

IDIS Online 11.11 Release Notes

The next system release for IDIS Online (Release 11.11.0) will occur the evening of September 11, 2015. The following are the changes that will go live in the system on September 14, 2015 as a result of the release:

Common Updates

- Following modifications made to IDIS Grantee Contact Information:
 - Loaded updated Grantee Chief Elected Official information and Grantee Program Contacts from CPD.
 - Require grantee users with Administration privilege in IDIS to verify Grantee Chief Elected Official and Grantee Program contacts information upon log in. The contacts information is required for update and verification upon log in to the system the first time after the 11.11 release goes live and every 6 months thereafter.
 - Allow grantee users with Administration privilege in IDIS to edit the Grantee Chief Elected Official and Grantee Program contacts information.
 - Capture the following new fields for Grantee Contacts:
 - Prefix (required)
 - Suffix (optional)
 - Address 1 (required; label changed from Address to Address 1)
 - Address 2 (optional; available for use to enter longer addresses)
- On the 'Add Retain Receipt' page, the system will associate receipt to the current program year grant of the organization creating the retained program income receipt. If the current Program Year grant does not exist, system will build a grant number using the prior year grant's source type and the year of the Program Year of Receipt.
- Prevents 'Do Not Use Invalid' value from being applied to open activities on beneficiary data fields.
- Updated Warning text on CPD Grants Portal Login page and IDIS landing page.
- Updated Rules of Behavior (RoB) text for IDIS.

CDBG

- Maximum Admin (AD) subfund amount to be calculated as follows for CDBG Grantees for 2015 onwards:
 - For Entitlements, Hawaiian Counties, and Insular Areas the maximum will be 20% of just the grant, and will not increase due to receipts of Program Income (PI) and Revolving Loans (RL).
 - For States, the maximum will be 3% + \$100,000 of just the grant, and will not increase due to receipts of PI, RL and CDBG State Funds (SF).
 - For Insular Areas the initial AD maximum will be updated to be 20% of the grant instead of 3%. This corrects a long-standing error in IDIS.
- 'CDBG Cancel with Draws' function will allow grantees to cancel those activities with field office approval regardless of repayment status.
- Prevents CDBG At-Risk flagged activities from being removed from the 'Activity Review' page when grantee enters accomplishments or performs draws for an activity listed in the 'Awaiting Grantee's Required Explanation and Remediation Plan' section.

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- Revolving Loan (RL) and CDBG State Funds (SF) receipt funds are consolidated back to a single funding source. In a previous release, the RL and SF funding screen provided multiple funding sources stratified as pre-2015, 2015, 2016 and so on. This stratification was a result of the programming done to the EN funds to accomplish grant-based accounting. However, for RL and SF, those changes were not necessary and misleading.
- Voucher creation pages show CDBG auto-adjust function regardless of whether Program Income (PI) funding is greater than or less than Entitlement (EN) funding.

Consolidated Plan

- MS Word template for the CAPER screens includes dynamically inserted objects associated with the fields on all of the CAPER screens.
- SP-35 screen allows grantee to delete user-added Anticipated Resources.
- NA-45 screen displays an error message when user exceeds 4,000 character limit in text boxes.
- Grantee users with Administration privilege in IDIS can update Grantee Contact information on ConPlan/AAP AD-55 page, no longer requiring field office approval.

ESG

- On 'Edit Activity' page, grantees are now prevented from changing the associated Project for a funded HESG activity.

HOME

- Implemented new criteria for four year completion deadline, and implemented waiver for four year completion deadline. Includes the following enhancements:
 - Automatically block activities flagged for "Involuntarily Terminated".
 - Allows HQ users to unblock and manually block "Involuntarily Terminated" activities.
 - Requires HQ users to enter justification for manual block and unblock actions.
- Updated 'HOME Review Activities' page to add relevant dates to each flagged activity.
- Fixed 'Search HOME Activities' page to enable users to search for all HOME activities.
- Fixed error on 'HOME Review Activities' page when entering large number of characters into 'Explain' field for activities flagged for infrequent draws.

MicroStrategy Reports

- PR03 BOSMAC – entries for activities are no longer duplicated.
- PR20 HOME Production Report – updated to show correct labels.
- PR26 CDBG Financial Summary Report – updated calculation on Line 4 to be the principal amount of Section 108 loan disbursed/received by the Section 108 borrower during selected reporting program year; and separated returns for line-of-credit and returns for the local program account (Line 6); and corrected Line 37 so value shows up correctly.
- PR27 Status of HOME Grants Report – implemented fix related to CHDO requirement data; and fixed double counting of the SU amount subgranted to.
- PR28 CDBG State Performance Evaluation Report (PER) – repaired the report sections I.B, C, D, E (except lines 59-61) and Part II to capture program income obligated or expended during the

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corresponding program year (in the previous release, the report was erroneously modified to capture program income amounts based on the corresponding program year of receipt as entered by the grantee on the Add/Edit Funding screen. The current repair is now consistent with CPD Notice 11-03, which states that program income belongs to the program year in which it is obligated or expended, and not the program year in which it is received.)

- PR32 – new MicroStrategy report to display Grantee contacts information and associated verification data.
- PR46 – new MicroStrategy report to report on HOME flagged activities and support implementation of HOME four year completion deadline, and implementation of waiver for four year completion deadline.
- PR47 HOME Vacant Units Report – updated to comply with new HOME Rule changes.
- PR48 HOME Open Activities Report – updated to comply with new HOME Rule changes; and updated the sort order of the fund types so that PI is before EN; and updated ‘# of HOME units’ count under each activity so that correct value is displayed.
- PR56 CDBG Timeliness Report – fixed double counting issue; and removed disaster sanction grants from being reported on.
- PR88 HOPWA Timeliness Dashboard Report – shows the grantee’s correct status during grantee's last month of the Program Year.
- PR91 ESG Subrecipients Vouchers Report – report is no longer missing voucher line items.
- SF425 – implemented Federal Financial Report for HOME.

HUD Environmental Review Online System (HEROS)

- Updated the Environmental Review Dashboards to allow columns to be sorted.
- Updated the Tiering track to allow Non-RE Recipient and Consultant user roles to access tiered reviews.
- Updated the Tiering track side-menus for all user roles.
- Updated the Search Screen to correct an error in the search function.
- Updated Rules of Behavior (RoB) text for HEROS.