

## Section 3: Activity Creation

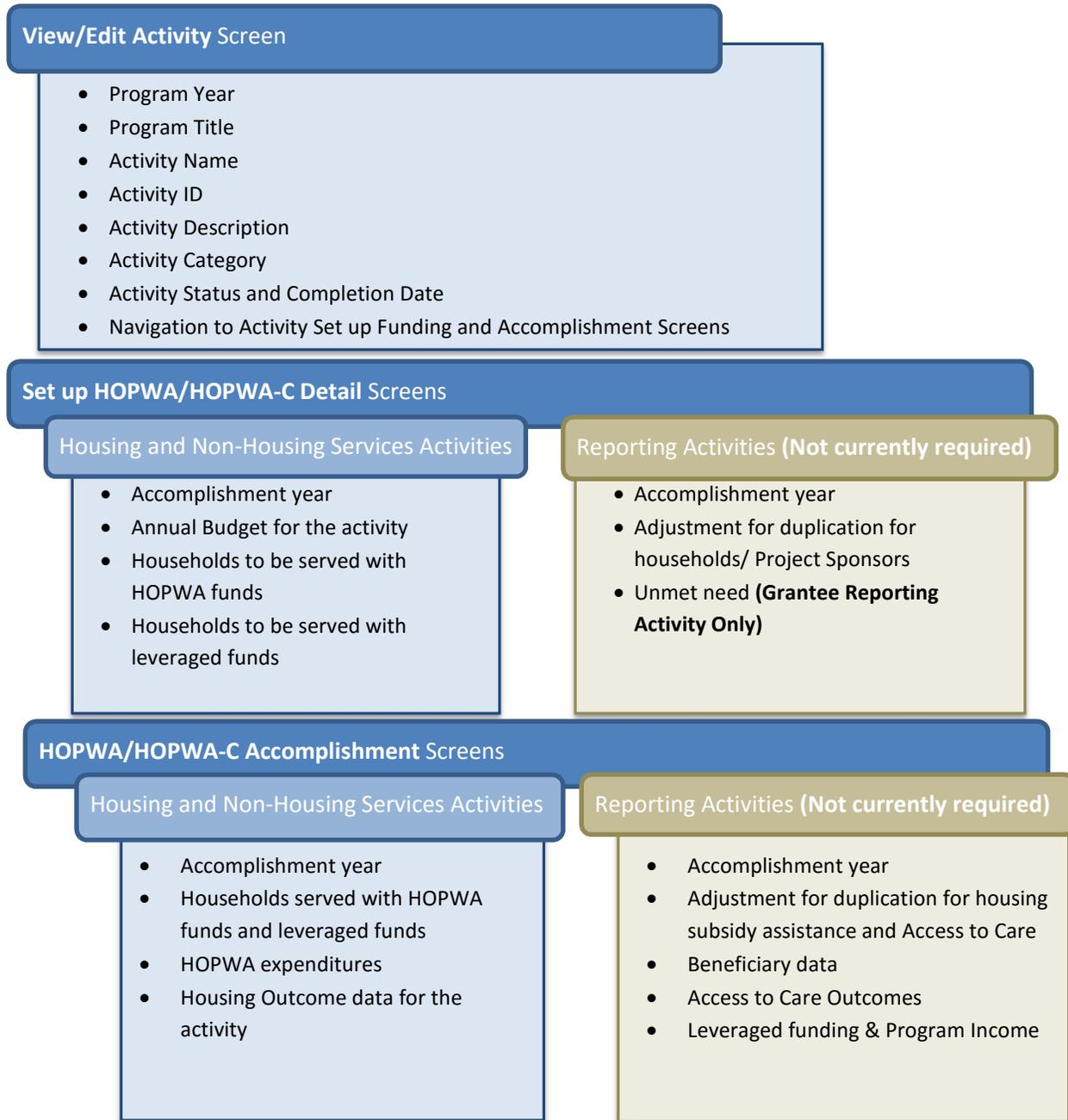
\*Please see [Section 1.1: Definitions](#) for a detailed description of **Activity**. When both Formula and Competitive HOPWA Grantees are preparing to use existing (or newly created) IDIS Projects, they will create activities for each of the projects that were created. Formula Grantees will search for the projects that were created in AP-35 for the Allocation Year they are preparing to use (Creating Formula Projects is described in [Section 2.1](#)), and Competitive Grantees will follow the steps search for the projects that were created (Creating Competitive Projects is described in [Section 2.2](#)) at the beginning of the grant. [Appendix C](#) provides details about which terms of service each HOPWA/HOPWA-C Grantee should utilize for the 2015 Accomplishment Year, which will allow the data for the 2015-2016 Program Year to be reported accurately in IDIS. All reports due 10/1/2015 – 9/30/2016 will be included in this program year.

Information in this Section refer to both Formula and Competitive Grantee Activities, since the structures and processes are the same for both programs. Where there **are** differences, they are noted.

### 3.1 Guidelines for Activity Creation

- It is of paramount importance that Grantees establish activities correctly in IDIS as this is how HUD both reimburses particular services for the HOPWA program and tracks HOPWA expenditures to report to Congress and other stakeholders.
- Only create the Activities for the HOPWA-eligible services that will be funded according to the Consolidated Plan/Annual Action Plan (for formula grantees) or Competitive Grant Agreement (for competitive grantees). Grantees do **NOT** need to set up activities for those services that will not be funded.
- Associate the service activities to the project of the Project Sponsor/ Grantee that will be performing the services. If there are two project sponsors who will be providing the same service, the user should establish separate activities to associate with each of these projects. As a result, the grantee may establish multiple activities for the same type of services. See [Figure 2](#) for an example of Activity Structure for Formula Grantees, and [Figure 3](#) for an example of Activity Structure for Competitive Grantees.
- HOPWA grantees should use the same IDIS Projects/Activities for the life of the allocation/grant by setting up multiple Accomplishment Years to represent each year of funding. When you reach the end of your performance year, navigate to both the **Set Up** and **Accomplishment** screens for each activity, and click the **Add Another Year** button to establish another performance year/Accomplishment Year for the activity. ([Section 3.7](#) details the steps required.)
- [Appendix D](#) includes a Tracking Sheet for Grantees to use to track all Projects, Activities and Accomplishment Years.
- Figure 5 shows all of the elements on the Activity-related Screens.

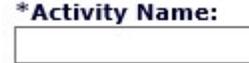
**Figure 5: Data Elements in Activity Screens**



### 3.2 “Add Activity” Screen

In order to establish an activity of any type, the user will start from the **Add Activity** screen. This screen is shared across all CPD programs in IDIS. On this screen, the user will choose the Project to which the activity belongs, identify the activity as a HOPWA activity; name the activity; and navigate to the screens for setting up annual budget and output goals, reporting accomplishments, and funding the activity.

To complete the **Add Activity** screen follow the steps below. The **Add Activity** screen is shown in its entirety in [Figure 6](#).

Steps to follow	What image/icon to look for
1. Log into IDIS.	
2. Click the <b>Plans/Projects/Activities</b> tab at the top of the screen.	
3. Click <b>Add</b> under <b>Activity</b> in the left side of the screen.	
4. Select the Project for the activity. Click on the <b>Select Project</b> button located under the title bar for <b>IDIS Project ID/Project Title (Program Year)</b> . Selecting this button will take you to the <b>Search Projects</b> screen. <ol style="list-style-type: none"> <li>Enter the search criteria to search for the HOPWA Project to which you want to associate this Activity.</li> <li>Click <b>Search</b>.</li> <li>When the results are displayed, choose <b>Select</b> in the <b>Action</b> column. The system will associate the project with the activity and will return the user to the <b>Add Activity</b> screen.</li> </ol>	
5. Enter a name for the activity in the box labeled <b>Activity Name</b> . Activities should be named according to the <b>Naming Conventions</b> in the <a href="#">Definitions</a> .	
6. If desired, assign a <b>Grantee Activity ID</b> ; this optional ID may be used by the Grantee for internal tracking purposes.	

<p>7. In the table labeled <b>Activity</b> in the column <b>Activity Category</b>, choose the HOPWA eligible service to be provided. Be sure to choose the appropriate pathway from either the row entitled <b>HOPWA</b> or <b>HOPWA-C</b>. *Activities can only belong in one pathway.</p> <p>NOTE: Formula Grantees who also have a Competitive Award should set up distinct Projects/Activities for each type of HOPWA Funding.</p>	<p><b>*Activity Category</b></p> <div style="border: 1px solid black; padding: 2px;"> <p>None</p> <p>Administration</p> <p>Facility-Based Housing Development</p> <p>Facility-Based Housing Subsidy Assistance</p> <p>Grantee Reporting</p> <p>Housing Information Services</p> <p>Permanent Housing Placement</p> <p>Project Sponsor Reporting</p> <p>Resource Identification</p> <p>Short Term Rent, Mortgage and Utility Payments (STRMU)</p> <p>Stewardship</p> <p>Supportive Services</p> <p>Tenant-Based Rental Assistance (TBRA)</p> </div>
<p>8. Under <b>Environmental Review</b> choose whether the project has completed the environmental review requirements according to 24 CFR 574.510; is exempt from the standard; or is in the process of completing the environmental review.</p>	<p><b>*Environmental Review:</b></p> <div style="border: 1px solid black; padding: 2px;"> <p>Select</p> <p>COMPLETED</p> <p>EXEMPT</p> <p>UNDERWAY</p> </div>
<p>HUD has determined that the following activity categories are categorically EXEMPT from Environmental Review:</p> <ul style="list-style-type: none"> <li>• TBRA</li> <li>• Facility-Based Housing Subsidy Assistance (Operating)</li> <li>• STRMU</li> <li>• Permanent Housing Placement</li> <li>• Supportive Services</li> <li>• Housing Information Services</li> <li>• Resource Identification</li> <li>• Stewardship</li> <li>• Administration</li> </ul> <p>The following Activities are required to complete an Environmental Review:</p> <ul style="list-style-type: none"> <li>• Facility-Based Housing Development</li> <li>• Facility-Based Housing Assistance (Project-Based Rental Assistance, Acquisition and Rehab Only)</li> </ul>	
<p>9. Click the <b>Allow Another Organization to Access this Activity</b> button ... if another organization will be entering any information for this activity.</p>	<p><b>Allow Another Organization to Access this Activity:</b></p> <div style="border: 1px solid gray; padding: 2px; width: fit-content;"> <p>Select Organization</p> </div>
<p>10. Write a description of the activity to be completed in the <b>Activity Description</b> box.</p>	<p><b>Activity Description:</b></p>
<p>11. Click <b>Save</b> button. The <b>Edit Activity</b> screen is displayed. See Section 3.6 for details on how to</p>	<div style="border: 1px solid gray; padding: 2px; width: fit-content;"> <p>Save</p> </div>

complete the additional screens needed to setup each activity.	
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**Figure 6: Add Activity**

**Activity**  
Add Activity

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Save | Cancel

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\*Indicates Required Field

\*Activity Owner: ATLANTA, GA ▾      Grantee/PJ Activity ID:

\*IDIS Project ID/Project Title (Program Year):

\*Activity Name:

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Program	*Activity Category	Ready to Fund	Setup Detail
HOPWA	None ▾	No	Add HOPWA

**3.3 Edit Activity**

If an activity was created with incorrect naming convention, or assigned to the wrong project, or was created with the wrong activity category, follow the steps below to navigate to the **Edit Activity** screen to make any changes. [Figure 7](#) shows the entire **Search Activity** screen, and [Figure 8](#) shows the **Edit Activity** screen.

Steps to follow	What image/icon to look for
1. Log into IDIS.	
2. Click <b>Plans/Projects/Activities</b> at the top of the screen.	
3. Click <b>Search</b> under <i>Activity</i> on the left side of the screen.	
4. <b>Search Activities</b> screen is displayed.	
5. Using the search criteria listed, search for the activity to edit. Click <b>Search</b> .	<b>Search Options:</b> Program                      IDIS Project ID Status                        Activity Name Activity ID                    Program Year Grantee/PJ Project ID
6. Search results are displayed.	
7. For each Activity to be edited, click <b>Edit</b> in the <b>Action</b> column.	
8. The <b>Edit Activity</b> screen is displayed. Make any required changes.	
9. Click <b>Save</b> button. The system will display the message <i>"The changes to the activity have been saved."</i>	

10. To edit additional activities, click the **Cancel** button to return to the **Search Activities** screen.

Cancel

**Figure 7: Search Activity**

Search Activities

**Search Criteria**

**Program:** All  **IDIS Project ID:**  **Status:** All

**Activity Name:**  **IDIS Activity ID:**

**Program Year:** Select  **Grantee/PJ Activity ID:**  **Activity Owner:** ATLANTA, GA

**Figure 8: Edit Activity**

Activity

Edit Activity

- The new activity has been saved.

Save | Cancel

\*Indicates Required Field

**Activity Owner:** ALABAMA

**IDIS Activity ID:** 5698

**IDIS Project ID/Project Title (Program Year):** 5/AIDS Alabama HOPWA Entitlement Grant 2015 (2015)  
Change Project

**\*Activity Name:** test

**Activity Status:** Open

**Completion Date:**  (mm/dd/yyyy)

**Grantee/PJ Activity ID:**

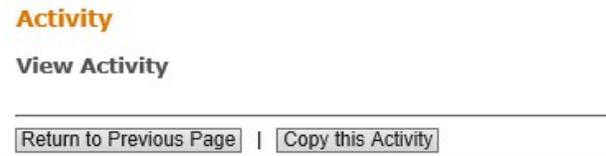
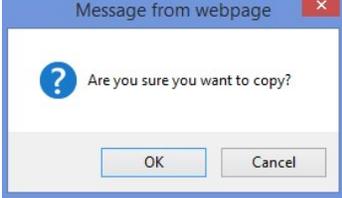
**Initial Funding Date:**

Activity

Program	*Activity Category (tip)	Ready to Fund	Funded	Setup Detail	Accomplishment	Completion Check
CDBG	Does this activity use Section 108 loan?* No <input type="text"/> Change answer None <input type="text"/>	No	No	Add CDBG	Add CDBG Accomp.	
ESG	None <input type="text"/>	No	No	Add ESG	Add ESG Accomp.	
HOME	None <input type="text"/>	No	No	Add HOME	Add HOME Accomp.	
HOPWA	Facility-Based Housing Subsidy Assistance <input type="text"/>	No	No	Add HOPWA	Add HOPWA Accomp.	

### 3.4 Copy Activity

If a Project Sponsor will be providing the same HOPWA-funded services from one allocation/grant to the next, the activities can be copied from year to year. Unlike copying Projects, Activities must be copied individually. **The Projects for the new Allocation/Program Year must be created/copied before copied activities can be associated correctly.** Copying Formula Projects is described in [Section 2.1b](#), and copying Competitive Projects is described in [Section 2.2b](#).

Steps to follow	What image/icon to look for								
1. Click <b>Plans/Projects/Activities</b> at the top of the screen.									
2. Click <b>Search</b> under <i>Activity</i> on the left side of the screen.									
3. <b>Search Activities</b> screen is displayed.									
4. Using the search criteria listed, search for the activity to copy. Click <b>Search</b> .	<b>Search Options:</b> <table border="0"> <tr> <td>Program</td> <td>IDIS Project ID</td> </tr> <tr> <td>Status</td> <td>Activity Name</td> </tr> <tr> <td>Activity ID</td> <td>Program Year</td> </tr> <tr> <td>Grantee/PJ Project ID</td> <td></td> </tr> </table>	Program	IDIS Project ID	Status	Activity Name	Activity ID	Program Year	Grantee/PJ Project ID	
Program	IDIS Project ID								
Status	Activity Name								
Activity ID	Program Year								
Grantee/PJ Project ID									
5. Search results are displayed.									
6. For each Activity to be copied, click <b>View</b> in the <b>Action</b> column.									
7. The <b>View Activity</b> screen is displayed.									
8. Click <b>Copy this Activity</b> .									
9. The Message Box <b>Are you sure you want to copy?</b> Is displayed. Click <b>OK</b> to copy the activity.									
10. The <b>Edit Activity</b> screen is displayed with the message <b>Activity copied to new activity with IDIS activity ID...</b> at the top. The Activity ID is assigned by IDIS.									
11. Click <b>Save</b> .									

When an activity is copied, the newly created activity is displayed, with the following specifications:

- a. Associated with the same project as the original activity; and

- b. Named the same as the original activity; and
- c. Not assigned to an Activity Category; and
- d. **Setup Details** screen not completed.

Follow the steps below to complete the **Edit Activity** screen for the newly copied Activity:

<p>12. To reassign the Activity to the newly created Project:</p> <ul style="list-style-type: none"> <li>a. Click on the <b>Change Project</b> button located under the title bar for <b>IDIS Project ID/Project Title (Program Year)</b>. Selecting this button will take you to the <b>Search Projects</b> screen.</li> <li>b. Enter the search criteria to search for the HOPWA Project to which you want to associate this Activity.</li> <li>c. Click <b>Search</b>.</li> <li>d. When the results are displayed, choose <b>Select</b> in the <b>Action</b> column. The system will associate the project with the activity, and will return the user back to the <b>Add Activity</b> screen.</li> </ul>	<p><b>IDIS Project ID/Project Title (Program Year):</b> 5/AIDS Alabama HOPWA Entitlement Grant 2015 (2015)</p> <p><input type="button" value="Change Project"/></p> <p><input type="button" value="Search"/></p> <p><b>Action</b></p> <p><input type="button" value="Select"/></p>													
<p>13. To rename the Activity, edit the information entered in the <b>*Activity Name</b> field.</p>	<p><b>*Activity Name:</b></p> <p><input type="text" value="Sponsor Administration 2015"/></p>													
<p>14. To choose the Activity Category:</p> <ul style="list-style-type: none"> <li>a. In the table labeled <b>Activity</b> in the column <b>Activity Category</b>, choose the HOPWA eligible service to be provided. Be sure to choose the appropriate pathway from either the row entitled <b>HOPWA</b> or <b>HOPWA-C</b>. *Activities can only belong in one pathway.</li> </ul>	<p><b>*Activity Category</b></p> <table border="1"> <tr><td>None</td></tr> <tr><td>Administration</td></tr> <tr><td>Facility-Based Housing Development</td></tr> <tr><td>Facility-Based Housing Subsidy Assistance</td></tr> <tr><td>Grantee Reporting</td></tr> <tr><td>Housing Information Services</td></tr> <tr><td>Permanent Housing Placement</td></tr> <tr><td>Project Sponsor Reporting</td></tr> <tr><td>Resource Identification</td></tr> <tr><td>Short Term Rent, Mortgage and Utility Payments (STRMU)</td></tr> <tr><td>Stewardship</td></tr> <tr><td>Supportive Services</td></tr> <tr><td>Tenant-Based Rental Assistance (TBRA)</td></tr> </table>	None	Administration	Facility-Based Housing Development	Facility-Based Housing Subsidy Assistance	Grantee Reporting	Housing Information Services	Permanent Housing Placement	Project Sponsor Reporting	Resource Identification	Short Term Rent, Mortgage and Utility Payments (STRMU)	Stewardship	Supportive Services	Tenant-Based Rental Assistance (TBRA)
None														
Administration														
Facility-Based Housing Development														
Facility-Based Housing Subsidy Assistance														
Grantee Reporting														
Housing Information Services														
Permanent Housing Placement														
Project Sponsor Reporting														
Resource Identification														
Short Term Rent, Mortgage and Utility Payments (STRMU)														
Stewardship														
Supportive Services														
Tenant-Based Rental Assistance (TBRA)														
<p>15. Click <b>Save</b>.</p>	<p><input type="button" value="Save"/></p>													
<p>16. See <a href="#">Section 3.6</a> for information on completing the <b>HOPWA Setup Detail</b> screens for each Activity Category.</p>														

### 3.5 Troubleshooting “Add/Edit Activity” Screens

Error Message	Solution
<p><i>Error Message: “Activity Name is required.”</i></p>	<p>Name the activity in the row entitled <b>Activity Name</b>. To make identifying the activity easier, please use the</p>

	<b>Naming Convention</b> as listed in the <b>Definitions</b> . For example, 2015-2018 STRMU MOH15F002 (MHSC) or 2015-2018 TBRA ME-H110005 (FPC).
<i>Error Message: "Activity XX has already been created with the selected HOPWA/HOPWA-C category for the selected project"</i>	IDIS will only allow one (1) Administration Activity for each Project. If a user attempts to add an additional Administration Activity, the associated error message will be returned.
<i>Error Message: "IDIS Project ID/Project Title is required"</i>	Associate the activity to the appropriate project. This should be the agency responsible for implementing services.
<i>Error Message: "Environmental Assessment is required"</i>	Select one of the following options for Environmental Assessment: Completed, Exempt, Underway. See <b>Definitions</b> as well as 24 CFR part 574.510 for more information about Environment Assessment.
<i>Error Message: "To add or edit program details or accomplishments, a category must be selected for that program."</i>	Activity Category was not chosen prior to user clicking "Add HOPWA" in the Setup Detail Column. User must choose the Category for the Activity prior to completing the Setup Detail screen.

### 3.6 Activity Setup Screens & Accomplishment Years

The **HOPWA/HOPWA-C Setup Detail** screen differs for each of the HOPWA Activity Categories in IDIS. This section provides information about how to set up activities for services to be funded with a new HOPWA allocation, including the differences that appear on each screen.

In the HOPWA program (both Formula and Competitive), each set of projects and activities are utilized for the entire length of time (up to three years from the Date of Obligation) that a Grantee takes to spend each Allocation. For Grantees who spend an allocation over the course of more than one Program Year/Operating Year/12 month period of performance, those Grantees will use the "Accomplishment Year" feature on both the **Add/Edit HOPWA/HOPWA-C Setup Detail** and **Add/Edit Accomplishment** screens IDIS activities to establish additional **Accomplishment Years** (layers within each Activity) to distinguish between each 12-month reporting period during which the funds are utilized. For information on how to add an additional Accomplishment Year, see [Section 3.7](#).

### 3.6a Housing and Non-Housing Service Activities

This section provides detailed information on how to set up each Housing and Non-Housing Service activity in IDIS. The following steps will allow the user to set up all of the Housing and Non-Housing Services Activities.

To set up the HOPWA Housing and Non-Housing Service Activities, follow the steps in Table 1 below. These instructions continue from the previous section, wherein the user has completed the “Add Activity” screen and is ready to set up the activity. Table 2 includes unique data fields for specific activities. [Appendix E](#) shows the Setup Detail Screens for all Housing and Non-Housing Service Activities.

Steps to follow	What image/icon to look for
<i>(Steps continue from previous section, wherein the user has completed the “Add Activity” screen.)</i>	
<p>17. Choose the appropriate category as the type of activity in either the HOPWA (formula program) or HOPWA-C (competitive program) row.</p>	<p><b>*Activity Category</b></p>  <p>HOPWA <input type="text" value="Facility-Based Housing Subsidy Assistance"/></p> <p>Or</p> <p>HOPWA-C <input type="text" value="Project Sponsor Reporting"/></p>
<p>18. Click <b>Add HOPWA</b> or <b>Add HOPWA-C</b> under the column labeled <b>Setup Detail</b>.</p>	<p><b>Setup Detail</b></p>  <p><i>(NOTE: Image has been modified.)</i></p>
<p>19. When the <b>HOPWA/HOPWA-C Setup Detail</b> screen is displayed, enter the <b>Accomplishment Year</b> and click <b>Select</b>. Please see Appendix C for details on how Accomplishment Years are reported. Accomplishment Years should be entered “YYYY” – “2015” or “2016.”</p>	<p><b>*Accomplishment Year:</b> <input type="text"/></p>
<p>20. Enter proposed (<b>annual</b>) Budget. This is the amount that the grantee expects to spend on this activity (for</p>	<p><b>*Budget:</b> <input type="text" value="0.00"/></p>

<p>this sponsor) during the given 12-month operating period.</p> <p>For Competitive Grantees, this amount should be consistent with Budget Line Items listed in the Grant Agreement.</p>	<p><b>NOTE: This does NOT fund the activity. This step merely establishes the annual budget for the activity.</b></p>
<p><b>NOTE: IDIS does NOT prevent a Grantee from establishing budgets that exceed what was entered in the Project “Estimated Amount” field during on Project Setup screen.</b></p>	
<p>21. Enter proposed households to be served with HOPWA funds.</p>	<p><b>*Proposed Households to be served with...</b> <i>NOTE: Image has been modified.</i></p>
<p>22. Enter proposed households to be served with Leveraged funds. See <b>Definitions</b> for how IDIS/HOPWA defines Leveraged Households. <b>NOTE: Not required for Resource Identification or Administration</b></p>	<p><b>Proposed Households to be served with Leveraged ...</b> <i>NOTE: Image has been modified.</i></p>
<p>23. If another organization(s) will be completing HOPWA Housing activities on behalf of the Project Sponsor, click <b>Select Organization</b> to associate an organization as a subrecipient (see Definitions of <b>Subrecipient</b> on page 22.)</p>	<p><b>Identify Subrecipient:</b> <input type="button" value="Select Organization"/></p>
<p>24. Choose a <b>Performance Objective</b> and a <b>Performance Outcome</b>. Grantees should choose the following options already defaulted in the system:</p> <ul style="list-style-type: none"> <li>i. <b>Performance Objectives:</b> Provide Decent Affordable Housing</li> <li>ii. <b>Performance Outcomes:</b> Affordability</li> </ul>	<p><b>*Performance Objective:</b> <input type="text" value="Provide decent affordable housing"/></p> <p><b>*Performance Outcome:</b> <input type="text" value="Affordability"/></p>
<p>25. Enter the <b>Address(es)</b> from where the activity will be operated.</p> <p>Check off the box that says <b>Confidential</b> if the address should not be published by HUD in reports or in mapping documents. <b>NOTE: All addresses where HIV/AIDS Housing is provided to clients is confidential, and should be indicated as such in IDIS.</b></p> <p>Click <b>Validate Address</b> to save the address.</p>	<p><b>Address</b> </p> <p><input type="checkbox"/> <b>Confidential</b> (Suppress on Reports)</p> <p><input type="button" value="Validate This Address"/></p> <p><b>Note:</b> <i>Once the address has been validated, IDIS will provide mapping and census data about the location. To access this information roll the cursor over the check mark symbol.</i> </p>
<p>26. Click <b>Save</b> button. The <b>Edit Activity</b> screen is displayed.</p>	<p><input type="button" value="Save"/></p>

### 3.6a-1: Activity-Specific Notes

Appendix E shows the Setup Screens for all Housing and Non-Housing Service Activities:

- [Figure 13](#): Tenant Based Rental Assistance
- [Figure 14](#): Facility Based Housing Subsidy Assistance
- [Figure 15](#): Facility Based Housing Development
- [Figure 16](#): Short-Term Rent, Mortgage and Utility Assistance
- [Figure 17](#): Permanent Housing Placement
- [Figure 18](#): Supportive Services
- [Figure 19](#): Housing Information Services
- [Figure 20](#): Resource Identification
- [Figure 21](#): Stewardship
- [Figure 22](#): Administration

Data Field	Activity-Specific Notes
<b>Budget</b>	<p><b>TBRA:</b> Include all allowable direct and indirect costs but not administrative costs associated with operating the program.</p> <p><b>Administration:</b> The annual budget should not be more than 3% of the total grant costs by Grantees and 7% of the total grant costs by sponsors. <b>NOTE:</b> IDIS will not prevent a user from setting an annual budget (or funding an activity) for an amount over the allowed amount for their Grantee or Project Sponsor Administration.</p>
Identify Subrecipient: <b>Select Organization</b>	<p><b>Administration:</b> This includes Administrative Agencies operating on behalf of the Grantee per the “FAQs REGARDING HOPWA ADMINISTRATIVE COSTS AND RELATED ISSUES” published by HUD on July 20, 2011. For more information about the FAQ, go to <a href="http://www.hudhre.info">www.hudhre.info</a>.</p>
<b>Total Number of Planned Units by Number of Bedrooms</b>	<p><b>Facility Based Housing Assistance:</b> This should be the proposed number of units to be funded by HOPWA during the operating year.</p>
<b>Facility Type</b>	<p><b>Facility Based Housing Assistance AND Facility Based Housing Development:</b> Select the Facility Type by selecting from the drop down box <b>Community Residence, Project-based rental assistance units or leased units, Single-room occupancy dwelling, or Other Housing Facility</b>. If the user choose <b>Other Housing Facility</b>, be sure to explain the facility type in the box labeled <b>If Other, Specify</b>.</p> <div data-bbox="500 1339 1117 1549" style="border: 1px solid black; padding: 5px;"> <p><b>*Facility Type:</b></p> <p>Select</p> <p>Community Residence</p> <p>Other Housing Facility</p> <p>Project-based rental assistance units or leased units</p> <p>Short-term facility</p> <p>Single room occupancy dwelling</p> </div>
<b>Housing Type</b>	<p><b>Facility Based Housing Assistance AND Facility Based Housing Development:</b> Select the <b>Housing Type</b> by selecting from the drop down box <b>Permanent housing, Short term shelter or Transitional supportive housing facility/units, or Supportive Services only facility</b>.</p> <div data-bbox="500 1717 1198 1852" style="border: 1px solid black; padding: 5px;"> <p><b>*Housing Type:</b></p> <p>Select</p> <p>Permanent housing</p> <p>Short-term shelter or Transitional supportive housing facility/unit</p> <p>Supportive Services only facility</p> </div>

<b>Is the Site Owned by a Public Entity</b>	<b>Facility Based Housing Assistance AND Facility Based Housing Development:</b> Answer the question by choosing <b>Yes</b> or <b>No</b> .
<b>Type of Development</b>	<b>Facility Based Housing Development:</b> Choose from the drop down box <b>Acquisition, Acquisition and New Construction, Acquisition and Rehabilitation, Lease with rehabilitation, New Construction, Rehabilitation</b> or <b>Substantial Rehabilitation</b> . <b>Type of Development:</b> 
<b>Facility was a capital development project and placed into service this operating year</b>	<b>Facility Based Housing Assistance AND Facility Based Housing Development:</b> Indicate whether the facility was placed into service during this operating year by choosing <b>Yes</b> or <b>No</b> . Please note the following: <ol style="list-style-type: none"> <li>1. The question refers to HOPWA funded capital development projects ONLY. Do NOT indicate yes if the capital development project will be funded with leveraged funds.</li> <li>2. If the project was developed with HOPWA capital development funds AND opened during the operating year, the user will need to set up a Facility Based Housing Development Activity in order to report the households served/funds expended on the project once the project was placed into service.</li> </ol>
<b>Name [of the facility] or Facility ID.</b>	<b>Facility Based Housing Assistance AND Facility Based Housing Development:</b> Enter name or Facility ID
<b>Enter Addresses</b>	<b>TBRA, STRMU, PHP, Supportive Services and Housing Information:</b> Do not enter addresses for each client household. <b>Facility Based Housing Assistance AND Facility Based Housing Development:</b> If HIV/AIDS Housing is provided at the facility (not a business address, for example) then the facility address should be marked <b>Confidential</b> . For facilities that are both business & residential, mark <b>Confidential</b> . Scattered site units may be entered in ONE activity. If HIV/AIDS housing is provided at this address. Scattered site units may be entered in ONE activity.

### 3.6b Troubleshooting Housing and Non-Housing Service Activity Setup Screens

<b>Error Message/Issue</b>	<b>Solution</b>
<i>Error Message: "Program Year is Required."</i>	<b>Note: On the Activity Screen, this refers to the "Accomplishment Year" of the Activity, not the Program Year of the Project. Since Grantees can spend allocations/awards over multiple Operating Years, the Accomplishment Year of an Activity may differ from the Program Year of the Project.</b> Select the Accomplishment Year for the activity. This should correspond to the Operating Year. See Appendix C for details on the terms for each Grantee.

<p>Error Message: <i>“Program Year must be between 2000 and 2017.”</i></p>	<p><b>Note: On the Activity Screen, this refers to the “Accomplishment Year” of the Activity, not the Program Year of the Project. Since Grantees can spend allocations/awards over multiple Operating Years, the Accomplishment Year of an Activity may differ from the Program Year of the Project.</b> The Program Year must be within the given time period. Check to make sure that the Accomplishment Year has been entered correctly.</p>
<p>Error Message: <i>“Proposed Households to be served with ... is required.”</i></p>	<p><b>All Activity Categories:</b> Enter the proposed number of households to be served (<i>with each category of service</i>) by the HOPWA program during the operating year.</p>
<p>Error Message: <i>“Budget is Required.”</i></p>	<p><b>All Activity Categories:</b> Indicate the budget for this activity for the operating year.</p>
<p>Error Message: <i>“Facility Type is required.”</i></p>	<p><b>Facility-Based Housing Subsidy Assistance/Development and Stewardship:</b> Select whether the facility is described as a community residence, project-based rental assistance units or leased units, single-room occupancy dwelling, or other housing facility type.</p>
<p>Error Message: <i>“Total # of Planned Units by Number of Bedrooms is required.”</i></p>	<p><b>Facility-Based Housing Subsidy Assistance/Development and Stewardship:</b> Enter the planned number of units in the facility to be supported by HOPWA funds by bedroom type. Scattered site units may be grouped together.</p>
<p>Error Message: <i>“Type of Development is required.”</i></p>	<p><b>Facility-Based Housing Development ONLY:</b> Select whether HOPWA funds are being used for acquisition, acquisition and new construction, acquisition and rehabilitation, lease with rehabilitation, new construction, rehabilitation, or substantial rehabilitation.</p>
<p>Error Message: <i>“Housing Type is required.”</i></p>	<p><b>Facility-Based Housing Subsidy Assistance/Development and Stewardship:</b> Select whether the housing is described as permanent housing, short term or transitional supportive housing facility/units, or a supportive services only facility. (Currently SSO facilities are not allowed for HOPWA/HOPWA-C Grantees.)</p>

### 3.6c Project Sponsor and Grantee Reporting Activity Setup – No Longer Needed

The Project Sponsor and Grantee Reporting Activities are not used by HOPWA/HOPWA-C Grantees at this time.

### 3.6d Stewardship

The Stewardship Activity should be completed annually to certify that projects developed, acquired or rehabilitated with HOPWA funds but no longer supported with HOPWA funds are meeting the minimum use periods as detailed in 24 CFR 574.310. There is no HOPWA funding associated with this activity. The

user should set up separate activities for each facility in stewardship. Scattered site units operated by the same agency may be reported in one Stewardship activity. These instructions continue from the previous section, wherein the user has completed the “Add Activity” screen and is ready to set up the Stewardship activity.

Steps to follow	What image/icon to look for														
1. Choose <b>Stewardship</b> as the type of activity under either HOPWA (formula program) or HOPWA-C (competitive program).															
2. Click <b>Add HOPWA</b> or <b>Add HOPWA-C</b> under the column labeled <b>Setup Detail</b> .	 or 														
3. The initial screen will ask only for <b>Accomplishment Year</b> .	<b>Proposed Accomplishments</b> <b>*Accomplishment Year:</b> <input type="text"/>														
4. Enter the <b>Proposed Stewardship Unit Developed with HOPWA Funds To Be Kept in Service during the Operating Year</b> .	<b>*Proposed Stewardship Units developed with HOPWA Funds to be kept in service during the operating year:</b> <input type="text"/>														
5. Enter the <b>Goal Amount of Leveraged Funds to be used during the operating year</b> .	<b>Goal Amount of Leveraged Funds to be used during the operating year:</b> <input type="text"/>														
6. Enter the <b>Total Number of Planned Units by Number of Bedrooms</b> . This should describe the proposed number of units developed with HOPWA funds that are expected to be in stewardship during the operating year.	<b>*Total # Planned Units by Number of Bedrooms</b> <table border="1" data-bbox="711 1083 1414 1125"> <thead> <tr> <th>Number of Bedrooms</th> <th>SRO/0</th> <th>1</th> <th>2</th> <th>3</th> <th>4</th> <th>5+</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> </tr> </tbody> </table>	Number of Bedrooms	SRO/0	1	2	3	4	5+	<input type="text"/>						
Number of Bedrooms	SRO/0	1	2	3	4	5+									
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>									
27. Choose a <b>Performance Objective</b> and a <b>Performance Outcome</b> . Grantees should choose the following options already defaulted in the system: ii. <b>Performance Objectives:</b> Provide Decent Affordable Housing iii. <b>Performance Outcomes:</b> Affordability	<b>*Performance Objective:</b> <input type="text" value="Provide decent affordable housing"/>  <b>*Performance Outcome:</b> <input type="text" value="Affordability"/>														

<p>7. Select the <b>Facility Type</b>. Select the Facility Type by selecting from the drop down box <b>Community Residence, Project-based rental assistance units or leased units, Single-room occupancy dwelling, or Other Housing Facility</b>. If the user choose <b>Other Housing Facility</b>, be sure to explain the facility type in the box labeled <b>If Other, Specify</b>.</p>	<p><b>*Facility Type:</b></p> <div style="border: 1px solid black; padding: 5px;"> <p>Select</p> <p>Community Residence</p> <p>Other Housing Facility</p> <p>Project-based rental assistance units or leased units</p> <p>Short-term facility</p> <p>Single room occupancy dwelling</p> </div>
<p>8. Select the <b>Housing Type</b>. Select the <b>Housing Type</b> by selecting from the drop down box <b>Permanent housing, Short term shelter or Transitional supportive housing facility/units, or Supportive Services only facility</b>.</p>	<p><b>*Housing Type:</b></p> <div style="border: 1px solid black; padding: 5px;"> <p>Select</p> <p>Permanent housing</p> <p>Short-term shelter or Transitional supportive housing facility/unit</p> <p>Supportive Services only facility</p> </div>
<p>9. Indicate the <b>Type of Development</b>. <b>Acquisition, Acquisition and New Construction, Acquisition and Rehabilitation, Lease with rehabilitation, New Construction, Rehabilitation or Substantial Rehabilitation</b>.</p>	<p><b>Type of Development:</b></p> <div style="border: 1px solid black; padding: 5px;"> <p>Select</p> <p>Acquisition</p> <p>Acquisition and New Construction</p> <p>Acquisition and Rehabilitation</p> <p>New Construction</p> <p>Rehabilitation</p> <p>Substantial Rehabilitation</p> </div>
<p>10. Enter the following information:</p> <ol style="list-style-type: none"> <li><b>Date Stewardship Starts.</b></li> <li><b>Specify Year of Stewardship.</b></li> <li><b>Date Stewardship Ends.</b></li> <li><b>Date the Facility Began Operations</b></li> </ol>	<p><b>Date Stewardship Starts:</b></p> <input type="text"/>  <small>(mm/dd/yyyy)</small> <p><b>Specify year of stewardship:</b></p> <input type="text" value="Select"/>  <p><b>Date Stewardship Ends:</b></p> <input type="text"/>  <small>(mm/dd/yyyy)</small> <p><b>Date Facility Began Operations :</b></p> <input type="text"/>  <small>(mm/dd/yyyy)</small>
<p>11. <b>Name [of the facility] or Facility ID.</b></p>	<p><b>Name or Facility ID:</b></p> <input style="width: 100%;" type="text"/>
<p>12. Enter the <b>Address</b> of the facility. Enter the address of the facility. Scattered site units may be entered in ONE activity.</p> <ol style="list-style-type: none"> <li>Check off the box that says <b>Confidential</b>, if the address should not be published by HUD in reports or in mapping documents. <b>Note:</b></li> </ol>	<p><b>Address</b> </p> <p><input type="checkbox"/> <b>Confidential</b> (Suppress on Reports)</p>

<p><b>All facilities where clients reside is confidential.</b></p> <p>b. Click <b>Validate Address</b> to save the address.</p>	<div style="text-align: center;"> <input type="button" value="Validate This Address"/> </div> <p><b>Note:</b> Once the address has been validated, IDIS will provide mapping and census data about the location. To access this information roll the cursor over the check mark symbol .</p>
<p>13. Click <b>Save</b> button.</p>	<div style="text-align: center;"> <input type="button" value="Save"/> </div>

### 3.6e Troubleshooting Stewardship Setup Screens

Error Message/Issue	Solution
<p><i>Error Message: "Program Year is Required."</i></p>	<p>Select the Accomplishment Year for the activity. See <a href="#">Definitions</a> for help choosing an accomplishment year.</p>
<p><i>Error Message: "Facility Type is Required."</i></p>	<p>Select whether the facility is described as a community residence, project-based rental assistance units or leased units, single-room occupancy dwelling, or other housing facility type.</p>
<p><i>Error Message: "Total # Planned Units by Number of Bedrooms is Required."</i></p>	<p>Enter the total number of units in the facility by bedrooms. This should include all units in the facility whether or not HOPWA funds were used to acquire, rehabilitate, or construct the units.</p>
<p><i>Error Message: "Housing Type is Required."</i></p>	<p>Select whether the housing is described as permanent housing, short term or transitional supportive housing facility/units, or a supportive services only facility.</p>
<p><i>Error Message: "Proposed Stewardship Units Developed with HOPWA Funds."</i></p>	<p>Enter the proposed number of stewardship units expected to be in service during the operating year. Remember stewardship units are units developed with HOPWA funds but no longer supported with HOPWA dollars.</p>

### 3.7 Adding an Accomplishment Year to an Existing Activity

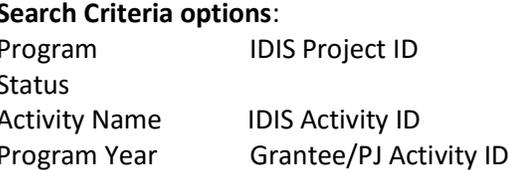
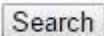
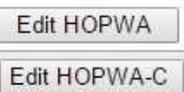
HOPWA Grantees will use the same set of Projects/Activities for the duration of time that it takes to fully draw each allocation. The "Accomplishment Year" feature of IDIS Activities allows Grantees to distinguish between each Operating Year (12-month reporting period) that is utilized to draw down funds for any given allocation. This section provides information about how to search for an activity and set up new Accomplishment Years for each activity.

In order to edit an activity and add additional accomplishment years, users must navigate through IDIS to search for the existing activity. Before additional accomplishment years have been added, activities must be properly created and set up. See [Section 3.3](#) for information on searching for an activity.

### 3.7a Adding an Accomplishment Year

The Accomplishment Year feature is the mechanism by which IDIS will link the activities/services that took place during the operating year. It is vital that Grantees track the activity numbers through the life of an allocation/grant, to ensure that households served and funds drawn are being reported accurately.

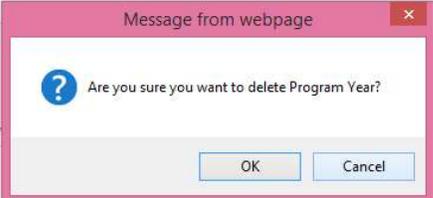
Both HOPWA Formula and HOPWA Competitive Grantees will follow this method of adding additional accomplishment years for the duration of their Allocation/Award. After multiple years have been established, the user will have the option to choose which of the existing Accomplishment Years to edit within the **Edit HOPWA Setup Detail** screen. The system will automatically show the most recent Accomplishment Year established.

Steps to follow	What image/icon to look for
1. Click <b>Projects/Plans/Activities</b>	
2. Click <b>Search</b> under <b>Activity</b> in the left side of the screen.	
3. Enter <b>Search Criteria</b> . The more provided, the more exact the search will be.	
4. Click <b>Search</b> .	
5. A list of activities matching the user <b>Search Criteria</b> entered by the user will appear.	
6. For each activity to be edited, choose <b>Edit HOPWA</b> or <b>Edit HOPWA C</b> in the column labeled <b>Setup Detail</b> .	 <i>(Note: Image has been modified.)</i>
7. The <b>Edit HOPWA Setup Detail</b> screen will be displayed.	
8. Click <b>Add Another Year</b> . This is at the top of the screen, in line with <b>Save</b> , <b>Cancel</b> , and <b>Delete Program Year</b> . The activity ID information at the top of the screen will remain the same, but a blank set up screen will be displayed for the activity.	
9. <b>On the blank screen, enter the following information:</b> a. <b>The next Accomplishment Year</b> (12 month operating period) during which	

<p>you will continue drawing the current source of funding;</p> <p>b. <b>The Annual budget for the next 12 month operating period;</b> and</p> <p>c. <b>The proposed number of households to be served with this activity.</b></p> <p><b>NOTE:</b> This screen may be different, based on the Activity Category. See <a href="#">Section 3.6</a> for different fields specific to each Activity Category.</p> <p><b>NOTE: For Competitive Grantees in Years 2 and 3 of their Grant Agreement:</b> If a Grantee has funds undrawn from an activity in Year 1, those remaining funds should be spent in Year 2. The <b>Budget</b> amount on the Year 2 <b>HOPWA Setup Detail</b> screen should reflect this increase.</p>	
<p>10. Click <b>Save</b>. The <b>Edit Activity</b> screen is displayed.</p>	

### 3.7b Deleting an Accomplishment Year

If an Accomplishment Year is created by mistake, Grantees can click the “Delete Program Year” button within the Activity Setup screens to delete the appropriate year.

Steps to follow	What image/icon to look for
<p>1. From the <b>Edit HOPWA Setup Detail</b> screen, click the <b>Delete Program Year</b> button. Be sure to have the correct accomplishment year (the one you wish to delete) selected.</p>	
<p>2. The Message Box will appear.</p> <p>Click <b>OK</b> to delete the Program Year from the activity.</p>	
<p>3. User will return to the <b>Edit Activity</b> screen.</p>	