

## IDIS Online 11.9.1 Release Notes

The next system release for IDIS Online (Release 11.9.1) will occur the evening of December 19, 2014. The following are the changes that will go live in the system on December 22, 2014 as a result of the release:

### Common Updates

- The performance issue reported for the “Search Grants” page has been resolved where the page will now be displayed in all browsers without delay. The “Grant Year” field’s dropdown values (on the Add Subfund; Add Subgrant; and Search Grants page) will display valid 4-digit year values.
- The “Edit Activity Funding” page has been updated to allow subgrantees to fund activities with retained program income.
- The “Create Voucher” page has been updated to no longer display an error when drawing program income funds that have been explicitly funded on an activity.
- The “Search Voucher” page has been updated to no longer display a page error when a user's search criterion includes a “Grant #” value.
- The calculation for an activity’s “available to de-fund amount” has been updated to include returned funds in activities 1, 2, 3, and 4. In previous scenarios, collection funds that have yet to be credited on an activity could generate a funding source imbalance, preventing users from de-funding activities. With this fix, the imbalance does not prevent de-funding.
- The View Setup and View Accomplishment pages have been updated to darken the text entered in the Narrative descriptions fields.
- The Project pages have been updated to allow users to save blank/null Estimated Amount values.
- The formatting errors on the Data Download files have been updated to display the correct data size and alignment.

### CDBG

- The “Edit Activity Funding” page has been updated to allow CDBG users to re-submit a “cancel with draws” request before the previous request has been approved by their corresponding field office.
- The “Add-Edit Funding Line Item” page has been restored to provide the ability for users to fund program income funds on a first-in-first-out basis for all program years. This update applies to CDBG activities only.
- The “Create Voucher” page has been updated to draw program income on a first-in-first-out basis for all program years. This update applies to CDBG activities only.
- The “Create Voucher” page has been updated to allow users to create Section 108 loan vouchers.
- The “CDBG Setup Details” page has been updated to accurately display the exception percentage associated with the Low and Moderate Income Summary Data (LMISD) date value selected by the user. This update applies to activities with a National Objective of LMA\*.
- The “CDBG Setup” page has been updated to display the Section 108 funds used on an activity separate from the Formula grant funds.
- The CDBG Setup and Accomplishment pages have been updated to no longer require job creation/retention data for activities with the following matrix code, National Objective, and

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accomplishment type combinations: 18A/LMA, SBA, SBR, URG and Businesses; 18B/LMA, SBA,SBR, URG/Businesses; 18C/LMA, LMC, SBA, SBR, URG/People, Businesses

- The “Review Activities” page has been updated to calculate three years from an activity’s initial funding date before flagging an activity with no draws. This update applies to CDBG State Planning and Admin type activities only.
- The “Review Activities” page has been updated to calculate two years from an activity’s initial funding date before flagging an activity with no draws. This update applies to CDBG State non-Admin type activities only.

### **HOME**

- The “Create Voucher” page has been updated to require users to explicitly fund activities with program income before being allowed to draw program income. This update applies to HOME program income funds created for program years 2015 and forward only.

### **HOPWA**

- The Accomplishment page for STRMU activities has been updated to calculate and retain the total number of households (Client Outcomes table). This update applies to HOPWA-C program activities only.

### **Consolidated Plan and CAPER**

- The program for collecting and pre-populating Goals and Outcome data on the CAPER CR-05 screen has been corrected to include accomplishments for the reporting program year if the accomplishments are associated with Project activities where the project for that activity is associated with an Annual Goal or Strategic Plan Goal.
- Grantees can now edit the “Expected Outcome” values in the “Program Year Accomplishments” and “Strategic Plan to date” tables on the CR-05 screen.
- The “Strategic Plan to date” table on the CAPER CR-05 screen now carries forward the accomplishment data from the preceding Program Year’s CAPER and includes current Program Year accomplishments.
- The MS Word template for the CAPER has been updated to include inserted JPEGs, Text and table objects added to the CR-05 screen in the downloaded document.
- The pre-populated data in the CAPER "Racial and Ethnic composition of families assisted" table on the CR-10 screen has been updated to include accomplishment data for the reporting program year regardless of whether the accomplishments are associated with Project activities where the owning project for that activity is on the current reporting period Annual Action Plan (AAP).
- The CR-10 screen has been updated to allow grantees to edit the data reported in the "Racial and Ethnic composition of families assisted" table.

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- The “Total” row in the “Race and Ethnic Composition” table in the MS Word template has been corrected to correspond with the “Total” value that appears in the on-screen table.
- The MS Word template has been updated to only include the ESG column in the “Race and Ethnic Composition” table if the grantee is an ESG recipient.
- The HOME PI/Program Income table on the CAPER CR-10 screen has been updated to allow grantees to remove table rows from this table.
- The “Project ID or Contract No.” field in the HOME tables on the CAPER CR-10 screen has been updated to allow grantees to enter up to 50 alphanumeric characters.
- The "Match Contribution for the Federal Fiscal Year" table on the CAPER CR-10 screen has been updated to properly save dollar values entered by the grantee when the values entered include decimal values.
- The “Planned Allocation” values in the CAPER Geographic Distribution table on the CR-15 screen are pre-populated from the Annual Action Plan AP-50 screen, but can now be edited by grantees on the CAPER CR-15 screen without affecting the AAP allocations.
- The MS Word template for the CAPER CR-15 section has been updated to only include the HOME Program Income tables for grantees that are HOME recipients.
- The pre-populated data in 'Expected Amount Available' column in the Resources table on the CAPER CR-15 screen is now populated from the Annual Action Plan’s Total 'Expected Amount Available' on the AP-15 Expected Resources screen.
- The data values in the 'Expected Amount Available' in the Resources table on the CAPER CR-15 Resources screen can now be edited by grantees.
- The MS Word template for the CAPER CR-55 section has been updated to prevent duplicate rows from appearing in the "Number of Households Served" table and to include the “Totals” row.
- The ESG subrecipients selection list on the CR-60 has been corrected to ensure that subrecipients are available for selection on any CAPER generated by a grantee.
- The MS Word template for the CAPER CR-65 section has been corrected to ensure that the column headings in Table 7, Special Populations Served, correspond with the on-screen table.
- The MS Word template for the CR-75 section has been updated to correct the Fiscal Year values in the column headings for the CR-75 section, tables 11a through 11g, to correspond with the FY values that appear in the on-screen column headings for these tables.
- The Annual Action Plan Copy function has been updated to prevent copy errors when the same value id is used for the source and target AAP version field.
- The Consolidated Plan NA-50 screen has been updated to allow Colonia text narratives to be properly saved and downloaded into the MS Word template.
- The email notifications for Consolidated Plans, Annual Action Plans and CAPERs have been updated to correctly substitute grantee and Field Office information for the generic field names in the email template.

### MicroStrategy Reports

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- PR27 Status of HOME Grants Report - Multiple corrections and enhancements to reflect new HOME Rule changes effective January 1, 2015.
- PR49 HOME Deadline Compliance Report - Implemented new enhancements to reflect HOME Rule changes effective January 1, 2015.
- PR59 CDBG Activities at Risk Dashboard - updated page 1 to reflect new CDBG State requirement.
- PR59 CDBG Canceled with Draws Report - corrected the display of most recently canceled draws.
- PR01 HUD Grants and Program Income Report - corrected calculation for Revised Vouchers.

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

- The e-mail entry fields for sending notifications through HEROS have been updated to allow for entering multiple e-mail addresses, which had prevented e-mails from being sent properly.
- Users are now required to select either “Part 50” or “Part 58” when creating a new review. This prevents Part 50 reviews from reverting to “Part 58”.
- The [Save and Go Back] button on screen 4100 – EA Factors is now saving the information.
- Parts 2 and 3 on screen 7015.15 - Request for Release of Funds and Certification now assure that only users with the correct privileges can complete the screen.
- Links to the Section 106 Agreement Database for Historic Preservation and the FAQ link for the Flood Insurance screens have been updated.
- Screen 1320 – Level of Review Determination has been modified to treat “Maintenance” the same as “Soft Costs”.