

IDIS LIVE

...for the Integrated Disbursement and Information System

U.S. Department of Housing and Urban Development

Office of Community Planning and Development

MARCH MADNESS CROWNS 11 NEW IDIS STATE CHAMPS

NEBRASKA STAKES CLAIM AS No. 2 EDI STATE

On March 21, a year after Louisiana proved that electronic data interchange (EDI) could efficiently move local data into IDIS, Nebraska has officially staked out the number two position. Working with MITAS, Inc., one of a handful of contractors specializing in IDIS/EDI technical assistance, Nebraska is now successfully creating and updating CDBG and ESG activity and project data in IDIS, with HOME still to come.

Joy Alice and Jenne Rodriguez of Nebraska teamed with Lisa Kocsis of MITAS, Inc., and Kyle Farris and Ken Nelson of the CPD EDI team to successfully create and update their data in IDIS. By using the IDIS/EDI process, Nebraska has significantly reduced the amount of data entry required for IDIS. Nebraska no longer needs to enter data into both its state database and IDIS.

Nebraska was able to successfully use EDI to transfer data to IDIS within a week of converting to IDIS. They answer an emphatic, "Yes!" to the question many states ask, "Can I implement EDI after I go live in IDIS?"

Nebraska uses a MITAS, Inc.-developed database to track the state's data, with an EDI back end that updates IDIS. Though planning took many months, it took only a few weeks of testing before they were successfully creating activity and project data using the IDIS/EDI process. ■

Thanks to the fancy footwork and unparalleled teamwork of CPD, State Coordinators, field offices, and support folks, Cinderella danced not once but 11 times last month. March marks the first month of a three month tournament during which all states will go live in IDIS. (All states must pass through IDIS before converting to the new DGMS system.)

With 31 states (including DC and PR) now live in IDIS, and 10 more scheduled to go live in both April and May, CPD will meet its goal of full state participation by June 1.

This is an important milestone to meet. After May 31, CPD formula grantees will no longer be able to use VRS (the LOCCS Voice Response System) to draw funds from CDBG, HOME, HOPWA, and ESG formula grants. Effective June 1, the only vehicle for drawing those funds will be IDIS. (*see March Madness on page 2*)

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[March Madness, cont'd]

Starting in July, grantees will begin migrating from IDIS to DGMS. Current timetables call for all grantees to be converted to DGMS by the end of 2001.

Any questions regarding IDIS hardware or software needs should be directed to the state's field office or to the IDIS Technical Assistance Unit (TAU) at 1-800-273-2573. ■

THE MARCH LINEUP OF STATES

We are happy to announce the addition of the following states to the list of state grantees that have gone "live" in IDIS.

Welcome! We look forward to working with you.

Missouri	March 1
Alabama	March 8
Nebraska	March 10
New Jersey	March 13
New Mexico	March 16
Puerto Rico	March 20
Rhode Island	March 22
Oklahoma	March 24
Arkansas	March 27
Connecticut	March 29
New Hampshire	March 31

WEB390 QUICK REFERENCE NOW AVAILABLE

HUD is phasing out SprintLink dial-up access to its systems as it converts to internet only access for the DGMS project. With the phase out of SprintLink dial-up access to IDIS in the offing, the TAU is receiving many calls about Web390 internet access.

CPD has prepared a Quick Reference which provides answers to the most frequently asked questions.

If you are receiving this issue electronically, we have attached the Quick Reference to your copy of IDIS Live #38. Simply detach and save the "web390qr.pdf" file to your hard drive. There is also a link to this file on the IDIS Internet Login screen, www.hud.gov/cpd/idis.html ■

ALTERNATIVE WAYS TO GET STARTED WITH EDI

For grantees considering EDI, there are three alternatives for getting started, depending on your current in-house technical sophistication and your budget.

The least costly alternative, but the one that requires the most in-house expertise, is to develop or use an existing tracking system (database or spreadsheet) yourself, extract the data to be sent to IDIS, create the EDI formatted file, and contract with a value added network (VAN) to electronically transfer the data to HUD.

The middle-ground alternative is to develop or use an existing tracking system (database or spreadsheet) and extract the data to be sent to IDIS, as above. Then you may contract with a VAN that will create the EDI formatted file for you and transmit the data to IDIS.

For grantees with no existing tracking system, contracting firms can design a complete end-to-end system including the database, extract file, and EDI formatted file, then function as a VAN to transmit the data to IDIS. DGMS plans to develop a simpler method for transmitting the extract file to HUD thereby eliminating the added complexity and expense of the VAN.

Watch for more grantees to start using the IDIS/EDI Process in April. The CPD EDI team is currently working with Lillian Pernell and Associates to test data in the pre-production region for the State of California, Los Angeles County, and the State of Ohio. The team is also working with HDS to test data in the pre-production region for Westchester County, New York; and AOD to test data in the pre-production region for the State of Nevada.

For more information about IDIS and EDI, visit the web page: WWW.HUD.GOV/CPD/IDIS/EDI_HOME.HTML

Or, contact James_K._Farris@Hud.Gov or Kenneth_S._Nelson@Hud.Gov, phone 202-708-0614 x4578. ■

NEW REPORTS ASSIST CDBG GRANTEES IN “TIMELY” DRAWS

Under the provisions of 24 CFR 570.902, a CDBG grantee will be considered to be *failing to carry out its CDBG activities in a timely manner* if, 60 days prior to the end of the current program year, the balance in its line of credit exceeds 1.5 times the annual entitlement grant.

The new IDIS CDBG Timeliness report lets grantees better manage their CDBG funds. It tells grantees the minimum dollar amount they must draw prior to the next time the Timeliness test is conducted (60 days before the end of their program year).

The number of grantees who do not meet this regulatory standard has increased substantially in recent years. Currently, about 26% of all entitlement grantees exceed the 1.5 standard. When funds are not being drawdown in a timely manner, it *gives the appearance* they are not being used for important housing, community, and economic development purposes, and that low- and moderate-income persons are not being served.

The availability of this report provides a valuable tool to both grantees and their field offices. If you haven't used IDIS to generate a Timeliness report for your community, do so now!

There are two versions of the Timeliness report. When a grantee runs the report, the grantee sees information only for his or her UOG Code/UOG Number. When HUD HQ or a field office runs this report, they see

data for all grantees within their jurisdiction, displayed in an easy-to-read table.

One new enthusiast of the Timeliness report is Frank Caballero of the HUD Los Angeles field office. “The Timeliness Report can calculate an up-to-date ratio on a daily basis. When I ran the report on March 16, I was able to determine current ratios for my 13 grantees (including LA City).”

To run the report, select Option E01, Report Selection. (For HQ and field offices, you must press <F1> from the Report Selection screen to select a *dummy* Region, Field Office, and Grantee to be able to run the report for a field office or region.) Press F16 to scroll to the very last page of available reports, then select the CDBG Timeliness Report. To run the report for a Field Office, on the Parameter Screen, delete the UOG Code and UOG Number. To run the report for a Region, delete the Field Office, UOG Code and UOG Number.

For complete step-by-step instructions on running the Timeliness report, see Chapter 12 of the IDIS Reference Manual (Sections 12.3.2.9 and 12.3.2.10).

In the example, the grantee currently has a 2.02 Timeliness ratio, which is higher than the 1.5 standard. The grantee needs to draw \$9,115,150.61 prior to July 2 in order to meet the standard when the next Timeliness test takes place. ■

WITHOUT PROGRAM INCOME ADJUSTMENT	
1999 LETTER OF CREDIT BALANCE:	\$35, 419, 150. 62
1999 TIMELINESS RATIO:	2. 02
MINIMUM DISBURSEMENT TO MEET TIMELINESS TEST (1.5 DRAWDOWN RATIO) ON 07-02-2000	
	\$9, 115, 150. 61
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CPD ACTIVITY FUNDING CLEAN-UP FINDS 150 SUSPECT GRANTS AND SUBGRANTS

Since activity funding was instituted in May, 1997, a number of *glitches* have caused some funding to be incorrect. To get things back in balance, CPD ran a series of clean-up programs during March. Currently, activity funding and grant commitments are consistent with each other.

When CPD examined activity funding after the clean-up, we found 150 cases where the amount committed from a grant, subgrant, or subfund exceeds the amount available to commit. Even though these are *negative* amounts, they appear in IDIS as a positive amount available to commit. (However, if you try to commit the money in Activity Funding, you will get an error message.)

The TAU has a list of the affected grants, subgrants, and subfunds. If you suspect you might have an over-committed activity, the TAU will help you identify which activity(ies) are over-committed funds and assist you in reducing funding. ■

ENTITLEMENT GRANTEE TRAINING CONTINUES, DON'T MISS OUT!

CPD is again offering IDIS training to entitlement grantees during the month of June, 2000. These workshops are designed to help users build on the IDIS skills they already possess. They include hands-on exercises in setting up and revising activities, reporting accomplishments, creating and maintaining drawdowns, creating and using subgrants, and generating and formatting reports.

Those grantees receiving HOME funds (in addition to other program funds) should register for Workshop 'B,' the multi-funded, two-day session. Those grantees receiving only CDBG program funds should register for Workshop 'A,' the one-day session.

The sessions will be facilitated by the IDIS experts from TONYA, Inc. and will be held in the Washington, DC area. For more information or to register, please contact Carmen Barnes at 202-289-8100. ■

<u>Location</u>	<u>Deadlines</u>	<u>Workshop 'A'</u> <u>(CDBG only)</u>	<u>Workshop 'B'</u> <u>(Multi-Funded)</u>
Washington, DC June 6 - 9, 2000 Hotel Washington 515 15th Street, NW Washington, DC 20004 202-638-5900 (800) 424-9540	Registration Deadline: May 22, 2000 Hotel Reservation Deadline: May 15, 2000 Sleeping room rate: \$115.00 per night + tax	June 6 or June 7	June 6-7 or June 8-9

FOR YOUR INFORMATION

Your IDIS contact is Vivian Baldwin at CPD. You may contact her via the following:

Telephone: 202-708-0614, ext. 4693

Internet: Vivian_C._Baldwin@hud.gov

Mail: HUD/CPD
Systems Development and Evaluation Division
451 Seventh St., S.W., Room 7226
Washington, DC 20410

For technical information, contact your field office or the CPD Technical Assistance Unit at 1-800-273-2573. **For Web390 and SprintLink ID and password information**, contact your local HUD field office. **To have your IDIS ID and password reset**, call HUD Security at 202-708-3300. **For IDIS training**, contact TONYA, Inc. at 202-289-8100.

The next edition of *IDIS Live* will be published on
May 1, 2000.

TAU TOTALS FOR FEBRUARY

A total of 1,269 calls were received by the TAU during the month of February, 2000. Twenty-three percent of the calls concerned the HOME C/MI System, the HOPE 3 program, or other non-IDIS calls, while 77% of the calls were associated with IDIS. All except two calls received by the TAU were answered by live representatives. ■

LOGGING IN TO PRE- PRODUCTION

Go to the url www.hud.gov/cpd/idis/idis.html

Do not click on the US map! Instead, click on **Click Here To Practice in Pre-Production** directly above the map.

You will see a pop-up that prompts for your Web390 Username and Password.

When the "HUD House" screen appears, click on the grey "Logon" button. The Pre-Production IDIS Logon Screen will appear. ■

IDIS ACCESS AVAILABLE 8 A.M. TO 8 P.M. EDT

To allow for the increased workload of processing state conversions during IDIS "off-hours," IDIS is not available in the morning until 8 a.m. EDT. For those few users on the East coast who are used to logging in at 7 a.m., we apologize for this change. Once all states are converted to IDIS, access will again be available starting at 7 a.m. The hours for the TAU remain unchanged. Representatives are available to answer your call 8 a.m. to 8 p.m. Monday through Thursday and 8 a.m. through 5 p.m. on Friday. ■