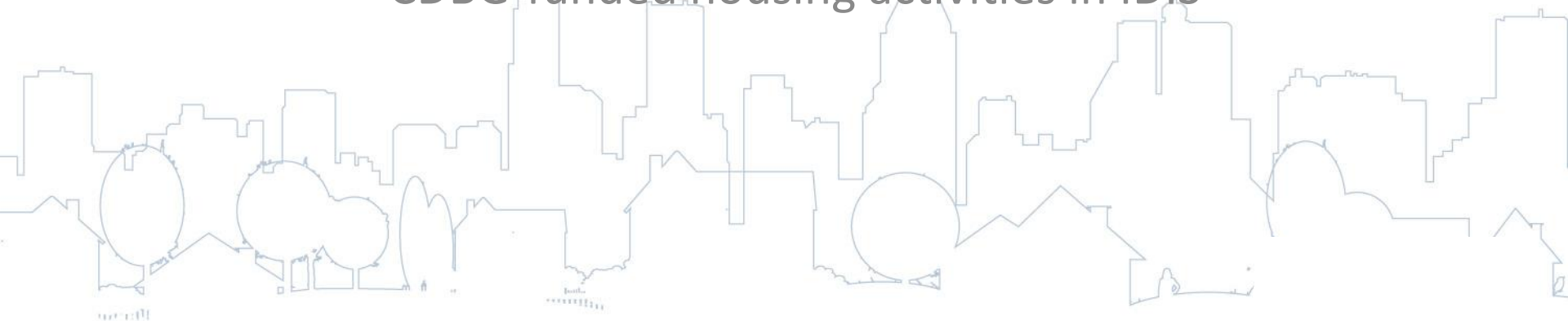




IDIS in 90 Minutes: Housing

A review of how to correctly set up and report on
CDBG-funded housing activities in IDIS



Participating in the Webinar

- Call will last approximately 90 minutes.
- All callers are “muted” due to the high number of participants.
- Webinar will be recorded for future use and made available for viewing/downloading.

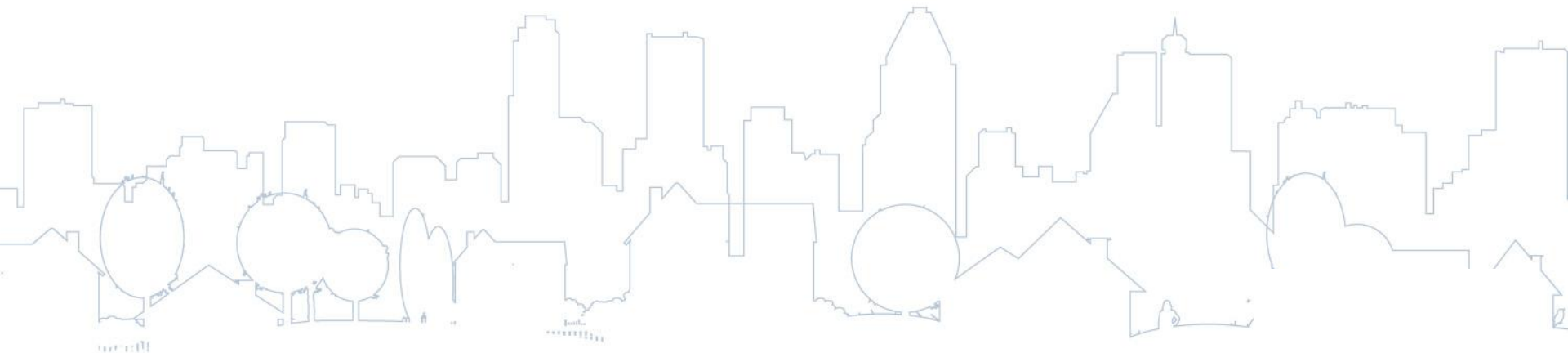
Participating in the Webinar

- If you are having audio difficulties, you may want to use your telephone instead of your computer.
- If you have questions, you are welcome to submit them throughout the presentation using the “Questions” function on the GoToWebinar toolbar. Submit your questions by keying them in the text box under the Questions pane on the toolbar.
- Presenter will answer some questions during the webinar; others will be answered in a new FAQ document posted to website: <http://www.comcon.org/programs/idis.html>



IDIS Data Entry for Housing Activities

Goal: Ensure grantees understand the correct way to set up and report accomplishments on CDBG-funded housing-related activities in IDIS.



Agenda

- What's New
- Concepts
- IDIS Activity Setup
- IDIS Activity Accomplishments
- Question and Answer



What's New: Resources

- Web-based IDIS Instruction
 - Detailed video walkthroughs of all slide material and exercises
 - ComCon Website:
<http://www.comcon.org/programs/idis.html>
- Three other webinars in the *IDIS in 90 Minutes* Series:
 - Public Facilities, Public Services, and Economic Development
 - Common Mistakes Grantees Make in Reporting CDBG Data
 - **Generating CDBG Reports in IDIS**

What's New in the System

- New Multiple Address Feature
- Lead Based Paint Fields
- Inclusion of Con Plan & Action Plan
 - Scheduled for release in April 2012
 - Connect Con Plan Goals to activities and outcomes
 - More details in July Con Plan webinars:
 - <http://www.comcon.org>

New Code Enforcement Metrics

Code Enforcement

* Housing units receiving violations

Housing units where code violations have been corrected using CDBG funds

Housing units where code violations have been corrected by the owner

Housing units where code violations have been corrected using other funds

***Describe specific public and private improvements or services provided in the code enforcement area**

IDIS Activity IDs where code corrections are being tracked

Concepts: What is IDIS?

- Real-time Online Database
- Supports CDBG, CDBG-R, HOME, ESG, and HOPWA
- Key Purposes of IDIS:
 - Disburse funds
 - Collect accomplishment and compliance data

Concepts: What Is an IDIS Activity?

- Basic Building Block of IDIS
- Collects Data Regarding:
 - Beneficiary Data
 - Expenses (drawdowns)
- For Housing:
 - Can represent a housing program (i.e., Downpayment Assistance Program)
 - Can represent a specific address (i.e., Rehab of 123 Main Street)

Activity Setup Focus

- Defining Scope of the Activity
- Matrix Codes
 - Describes Eligibility of Activity
 - Use Most Specific
 - Use Appendix of Training Manual
- National Objectives (N.O.)
 - Must document N.O. compliance for all non-admin/planning activities

Housing Matrix Codes

- 12 Construction of Housing
- 13 Direct Homeownership Assistance
- 14A Rehab: Single-Unit Residential
- 14B Rehab: Multi-Unit Residential
- 14C Rehab: Public Housing Modernization
- 14D Rehab: Other Publicly Owned Residential Buildings
- 14F Rehab: Energy Efficiency Improvements
- 14G Rehab: Acquisition
- 14H Rehab: Administration
- 14I Lead-Based Paint/Lead Hazards Testing/Abatement
- 14J Housing Services
- 16A Residential Historic Preservation
- 19E Operation/Repair of Foreclosed Property

Homeownership Assistance vs. Housing Counseling

- Misuse of matrix codes 13 and 05R for activities that solely provide housing counseling is one of most common user errors in IDIS.
- For activities that ONLY provide counseling:
 - Use 05U
 - Report number of persons receiving counseling
- For activities that provide financial assistance:
 - Use 13 or 05R
 - Report the number of households receiving financial assistance
 - Do NOT report the number receiving housing counseling, except under the Performance Measurement screen where it specifically asks for this number.

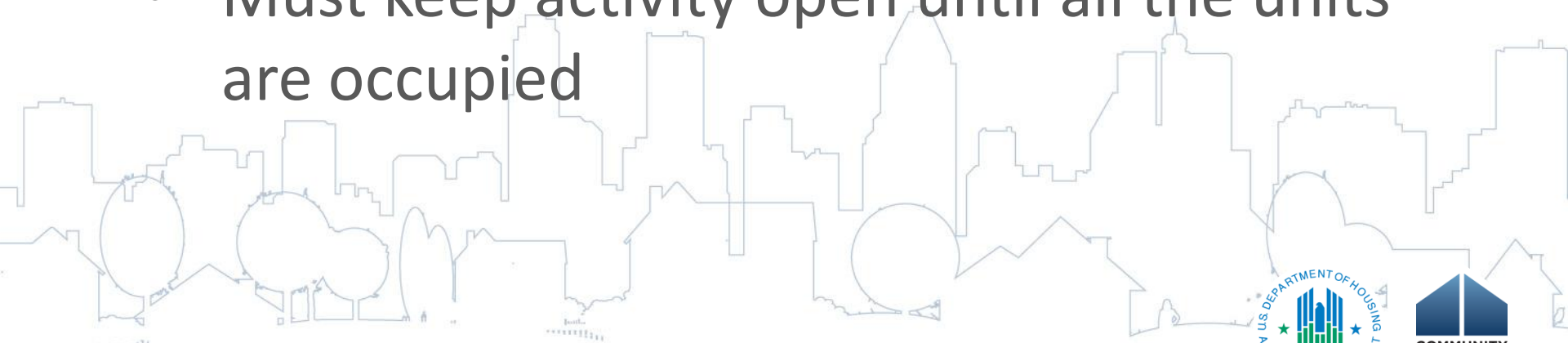
Reporting Accomplishments: Housing Admin & Services

- Housing Rehabilitation Administration 14H
- Housing Services 14J

Activity	Project Costs paid with...	Report Accomplishments in IDIS?
Housing Rehab Admin (14H)	CDBG	Reported Under Other Activities
Housing Rehab Admin (14H)	Non-CDBG	YES
Housing Services (14J)	HOME	YES

Choosing the Right Matrix Code: Housing Acquisition Activities

- Matrix codes 01 and 14G
- When new construction or rehabilitation is not funded with CDBG
- Only after the units are occupied
- Must keep activity open until all the units are occupied



Housing National Objectives

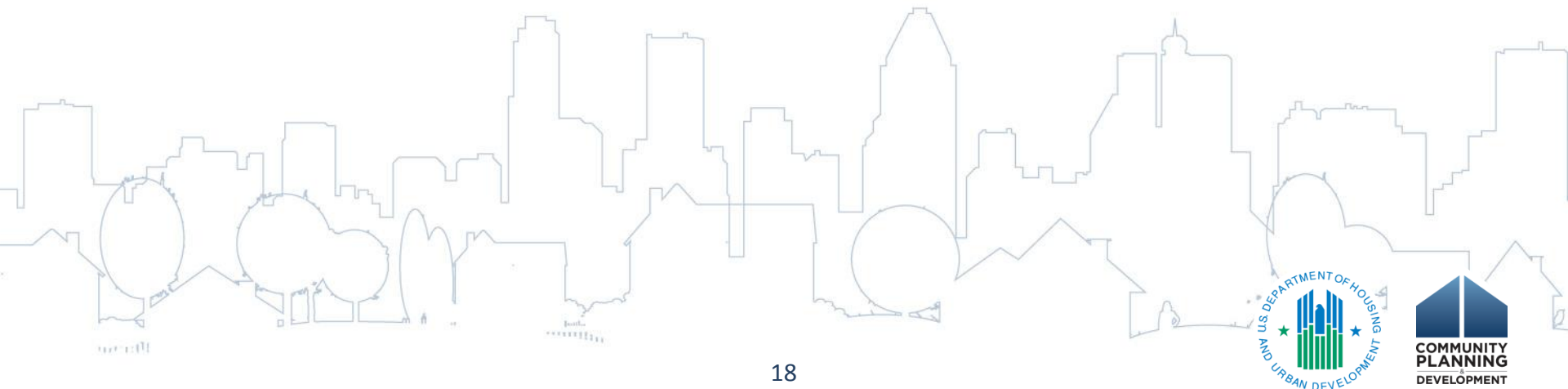
- Low/Mod Housing (LMH) – most common
 - Count households, not residents or families. Households are all occupants of unit, related or unrelated
 - Single unit = must be occupied by LMI HH
 - Duplex: 1 of 2 units must be occupied by LMI HH
 - 3+ units: 51% must be occupied by LMI HH
- Some housing activities qualify under Slum/Blight Area Basis or Spot Basis

Housing Activity Setup Screens

- Add Activity
 - Name, Description, Matrix Code
- Add CDBG Setup Detail Page 1
 - National Objective, Address
- Add CDBG Setup Detail Page 2
 - Other Funding, Minor Rehab flags

Data Entry Exercise

- Emergency Repair Program
 - Activity will represent entire rehab program
- Rental Rehabilitation Program
 - Activity will represent one property assisted

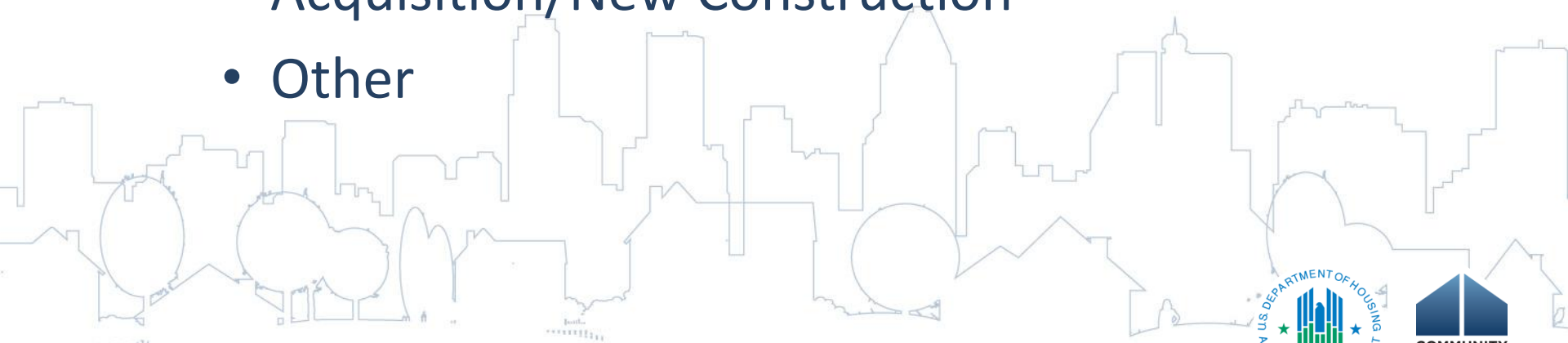


Activity Accomplishments

- When to Report
 - Quarterly recommended
 - Annual required
- What to Report
 - Benefits realized during PROGRAM YEAR
 - Report on every screen (completeness)
 - National Objective compliance
 - Accomplishment & Performance measurements
 - Narrative per field office guidance

Housing Activity Accomplishment Screens

- Refer to Chapter 11 in Manual
- Page 1: Narrative and Direct Benefit Data
- Page 2: Varies based on type of activity
 - Rehab
 - Acquisition/New Construction
 - Other



Data Entry Exercise

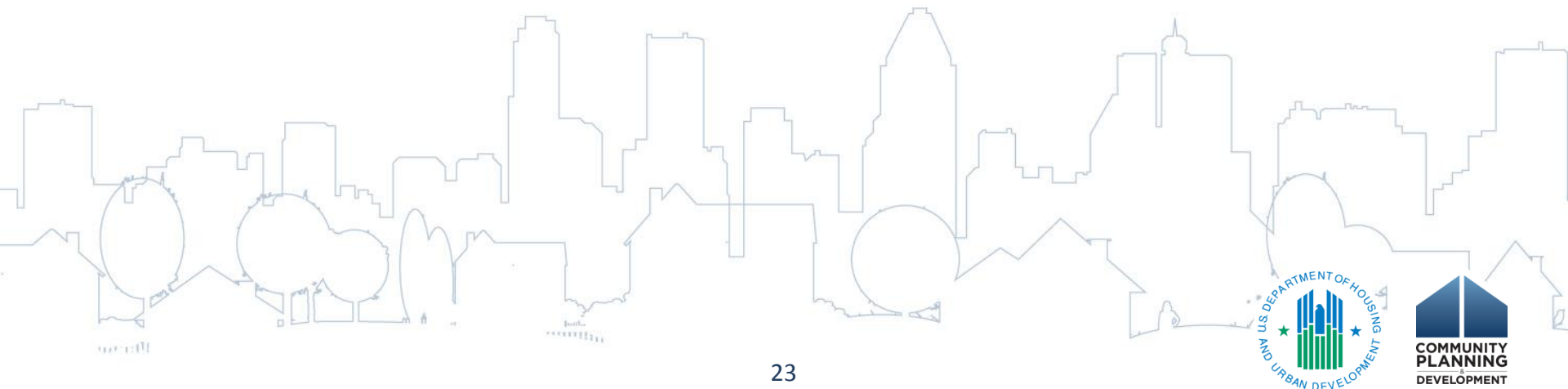
- Emergency Repair Program
 - 20 households assisted
 - All funds drawn
 - Update to complete
- Rental Rehab: 500 Maple Avenue
 - 3 units complete
 - Remaining three units will be complete in following program year

Summary

- Activity Setup
 - Define scope
 - Choose most appropriate Matrix Code and National Objective
- Activity Accomplishments
 - Report annually at a minimum
 - Report by Program Year
 - Maintain adequate documentation to report on all fields

Question and Answer

- What questions do you have?
(Submit questions using the “Questions” function on the lower portion of your webinar control panel.)



Thank you

- Upcoming IDIS webinars
- An online evaluation will be sent automatically to all attendees in approximately 1 hour. Please take a few moments to complete the evaluation. HUD values your feedback.
- Thank you for attending today's webinar.