

# IDIS Online 11.25.0 Release Notes

The next system release for IDIS Online (Release 11.25.0) will be implemented beginning on the evening of November 19, 2021. The following are the changes that will go live in the system on Monday, November 22, 2021, with this release:

## **COMMON**

- Section 3 screen has been updated to include the following additional Nature of Agency Efforts values displayed when the Safe Harbor Benchmark has not been met:
  - Promoting the use of a business registry designed to create opportunities for disadvantaged and small businesses.
  - Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act.
- Section 3 screen will allow zero Total Labor Hours making the Safe Harbor Benchmark not applicable.
- Section 3 screen modified to ensure Targeted Worker Hours does not exceed Worker Hours.
- Tool Tips added to the Section 3 screen to provide an explanation of Worker Hours for CPD programs.
- The Activity Common screen functionality has been advanced in IDIS to separate an activity's Initial Funding date for activities containing multiple program paths.
- The Create Drawdown screen navigation options have been fixed to allow cents ending in zero.
- IDIS interface code upgraded with SFTP protocol to communicate with Azure LOCCS.

## **CONSOLIDATED PLAN, ANNUAL ACTION PLAN and CAPER**

- AD-25 ConPlan and AD-26 Annual Action Plan screens enhanced to allow a 4<sup>th</sup> attachment upload option to enable American Rescue Plan (ARP) Participating Jurisdictions (PJs) to upload and submit their "HOME-ARP allocation plans" to HUD as a prerequisite for the approval and subsequent release of HOME-ARP funds to the PJ. Acceptable file types include MS Word, PDF, and Text attachments.
- The ConPlan NA-10 Housing Needs Assessment screen has been updated to allow 8-digit population demographics values.
- A new CR-58 Section 3 screen has been added to the CAPER to capture CDBG, ESG, HOME, HOPWA, and HTF Section 3 Labor Hours and Qualitative Efforts data. A tool-tip has also been added to note the inclusion of HOME-ARP activity data in the HOME column.

## **CDBG**

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- Completion Check functionality for State grantees updated to ensure the UGLG setup value has been provided if the activity does not prevent, prepare for, and respond to the coronavirus pandemic.

### HESG

- Setup screen amended to allow grantees to categorize an activity as Section 3 applicable, while only requiring Labor Hours if the Initial Funding Date is on or after July 01, 2021.
- Review Expenditure Deadline screen revised to use the database date value to flag a grant as past due; calculating the Expenditure Deadline based on the grant's Obligation Date if date value does not exist in database. This functionality was included to include ESG-CARES grant on the Review Expenditure Deadline screen.

### HOME

- Activity Setup screen modified to ensure HOME American Rescue Plan (ARP) Rental Operating activities are not subject to Section 3 requirements.
- Activity Setup screen amended to use an activity's Written Agreement Execution Date (WAED) to determine whether Section 3 Labor Hours are required.
- Completion screen amended to allow grantees to categorize an activity as Section 3 applicable, while only requiring Labor Hours if the WAED is on or after July 01, 2021.
- Implemented Section 3 requirements for ARP Rental non-operating and Non-Congregate Shelter activities.
- Section 3 Worker Hours values have been cleared for existing activities containing a WAED value before July 01, 2021.
- View Activity screen customized to allow users to view Completion and Funding details for activities where the WAED value has not been provided.
- Review Activity screen updated to use an activity's WAED to flag an activity as Involuntarily Terminated.
- Add Activity screen updated to prevent identifying an activity as HOME-ARP without a HOME-ARP Tenure Type selection.
- TBRA Beneficiary screen for HOME-ARP activities updated to require Household Qualifying Population homelessness status for each tenant.
- TBRA setup screen advanced to display the eligible funding amount for each tenant.
- Funding module enhanced to cap TBRA activity funding to the sum of each eligible tenant amount plus security deposit and/or delivery cost.
- Quarterly Report Data screen for HOME-ARP Supportive Services activities updated to display table lines in the Firefox browser.

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- Completion Check functionality has been implemented for HOME-ARP Non-Congregate Shelter activities.
- Completion screens implemented for HOME-ARP Rental non-operating activities to include identifying each beneficiary's Veteran status and Homelessness Qualifying Population status.
- Completion screens implemented for HOME-ARP Non-Congregate Shelter activities.

### HOPWA

- Accomplishment screen amended to allow grantees to categorize an activity as Section 3 applicable, while only requiring Labor Hours if the Initial Funding Date is on or after July 01, 2021.

### HTF

- Activity Setup screen amended to use an activity's Written Agreement Execution Date (WAED) to determine whether Section 3 Labor Hours are required.
- Completion screen amended to allow grantees to categorize an activity as Section 3 applicable, while only requiring Labor Hours if the WAED is on or after July 01, 2021.
- Section 3 Worker Hours values have been cleared for existing activities containing a WAED value before July 01, 2021.
- View Activity screen customized to allow users to view Completion and Funding details for activities where the WAED value has not been provided.

### MicroStrategy Reports

- PR02 HOPWA and HOPWA-C: The following 2 reports are now showing the activity break-down by Fund Type:
  - PR02 - List of Activities by Program Year and Project - HOPWA and HOPWA-C
  - PR02 – List of Activities by Program Year and Project – HOPWA and HOPWA-C – Detailed Report
- PR03 - CDBG/CDBG-R Activity Summary Report: Fixed to display the correct Grant Number.
- PR05 - Drawdown Report by Project and Activity: Added HOME-ARP to Program prompt to run report for HOME-ARP.
- PR07: Added HOME-ARP to Program prompt to run the report for HOME-ARP for the following 3 reports
  - PR07 - Drawdown Report by Voucher Number - All Vouchers
  - PR07 - Drawdown Report by Voucher Number - Vouchers Submitted to LOCCS
  - PR07 - Outstanding Balances: Collections, Adjustments, Manual Payments
- PR08 - Grantee Summary Activity Report: Dataset updated to filter out HOME-ARP Grants from the report.

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- PR09 - Receipt Fund Type Detail Report: Dataset updated to filter out HOME-ARP Grants from the report.
- PR20 – HOME Production Report: Dataset updated to filter out HOME-ARP Grants from the report.
- PR20 – HOME Production Report for HOME-ARP: New report that displays monthly cumulative summary reports of HOME-ARP data by fiscal year; to include allocations, commitments, disbursements, leveraging ratios, as well Rental, TBRA and Supportive Services beneficiary data.
- PR22 - Status of HOME / TCAP Activities: Functionality updated to separate HOME-ARP grants from the HOME program grants. As a result, grantees or field offices now have the flexibility to generate the report for HOME and HOME-ARP programs separately for all participating jurisdictions.
- Updated the following 3 reports to support HOME-ARP functionality:
  - PR22 (1 of 3) - Status of HOME/TCAP Activities - State
  - PR22 (2 of 3) - Status of HOME/TCAP Activities - Entitlement
  - PR22 (3 of 3) - Status of HOME/TCAP Activities - Non- Entitlement
  - New fields added:
    - Total Households Assisted
    - Commitment Date (Written agreement execution date (If available) or Initial funding date)
    - Commitment Date Type (WAED or IFD)
- PR25 - Status of CHDO Funds by Fiscal Year Report: Dataset updated to filter out HOME-ARP CHDO funds from the report.
- PR27 - Status of HOME Grants:
  - The functionality of the report is updated to separate HOME-ARP grants from HOME. As a result, grantees or field offices now have the flexibility to generate the program status report for HOME or HOME-ARP programs separately for all participating jurisdictions.
  - In addition, the report has a new section to display authorized and committed amounts for the capacity building (CB) funds as applicable to the HOME-ARP program.
  - Updated the following 3 reports to support HOME-ARP functionality:
    - PR27 - Status of HOME Grants - State
    - PR27 - Status of HOME Grants - State - Subrecipients
    - PR27 - Status of HOME Grants - Entitlement
- PR28 - PER Financial Summary: Updated to show the correct numbering.
- PR35 - Grant, Subfund, and Subgrant Report:
  - Report updated to filter out HOME-ARP grant funding data from the grid report.
  - Excludes the following funding source types: HOME-ARP Consortium (DP), HOME-ARP Insular Area (IP), HOME-ARP Metro City (MP), HOME-ARP State (SP), and HOME-ARP Urban County (UP)
- PR47 - HOME Vacant Units Report: Dataset updated to filter out HOME-ARP Grants from the report.

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- PR57 - CDBG State Timely Award of Funds:
  - Report now available to grantees
  - Added Hierarchy Prompt to run the report by State
  - Added Program Prompt to run for CDBG or CDBG-CV
  - Added 2 columns to the report:
    - Matrix Code
    - Activity to prevent, prepare for, and respond to Coronavirus
- PR70 - Activity Funding Detail Audit History, PR70 Subgrant & PR70 Subfund: Dataset updated the report to filter out HOME-ARP Grants from the report.
- SF 425 Federal Financial Report: Dataset updated to filter out HOME-ARP Grants from the report.
- Section 3: A new summary report to display Section 3 data across all programs.
  - Report summarizes the data by program, program year, grantee, and activity.
  - Each activity will show its total labor hours, Section 3 target work hours and Section 3 work Hours.
  - Report also displays applicable nature of effort on its activities if Section 3 benchmark is not met.
  - Report can be run at Grantee, Field Office or National level and can be exported to excel.

### **HUD Environmental Review Online System (HEROS):**

- Screen 5000 enhanced to display Flood Insurance Mitigation Measures. The response and the Mitigation Measures are displayed in the Environmental Review Record output file.
- Screen 7000 Ad-hoc Mitigation Measure link remedied to accurately navigate users back to Mitigation Measures and Conditions (50/58) screen.
- Screen 1105 Initial Screen (50/58) and Screen 2050 Historic Preservation (50/58 ) enhanced to include the Section 106 Lender Delegation question for the appropriate combinations of HUD Program and Program Names, where response is displayed in the Environmental Review Record output file.
- Updated the URL links and the ATEC replaced by HUD Exchange. The Environmental Review Record output file displays the latest updated text and links.