

IDIS Online 11.14 Release Notes

The next system release for IDIS Online (Release 11.14.0) will occur the evening of July 7, 2017. The following are the changes that will go live in the system on July 10, 2017 as a result of the release:

Common Updates

- Updated Grant screen to display correct HTF and HOME Expenditure Deadline Dates
- Updated voucher revision processing for CDBG, HESG, HOME, HOPWA and HTF to:
 - Allow grantees to revise collection vouchers (e.g. for returned funds) to activities with fund types other than EN and to activities where subgranted funds have been drawn
 - Limit the revision of collection vouchers to activities with sufficient completed draws that match the year of the collection
- Prevented voucher revisions from occurring to and from the same Activity in a single revision action, except for the HESG grant path where revisions are allowed within the same activity from one subrecipient to another.
- In the database, capture the following transaction history data:
 - Grant Transaction History
 - Activity Funding Transaction History
 - Subgrant Transaction History
 - Subfund Transaction History

CDBG

- Corrected issue with 'Add/Edit Additional Locations' button on CDBG Setup Page-1 where the button was incorrectly disabled.
- Corrected fund type rules for CDBG Activities based on matrix code and Section 108 Activity flag.

Consolidated Plan

- Updated CR-75 Totals in tables 11e and 11g in the MS Word download to include the 'Street Outreach' values from the CR-75 table 11d in the totals calculation.
- Updated the NA-10 screen to remove asterisks from the three categories for >80 - 100% data; the data is now available.
- Corrected Field Office privileges surrounding CAPER update and save status as follow:
 - A Field Office user with View CAPER privileges cannot update/save the CAPER status.
 - A Field Office user with Review & Comment on CAPER privileges should only be able to update the status to "Reviewed and Waiting for Modification"
 - A Field Office user with Review & Approve CAPER privileges should only be able to update the status to "Reviewed and Waiting for Modification" or "Reviewed and Approved"
- Updated the reporting public burden information.
- Functionality in the system that will be turned on at a later time:
 - State and Insular Area ConPlans and Annual Action Plans (AAPs) will include Housing Trust Fund (HTF) program specific fields. This includes the following:
 - Updates to the AD-25, AD-26, SP-35, AP-15, AP-90

IDIS Online 11.14 Release Notes

- Addition of a new AP-91 page for HTF
- Local Government (including Consortia Lead and Entitlement participating grantees) Consolidated Plans and AAPs will include Housing Trust Fund (HTF) program specific fields if the grantee is a HTF subgrantee. This includes updates to the AD-25, AD-26, AP-15, and AP-90.
- Updated CAPER functionality to include HTF program specific fields. This includes the following updates:
 - Updates to the CR-00, CR-05, CR-10, CR-15, CR-20
 - Addition of a new CR-56 page for HTF
- Updated ConPlan and AAP template file MS Word generation specification page to allow inclusion of HTF specific data.
- Updates to ConPlan, AAP and CAPER download templates to include additions for HTF.

HESG

- Enabled HESG collection voucher processing. To revise HESG collection vouchers recipients can use either the search collections or the search vouchers options.

HOME

- Updated Edit Grant screen to correctly enforce HOME Commitment Deadline date on pre-2015 years.
- Addressed calculation issues when increasing Authorized Amount of CHDO Loan (CL) subfund.
- Removed error message associated with entering cents in the 'Total Monthly Rent' beneficiary field on the Edit Completion (Page-2) Beneficiaries tab for Rental activities.
- Separated the CHDO deadline waiver from the grant commitment deadline waiver functionality on the Edit Grant screen.
- Corrected the calculated expenditure deadline date for new grants.

HOPWA

- Addressed Page Error when trying to add 'Contact at grantee agency' on Add HOPWA Accomplishment page for Stewardship activity types.
- Corrected issue where Calculated 'HOPWA Funds Expended' Accomplishment field incorrectly displayed extended decimal places on HOPWA and HOPWA-C Accomplishment page for STRMU activity types.
- Corrected the value of the Activity 'Ready to Fund' field to be 'No' if there is no accomplishment program year or the activity category is either stewardship, project sponsor reporting, or grantee reporting.

HTF

- Enabled collection voucher processing. To revise collection vouchers HTF grantees will need to utilize the search vouchers feature.
- Enabled capability to create the following receipt fund types for HTF:

IDIS Online 11.14 Release Notes

- Program Income (PI)
- Recaptured from the Homebuyer Program (HP)
- Repayment to Local Account (IU)
- Enabled capability to Subfund HTF Program Income for Administration (PA) funds.
- Enabled capability to Subgrant HTF receipt funds (PI, HP, IU and PA).
- Allow HQ users to cancel HTF activities with draws.
- Corrected the calculated expenditure deadline date for new grants.

MicroStrategy Reports

- Updated PR01 to show correct Section 108 Income amount
- Corrected issue where PR01 report was showing prior Section 108 information duplicated
- Updated PR49 Grant Specific HOME Deadline Compliance Status Report to no longer display the Commitments, SU commitments, and Local Account commitments fields
- Updated PR20 report so that Committed Activity Commitments and Committed Activity Disbursements on page 5 of the PR20 add up to the total funded amounts and drawn amounts listed on the PR48 report
- Corrected calculation of Available to Disburse in CHDO Loans (CL) section on PR27 report
- Updated the Consolidated Plan Goals and Accomplishment Report to include HTF program data

HUD Environmental Review Online System (HEROS)

For an overview of the changes to HEROS in the 11.14 release, see <https://youtu.be/Yv12Rbnu8DY>

- Added “Assign Review” feature. With this change, each Environmental Review (ER) will have only one Assigned User at a time, and only that Assigned User may edit the review until it is assigned to another user.
 - Revised My Environmental Reviews Dashboard so that Users can either view all reviews or just those that are currently assigned to them
 - Created Assign Review screen
 - Created Assign Review History screen
 - Added Assign link to side menus and dashboard
 - Updated several screens, including screens 7015.15 and 7015.16, to remove E-mail Notifications and replace them with instructions on assigning reviews
- Implemented Partner User role to allow partners including consultants, contractors, public housing authorities, nonprofits, applicants, lenders, third party providers, and others to access HEROS and assist HUD and Responsible Entities with the preparation of environmental reviews.
 - Consolidated existing “Non-RE” and “Consultant” roles to new Partner Role
 - Enhanced Admin Screens to create new Role, allow Partner Users to be linked to Partner Organizations, and search for Users by Responsible Entity (RE) or Partner Organizations
 - Edited various screens, including Level of Review, Related Laws and Authorities, and 7015.15 – RROF/C, to clarify responsibilities of Partner Users
- Various changes specifically for Housing Programs:
 - Increased number of scenarios where screen 2090 – Housing Requirements is displayed
 - Enhanced screen 2090 – Housing Requirements: added new questions to clarify requirements and improve data

IDIS Online 11.14 Release Notes

- Various changes specifically for Public Housing Programs:
 - Loaded Public Housing Authorities (PHA) data to be used within HEROS
 - Added functionality to link reviews to specific PHAs and Asset Management Projects (AMPs)
- Screen 1105 – Initial Screen: multiple changes, to include:
 - Added new programs to pulldown lists
 - Removed unnecessary questions (including certain funding, date, and contact information)
 - Improved search for recipient and consulting organizations
 - Updated Project Name field to not allow for underscore
- Screen 1125 – Project Summary: multiple changes, to include:
 - Added additional Save button
 - Edited text
 - Updated to make address information not required
- Screen 2040 – Flood Insurance: clarified Question 1
- Screen 2046 – Floodplain Management: clarified multiple questions
- Screen 2055 – Sole Source Aquifers: Switched order of Questions 1 and 2 and updated existing reviews to reflect change
- Screen 4010 – EA Factors: multiple changes to include:
 - Added additional Save buttons
 - Addressed issue where EA Factors Impact code selection clears
- Screen 5000 – Mitigation Measures: Allowed users to enter mitigation measures and conditions even if not prompted by the system
 - Also updated screen 7000 – Mitigation Follow Up to show user-entered mitigation measures
- Screen 7015.15 – Request for Release of Funds: multiple changes including:
 - Enhanced screen to expand on two options to complete the screen and collect dates for all reviews, and updated existing reviews to reflect changes
 - Changed side menu for HUD Users in "Edit 7015.16" mode to only show the 7015.15 and 7015.16 screens
- My Environmental Reviews Dashboard – Prevented changing of ER Status Back to "In Progress" after users 'Reevaluate' or Re-open' a completed or canceled ER
- Created new Mitigation Conditions Report
- Created three separate Program Review Reports: Part 58, Part 50, Public and Indian Housing (PIH)
- Created HEROS data view for use by Disaster Recovery Grant Reporting system (DRGR)
- Created HEROS data view for use by Online Property Integrated Information Suite (OPIIS)
- Outputs (Documents)
 - Updated Part 58 signature pages to not pre-populate the Determination selection
 - Updated all outputs based on implemented screen changes where applicable