Chapter 3
THE COMMON ACTIVITY SCREENS

HOME, CDBG, ESG, HOPWA, HTF, 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 completed for every activity entered in IDIS. This screen is discussed in detail on the next page.

The Search link displays the screen shown above, which is the starting point for updating existing activities. Turn to page 3-6 for details.
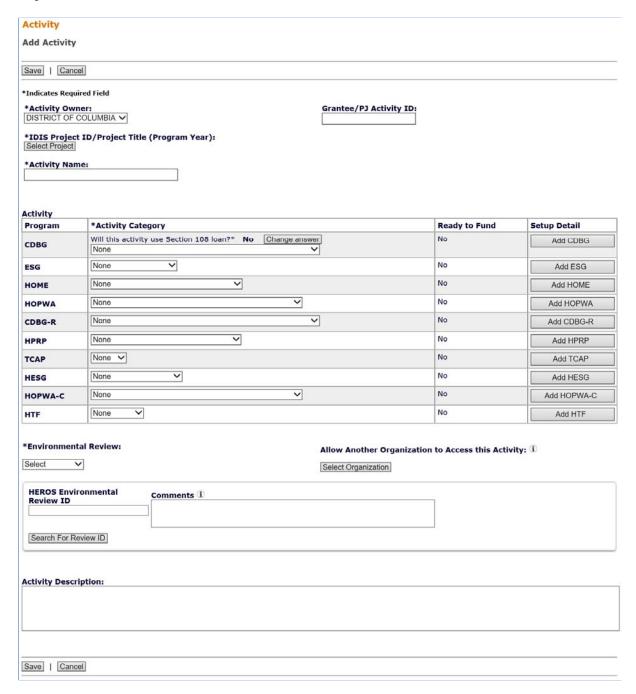
The Search HOME/HTF link accesses a screen for searching your HOME and HTF activities. This screen is covered in Chapter 5.

The Review link is listed only if the orange banner, identifying CDBG and/or HOME activities as flagged, is displayed at the top of the screen. This screen is covered 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:

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.

Field	Description
IDIS Project ID/Project Title (Program Year)	To select the program year and project for the activity: 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.
Grantee/PJ Activity ID	This is an optional field for your own activity identifier.
Program	All of the programs for which you have activity setup authority are listed. Only the HOME Program is covered in this manual. Note: You will not be able to add a new HOME activity if the HOME field is marked with a yellow exclamation point: This 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.
Activity Category	The HOME activity categories are: **Rental** – PJs may use HOME funds to acquire, rehabilitate, or construct affordable rental housing. **Homebuyer** – HOME funds may be used to finance the acquisition and/or new construction or the acquisition and rehabilitation of homes for homebuyers. **Homeowner Rehab** – PJs may use HOME funds to assist existing homeowners with the repair, reconstruction, or rehabilitation of their homes. **Tenant-Based Rental Assistance (TBRA)** – Tenants may receive HOME funds to pay for rent, security deposits, and utility costs and deposits. **AD/CO/CC Only** – Select this for activities that will be funded *only* with Administration (AD), CHDO Operating Expenses (CO), CHDO Capacity Building (CC), and/or Program Income for Administration (PA) funds.

Field	Description
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 Review	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. For HOME rental, homebuyer, and homeowner rehab activities, this field should always be set to **Completed**, because HOME regulations require the environmental review to be completed before the activity is funded [see 24 CFR 92.352(b)(1)]. For TBRA and AD/CO/CC activities, this field should be set to **Exempt**.
Allow Another Organization to Access this Activity	If you want IDIS users at another organization to be able to access this activity: 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 organizations. 3. Click the [Search] button. 4. To select an organization, click first on the radio button next to the name of the organization, and then on the [Select] button. To return to the Add Activity page without selecting an organization, click the [Cancel] button.
HEROS Environmental Review ID	If the environmental review was completed in HEROS (HUD Environmental Review Online System), add the HEROS ID number associated with the activity. To add the HEROS environmental review ID number associated with the activity, click the [Search for Review ID] button to display the Search Environmental Review IDs screen. Run a search to find the appropriate ID, then click its Select link in the last column of the results table. The Add Activity screen is redisplayed with the Review ID you just selected.
Comments	Provide any notes on the environmental review here. If more than one environmental review was required for this activity, use this space to enter additional HEROS ID's.
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 are described in Chapters 8 and 9, the homeowner rehab screens are described in Chapters 10 and 11, and the TBRA screens are described in Chapter 12.
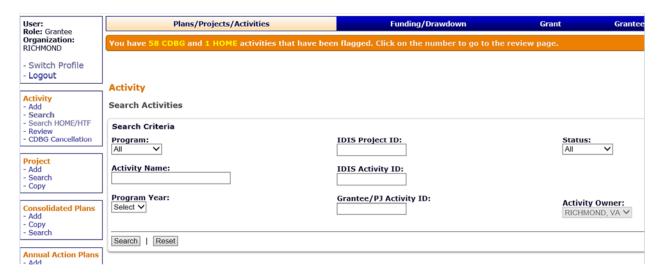
If you are setting up an AD/CO/CC Only activity, there are no HOME-specific setup screens to complete. Click the [Save] button to add the activity. The screen is redisplayed in edit mode, and the activity is ready to be funded (see Chapter 18). Additional details about AD/CO/CC Only activities are provided 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 the activity.

SEARCH ACTIVITIES SCREEN

Click the Activity <u>Search</u> link on any Plans/Projects/Activities tab screen to access the Search Activities screen:
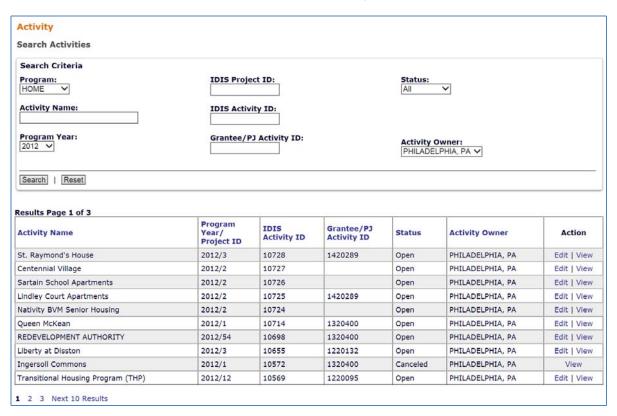

The purpose of this screen is for you to identify the activity or activities you want to update. To identify this activity or activities, you can:

- 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	To limit the results to activities that contain a specific name, input a text string in this field.
Program Year	To limit the results to activities set up under projects from a specific PROGRAM YEAR, select the PROGRAM YEAR from the dropdown.
IDIS Project ID	To limit the results to activities set up under a specific project, enter the Project ID here.
IDIS Activity ID	The quickest way to retrieve an activity is to enter its IDIS ACTIVITY ID. This is a unique identifier for an activity and no other search criteria is needed when the IDIS ACTIVITY ID is entered.

Field	Description
Grantee/PJ Activity ID	To limit the results to activities that contain a grantee/PJ activity ID, input a text string in this field.
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 edit this field. Those who can edit this field should select the grantee who owns the associated Action Plan project for the activity.

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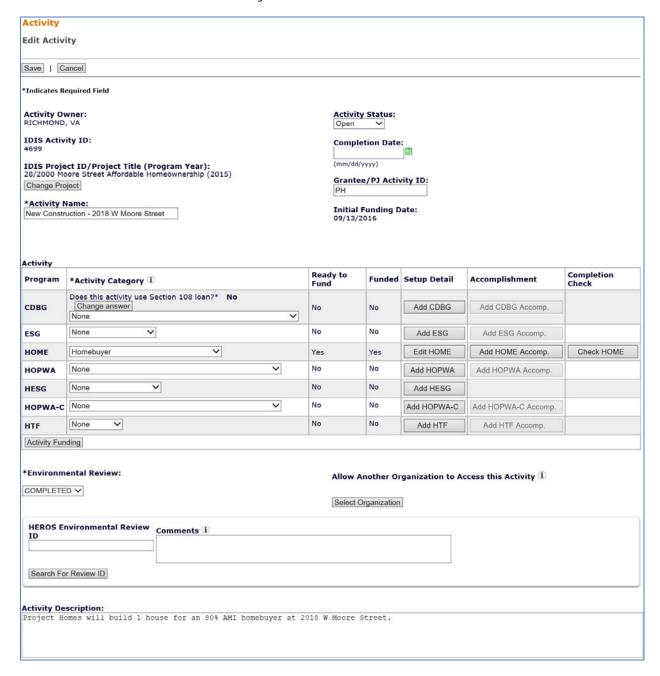

On initial display, the results are sorted by IDIS ACTIVITY ID in descending order. You can change the sort field and the sort order (ascending or descending) by clicking on any column header (displayed in blue).

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 similar to the Add Activity screen:

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.

Field	Description
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 3-11.
Completion Date	This field defaults to today's date when the status of an activity is changed to **Completed** or **Canceled**. Turn to page3-11 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	The date this activity was initially funded. It is system-assigned and cannot be changed.
Program	Only the HOME Program is covered in this manual.
Activity Category	When this field is changed, the following message is displayed: *Caution!* 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 activities (which have 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. The ACTIVITY CATEGORY of an activity funded with CHDO Reserve (CR) funds 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. All applicable setup data must be provided before the activity can be funded. If this read-only field 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 located to the lower left of the Activity box.
Funded	This read-only field is **No** if the activity has not been funded and **Yes** if it has been funded.
Setup Detail [HOME] button	Click this button to save any changes you have made on this screen and access the HOME setup screens for the activity. If the button label is [Add HOME], then no setup data has been entered. If the button label is [Edit HOME], then some or all setup data has been entered.

Field	Description
Accomplishment [HOME] button	Click this button to save any changes you have made on this screen and access the HOME completion screens for the activity. If the button label is [Add HOME Accomp.] then no completion data has been entered. If the button label is [Edit HOME Accomp.], then some or all accomplishment data has been entered. The button is inactive if required setup data is missing. Setup 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 Review	Same as the Add Activity screen.
Allow Another Organization…	Same as the Add Activity screen.
HEROS Environmental Review ID	Same as the Add Activity screen.
Comments	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.
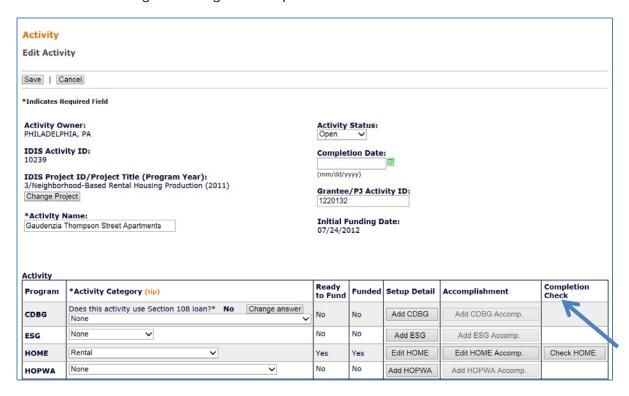
UPDATING THE ACTIVITY STATUS

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 24 CFR 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 of an activity to **Completed** in IDIS, you must run a "completion check." To do so, go to the Edit Activity screen (see page 3-8). You may need to scroll to the right to bring the Completion Check column into view:

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 been 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 3-14), the new COMPLETION DATE cannot be earlier than the initial COMPLETION DATE or later than today's date.

If the status of an activity is changed to **Completed**, and the activity has an undisbursed balance from a 2015 or later grant which has passed its 24-month commitment deadline, unless the deadline has been waived, a warning message will be displayed when trying to [Save] the record: "WARNING: Changing the activity status to 'Completed' or 'Canceled' will uncommit the undisbursed balance of this activity. These uncommitted funds would no longer meet the HOME 24-month commitment requirement and will be deobligated by HUD. Click 'I Agree' to proceed." In order to proceed with completing the activity, you must

confirm that you understand that the undisbursed balance for the activity may be deobligated by selecting [I agree] on the pop-up message. Note that the Consolidated Appropriations Act of 2017 (P.L. 115-31) suspends the 24-month HOME commitment requirement for deadlines that occurred, or will occur in 2016 through 2019. HUD will not enforce commitment deadlines during this time, but will continue to enforce the CHDO reservation and cumulative expenditure deadlines.

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. If the status of an activity is changed to **Canceled**, and the activity has an undisbursed balance from a 2015 or later grant which has passed its 24-month commitment deadline, unless the deadline has been waived, a warning message will be displayed when you try to [Save] the record: "WARNING: Changing the activity status to 'Completed' or 'Canceled' will uncommit the undisbursed balance of this activity. These uncommitted funds would no longer meet the HOME 24-month commitment requirement and will be deobligated by HUD. Click 'I Agree' to proceed." In order to proceed with cancelling the activity, you must confirm that you understand that the undisbursed balance for the activity may be deobligated by selecting [I agree] on the pop-up message.

- Never funded, the COMPLETION DATE cannot be later than today.
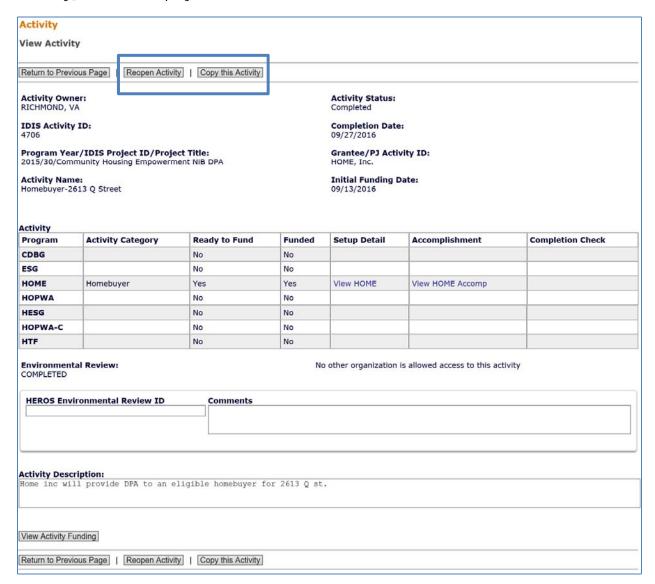
Important Note:

The Consolidated Appropriations Act of 2017 (P.L. 115-31) suspends the 24-month HOME commitment requirement for deadlines that occurred, or will occur in 2016 through 2019. HUD will not enforce commitment deadlines during this time, but will continue to enforce the CHDO reservation and cumulative expenditure deadlines. Consequently, IDIS will allow PJs to commit non-CHDO funds from Federal fiscal years (FYs) 2016 through 2019 after the 24-month deadline has passed (i.e., Entitlement (EN), Administration (AD), CHDO Operating (CO), and General Subgrants (SU)). However, the system will prevent PJs from committing CHDO funds from these years after the 24-month CHDO reservation deadline has passed (i.e., CHDO Reserve (CR), CHDO Loan (CL), and CHDO Capacity (CC).

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

REOPEN ACTIVITY AND COPY ACTIVITY

To access these functions, choose the <u>View</u> link for an activity on the Search Activities screen (see page 3-6).

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

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.

Important Note: Reopening activities that are subject to the 4-year completion deadline requirements established in the 2012 and 2013 Appropriation Laws and the 2013 HOME Rule may result in the activity becoming "Involuntarily Terminated". If this occurs, the PJ must contact its Field Office Representative for resolution.

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.