

Chapter 10

SINGLE-ADDRESS HOMEOWNER REHAB ACTIVITIES

This chapter explains how to set up, fund, draw funds for, and complete homeowner rehabilitation activities that are carried out at a single location.

ACTIVITY SETUP

To add a new activity, complete the Add Activity screen (see page 3-2), setting the ACTIVITY CATEGORY to **Homeowner Rehab**. To update or view an existing activity, follow the instructions on page 3-6 for retrieving and displaying activities on the Edit Activity screen.

Click the [Add HOME] or [Edit HOME] Setup Detail button to display the homeowner rehab setup screen.

ADD/EDIT HOME SETUP DETAIL (PAGE 1)

Basic setup information is entered on this screen, including the address of the assisted property, the number of units expected to be assisted with HOME funds, the estimated HOME cost, and whether the activity is located at a single site or at multiple addresses:

- Add Profile
- Logout

Activity
- Add
- Search
- Search HOME/HTF
- Review
- CDBG Cancellation

Project
- Add
- Search
- Copy

Consolidated Plans
- Add
- Copy
- Search

Annual Action Plans
- Add
- Copy
- Search

Consolidated Annual Performance Evaluation Report
- Add
- Search

Utilities
- Home
- Data Downloads
- Print Page
- Help (Add)
- Help (Edit)

Links
- Contact Support
- Rules of Behavior
- CPD Home
- HUD Home

Activity

Edit HOME Setup Detail (Page 1)

Homeowner Rehab

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* Indicates Required Field

Grantee/PJ Activity ID: N/A	Activity Name: GAHP Homeowner Rehab	Program Year/Project ID: 2016/3
IDIS Activity ID: 1462	Activity Owner: ALBUQUERQUE	Project Title: Affordable Housing Development-Housing

Performance Objective: Select Option **Will this activity be carried out by a faith-based organization?**

Yes No

Performance Outcome: Select Option

Special Characteristics (Check any that apply to the location of this activity)

- CDBG Strategy Area
- Local Target Area
- Presidentially Declared Major Disaster Area
- Historic Preservation Area
- Brownfield Redevelopment Area
- Conversion from Non-Residential to Residential Use
- Colonia

***Setup Activity Type:**
Rehabilitation Only

Multi-Address: Yes No **Loan Guarantee:** Yes No

Homeowner's Name

First Name:
Middle Initial:
Last Name:

Activity Address

***Address Line 1:** ***City:**

Address Line 2: ***State:** New Mexico ***Zip Code:** +

Address Line 3: ***County:** Select Option

Activity Estimates

***Estimated HOME Units:**
***Estimated HOME Cost:** \$

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Field	Description
Fields in gray box	These read-only fields identify the activity that is being processed. The fields are populated with data from the common activity screen.
Performance Objective	<p>Select the objective that best reflects your intent in setting up this activity. Descriptions of the objectives are provided on the help screen.</p> <p>If you leave the field blank, it will be set to Provide decent affordable housing.</p>
Performance Outcome	<p>Select the outcome that best reflects the results you are seeking to achieve with this activity. Descriptions of the outcomes are provided on the help screen.</p> <p>If you leave the field blank, it will be set to Affordability.</p>
Will this activity be carried out by a faith-based organization?	Change this field to Yes if a faith-based organization will carry out this activity.
Special Characteristics	<p>Check the box for each characteristic that applies to the location of the activity you are setting up. More than one box may be checked; all boxes may be left unchecked. See the help screen for definitions of the characteristics.</p> <p>Note: For PJs in Arizona, California, New Mexico, and Texas, an additional characteristic, COLONIA, is displayed. Check this field if the activity assists a rural community or neighborhood that is within 150 miles of the U.S.-Mexican border and lacks decent housing.</p>
Setup Activity Type	This is a read-only field because the only valid type for a homeowner rehab activity is Rehabilitation Only —the alteration, improvement or modification of an existing structure that does not include the acquisition of real property.
Multi-Address	<p>For a single-address activity, leave this field set to No.</p> <p>If there is more than one property address for the activity, change it to Yes. Multi-address homeowner rehab activities are covered in the next chapter.</p>
Loan Guarantee	If HOME funds will be used to guarantee financing provided by private lenders, change this field to Yes .
Homeowner's Name	Optional.
Activity Address	<p>Enter the street, city, and state of the property being assisted.</p> <p>Note: If you change the STATE, click the [Refresh County Code] button before validating the address.</p>

Field	Description
[Validate This Address] button	<p>Validation of the activity address is required. After entering ADDRESS LINE 1, CITY, and STATE, click this button to validate the address. If the address is:</p> <ul style="list-style-type: none"> • Valid, the ZIP CODE and COUNTY will be populated automatically with the correct data. • Invalid, an error message is displayed. You may either correct and revalidate the address, or check the SKIP VALIDATION FOR NOW box under the ADDRESS LINE 3 field and validate later. If you check the SKIP VALIDATION box, you must enter the ZIP CODE and COUNTY before the screen can be saved.
Activity Estimates	
Estimated HOME Units	<p>Enter the number of units that you expect will have been assisted with HOME funds upon activity completion. For single-address activities, the number must be between 1 and 4.</p>
Estimated HOME Cost	<p>Enter the estimated amount of HOME funds (including program income) that will be disbursed for the activity. Enter the amount in whole dollars, with or without commas.</p> <p>The <u>minimum</u> amount of HOME funds that must be invested in a housing activity is \$1,000 times the number of HOME-assisted units (see 24 CFR 92.205(c)). If you enter an estimated amount below this minimum, IDIS displays an error message and does not allow activity setup to continue until the estimate is corrected.</p> <p>The <u>maximum</u> amount of HOME funds that may be invested per unit varies by location and by unit size (see 24 CFR 92.250). IDIS does not have system restrictions on the per-unit maximum.</p>

When you are finished, click [Save] to save your data and display the Edit Activity screen (see page 3-8).

ACTIVITY FUNDING AND DRAWDOWNS

Rehab activities may be funded with EN (Entitlement), SU (General Subgrant), AD (Administration), PI (Program Income), PA (Program Income for Administration), HP (Recaptured Homebuyer), and IU (Repayment to Local Account) HOME funds. CHDO fund types (CR, CO, CL, or CC) may not be used.

For more information on activity funding and drawdowns, see Chapters 18 and 19.

ACTIVITY COMPLETION

To complete a single-address homeowner rehab activity in IDIS, you will provide information about the activity's units, costs, and beneficiaries on two HOME completion screens. Once all of the required data has been entered, the ACTIVITY STATUS must be

updated to **Completed**. HOME regulations require PJs to enter this completion information and update the status within 120 days of the final draw for the activity.

To access the completion screens, follow the instructions on page 3-6 for retrieving the activity and displaying it on the Edit Activity page. On that page, click the [Add HOME Accomp.] or [Edit HOME Accomp.] button to display the first HOME completion screen.

ADD/EDIT COMPLETION DETAIL (PAGE 1)

Basic completion information is entered on this screen:

- Add Profile
- Logout

- Activity**
- Add
- Search
- Search HOME/HTF
- Review
- CDBG Cancellation

- Project**
- Add
- Search
- Copy

- Consolidated Plans**
- Add
- Copy
- Search

- Annual Action Plans**
- Add
- Copy
- Search

- Consolidated Annual Performance Evaluation Report**
- Add
- Search

- Utilities**
- Home
- Data Downloads
- Print Page
- Help

- Links**
- [Contact Support](#)
- [Rules of Behavior](#)
- [CPD Home](#)
- [HUD Home](#)

Activity

Add HOME Completion Detail (Page 1)

Homeowner Rehab

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*** Indicates Required Field**

Grantee/PJ Activity ID: N/A	Activity Name: GAHP Homeowner Rehab	Program Year/Project ID: 2016/3
IDIS Activity ID: 1462	Activity Owner: ALBUQUERQUE	Project Title: Affordable Housing Development-Housing
HOME Multiple-address: No	HOME Completion Activity Type:	Number of HOME-Assisted Units: 1

Activity Address:
124 Main St
Windsor, NM 80550-5014

Completion Narrative: (Maximum 4000 characters) ⓘ

***Completion Activity Type:** ⓘ

Rehabilitation Only

***Property Type:** ⓘ

1- 4 Single Family ▼

Units

***Total Completed Units:** ⓘ ***HOME-Assisted Units:** ⓘ

Of the Total Completed Units, the Number of

	Total	HOME-Assisted
Energy Star Certified Units	<input style="width: 40px;" type="text"/>	<input style="width: 40px;" type="text"/>
Section 504 Accessible Units	<input style="width: 40px;" type="text"/>	<input style="width: 40px;" type="text"/>

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Field	Description
Fields in gray box	These read-only fields identify the activity that is being processed.
Completion Narrative	Optional.
Completion Activity Type	This is a read-only field shows that is set to Rehabilitation Only —the only valid type for a rehab activity.
Property Type	This field is initially populated with 1-4 Single-Family . If necessary, change this selection to one of the other property types listed on the dropdown.

Field	Description
Total Completed Units	Enter the total number of units (HOME assisted plus non-HOME assisted) to be assisted upon activity completion. This field is initially populated with the number of ESTIMATED HOME UNITS entered at activity setup (see page 10-4), but may be changed.
HOME-Assisted Units	<p>Enter the number of units that received HOME assistance. This field is also initially populated with ESTIMATED HOME UNITS, but may be changed.</p> <p>The number must be between 1 and 4 and cannot be more than TOTAL COMPLETED UNITS.</p>
Units Qualified as Energy Star	<p>In the TOTAL column, enter the total number of units that have received Energy Star certification.</p> <p>In the HOME-ASSISTED column, enter the number of HOME-assisted units that have received Energy Star certification.</p> <p>For information about HOME and Energy Star, go to https://www.hudexchange.info/resources/documents/EnergyStarAndHOME.pdf</p>
Section 504 Accessible Units	<p>Enter the total number of units that were made accessible for occupants under Section 504 accessibility standards. A unit does not need to have been made fully accessible under Section 504 standards (i.e., meet full UFAS standards) to be counted. Include all 504-accessible units in the count, whether or not HOME funds were spent to make them 504-accessible.</p> <p>Note that 504-accessibility is not a program requirement for homeowner rehab activities.</p> <p>For more information on the HOME Program's Section 504 compliance requirements, see HUD Notice CPD-00-9 or superseding notices.</p>

When you are finished, click the [Save and Continue] button to display the next screen.

ADD/EDIT COMPLETION DETAIL (PAGE 2)

Page 2 consists of three screens for entering location, costs, and beneficiary information about the activity. The top part of each screen looks like this:

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<ul style="list-style-type: none"> - Add Profile - Logout 	<p>Activity</p> <p>Add HOME Completion Detail (Page 2)</p> <p>Homeowner Rehab</p> <ul style="list-style-type: none"> • HOME Completion has been saved <p>Save and Previous Page Save Cancel</p> <p>* Indicates Required Field</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Grantee/PJ Activity ID: N/A</td> <td style="width: 33%;">Activity Name: GAHP Homeowner Rehab</td> <td style="width: 33%;">Program Year/Project ID: 2016/3</td> </tr> <tr> <td>IDIS Activity ID: 1462</td> <td>Activity Owner: ALBUQUERQUE</td> <td>Project Title: Affordable Housing Development- Housing</td> </tr> <tr> <td>HOME Multiple-address: No</td> <td>HOME Completion Activity Type: Rehabilitation Only</td> <td>Number of HOME-Assisted Units: 1</td> </tr> </table> <p>Activity Address: 124 Main St Windsor, NM 80550-5014</p>	Grantee/PJ Activity ID: N/A	Activity Name: GAHP Homeowner Rehab	Program Year/Project ID: 2016/3	IDIS Activity ID: 1462	Activity Owner: ALBUQUERQUE	Project Title: Affordable Housing Development- Housing	HOME Multiple-address: No	HOME Completion Activity Type: Rehabilitation Only	Number of HOME-Assisted Units: 1
Grantee/PJ Activity ID: N/A	Activity Name: GAHP Homeowner Rehab	Program Year/Project ID: 2016/3								
IDIS Activity ID: 1462	Activity Owner: ALBUQUERQUE	Project Title: Affordable Housing Development- Housing								
HOME Multiple-address: No	HOME Completion Activity Type: Rehabilitation Only	Number of HOME-Assisted Units: 1								
<p>Activity</p> <ul style="list-style-type: none"> - Add - Search - Search HOME/HTF - Review - CDBG Cancellation 										
<p>Project</p> <ul style="list-style-type: none"> - Add - Search - Copy 										
<p>Consolidated Plans</p> <ul style="list-style-type: none"> - Add - Copy - Search 										
<p>Annual Action Plans</p> <ul style="list-style-type: none"> - Add - Copy - Search 										
<p>Consolidated Annual Performance Evaluation Report</p>										

Field	Description
Fields in gray box	These read-only fields identify the activity that is being processed.
Location, Costs, Beneficiaries tabs	Use these tabs to navigate the Page 2 completion screens. When you select a different tab, data on the current screen is validated and saved before the new screen is displayed. Use the buttons at the top/bottom of the screen only when you are ready to exit Page 2.

The Location, Costs, and Beneficiaries screens are explained below.

Location Tab

The Location screen is displayed when Page 2 is first accessed:

The screenshot shows a web form with three tabs: 'Location', 'Costs', and 'Beneficiaries'. The 'Location' tab is active. Below the tabs, there are three main sections:

- Lead Paint**
 - *Applicable Lead Paint Requirement:**
 - Housing constructed before 1978
 - Exempt: housing constructed 1978 or later ⓘ
 - Otherwise exempt ⓘ
 - *Lead Hazard Remediation Actions:**
 - Lead Safe Work Practices (24 CFR 35.930(b)) ⓘ
 - Interim Controls or Standard Practices (24 CFR 35.930(c)) ⓘ
 - Abatement (24 CFR 35.930(d)) ⓘ
- Property**
 - FHA Insured: (tip)**
 - Yes
 - No

At the bottom of the form, there are three buttons: 'Save and Previous Page', 'Save', and 'Cancel'.

Field	Description
Lead Paint	
Applicable Lead Paint Requirement	This field must be completed before the Costs or Beneficiaries tab can be accessed.
Lead Hazard Remediation Actions	Make a selection only if the previous field is Housing constructed before 1978 .
FHA Insured	If the property is insured by the FHA, change this field to Yes .

Costs Tab

Clicking the Costs tab displays this screen:

Location
Costs
Beneficiaries
i

***Value after Rehabilitation:** (tip)

\$

HOME FUND (including PI)	
Form of Assistance	
Amortized Loan	\$ <input style="width: 80%;" type="text"/>
Grant	\$ <input style="width: 80%;" type="text"/>
Deferred Payment Loan	\$ <input style="width: 80%;" type="text"/>
Other	\$ <input style="width: 80%;" type="text"/>
Total	\$ <input style="width: 80%; border: none;" type="text" value="0.00"/>

Public Funds	
Form of Assistance	
Other Federal Funds	\$ <input style="width: 80%;" type="text"/>
State/Local Funds	\$ <input style="width: 80%;" type="text"/>
Tax-Exempt Bond Proceeds	\$ <input style="width: 80%;" type="text"/>
Total	\$ <input style="width: 80%; border: none;" type="text" value="0.00"/>

Private Funds	
Form of Assistance	
Private Loans	\$ <input style="width: 80%;" type="text"/>
Owner Cash Contributions	\$ <input style="width: 80%;" type="text"/>
Private Grants	\$ <input style="width: 80%;" type="text"/>
Total	\$ <input style="width: 80%; border: none;" type="text" value="0.00"/>

Activity Totals

HOME Funds	\$
<input style="width: 80%; border: none;" type="text" value="0.00"/>	\$
All Funds	\$
<input style="width: 80%; border: none;" type="text" value="0.00"/>	\$
Total HOME Funds Disbursed	\$
<input style="width: 80%; border: none;" type="text" value="0.00"/>	\$

Save and Previous Page
Save
Cancel

Field	Description
Value after Rehabilitation	Enter the dollar value of the property after rehabilitation. For more information on this field, go to the HUD Exchange link: Maximum Purchase Price/After-rehab Value .
HOME Funds (Including PI)	
Amortized Loan	Enter the total amount, in dollars and cents, of HOME funds provided as an amortized loan. This is a direct loan which the borrower is expected to repay in full (principal and interest or principal only) over a fixed period of time.

Field	Description
Grant	<p>Enter the total amount, in dollars and cents, of HOME funds provided as a grant. A grant is provided with no requirement or expectation of repayment.</p> <p>A grant may be used to reduce the amount of principal borrowed, the principal repayment, or the effective interest rate (an interest subsidy payment) on a private loan.</p>
Deferred Payment Loan	<p>Enter the total amount, in dollars and cents, of HOME funds provided as a deferred payment loan (DPL). A DPL can be repayable at some future time or forgiven. A DPL is repayable when the property is sold, or is forgiven if (a) the owner does not sell the property for a specified number of years or (b) repayment of principal and interest starts after the bank loan is repaid.</p>
Other	<p>Enter the total amount, in dollars and cents, of HOME funds provided in some form other than the loan/grant assistance identified above.</p>
Total	<p>This read-only field shows the sum of the HOME FUNDS amounts entered. This total must equal TOTAL HOME FUNDS DISBURSED (the last field on the screen) before you will be allowed to change the activity status to Completed.</p>
Public Funds	
Other Federal Funds	<p>Enter the total amount of activity costs paid for with other (non-HOME) federal funds.</p>
State/Local Funds	<p>Enter the total amount of activity costs paid for with state or local government appropriated funds.</p>
Tax-Exempt Bond Proceeds	<p>Enter the total amount of activity costs paid for with state or local government tax-exempt bond proceeds.</p>
Total	<p>This read-only field is the sum of the PUBLIC FUNDS amounts entered.</p>
Private Funds	
Private Loans	<p>Enter the total amount of activity costs paid for with money obtained from private financial institutions such as banks or credit unions.</p>
Owner Cash Contributions	<p>Enter the total amount of cash contributions provided by the homeowner.</p>
Private Grants	<p>Enter the total amount of cash contributions donated by private individuals, organizations, etc.</p>
Total	<p>This read-only field is the sum of the PRIVATE FUNDS amounts entered.</p>
Activity Totals	
HOME Funds	<p>This read-only field always equals the HOME Funds (Including PI) TOTAL field above. This field and the TOTAL HOME FUNDS DISBURSED field below must match before the activity status can be changed to Completed.</p>

Field	Description
All Funds	This read-only field shows the sum of all HOME, public, and private funding amounts.
Total HOME Funds Disbursed	This read-only field displays the amount of HOME funds drawn down for the activity to date. This field and the HOME FUNDS field must be equal before the activity status can be changed to Completed .

Beneficiaries Tab

Information about the households assisted with HOME funds is entered on the Beneficiaries screen. The number of lines displayed is the same as the number entered in the HOME-ASSISTED UNITS field on the Page 1 completion screen (see page 10-6).

Location		Costs		Beneficiaries i			
Line i	*Unit No.	*Number of Bedrooms	*Occupant	Household			
				*% Median Income	*Hispanic /Latino	*Race	*Size i
1		Select	Owner	Select	Select	Select	Select

*Type	*Assistance Type	*Total Monthly Rent
Select	No Assistance	

Field	Description
Line	The number of lines completed must equal the number of HOME-ASSISTED UNITS entered on the Page 1 screen before you will be allowed to change the activity status to Completed .
i	To delete a line of data, check the box in this column. Empty lines cannot (and need not) be deleted.
Unit No.	Enter the unit number of the HOME-assisted unit.
Number of Bedrooms	Specify the number of bedrooms in the unit: SRO/Efficiency or 1 through 5+ .
Occupant	On the first row, this field is populated with Owner and cannot be changed. For additional units, select Tenant or Vacant , as appropriate. If the unit is vacant, leave the rest of the fields on the input line blank (any data you enter will not be saved).
% Median Income	For each occupied unit, specify the household's annual income level at the time of initial occupancy. Income levels are expressed as a percentage of the median income for the area, as determined by HUD with adjustments for family size. The percentages are: <p>0 - 30 percent Household annual income at or below 30 percent of the area median income (AMI).</p> <p>30+ - 50 percent Household annual income above 30 percent and at or below 50 percent of AMI.</p> <p>50+ - 60 percent Household annual income above 50 percent and at or below 60 percent of AMI.</p> <p>60+ - 80 percent Household annual income above 60 percent and at or below 80 percent of AMI.</p>

Field	Description
Hispanic/Latino	<p>For each occupied unit, indicate if the head of household is Hispanic/Latino by selecting Yes or No.</p> <p>A person of Hispanic/Latino ethnicity is defined as someone of Cuban, Mexican, Puerto Rican, Central or South American, or other Spanish culture, regardless of race.</p>
Race	<p>For each occupied unit, select the race of the head of household:</p> <p>White: A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.</p> <p>Black/African American: A person having origins in any of the black racial groups of Africa.</p> <p>Asian: A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.</p> <p>American Indian/Alaskan Native: A person having origins in any of the original peoples of North and South America (including Central America) and who maintains a tribal affiliation or community attachment.</p> <p>Native Hawaiian/Other Pacific Islander: A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.</p> <p>American Indian/Alaskan Native & White: A person having these multiple racial origins as defined above.</p> <p>Asian & White: A person having these multiple racial origins as defined above.</p> <p>Black/African American & White: A person having these multiple racial origins as defined above.</p> <p>American Indian/Alaskan Native & Black/African American: A person having these multiple racial origins as defined above.</p> <p>Other Multi-Racial: Category used for reporting individual responses that are not included in any of the categories listed above.</p>
Size	<p>For each occupied unit, specify the number of persons in the household, 1 through 8+.</p>

Field	Description
Type	<p>For each occupied unit, specify the type of household occupying the unit:</p> <p>Single, Non-Elderly – One person under the age of 62.</p> <p>Elderly – One or more persons, each of whom is at least 62 years old.</p> <p>Single Parent – A single parent with one or more dependent children 18 years old or younger.</p> <p>Two Parents – Two parents with one or more dependent children 18 years old or younger.</p> <p>Other – Any household not included in the above definitions, including two or more unrelated persons.</p> <p>If the previous field is 1 person, then this field must be either Single, Non-Elderly or Elderly.</p>
Assistance Type	<p>For the owner-occupied unit (first row), this field is set to No Assistance and cannot be changed. For each tenant-occupied unit, select:</p> <p>Section 8 – for tenants receiving Section 8 assistance through the Housing Choice Voucher Program under 24 CFR 982.</p> <p>HOME TBRA – for tenants receiving HOME tenant-based rental assistance.</p> <p>Other Federal, State, or Local Assistance – for tenants receiving rental subsidies from other federal, state, or local rental assistance programs.</p> <p>No Assistance – self-explanatory.</p>
Total Monthly Rent	<p>For the owner-occupied unit (first row), this field is deactivated. For each tenant-occupied unit, enter the total amount of the initial monthly rent to the nearest dollar. Include both the tenant contribution and the subsidy amount in the total.</p> <p><i>Tenant contribution</i> is the amount the tenant pays each month for rent. If the tenant-paid rent includes utilities or partial utilities (e.g., heat but not electricity), these costs must be added to the rent. Use the utility allowance schedule established by the PJ in accordance with 92.252(d).</p> <p><i>Subsidy amount</i> is the amount of rental assistance the tenant receives each month (including any utility allowances paid directly to the tenant).</p>

When you are finished, select a different tab or click the [Save] button to save your data and return to the Edit Activity screen.

UPDATING THE ACTIVITY STATUS TO COMPLETED

The final step in completing any HOME activity is to change the ACTIVITY STATUS to **Completed** (see page 3-11).

Remember, the HOME final rule at 24 CFR 92.502(d)(1) requires PJs to enter all completion data and update the status to **Completed** within 120 days of the final draw for the activity. If the 120-day deadline is not met, IDIS flags the activity for non-compliance and suspends your ability to set up and to fund HOME activities until the flag is cleared.