

CDBG IDIS ACTIVITY SETUP INFORMATION PUBLIC SERVICE SUBRECIPIENTS

Subrecipient _____ Activity _____
Amount to be Funded \$ _____

Add Activity	
Select Project <i>[Enter project name]</i>	
Activity Name	
CDBG Activity Category <i>[Refer to Matrix Code chart]</i>	
Environmental Review -	<input type="checkbox"/> Complete <input type="checkbox"/> Exempt <input type="checkbox"/> Underway
HEROS ID [Optional]	
Comment (re ER) [Optional]	
Activity Description	
Click Add CDBG	

Add CDBG Setup Detail (Page 1)	
National Objective	<input type="checkbox"/> LMC <input type="checkbox"/> LMA <input type="checkbox"/> LMH <input type="checkbox"/> Other (list) _____
Accomplishment Type	<input type="checkbox"/> 01 – People <input type="checkbox"/> 04 – Households
Program Year	
Proposed Count	
Performance Objective	<input type="checkbox"/> Creating a suitable living environment <input type="checkbox"/> Providing decent housing <input type="checkbox"/> Creating economic opportunities
Performance Outcome	<input type="checkbox"/> Improving availability or accessibility of units or services <input type="checkbox"/> Improving affordability of housing or services <input type="checkbox"/> Improving sustainability by promoting viable communities
Confidential?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Address – Line 1	
Address – Line 2	
Address – Line 3	
City	
State	
Zip <i>[In IDIS click Validate Address to populate Zip field]</i>	_____ Is IDIS Correct? <input type="checkbox"/> Yes <input type="checkbox"/> No
Activity Purpose	Help Prevent Homelessness? <input type="checkbox"/> Yes <input type="checkbox"/> No Help the Homeless? <input type="checkbox"/> Yes <input type="checkbox"/> No Help those with HIV/AIDS? <input type="checkbox"/> Yes <input type="checkbox"/> No Help Persons with Disabilities? <input type="checkbox"/> Yes <input type="checkbox"/> No
Associate with another Activity?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If Yes, IDIS Activity #	
Activity carried out by grantee?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If No, Name of Organization	
Organization Type	<input type="checkbox"/> Another Unit of Local Government <input type="checkbox"/> Another Public Agency CBDO – N/A for public services <input type="checkbox"/> Subrecipient Only <input type="checkbox"/> CBDO designated as a subrecipient
Target Area?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If Yes, Type and Area Name	
Special Characteristics	Presidentially Declared Major Disaster Area <input type="checkbox"/> Yes <input type="checkbox"/> No Historic Preservation Area <input type="checkbox"/> Yes <input type="checkbox"/> No Brownfield Redevelopment Area <input type="checkbox"/> Yes <input type="checkbox"/> No Conversion from Non-residential to Residential <input type="checkbox"/> Yes <input type="checkbox"/> No
Brownfield Activities	N/A for Public Service Activities
Activity Information	N/A for Public Service Activities
Float Funds	N/A for Public Service Activities
Click Save and Continue to Add CDBG Setup Detail (Page 2) – LMC, LMA or LMH	

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Add CDBG Setup Detail (Page 2) – LMC	
Presumed Benefit?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Nature/Location	<input type="checkbox"/> Yes <input type="checkbox"/> No
If Yes, explain how nature/location benefits limited clientele.	
<i>Continue to CDBG Setup Detail (Page 2) - Funds table below</i>	

Add CDBG Setup Detail (Page 2) - LMA	
Area Benefit Data Determined by	<input type="checkbox"/> Census <input type="checkbox"/> Survey
<i>Continue to HUD Funds table below</i>	

Add CDBG Setup Detail (Page 2) – LMH and some SB and URG	
Multi-Unit Housing?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If Yes, Includes Rental Housing?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>Continue to HUD Funds table below</i>	

Add CDBG Setup Detail (Page 2) – Funds	
Source of HUD Funds [IDIS will populate CDBG after activity is funded]	CDBG - \$ Section 108 – N/A ESG - \$ HOME - \$ HOPWA - \$
Source of Other Funds	Appalachian Regional Commission - \$ Other Federal Funds - \$ State/Local Funds - \$ Private Funds - \$ Other _____ - \$
Grants/Loans provided to activity beneficiaries?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How many?	Grants _____ Loans _____
Amortized Loans	Average Interest Rate (nn.nn%) _____% Average Amortization Period (in months) _____ Total Amount \$ _____
Deferred Payment Loans	Average Interest Rate (nn.nn%) _____% Average Amortization Period (in months) _____ Total Amount \$ _____
<i>For all but LMA activities , click SAVE and continue to Edit Activity screen</i>	

For LMA activities, click SAVE and CONTINUE and continue to CDBG Setup Detail (Page 3) – Below, p.4

Edit Activity
<i>If this screen is reached from an activity setup page, information for that activity will populate the page. The Edit Activity screen may also be accessed through the Search Activity screen. If there is a NO, click Check CDBG for a list of missing details, then click EDIT CDBG in Setup Detail column to access incomplete fields. IDIS will not allow a project with missing setup to be funded.</i>
<i>If there is a YES in the Ready to Fund column, the activity has been set up correctly and saved. Click Activity Funding to access funding options. Clicking the Funding/Drawdown link at the top of all IDIS pages will also access funding options.</i>

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Activity Funding – Search for Activities to Fund
Set search criteria then click Search. Select a project for funding by clicking Add-Edit in the Action column at far right.

Activity Funding – Edit Activity Funding									
<i>IDIS populates the fields on this screen showing amounts available for each fund type. For CDBG public service activities, the fund types allowed are EN (Entitlement), PI (Program Income) and LA (Grant Specific Repayment to Local Account). LA funds become available when the jurisdiction returns funds disbursed for an ineligible activity to a local account rather than the jurisdiction's line of credit. Creating a Local Account requires HUD Field Office approval.</i>									
Which Funds Type(s) will be used for this activity?	<input type="checkbox"/> EN <input type="checkbox"/> PI <input type="checkbox"/> LA								
For each Funding Type to be used for this activity, what will be the Funded Amount?	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 100px;">EN</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>PI</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>LA</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Total</td> <td style="text-align: right;">\$ _____</td> </tr> </table>	EN	\$ _____	PI	\$ _____	LA	\$ _____	Total	\$ _____
EN	\$ _____								
PI	\$ _____								
LA	\$ _____								
Total	\$ _____								
<i>[Enter the amounts to the right on Add-Edit Funding Line Item screens by funding type. IDIS will re-populate Available for Funding and Funded Amounts fields on this screen for each funding type when a Add-Edit Funding Line Item screen is saved.]</i>									
To continue to an Add-Edit Funding Line Item screen, click on Add-Edit for the selected funding type.									

Add-Edit Funding Line Item - EN	
The grant year for the EN funding available is ...	<input type="checkbox"/> Pre-2015 <input type="checkbox"/> 2015 or after
If Pre-2015 funding, enter ...	Grant Year _____
<i>[Click Add Grant Year if funding from more than one Pre-2015 grant is being used to fund the activity.]</i>	Funded Amount \$ _____
If 2015 or after funding, enter	Grant Year(s) _____
	Funded Amount (by grant year) _____
<i>Click Save to save input and update read-only data fields. Click Return to Add-Edit Funding to select another funding type for this activity if applicable.</i>	

Add-Edit Funding Line Item – PI	
Enter ...	Program Year of Receipt _____
	Funded Amount \$ _____
<i>Click Save to save input and update read-only data fields. Click Return to Add-Edit Funding to select another funding type for this activity if applicable.</i>	

Add-Edit Funding Line Item – LA	
IDIS populates Grant Year . Enter ...	Funded Amount \$ _____
<i>Click Save to save input and update read-only data fields. Click Return to Add-Edit Funding to select another funding type for this activity if applicable.</i>	

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Add CDBG Setup Detail (Page 3) - Survey	
Enter FIPS county code for area surveyed	
Enter Census tract [nnnn.nn]	
Check affected Block Groups if area less than entire tract	<input type="checkbox"/> 01 <input type="checkbox"/> 02 <input type="checkbox"/> 03 <input type="checkbox"/> 04 <input type="checkbox"/> 05 <input type="checkbox"/> 06 <input type="checkbox"/> 07 <input type="checkbox"/> 08 <input type="checkbox"/> 09 <input type="checkbox"/> 10
Enter total number of LMI persons in service area	
Enter total number of persons (TP) in service area	
Total LMI ÷ TP = % Low/Mod	____% [IDIS performs calculation and populates field]
<i>Click SAVE and continue to Edit Activity screen</i>	

Add CDBG Setup Detail (Page 3) - Census	
Is Service Area City- or County-Wide?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Enter FIPS county code for area surveyed	
Effective date of Low/Mod Income Summary Data	
<i>In IDIS, click SAVE to access Add/Edit Census Tracts column. Click radio button then click Add/Edit Census Tract and continue to Add CDBG Setup Detail (Page 4). After entering Census tracts in service area on Page 4, use the Select Option drop-down menu to view or edit Census tracts selected. Once Census tracts and block groups in service area are entered, IDIS will populate total LMI, total persons and % of LMI in service area after clicking Calculate % Low/Mod. When calculation is complete, click SAVE and continue to Edit Activity screen</i>	

Add CDBG Setup Detail (Page 4) - Census	
Is Service Area City- or County-Wide?	<input type="checkbox"/> Yes <input type="checkbox"/> No [If Yes, click Save and Return to Previous Page]
Census Tracts in service area	
<i>When finished, click Select Block Groups to continue to Add CDBG Setup Detail (Page 5) - Census</i>	

Add CDBG Setup Detail (Page 4) - Census	
For each Census tract in service area, list each block group included in the service area	
<i>When finished, click Save and Return to Previous Page to return to Page 4, then again to return to Page 3. After clicking Calculate % Low/Mod on Page 3, IDIS will populate Low/Mod data fields.</i>	