initially funded via the Activity Funding option. It is system-assigned and cannot be changed.
Indicate if activity will be funded with Recovery Grant Funds	Same as the Add Activity screen.
Activity	
Program	Use the third row for HOME-funded activities.
Activity Category	If you change this field, the message "Changing the activity category may result in loss of data. Do you wish to continue?" is displayed. Click <OK> or <Cancel>, as appropriate. The ACTIVITY CATEGORY of an activity funded with CHDO Reserve cannot be changed to Homeowner Rehab, TBRA, or AD/CO/CC Only.
Ready to Fund	If this read-only field is No , then required setup data is missing. It must be provided before the activity can be funded. If it is Yes , then all required setup data has been input and the activity can be funded. You can access the funding screens by clicking the <Activity Funding> button at the lower left of the Activity box, under the HOPWA label.
Funded	This read-only field is No if the activity has not been funded and Yes if it has.
Setup Detail	Click this button to save any changes you have made and access the HOME setup screens for the activity. If the button label is <Add HOME Detail>, then no setup data has been entered. If it is <Edit HOME Detail>, then some or all setup data has been input.

Field	Description
Accomplishment	<p>Click this button to save any changes you have made and access the HOME completion screens for the activity.</p> <p>If the button label is <Add HOME Accomp.> then no completion data has been input yet. If it is <Edit HOME Detail>, then some or all accomplishment data has been input.</p>
Completion Check	<p>Before the status of an activity can be changed to Completed, you must click the <Check HOME> button to run a completion check. See the next page for more details.</p>
Environmental Assessment	<p>Same as the Add Activity screen.</p>
Allow Another Organization...	<p>Same as the Add Activity screen.</p>
Activity Description	<p>Same as the Add Activity screen.</p>

Click the <Save> button to save or the <Cancel> button to cancel any changes you made on this screen and redisplay the Search Activities screen.

UPDATING THE ACTIVITY STATUS

As mentioned earlier, the valid values for ACTIVITY STATUS are Open, Completed, and Cancelled. IDIS OnLine automatically assigns a status of Open to a new activity. It is your responsibility to indicate when an activity has been completed or cancelled.

Changing the Status to Completed

The completion criteria for HOME activities are defined at 24CFR 92.2 under *Project Completion* (what is called a HOME project in the regulations is called an activity in IDIS).

Before you will be able to change the status to Completed in IDIS OnLine, you must run a "completion check." To do so, go to the Edit Activity screen (see page 3-7). You may need to scroll to the right to bring the Completion Check column into view:

Activity

Edit Activity

Save | Cancel

***Indicates Required Field**

Activity Owner:
PHILADELPHIA, PA

Activity Status:
Open

IDIS Activity ID:
9256

Completion Date:
 [Select Date](#)
(ex: mm/dd/yyyy)

***Program Year:**
2008

Grantee/PJ Activity ID:

***IDIS Project ID/Project Title:**
2/HOMEOWNERSHIP NEW CONSTRUCTION (2008)

Initial Funding Date:
09/21/2009

***Activity Name:**
Lawrence Court

***Indicate if activity will be funded with Recovery Grant Funds:(tip)**
 Yes No

Program	*Activity Category (tip)	Ready to Fund	Funded	Setup Detail	Accomplishment	Completion Check
CDBG	None	No	No	Add CDBG	Add CDBG Accomp.	
ESG	None	No	No	Add ESG	Add ESG Accomp.	
HOME	Homebuyer	Yes	Yes	Edit HOME	Add HOME Accomp.	Check HOME
HOPWA	None	No	No	Add HOPWA	Add HOPWA Accomp.	

Activity Funding

Click the <Check HOME> button. Respond to any error messages, rerunning the check as many times as needed to get the message "HOME activity pathway is complete."

Once the completion check has run successfully, the status can be changed to **Completed** and the COMPLETION DATE provided. Click the <Save> button to save your changes and display the View Activity screen.

When the status is successfully updated to Completed, no further updates are permitted. Any undrawn funds that have been committed to the activity through the Activity Funding option will be released and the funded amount adjusted to equal the drawn amount.

Changing the Status to Cancelled

If no funds have been drawn for the activity, just select **Cancelled** from the ACTIVITY STATUS dropdown. Any funds that were committed to the activity through the Activity Funding option will be released automatically.

Instructions for cancelling an activity with draws are provided in Chapter 19.

REOPEN ACTIVITY AND COPY ACTIVITY

To access these functions, choose the [View](#) link for an activity on the Search Activities screen (see page 3-5). The <Reopen Activity> button is displayed for cancelled and completed activities. The <Copy this Activity> button is displayed for all activities.

User ID: C09474
User Role: Grantee
Organization: PHILADELPHIA
[Logout](#)

Projects/Activities | **Funding/Drawdown** | **Grant** | **Grantee/PJ** | **Admin** | **Reports**

Activity
[View Activity](#)

[Return to Previous Page](#) | **Reopen Activity** | **Copy this Activity**

Activity Owner: PHILADELPHIA, PA
Activity Status: Completed
IDIS Activity ID: 9022
Completion Date: 06/30/2009
Program Year/IDIS Project ID/Project Title: 2008/23/RENTAL ASSISTANCE/HOMELESS AND HIV/AIDS
Grantee/PJ Activity ID: 0920164
Activity Name: HOME RENTAL ASSISTANCE
Initial Funding Date: 10/15/2008
***Indicate if activity will be funded with Recovery Grant Funds:** (tip)
 Yes No

Activity

Program	Activity Category	Ready to Fund	Funded	Setup Detail	Accomplishment
CDBG		No	No		
ESG		No	No		
HOME	Tenant-Based Rental Assistance (TBRA)	Yes	Yes	View HOME	
HOPWA		No	No		

Environmental Assessment: EXEMPT
Allow Another Organization to Access this Activity:

Activity Description:
 THIS ACTIVITY FUNDS RENTAL ASSISTANCE FOR PEOPLE LIVING WITH AIDS. HOME FUNDING WILL PAY FOR 85 SLOTS OF RENTAL ASSISTANCE.

[View Activity Funding](#)

[Return to Previous Page](#) | [Reopen Activity](#) | [Copy this Activity](#)

Clicking the <Reopen Activity> button displays the activity on the Edit Activity screen with the message "Activity has been reopened successfully." The ACTIVITY STATUS is reset from Cancelled or Complete to Open and the COMPLETION DATE is reset to blank.

Clicking the <Copy Activity> button displays the message "Are you sure you want to copy?" Click <OK> to continue. The Edit Activity screen for the copied activity is displayed with the message "Activity copied to new activity with IDIS activity ID nnnnn."