

Chapter 6

SINGLE-ADDRESS RENTAL ACTIVITIES

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

Note: If one of the units in a rental activity will be occupied by the owner, there must be at least four other HOME-assisted units in the building. If there are not, you should set up a homebuyer or homeowner rehab activity instead.

ACTIVITY SETUP

To add a new activity, complete the Add Activity screen (see page 3-2) and set the ACTIVITY CATEGORY to **Rental**. 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 first of three rental setup screens.

ADD/EDIT HOME SETUP DETAIL (PAGE 1)

On this screen, indicate if CHDO Reserve funds (including CHDO Loan funds) are to be used for the activity.

Note to Insular Area users: Since Insular Area grantees do not receive CHDO Reserve funds, this screen is not displayed for you.

The screenshot shows a web application interface for setting up a rental activity. On the left is a navigation sidebar with categories: Organization (CLEVELAND, Logout), Activity (Add, Search), Project (Add, Search, Copy), Utilities (Home, Data Downloads, Print Page, Help (Add), Help (Edit)), and Links (Rules of Behavior, RAMPs, Support, CPD Home, HUD Home). The main content area is titled 'Activity' and 'Add HOME Setup Detail (Page 1)'. It shows the activity category as 'Rental' and includes 'Save', 'Save and Continue', and 'Cancel' buttons. A table of metadata is displayed:

* Indicates Required Field		
Grantee/PJ Activity ID: N/A	Activity Name: Ferncrest Apartments	Program Year/Project ID: 2011/1
IDIS Activity ID: 12163	Activity Owner: CLEVELAND	Project Title: Scattered Site Affordable Housing

Below the table are 'CHDO Questions':

- Will the activity be funded with CHDO Reserve (CR)?
 Yes No
- CHDO Acting As:
Select
- Will initial funding be a CHDO site control and/or seed money loan?
 Yes No

'Save', 'Save and Continue', and 'Cancel' buttons are at the bottom.

If the activity will not be funded with CHDO Reserve (CR) or CHDO Loan (CL) funds, click the [Save and Continue] button to display the next screen. If CR funding will be used, proceed as follows:

Field	Description
Fields in gray box	These read-only fields identify the activity you are processing. They are populated with data from the common activity screen.
Will the activity be funded with CHDO Reserve (CR)?	Change this field to Yes .
CHDO Acting As	<p>Indicate if the CHDO is acting as the owner, sponsor, or developer of the rental housing:</p> <p>Owner: The CHDO holds legal title to or has a long-term (99-year minimum) leasehold interest in the property. The CHDO may be an owner with one or more individuals, corporations, partnerships, or other legal entities.</p> <p>The 2013 final rule permits a PJ to provide CHDO set-aside funds to a CHDO that owns rental housing that it does not develop [see 92.300(a)(2)].</p> <p>Sponsor: The CHDO develops a property that it solely or partially owns and agrees to convey ownership to a second nonprofit organization at a predetermined time.</p> <p>Developer: The CHDO either owns and develops the property or is under a contractual obligation with the owner to obtain financing and develop the property.</p>
Will initial funding be a CHDO site control and/or seed money loan?	<p>If the activity will be initially funded with a CHDO Loan, select Yes. Otherwise, select No.</p> <p>For information on CHDO predevelopment loans, see 24 CFR 92.301.</p> <p>If you answered Yes here, turn to Chapter 14 for instructions on setting up a CHDO Loan activity.</p>

When you are finished, click the [Save and Continue] button.

ADD/EDIT HOME SETUP DETAIL (PAGE 2)

Basic setup information is entered on this screen, including the type of activity to be performed, the address of the assisted property, the number of rental units you expect to assist with HOME funds, the estimated HOME cost, and whether the activity is located at a single site or at multiple addresses.

<p>Grantee Organization: CLEVELAND - Logout</p> <p>Activity - Add - Search</p> <p>Project - Add - Search - Copy</p> <p>Utilities - Home - Data Downloads - Print Page - Help (Add) - Help (Edit)</p> <p>Links - Rules of Behavior - RAMPS - Support - CPD Home - HUD Home</p>	<p>Activity</p> <p>Add HOME Setup Detail (Page 2)</p> <p>Rental</p> <ul style="list-style-type: none"> HOME setup has been saved <p>Update/Review CHDO Info Save Save and Continue Cancel</p> <p>* Indicates Required Field</p> <table border="1"> <tr> <td>Grantee/PJ Activity ID: N/A</td> <td>Activity Name: Ferncrest Apartments</td> <td>Program Year/Project ID: 2011/1</td> </tr> <tr> <td>IDIS Activity ID: 12164</td> <td>Activity Owner: CLEVELAND</td> <td>Project Title: Scattered Site Affordable Housing</td> </tr> </table> <p>Performance Objective: Select Option</p> <p>Performance Outcome: Select Option</p> <p>Will this activity be carried out by a faith-based organization? <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Special Characteristics (Check any that apply to the location of this activity)</p> <ul style="list-style-type: none"> <input type="checkbox"/> CDBG Strategy Area <input type="checkbox"/> Local Target Area <input type="checkbox"/> Presidentially Declared Major Disaster Area <input type="checkbox"/> Historic Preservation Area <input type="checkbox"/> Brownfield Redevelopment Area <input type="checkbox"/> Conversion from Non-Residential to Residential Use <p>*Setup Activity Type: Select Option</p> <p>Multi-Address: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Loan Guarantee: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Activity Address ?</p> <p>*Address Line 1: <input type="text"/></p> <p>Address Line 2: <input type="text"/></p> <p>Address Line 3: <input type="text"/></p> <p>*City: <input type="text"/></p> <p>*State: Ohio</p> <p>*Zip Code: <input type="text"/> + <input type="text"/></p> <p>*County: Select Option</p> <p>Refresh County Code</p> <p>Validate This Address</p> <p>Activity Estimates</p> <p>*Estimated HOME Units: <input type="text"/></p> <p>*Estimated HOME Cost: \$ <input type="text"/></p> <p>Update/Review CHDO Info Save Save and Continue Cancel</p>	Grantee/PJ Activity ID: N/A	Activity Name: Ferncrest Apartments	Program Year/Project ID: 2011/1	IDIS Activity ID: 12164	Activity Owner: CLEVELAND	Project Title: Scattered Site Affordable Housing
Grantee/PJ Activity ID: N/A	Activity Name: Ferncrest Apartments	Program Year/Project ID: 2011/1					
IDIS Activity ID: 12164	Activity Owner: CLEVELAND	Project Title: Scattered Site Affordable Housing					

Field	Description
Fields in gray box	These read-only fields identify the activity you are processing. They 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 box 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	<p>Select the dropdown item that describes the type of work to be performed:</p> <p>Rehabilitation Only: Alteration, improvement or modification of an existing structure that does not include the acquisition of real property.</p> <p>New Construction Only: Construction of new residential units or the addition of units outside the existing walls of the structure.</p> <p>Acquisition Only: Acquisition of a structure that received a certificate of occupancy at least 13 months before acquisition and consequently does not require rehabilitation.</p> <p>Acquisition and Rehabilitation: Rehabilitation that includes the acquisition of real property.</p> <p>Acquisition and New Construction: New construction that involves the acquisition of real property.</p>
Multi-Address	<p>For a single-address activity, leave this field set to No.</p> <p>If the activity is being carried out at more than one address (each rental unit in an apartment building is <u>not</u> considered a separate address), change this field to Yes. Multi-address rental activities are covered in the next chapter.</p>

Field	Description
Loan Guarantee	If HOME funds will be used to guarantee financing provided by private lenders, change this field to Yes .
Activity Address	Enter the street, city, and state of the property being assisted. Note: If you change the STATE, click the [Refresh County Code] button before validating the address.
[Validate This Address] button	Required. After filling in ADDRESS LINE 1, CITY, and STATE, click this button to verify the input. If the address is: <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	Enter the number of units that you expect to assist with HOME funds upon activity completion.
Estimated HOME Cost	Enter the estimated amount of HOME funds (including program income) that will be spent on the activity. Enter the amount in whole dollars, with or without commas. 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. The <u>maximum</u> amount of HOME funds that may be invested per unit varies by location and unit size (see 24 CFR 92.250). IDIS does not have system restrictions on the per-unit maximum.

When you have finished, click the [Save and Continue] button.

ADD/EDIT HOME SETUP DETAIL (PAGE 3)

On the last rental setup screen, you will provide information about the property owner:

Organization: CLEVELAND - Logout	Activity Add HOME Setup Detail (Page 3)						
Activity - Add - Search	Rental <ul style="list-style-type: none"> HOME setup has been saved 						
Project - Add - Search - Copy	Save and Previous Page Save Cancel						
Utilities - Home - Data Downloads - Print Page - Help (Add) - Help (Edit)	<p>* Indicates Required Field</p> <table border="1"> <tr> <td>Grantee/PJ Activity ID: N/A</td> <td>Activity Name: Ferncrest Apartments</td> <td>Program Year/Project ID: 2011/1</td> </tr> <tr> <td>IDIS Activity ID: 12163</td> <td>Activity Owner: CLEVELAND</td> <td>Project Title: Scattered Site Affordable Housing</td> </tr> </table> <p>Activity Address: 2088 Fairchild Dr Cleveland, OH 44121</p>	Grantee/PJ Activity ID: N/A	Activity Name: Ferncrest Apartments	Program Year/Project ID: 2011/1	IDIS Activity ID: 12163	Activity Owner: CLEVELAND	Project Title: Scattered Site Affordable Housing
Grantee/PJ Activity ID: N/A	Activity Name: Ferncrest Apartments	Program Year/Project ID: 2011/1					
IDIS Activity ID: 12163	Activity Owner: CLEVELAND	Project Title: Scattered Site Affordable Housing					
Links - Rules of Behavior - RAMPS - Support - CPD Home - HUD Home	<p>*Property Owned by: Select Option ▾</p> <p>Property Owner Name First Name: <input type="text"/> Middle Initial: <input type="text"/> Last Name: <input type="text"/></p> <p>Property Owner Address *Address Line 1: <input type="text"/> Address Line 2: <input type="text"/> Address Line 3: <input type="text"/> *City: <input type="text"/> *State: Ohio ▾ *Zip Code: <input type="text"/> + <input type="text"/></p>						
	Save and Previous Page Save Cancel						

Field	Description
Fields in gray box	These read-only fields identify the activity that is being processed. Notice that the activity address from the previous screen has been added.
Property Owned by	Make a selection from the dropdown to indicate who owns the rental property being assisted with HOME funds.
Property Owner Name	Optional. If the owner is an individual, enter his/her full name. Otherwise, enter the legal name of the organization in the FIRST NAME field.
Property Owner Address	Enter the property owner's address.

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

ACTIVITY FUNDING AND DRAWDOWNS

All rental activities except those initially funded with a CHDO loan may be funded with EN (Entitlement), SU (General Subgrant), AD (Administration), CO (CHDO Operating Expenses), PA (Program Income for Administration), PI (Program Income), HP (Recaptured Homebuyer), and IU (Repayment to Local Account) HOME funds.

The availability of CHDO funds depends on the answers you provided on the first HOME setup screen (see page 6-1). If you answered **No** to WILL THE ACTIVITY BE FUNDED WITH CHDO RESERVE, you will not be able to fund the activity with CHDO Reserve (CR), CHDO Capacity Building (CC), or CHDO Loan (CL) funds. If you answered **Yes** to that question and entered:

- **No** in the CHDO LOAN field, the activity can be funded with CR or CC.
- **Yes** in the CHDO LOAN field, initial funding is limited to the CL fund type. If the activity goes forward to produce affordable housing, the activity may be funded with CR (but not additional CL). Activities that are initially funded with a CHDO loan are explained in detail in Chapter 14.

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

ACTIVITY COMPLETION

To complete a single-address rental 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**. The HOME final rule at 24 CFR 92.502(d)(1) require PJs to enter all completion data and update the activity status to **Completed** within 120 days of the final draw for the activity.

To access the completion screens, follow the instructions on page 3-6 for retrieving an 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 input on this screen:

Organization:
CLEVELAND

[- Logout](#)

Activity

[- Add](#)

[- Search](#)

Project

[- Add](#)

[- Search](#)

[- Copy](#)

Utilities

[- Home](#)

[- Data Downloads](#)

[- Print Page](#)

[- Help](#)

Links

[- Rules of Behavior](#)

[- RAMPS](#)

[- Support](#)

[- CPD Home](#)

[- HUD Home](#)

Activity

Add HOME Completion Detail (Page 1)

Rental

[Save](#) | [Save and Continue](#) | [Cancel](#)

*** Indicates Required Field**

Grantee/PJ Activity ID: N/A	Activity Name: Ferncrest Apartments	Program Year/Project ID: 2011/1
IDIS Activity ID: 12163	Activity Owner: CLEVELAND	Project Title: Scattered Site Affordable Housing
HOME Multiple-address: No	HOME Completion Activity Type:	Number of HOME-Assisted Units: 12

Activity Address:
2088 Fairchild Dr
Cleveland, OH 44121

Completion Narrative: (Maximum 4000 characters) (tip)

***Completion Activity Type:** (tip)
Rehabilitation Only ▼

***Property Type:** (tip)
Select Option ▼

Mixed Use:
 Yes No

Mixed Income:
 Yes No

Units

***Total Completed Units:** (tip) 18 ***HOME-Assisted Units:** (tip) 18

Of the Total Completed Units, the Number of

	Total	HOME-Assisted
Units Qualified as Energy Star	<input type="text"/>	<input type="text"/>
Section 504 Accessible Units	<input type="text"/>	<input type="text"/>
Units Designated for Persons with HIV/AIDS	<input type="text"/>	<input type="text"/>
Of Units Designated for Persons with HIV/AIDS, Number of Units for the Chronically Homeless	<input type="text"/>	<input type="text"/>
Units Designated for Homeless Persons and Families	<input type="text"/>	<input type="text"/>
Of Units Designated for Homeless Persons and Families, Number of Units for the Chronically Homeless	<input type="text"/>	<input type="text"/>

Period of Affordability
 If you are imposing a period of affordability that is longer than the regulatory minimum, enter the total years (HOME minimum + additional) of affordability.

Total Years of Affordability: (tip)

[Save](#) | [Save and Continue](#) | [Cancel](#)

Field	Description
Fields in gray box	These read-only fields identify the activity that is being processed.
Completion Narrative	Optional.
Completion Activity Type	<p>This field is initially populated with the ACTIVITY SETUP TYPE input at setup. Change it here if the setup type no longer accurately reflects the work that was performed.</p> <p>The completion activity types are the same as the setup types (see page 6-4 for definitions).</p>
Property Type	Make a selection from the dropdown to identify the type of property assisted with HOME funds.
Mixed Use	If the HOME-assisted property is not 100 percent residential (e.g., there is a video rental store on the ground floor of the apartment building), change this field to Yes .
Mixed Income	If less than 100 percent of the residential units in the HOME-assisted property qualifies as affordable housing (see 24 CFR 92.252), change this field to Yes .
Total Completed Units	Enter the total number of units (HOME assisted plus non-HOME assisted) at activity completion. This field is initially populated with the number of ESTIMATED HOME UNITS you entered at activity setup (see page 6-5), but may be changed.
HOME-Assisted Units	Enter the number of units that received HOME assistance. This field is also initially populated with ESTIMATED HOME UNITS, but may be changed. The number of HOME-ASSISTED UNITS cannot be more than TOTAL COMPLETED UNITS.
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>For more information on the HOME Program's Section 504 compliance requirements, see HUD Notice CPD-00-9 or superseding notices.</p>

Field	Description
<p><i>A note regarding the next four fields</i></p>	<p><i>PJs are not required to ask program participants about their disability status in order to report on the Performance Measurement indicators concerning access for persons with disabilities. The special needs indicators refer to the units developed and designated specifically for persons with these disabilities, <u>not</u> to the individuals who occupy the units.</i></p>
<p>Units Designated for Persons with HIV/AIDS</p>	<p>In the TOTAL column, enter the total number of rental units developed specifically for occupancy by persons with HIV/AIDS.</p> <p>In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by persons with HIV/AIDS.</p>
<p>Of Units Designated for Persons with HIV/AIDS, Number of Units for the Chronically Homeless</p>	<p>In the TOTAL column, enter the total number of units developed specifically for occupancy by persons with HIV/AIDS who met the HUD definition of chronically homeless at entry. This number cannot be greater than the total number of units designated for persons with HIV/AIDS.</p> <p>In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by persons with HIV/AIDS who met the HUD definition of chronically homeless at entry. This number cannot be greater than the number of HOME-assisted units designated for persons with HIV/AIDS.</p> <p>HUD’s definition of “chronically homeless” is an unaccompanied homeless individual with a disabling condition who has either:</p> <ul style="list-style-type: none"> • been continuously homeless for a year or more, or • had at least four episodes of homelessness in the past three years. <p>A “disabling condition” is defined as a diagnosable substance use disorder, serious mental illness, developmental disability, or chronic physical illness or disability. “Homelessness” is defined as sleeping in a place not meant for human habitation or in an emergency homeless shelter.</p>

Field	Description
Units Designated for Homeless Persons and Families	<p>In the TOTAL column, enter the total number of units developed specifically for occupancy by persons who met the HUD definition of homeless at entry.</p> <p>In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by persons who met the HUD definition of homeless at entry.</p> <p>HUD’s definition of “homeless” is an individual or family who lacks a fixed, regular, and adequate nighttime residence or whose primary nighttime residence is either:</p> <ul style="list-style-type: none"> • a supervised publicly or privately operated shelter designed to provide temporary living accommodations including welfare hotels, congregate shelters, and transitional housing for the mentally ill); or • an institution that provides a temporary residence for individuals intended to be institutionalized; or • a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings.
Of Units Designated for Homeless Persons and Families, Number of Units for the Chronically Homeless	<p>In the TOTAL column, enter the total number of units developed specifically for occupancy by homeless persons who met the HUD definition of chronically homeless at entry. This number cannot be greater than the total number of units designated for homeless persons and families.</p> <p>In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by homeless persons who met the HUD definition of chronically homeless at entry. This number cannot be greater than the number of HOME-assisted units designated for homeless persons and families.</p> <p>HUD’s definition of “chronically homeless” is given on the previous page.</p>
Total Years of Affordability	<p>If the period of affordability (POA) you are imposing on HOME-assisted units is longer than the period required by HOME regulations, enter the total number of years (HOME minimum plus additional) in this field. To indicate that the HOME-assisted units are to remain affordable in perpetuity, enter 99.</p> <p>If you are not imposing a longer-than-required POA, leave the field blank.</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 for the activity. The top part of each screen looks like this:

<p>Organization: CLEVELAND</p> <p>- Logout</p>	<p>Activity</p> <p>Add HOME Completion Detail (Page 2)</p>												
<p>Activity</p> <p>- Add</p> <p>- Search</p>	<p>Rental</p> <p>• HOME Completion has been saved</p>												
<p>Project</p> <p>- Add</p> <p>- Search</p> <p>- Copy</p>	<p>Save and Previous Page Save Cancel</p>												
<p>Utilities</p> <p>- Home</p> <p>- Data Downloads</p> <p>- Print Page</p> <p>- Help</p>	<p>* Indicates Required Field</p> <table border="1"> <tr> <td>Grantee/PJ Activity ID: N/A</td> <td>Activity Name: Ferncrest Apartments</td> <td>Program Year/Project ID: 2011/1</td> </tr> <tr> <td>IDIS Activity ID: 12163</td> <td>Activity Owner: CLEVELAND</td> <td>Project Title: Scattered Site Affordable Housing</td> </tr> <tr> <td>HOME Multiple-address: No</td> <td>HOME Completion Activity Type: Rehabilitation Only</td> <td>Number of HOME-Assisted Units: 12</td> </tr> <tr> <td colspan="3">Activity Address: 2088 Fairchild Dr Cleveland, OH 44121</td> </tr> </table>	Grantee/PJ Activity ID: N/A	Activity Name: Ferncrest Apartments	Program Year/Project ID: 2011/1	IDIS Activity ID: 12163	Activity Owner: CLEVELAND	Project Title: Scattered Site Affordable Housing	HOME Multiple-address: No	HOME Completion Activity Type: Rehabilitation Only	Number of HOME-Assisted Units: 12	Activity Address: 2088 Fairchild Dr Cleveland, OH 44121		
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Activity Address: 2088 Fairchild Dr Cleveland, OH 44121													
<p>Links</p> <p>- Rules of Behavior</p> <p>- RAMPs</p> <p>- Support</p> <p>- CPD Home</p> <p>- HUD Home</p>	<p>Location Costs Beneficiaries ?</p>												

Field	Description
Fields in gray box	These read-only fields identify the activity that is being processed.
Location, Costs, Beneficiaries tabs	Use the 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 two main sections: 'Lead Paint' and 'Property'. The 'Lead Paint' section contains two sub-sections: '*Applicable Lead Paint Requirement:' with three radio button options ('Housing constructed before 1978', 'Exempt: housing constructed 1978 or later', and 'Otherwise exempt'), and '*Lead Hazard Remediation Actions:' with three radio button options ('Lead Safe Work Practices (24 CFR 35.930(b))', 'Interim Controls or Standard Practices (24 CFR 35.930(c))', and 'Abatement (24 CFR 35.930(d))'). The 'Property' section contains the label 'FHA Insured: (tip)' and two radio button options ('Yes' and 'No', with 'No' selected). At the bottom of the form, there are three buttons: 'Save and Previous Page', 'Save', and 'Cancel'.

Field	Description
Lead Paint	These fields are displayed only if the COMPLETION ACTIVITY TYPE on the previous screen is Rehabilitation Only, Acquisition Only, or Acquisition and Rehabilitation.
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
HOME FUND (including PI)			
Form of Assistance			
Amortized Loan	\$	<input type="text"/>	
Grant	\$	<input type="text"/>	
Deferred Payment Loan	\$	<input type="text"/>	
Other	\$	<input type="text"/>	
Total	\$	<input type="text" value="0.00"/>	
Public Funds			
Form of Assistance			
Other Federal Funds	\$	<input type="text"/>	
State/Local Funds	\$	<input type="text"/>	
Tax-Exempt Bond Proceeds	\$	<input type="text"/>	
Total	\$	<input type="text" value="0.00"/>	
Private Funds			
Form of Assistance			
Private Loans	\$	<input type="text"/>	
Owner Cash Contributions	\$	<input type="text"/>	
Private Grants	\$	<input type="text"/>	
Total	\$	<input type="text" value="0.00"/>	
Other			
Form of Assistance			
Low Income Housing Tax Credit Proceeds	\$	<input type="text"/>	
Total	\$	<input type="text" value="0.00"/>	
Activity Totals			
HOME Funds	\$	<input type="text" value="0.00"/>	
All Funds	\$	<input type="text" value="0.00"/>	
Total HOME Funds Disbursed	\$	<input type="text" value="0.00"/>	
<input type="button" value="Save and Previous Page"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Enter all amounts as dollars and cents. If you omit the decimal point and cents, IDIS will append '.00' when the amount is saved.

Field	Description
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> <p>DPLs are often used to help rental activities by allowing deferral of payment until the activity becomes stable.</p>
Other	Enter the total amount, in dollars and cents, of HOME funds provided in some form other than the loan/grant assistance identified above.
Total	This read-only field shows the sum of the HOME FUNDS (INCLUDING PI) 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 .
Public Funds	
Other Federal Funds	Enter the total amount of activity costs paid for with other (non-HOME) federal funds.
State/Local Funds	Enter the total amount of activity costs paid for with state or local government appropriated funds.
Tax-Exempt Bond Proceeds	Enter the total amount of activity costs paid for with state or local government tax-exempt bond proceeds.
Total	This read-only field is the sum of the PUBLIC FUNDS amounts.
Private Funds	
Private Loans	Enter the total amount of activity costs paid for with money obtained from private financial institutions such as banks or credit unions.
Owner Cash Contributions	Enter the total amount of cash contributions provided by the owner of the rental property.
Private Grants	Enter the total amount of cash contributions donated by private individuals, organizations, etc.
Total	This read-only field is the sum of the PRIVATE FUNDS amounts.
Other	
Low Income Housing Tax Credit Proceeds	Enter the total amount of activity costs paid for with proceeds from the Low Income Housing Tax Credit (LIHTC) program.
Total	This read-only field shows the LIHTC amount.

Field	Description
Activity Totals	
HOME Funds	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 .
All Funds	This read-only field shows the sum of all HOME, public, private, and LIHTC 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 (Including PI) TOTAL field must match 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 6-8).

Location Costs **Beneficiaries** ⓘ

Show lines: 1-15

Line	i	*Unit No.	*Number of Bedrooms	*Occupant	*Total Monthly Rent	Household		
						*% Median Income	*Hispanic/Latino	*Race
1	<input type="checkbox"/>		Select	Select		Select	Select	Select

*Size ⓘ	*Type	*Assistance Type
Select	Select	Select

Field	Description
Show Lines	Displayed only if the number of HOME-ASSISTED UNITS on the Page 1 completion screen is greater than 15. Change the SHOW LINES selection and click the [Go] button to page through the screens. Updates made on the current page will be validated and saved before the next page is displayed.
Line	The number of lines completed must equal the number of HOME-ASSISTED UNITS entered on the Page 1 completion screen before you will be allowed to change the activity status to Completed .
ⓘ	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+ .

Field	Description
Occupant	<p>Specify Tenant, Owner, or Vacant.</p> <p>If the unit is vacant, leave the rest of the fields on this input line blank (any data you enter in them will not be saved).</p> <p>If one of the units is occupied by the owner, you must input data for at least four other units (with an OCCUPANT that is either Tenant or Vacant) before you will be able to change the activity status to Completed.</p> <p>Note: HUD understands that rental units may not always be leased up immediately, and for that reason permits rental activities to be completed with vacant units. However, the 2013 HOME rule at 92.252 imposes two deadlines within which the units must be occupied by low-income households:</p> <ul style="list-style-type: none"> • Within 6 months from the date of project completion, if a rental unit remains unoccupied, the PJ must provide to HUD information about current marketing efforts and, if appropriate, an enhanced plan for marketing the unit so that it is leased as quickly as possible. • Within 18 months from the date of project completion, if efforts to market the unit are unsuccessful and the unit is not occupied by an eligible tenant, HUD will require repayment of all HOME funds invested in the unit. A unit that has not served a low- or very low-income household has not met the purposes of the HOME program. Therefore, the costs associated with the unit are ineligible. <p>It is expected that tenant information will be input as soon as it becomes available and at least before the annual tenant report.</p>
Total Monthly Rent	<p>For each 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>

Field	Description
% Median Income	<p>For each occupied unit, specify the household's annual income level at the time of initial occupancy.</p> <p>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> <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> <p>In rental activities with five or more HOME-assisted units, at least 20 percent of the units must be occupied by extremely low and very low income families (0 - 30 percent or 30+ - 50 percent). See 24 CFR 92.252(b) for additional information.</p>
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>

Field	Description
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 not included in any of the above categories.</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 each occupied unit, specify the type of assistance being provided to the occupant. 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>

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 fund HOME activities until the flag is cleared.