

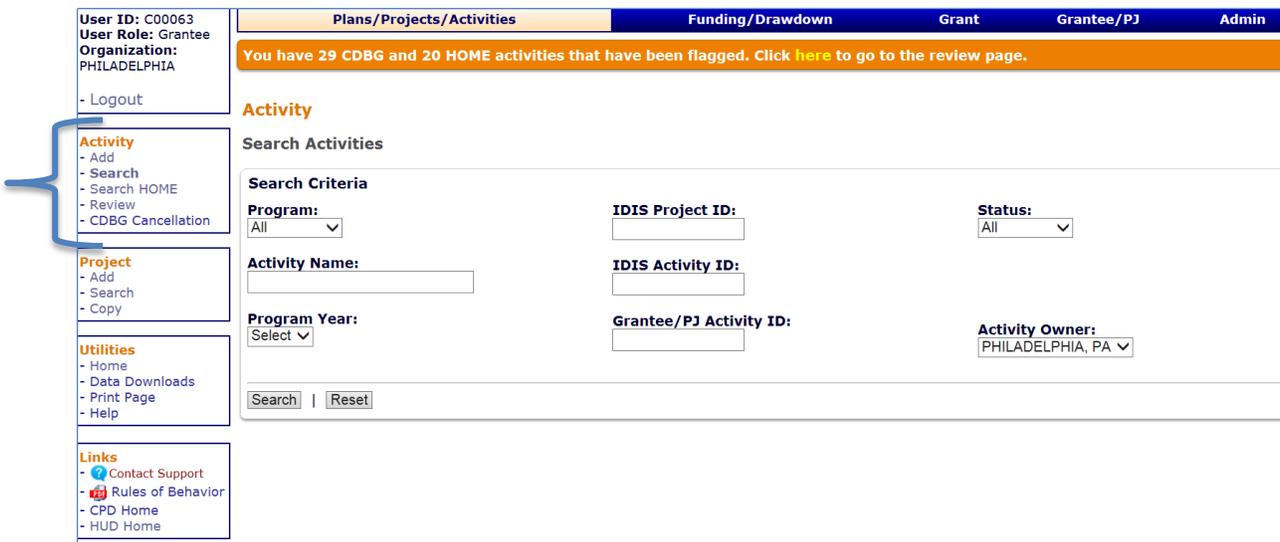
Chapter 3

THE COMMON ACTIVITY SCREENS

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

ACCESSING THE COMMON ACTIVITY FUNCTIONS

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



The Add link accesses the initial activity setup screen that must be filled in for every activity entered in IDIS. 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.

The Search Home link accesses a screen for searching your HOME activities, and is covered in Chapter 5.

The Review link is listed only if the orange banner with the message that CDBG and/or HOME activities have been flagged is displayed at the top of the screen. It is explained in Chapter 4.

The CDBG Cancellation link does not apply to HOME activities and is not covered in this manual.

ADD ACTIVITIES

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

Activity

Add Activity

Save | Cancel

***Indicates Required Field**

***Activity Owner:** PHILADELPHIA, PA **Grantee/PJ Activity ID:**

***IDIS Project ID/Project Title (Program Year):**

***Activity Name:**

Activity

Program	*Activity Category	Ready to Fund	Setup Detail
CDBG	Will this activity use Section 108 loan?* No <input type="button" value="Change answer"/> None <input type="text"/>	No	<input type="button" value="Add CDBG"/>
ESG	None <input type="text"/>	No	<input type="button" value="Add ESG"/>
HOME	None <input type="text"/>	No	<input type="button" value="Add HOME"/>
HOPWA	None <input type="text"/>	No	<input type="button" value="Add HOPWA"/>

***Environmental Assessment:(tip)** **Allow Another Organization to Access this Activity: (tip)**

Activity Description:

Field	Description
Activity Owner	If the name of the grantee whose Action Plan project the activity is to 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.
IDIS Project ID/Project Title (Program Year)	To select the program year and project for the activity: <ol style="list-style-type: none"> 1. Click the [Select Project] button. The Search Projects screen is displayed. 2. On the Search Projects screen, enter search criteria to find the program year and project you want to assign to the activity. Click [Search] to display the results. 3. In the last column of the results table, click "Select" for the Program Year and Project to be assigned. Your selection is displayed in the IDIS Project ID/Project Title (Program Year) field. To change the program year and project, click the [Change Project] button.
Activity Name	Enter a name for the activity.

Field	Description								
Grantee/PJ Activity ID	This is an optional field for your own activity identifier.								
Program	<p>All of the programs for which you have activity setup authority are listed. Only the HOME Program is covered in this manual.</p> <p>Note: You will not be able to add a new HOME activity if the HOME field is marked with a yellow exclamation point:</p> <div data-bbox="634 453 1247 621" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <table border="1"> <thead> <tr> <th>Program</th> <th>*Activity Category</th> </tr> </thead> <tbody> <tr> <td>CDBG</td> <td>Will this activity use Section 108 loan?* No Change answer None</td> </tr> <tr> <td>ESG</td> <td>None</td> </tr> <tr> <td>HOME </td> <td>None</td> </tr> </tbody> </table> </div> <p>It indicates that HOME activities have been flagged for infrequent draws and/or for being in final draw for 120 days or more (see Chapter 4). Those flags must be cleared before you will be able to set up a new HOME activity.</p>	Program	*Activity Category	CDBG	Will this activity use Section 108 loan?* No Change answer None	ESG	None	HOME 	None
Program	*Activity Category								
CDBG	Will this activity use Section 108 loan?* No Change answer None								
ESG	None								
HOME 	None								
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), CHDO Capacity Building (CC), and/or Program Income for Administration (PA) 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. 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, because 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 and AD/CO/CC activities, it should be Exempt.</p>								

Field	Description
Allow Another Organization to Access this Activity	<p>If you want IDIS users at another organization 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 that includes your HOME subgrantees. 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 6 and 7, the homebuyer screens in Chapters 8 and 9, the homeowner rehab screens in Chapters 10 and 11, and the TBRA screens in Chapter 12.

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 18). Additional details about AD/CO/CC Only activities are provided in Chapter 13.

EDIT/VIEW ACTIVITIES

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

SEARCH ACTIVITIES SCREEN

Click the Activity [Search](#) link on any Plans/Projects/Activities tab 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:

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.
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 need to input any other search criteria.

Field	Description
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 Canceled .
Activity Owner	Most users will not be able to change this field. Those who can should select the grantee who owns the Action Plan project that the activity is set up under.

Click the [Search] button to run the search and redisplay the screen with the search results:

Activity

Search Activities

Search Criteria

Program:
IDIS Project ID:
Status:

Activity Name:
IDIS Activity ID:

Program Year:
Grantee/PJ Activity ID:
Activity Owner:

|

Results Page 1 of 3

Activity Name	Program Year/ Project ID	IDIS Activity ID	Grantee/PJ Activity ID	Status	Activity Owner	
Bigham Place Project	2011/5	10526	1220132	Open	PHILADELPHIA, PA	Edit View
Strawberry Mansion Homeownership 32nd & C.B. Moore	2011/1	10449	1020207	Open	PHILADELPHIA, PA	Edit View
Gratz/Wilts Street - Habitat For Humanity	2011/2	10436	1220132	Open	PHILADELPHIA, PA	Edit View
1900-02 Moorese Street - Habitat For Humanity	2011/2	10432	1220132	Open	PHILADELPHIA, PA	Edit View
Liberty at Welsh Road	2011/5	10413	1220132	Open	PHILADELPHIA, PA	Edit View
Anthony Wayne Senior Apartments	2011/3	10408	1220132	Open	PHILADELPHIA, PA	Edit View
Nugent Senior Apartments	2011/3	10407	1220132	Open	PHILADELPHIA, PA	Edit View
William Way Senior	2011/3	10267	1220132	Open	PHILADELPHIA, PA	Edit View
Project Home Preservation	2011/5	10265	1220132	Open	PHILADELPHIA, PA	Edit View
Sartain School Apartment	2011/3	10241	1220132	Open	PHILADELPHIA, PA	Edit View

1 2 3 Next 10 Results

On initial display, the results are sorted by IDIS ACTIVITY ID in descending order. You can change 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 canceled 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 very similar to the Add Activity screen:

Activity

Edit Activity

Save | Cancel

***Indicates Required Field**

Activity Owner:
PHILADELPHIA, PA

Activity Status:
Open

IDIS Activity ID:
10526

Completion Date:

(mm/dd/yyyy)

IDIS Project ID/Project Title (Program Year):
5/Development Financing for Homeless and Special-Needs Housing (2011)

Grantee/PJ Activity ID:
1220132

***Activity Name:**

Initial Funding Date:
06/28/2013

Activity

Program	*Activity Category (tip)	Ready to Fund	Funded	Setup Detail	Accomplishment	Completion Check
CDBG	Does this activity use Section 108 loan?* No <input type="button" value="Change answer"/> None <input type="button" value="v"/>	No	No	<input type="button" value="Add CDBG"/>	<input type="button" value="Add CDBG Accomp."/>	
ESG	None <input type="button" value="v"/>	No	No	<input type="button" value="Add ESG"/>	<input type="button" value="Add ESG Accomp."/>	
HOME	Rental <input type="button" value="v"/>	Yes	Yes	<input type="button" value="Edit HOME"/>	<input type="button" value="Add HOME Accomp."/>	<input type="button" value="Check HOME"/>
HOPWA	None <input type="button" value="v"/>	No	No	<input type="button" value="Add HOPWA"/>	<input type="button" value="Add HOPWA Accomp."/>	
HESG	None	No	No		Grantees will enter Accomp data into e-SNAPS	
HOPWA-C	None	No	No			

***Environmental Assessment:(tip)** **Allow Another Organization to Access this Activity (tip)**

COMPLETED

Activity Description:
This activity supports the rehabilitation and new construction costs to create 11 affordable rental housing units to persons with disabilities at 4226-4232 Powelton Avenue. The developer is People's Emergency Center, CDC:CHDO # 27.

Save | Cancel

Field	Description
Activity Owner	Same as the Add Activity screen.
IDIS Activity ID	The system-generated identifier for the activity.
IDIS Project ID/Project Title (Program Year)	Same as the Add Activity screen. To select a different program year and/or project, click the [Change Project] button.
Activity Name	Same as the Add Activity screen.
Activity Status	A new activity is automatically assigned a status of Open . For the steps required to update the status to Completed or Canceled , turn to page 3-10.

Field	Description
Completion Date	This field defaults to today's date when the status of an activity is changed to Completed or Canceled . Turn to pages 3-10 and 3-11 for details about when the COMPLETION DATE can be set to a date other than today.
Grantee/PJ Activity ID	Same as the Add Activity screen.
Initial Funding Date	<p>The date this activity was initially funded via the Activity Funding option. It is system-assigned and cannot be changed.</p> <p>If none of the HOME funds committed to an activity are drawn down within a year of the INITIAL FUNDING DATE, the HOME funds are automatically "uncommitted." If the activity is funded only by HOME, the ACTIVITY STATUS is also reset from Open to Canceled. For more details, see HOME FACTS Vol. 3, No. 1 (June 2010).</p>
Program	Only the HOME Program is covered in this manual.
Activity Category	<p>When this field is changed, the following message is displayed:</p> <div data-bbox="727 827 1263 1066" style="text-align: center;"> </div> <p><i>Caution!</i> If you click [OK], the data that has been entered on the HOME completion screens for a rental, homebuyer, or homeowner rehab activity will be deleted; for TBRA (which has no completion screens), data on the setup screens will be deleted. Click [Cancel] if you need to get screen prints of the data before it is deleted.</p> <p>The ACTIVITY CATEGORY of an activity funded with CHDO Reserve cannot be changed to Homeowner Rehab, TBRA, or AD/CO/CC Only.</p>
Ready to Fund	<p>If this read-only field is No, then required setup data is missing. It must be provided before the activity can be funded.</p> <p>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.</p>
Funded	This read-only field is No if the activity has not been funded and Yes if it has.
Setup Detail [HOME] button	<p>Click this button to save any changes you have made on this screen and access the HOME setup screens for the activity.</p> <p>If the button label is [Add HOME], then no setup data has been entered. If it is [Edit HOME], then some or all setup data has been input.</p>

Field	Description
Accomplishment [HOME] button	Click this button to save any changes you have made and access the HOME completion screens for the activity. If the button label is [Add HOME Accomp.] then no completion data has been input yet. If it is [Edit HOME Accomp.], then some or all accomplishment data has been input. The button is inactive if required setup data is missing. That data must be input before the completion screens can be accessed.
Completion Check [Check HOME] button	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.
Environmental Assessment	Same as the Add Activity screen.
Allow Another Organization...	Same as the Add Activity screen.
Activity Description	Same as the Add Activity screen.

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 **Canceled**. IDIS automatically assigns a status of **Open** to a new activity. It is your responsibility to indicate when an activity has been completed or canceled.

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, 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**

<p>Activity Owner: PHILADELPHIA, PA</p> <p>IDIS Activity ID: 10239</p> <p>IDIS Project ID/Project Title (Program Year): 3/Neighborhood-Based Rental Housing Production (2011) Change Project</p> <p>*Activity Name: Gaudenzia Thompson Street Apartments</p>	<p>Activity Status: Open <input type="button" value="v"/></p> <p>Completion Date: <input type="text" value=""/> <small>(mm/dd/yyyy)</small></p> <p>Grantee/PJ Activity ID: 1220132</p> <p>Initial Funding Date: 07/24/2012</p>
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Program	*Activity Category (tip)	Ready to Fund	Funded	Setup Detail	Accomplishment	Completion Check
CDBG	Does this activity use Section 108 loan?* <input type="button" value="No"/> Change answer None <input type="button" value="v"/>	No	No	<input type="button" value="Add CDBG"/>	<input type="button" value="Add CDBG Accomp."/>	<input type="button" value="Check HOME"/>
ESG	None <input type="button" value="v"/>	No	No	<input type="button" value="Add ESG"/>	<input type="button" value="Add ESG Accomp."/>	<input type="button" value="Check HOME"/>
HOME	Rental <input type="button" value="v"/>	Yes	Yes	<input type="button" value="Edit HOME"/>	<input type="button" value="Edit HOME Accomp."/>	<input type="button" value="Check HOME"/>
HOPWA	None <input type="button" value="v"/>	No	No	<input type="button" value="Add HOPWA"/>	<input type="button" value="Add HOPWA Accomp."/>	<input type="button" value="Check HOME"/>

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. When a HOME activity is initially completed, the only valid COMPLETION DATE is today's date (the default if the field is left blank). If a completed HOME activity is later reopened (see page 3-12), the new COMPLETION DATE cannot be earlier than the initial COMPLETION DATE or later than today's date.

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 are released and the funded amount is adjusted to equal the drawn amount.

Changing the Status to Canceled

If no funds have been drawn for the activity, select **Canceled** from the ACTIVITY STATUS dropdown. If the activity was:

- Funded, the COMPLETION DATE cannot be earlier than the INITIAL FUNDING DATE or later than today. The committed funds will be released automatically.
- Never funded, the COMPLETION DATE cannot be later than today.

Instructions for cancelling an activity with draws are provided in Chapter 21.

REOPEN ACTIVITY AND COPY ACTIVITY

To access these functions, choose the View link for an activity on the Search Activities screen (see pages 3-5 and 3-6).

The [Reopen Activity] button is displayed for completed and canceled activities. The [Copy this Activity] button is displayed for all activities.

Activity

View Activity

Return to Previous Page

Reopen Activity | Copy this Activity

Activity Owner:
PHILADELPHIA, PA

IDIS Activity ID:
9653

Program Year/IDIS Project ID/Project Title:
2010/72/PCRC/TURN

Activity Name:
HOME TBRA

Activity Status:
Completed

Completion Date:
08/29/2011

Grantee/PJ Activity ID:
1120095

Initial Funding Date:
09/21/2010

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 provides HOME Funded TBRA to individuals or families with a member living with AIDS.

[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 **Completed** or **Canceled** 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." Only the setup data of a HOME activity is copied to the new activity. To move the copied activity to a different project, change its PROGRAM YEAR and/or IDIS PROJECT ID on the Edit Activity screen.