Guidance for Reporting CDBG Accomplishments and Performance Measures in IDIS

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Additional Resources:

Definitions of CDBG Matrix Codes:
http://www.hud.gov/offices/cpd/systems/idis/cdbg/Matrix%20Code%20Definitions.pdf

Definitions of CDBG National Objectives:
http://www.hud.gov/offices/cpd/systems/idis/cdbg/nocdescriptions.cfm

Matrix Code/National Objective Table:
http://archives.hud.gov/offices/cpd/systems/idis/library/matrix_noc.pdf

Valid Matrix Code/National Objective/Accomplishment Type Combinations:
http://www.hud.gov/offices/cpd/systems/idis/cdbg/Matrix%20Code%20National%20Objective%20Accomplishment%20Type%20Combinations.pdf

Strategy, Local Target, and CDFI Areas
http://www.hud.gov/offices/cpd/systems/idis/cdbg/StrategyLocalTargetCDFIAreas.pdf

Selecting and Adding Special Areas on CDBG Setup Detail (Page 1)
http://www.hud.gov/offices/cpd/systems/idis/cdbg/SelectingAddingSpecialAreas.pdf

Job Categories
http://www.hud.gov/offices/cpd/systems/idis/cdbg/Job%20Category%20Definitions.pdf

Introduction

To ensure that HUD has complete, accurate, and timely information on grantee performance, the CDBG program is issuing the following guidance for reporting accomplishment data in IDIS. HUD requires reliable, comprehensive information regarding program performance to ensure accountability on the use of CDBG funds. HUD must comply with the Government Performance and Results Act of 1993 and the performance management changes brought about by the Government Performance Modernization Act of 2010, fulfill reporting requirements for Congress and other stakeholders, measure progress made in meeting Agency Priority Goals, monitor grantee performance, and evaluate overall program results. In addition, grantees are subject to the full CDBG regulations regarding recordkeeping, listed at 24 CFR 570.490 (States) and 570.506 (Entitlements). HUD must be able to measure the contributions the CDBG program makes toward meeting the needs of low- and moderate-income citizens across the country and be able to account for the expenditures of each and every CDBG activity, focusing on achieving the primary goal of the program to serve low and moderate income persons. This guidance is intended to assist grantees in providing information needed for HUD to meet these requirements.

Accurate and Complete Reporting is Required

Grantees are required to report all accomplishments achieved for each activity in a program year, excluding planning and administration activities (matrix codes 20, and 21A-J) for States and Entitlements, but including planning-only activities for State grantees (matrix code 20A). Complete information must be reported for each activity. These data are required to demonstrate national objective compliance and to account for the use of CDBG funds. The data required for each activity are dependent on the activity's matrix code and national objective. The matrix code identifies the eligible use of an activity and is required for each activity in IDIS. Each activity, except for planning and administration activities, must also meet a national objective to either benefit low- and moderate income persons, aid in the prevention or elimination of slums or blight, or meet an urgent need. Definitions of CDBG matrix codes and national objectives appear in Appendices A and B, respectively.

Direct benefit activities, those with a national objective of LMC*, LMH*, and LMJ*, generally require the following accomplishment data:

- Race/ethnicity of beneficiaries
- Income level of beneficiaries
- Number of jobs created and retained, for LMJ activities
- Leveraging
- Performance measures

For LMA* activities information on the service area must be reported by either using HUD Low- and Moderate-Income Summary data (LMISD) or data obtained in a survey. If the grantee is using data from a survey, the grantee must enter the total LM universe population, the low-/moderate-income population and the percentage of low- to moderate-income persons. Data required for LMA* activities also includes:

- Leveraging
- Performance measures

For activities with a national objective of SB* and URG, grantees must report:

- Actual units
- Designation of slum blight area, for SBA activities
- Leveraging
- Performance measures

*Denotes all national objective criteria options under a general national objective category.

Timely Reporting is Required

When accomplishment data are not entered on a regular basis, the CDBG program does not have up-to-date information on what has been achieved. This results in undercounting the program's accomplishments and is due, in part, to the infrequent entry of data in IDIS by some grantees.

Report as frequently as possible.

- Reporting as benefits are realized is the ideal
- Quarterly reporting is recommended
- Annual reporting is required

Grantees should understand the data needs upfront for each activity. If the grantee is carrying out the activity itself, it should provide the manager of that activity with complete information on what data are needed and when those data are due. When activities are being carried out by subrecipients or financial assistance has been provided to for-profit businesses, agreements should contain complete information on what data are to be collected and when those data need to be submitted. Penalties should be attached when data are not submitted as designated in an agreement.

The CDBG regulations regarding recordkeeping are listed at 24 CFR 570.490 (States) and 570.506 (Entitlements).

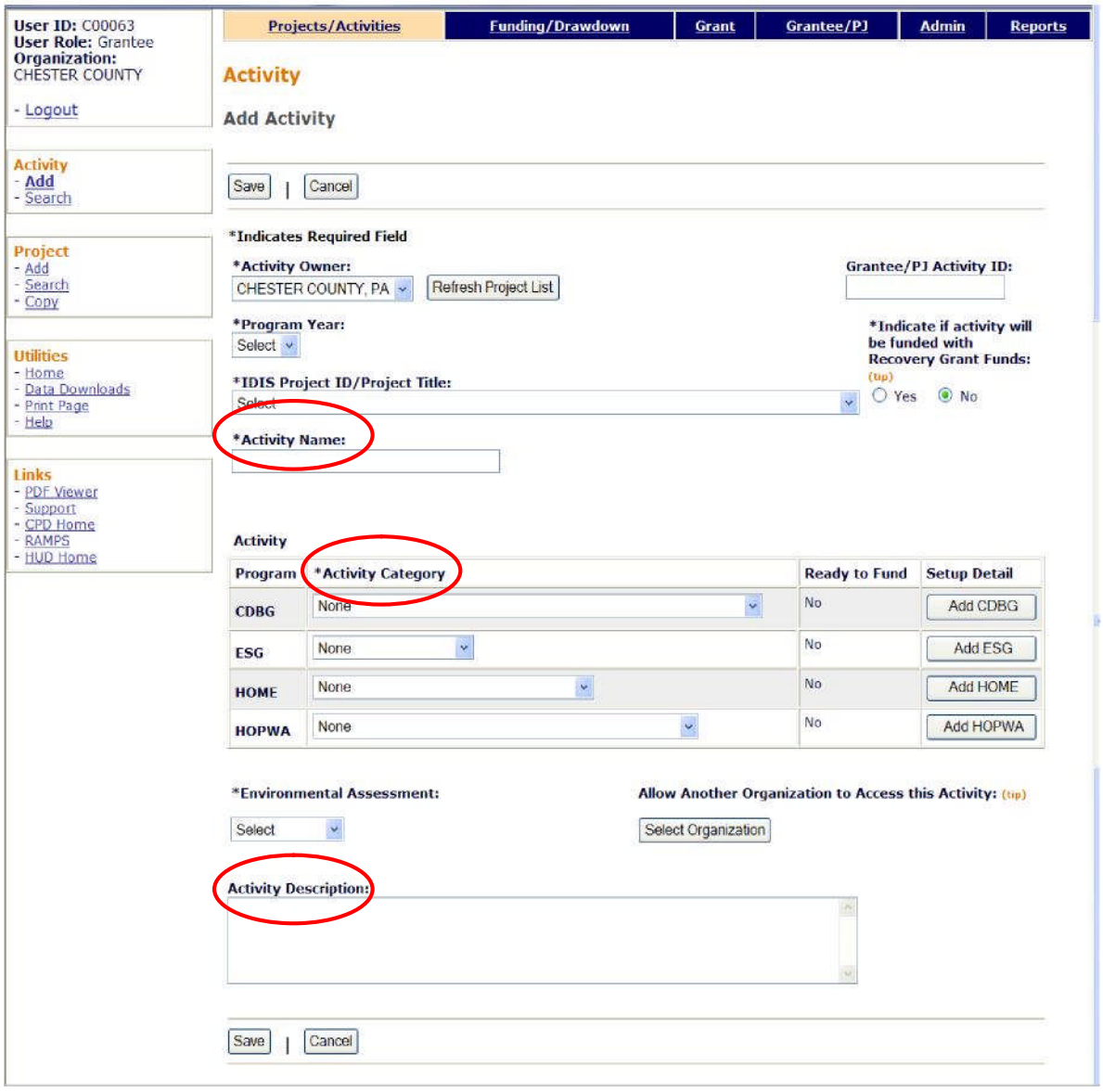
This guidance takes grantees through the CDBG activity screens and highlights those data elements that are key for reporting accomplishments for the CDBG program. Emphasis is given to data that are commonly entered incorrectly in IDIS and to programmatic reporting requirements.

Data Impacting Accomplishment Reporting

Add Activity Screen

Guidance is provided below to assist grantees in selecting the most appropriate eligible activity category and assigning the correct matrix code to that activity. Matrix codes are key determinants, along with national objectives, in accomplishment reporting requirements. Common incorrect uses of matrix codes are highlighted. Guidance is also provided on the activity name and description fields.

For a complete description and instructions for all fields, go to the IDIS Training Manual for Entitlement Communities or the IDIS Training Manual for States, available at the HUD website: http://www.hud.gov/offices/cpd/systems/idis/cdbg/



Field	Description
Activity Name	Enter a name for the activity. ***Important Guidance: Don't Include Personal Information in Activity Name*** Because this field appears on numerous IDIS reports, **do not include any personal information (such as beneficiary name)** as part of the Activity Name. This error is especially common in the names of housing rehab activities.
Activity Category (Matrix Code)	For CDBG, the activity categories are the **matrix codes**. The activity category/matrix code is one of the most critical data items you will enter when setting up a CDBG activity. The matrix code, along with the national objective you will specify for the activity, identifies the purpose and eligibility of the assistance being provided. Together, they determine the type of accomplishments you will report. For the accomplishment data you report in IDIS to be accurate and useful, it is very important that you assign the most appropriate and most specific matrix code to each activity. Information to assist you in making the correct selection is provided in: **Definitions of CDBG Matrix Codes**: http://www.hud.gov/offices/cpd/systems/idis/cdbg/Matrix%20Code%20Definitions.pdf **Definitions of CDBG National Objectives:** http://www.hud.gov/offices/cpd/systems/idis/cdbg/nocdescriptions.cfm **Matrix Code/National Objective Table:** http://archives.hud.gov/offices/cpd/systems/idis/library/matrix_noc.pdf **Valid Matrix Code/National Objective/Accomplishment Type Combinations:** http://www.hud.gov/offices/cpd/systems/idis/cdbg/Matrix%20Code%20National%20Objective%20Accomplishment%20Type%20Combinations.pdf If you are still unsure about which matrix code to assign to an activity after reviewing this material, your CPD Field Office representative can help you. **See guidance below to avoid common mistakes when assigning matrix codes.**
Activity Description	A description of the activity is optional but strongly recommended.

Important Guidance: Assigning Correct Matrix Codes—Common Errors

When selecting a matrix code for public services or public facilities activities, use the most specific code that applies. **Do not use 05 General Public Services or 03 General Public Facilities, unless no other code applies.** Assign the specific 03* or 05* code that most accurately describes how CDBG funds are being used. The general codes do not provide enough information to HUD, the public, or our stakeholders about how CDBG funds are expended. The National Expenditure reports on the CDBG website (http://portal.hud.gov/hudportal/HUD?src=/program_offices/comm_planning/communitydevelopment/budget/disbursementreports) reveal the size of this problem. Almost a quarter of CDBG expenditures for public services are listed as 05 General Public Services, when nearly all of those expenditures actually fit under a more specific public services code.

Grantees may only have one public service program or public facility in an activity. This is the only way that HUD can determine national objective compliance for a particular service or facility. For instance, you may not combine in one activity operating costs for CDBG-funded senior meals-on-wheels, child care, and youth programs that are taking place at a community center. Each program must be in a separate activity in order to be able to demonstrate that each program has met a national objective. Likewise, you may not combine five different day care centers in one activity, even if they are serving the same neighborhood and/or carried out by the same provider. Each day care center must be reported in a separate activity in order to determine national objective compliance.

- **Use matrix code 05U for Housing Counseling**. This is the **only** matrix code for which you report accomplishments for the number of households receiving Housing Counseling. Counseling may be provided to purchase a home, to avoid foreclosure, and to current and prospective renters. This code must be used for counseling prospective homebuyers that are not part of a Homeownership Assistance (13 and 05R matrix codes) program.

- Matrix codes **05R Homeownership Assistance (not direct) and 13 Direct Homeownership Assistance** are to be used solely to provide financial assistance to homebuyers for the purchase of a home. The accomplishments for these two types of homeownership assistance are the number of households receiving financial assistance toward purchasing a home. A portion of the activity delivery costs may for these activities may provide housing counseling to prospective homebuyers. However, the housing counseling should be limited to households that are participating in your homeownership program. Grantees MAY report the number of households receiving housing counseling under the performance measures for these activities. Those households may not be reported in the beneficiary data providing income level and race/ethnicity information. Income level and race/ethnicity data are only to be reported for those households that actually purchase a home.

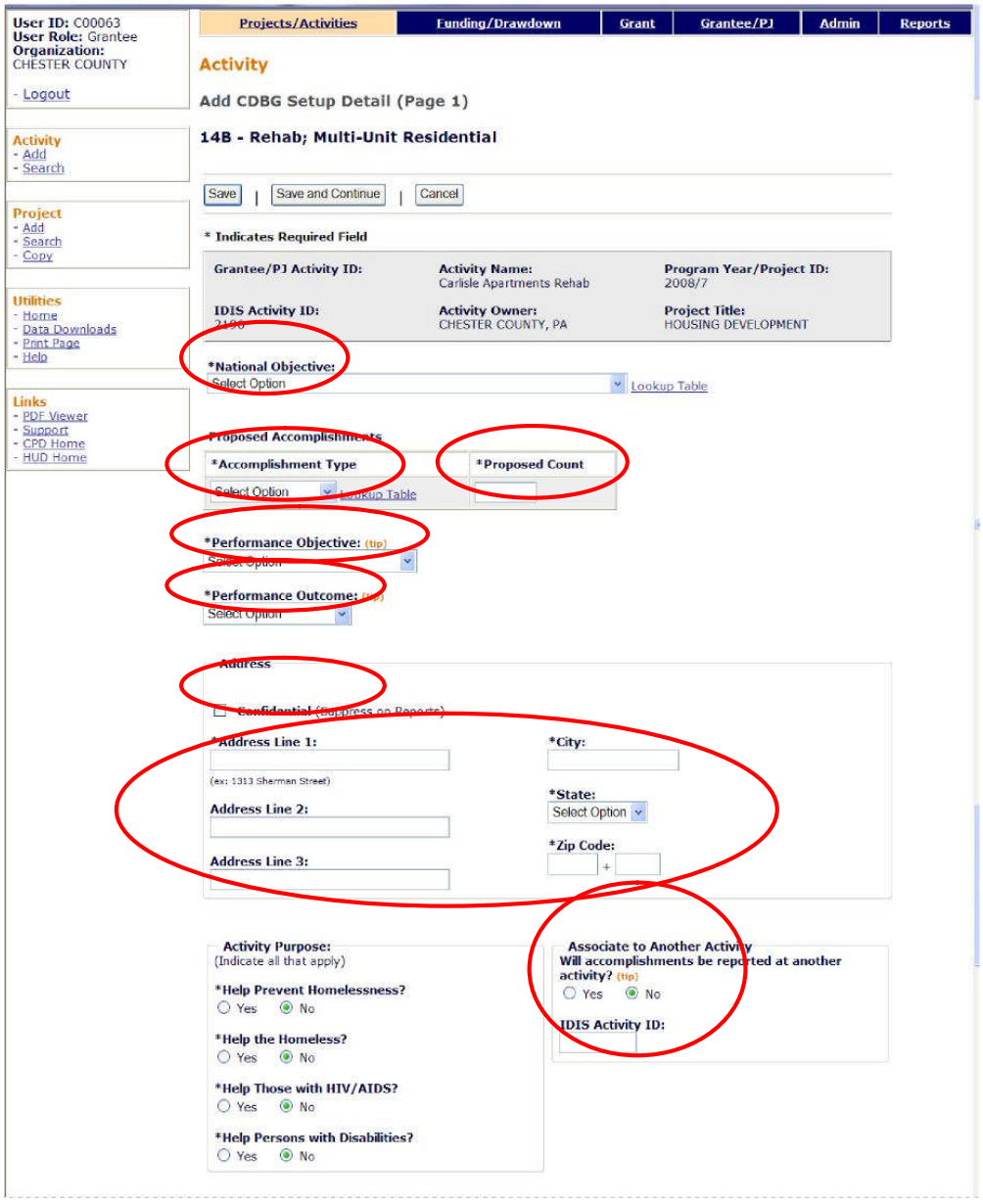
- **Matrix code 14H, Housing Rehabilitation Administration**, is to be used for the costs of running a rehab program, i.e., activity delivery costs associated with actual rehabilitation activities. It is *not* to be used for costs unrelated to running a rehab program, such as tenant/landlord counseling, planning, and development of research studies on foreclosures. Housing counseling may be part of the activity delivery costs only for those households whose housing units are being rehabilitated.

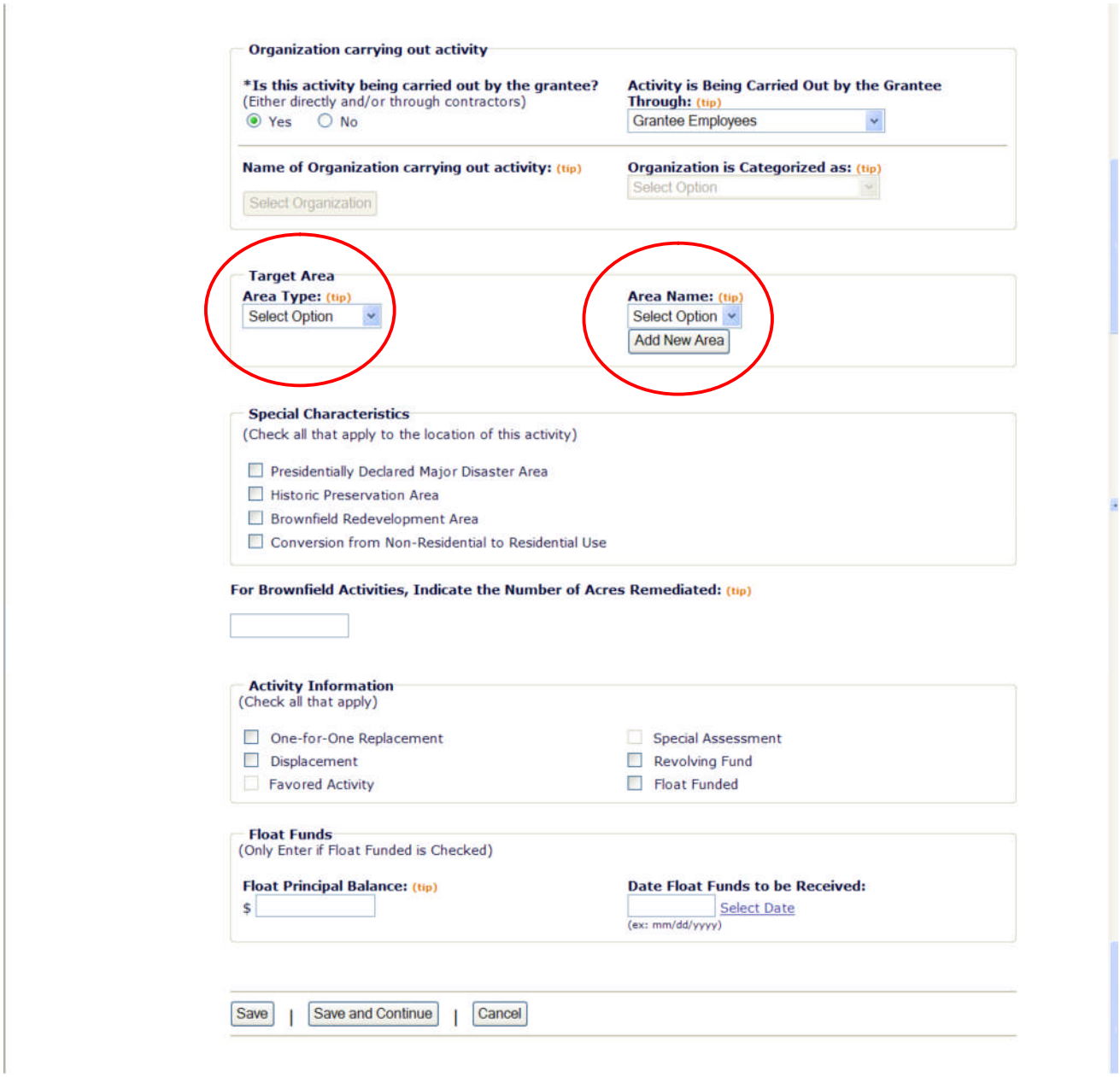
CDBG Setup Detail (Page 1)

Guidance is provided below on proposed accomplishments, performance objectives and outcomes, national objectives, addresses, reporting accomplishments in another activity, and target areas.

For a complete description and instructions for all fields on this screen go to the IDIS Training Manual for Entitlement Communities or the IDIS Training Manual for States, available at the HUD website: http://www.hud.gov/offices/cpd/systems/idis/cdbg/

The first activity setup screen is the same for all CDBG activities:




Organization carrying out activity
*Is this activity being carried out by the grantee?
(Either directly and/or through contractors)
Yes
No
Activity is Being Carried Out by the Grantee Through: (tip)
Grantee Employees
Name of Organization carrying out activity: (tip)
Select Organization
Organization is Categorized as: (tip)
Select Option
Target Area
Area Type: (tip)
Select Option
Area Name: (tip)
Select Option
Add New Area
Special Characteristics
(Check all that apply to the location of this activity)
Presidentially Declared Major Disaster Area
Historic Preservation Area
Brownfield Redevelopment Area
Conversion from Non-Residential to Residential Use
For Brownfield Activities, Indicate the Number of Acres Remediated: (tip)
Activity Information
(Check all that apply)
One-for-One Replacement
Displacement
Favored Activity
Special Assessment
Revolving Fund
Float Funded
Float Funds
(Only Enter if Float Funded is Checked)
Float Principal Balance: (tip)
$
Date Float Funds to be Received:
Select Date
(ex: mm/dd/yyyy)
Save
Save and Continue
Cancel

Field	Description
National Objective	Select the national objective this activity will meet. The dropdown shows only those objectives that are valid with the matrix code you selected on the previous screen. **Definitions of the objectives are available here:** http://www.hud.gov/offices/cpd/systems/idis/cdbg/nocdescriptions.cfm **Valid matrix code/national objective/ accomplishment type combinations are available here:** http://www.hud.gov/offices/cpd/systems/idis/cdbg/Matrix%20Code%20National%20Objective%20Accomplishment%20Type%20Combinations.pdf
Proposed Accomplishments	
Accomplishment Type	Select the type of accomplishment the activity will achieve. The dropdown lists only those types that are valid with the matrix code and national objective you have assigned.
Proposed Count	Enter the number of {ACCOMPLISHMENT TYPE} expected to benefit from this activity for each year for which accomplishments are anticipated.
Performance Objective	Select the objective that best reflects your intent in setting up this activity. Brief descriptions of the objectives are provided on the help screen.
Performance Outcome	Select the outcome that best reflects the results you hope to achieve with this activity. Brief descriptions of the outcomes are provided on the help screen.
Address	
Confidential (Suppress on Reports)	Check this box if you do not want the activity address to print on IDIS reports. ***Important Guidance: What to Suppress on Reports*** Always suppress addresses for domestic violence shelters. Grantees may also want to suppress addresses of individual or household beneficiaries.
Address Lines 1, 2, 3, City, State, Zip	***Important Guidance: How to Report Addresses*** Provide the activity's physical location in these fields. Do not use P.O. boxes and do not enter the address of the organization administering the activity.
Associate to Another Activity	
Will accomplishments be reported at another activity?	Change this field to **Yes** if accomplishments for the activity (usually a service delivery costs activity or an acquisition activity) are reported under another activity. If you change the field to **Yes,** do not input proposed or actual accomplishment data on this or any other CDBG screen for the activity. See additional guidance below.

Field	Description
IDIS Activity ID	If you answered **Yes** above, enter the ID of the activity under which the accomplishments will be reported. If there is more than one activity under which accomplishments are reported, enter one of the IDIS Activity IDs in this field and enter the remaining Activity IDS in the accomplishment narrative. The national objective for this activity and for all activities under which accomplishments are provided must be the same.
Target Area	
Area Type	Indicate if the activity is located in one of these special areas: **Strategy Area**: A Neighborhood Revitalization Strategy Area (NRSA). **CDFI**: Community Development Financial Institution area. **Local Target Area**: A locally defined and designated target area. For activities with a national objective code of: LMAFI, you must specify CDFI. LMASA, you must specify Strategy Area. LMHSP, you must specify CDFI or Strategy Area. *It is very important that you identify these areas in IDIS so HUD can demonstrate that CDBG funds are being targeted to neighborhoods in need.* For definitions of the three types of special areas, visit : http://www.hud.gov/offices/cpd/systems/idis/cdbg/StrategyLocalTargetCDFIAreas.pdf
Area Name	When you select an AREA TYPE, you must specify the name of the area in this field. If it is not listed on the dropdown, or if you need to update information about one of the areas that is listed, click the <Add New Area> button. For instructions on completing the add/update area screens, visit: http://www.hud.gov/offices/cpd/systems/idis/cdbg/SelectingAddingSpecialAreas.pdf

When you are finished, click the <Save and Continue> button to display the next screen.

Important Guidance: Will Accomplishments be reported at another activity?

Answering "No"
This field defaults to "no" because, for most CDBG activities, grantees will enter accomplishments. However, in spite of this question and in spite of leaving this field defaulted to "No," grantees are not entering accomplishments for some activities. This is a serious issue that appears most frequently for a project that is only partially supported with CDBG funds. Accomplishments must be reported under a CDBG activity in IDIS when:

- CDBG funds are used only to cover activity delivery costs for a project
- CDBG funds are used only for acquisition of real property for a project
- Different components of a CDBG-assisted project meet different national objectives

When the CDBG program is funding the activity delivery costs and the actual assistance, such as the rehabilitation or new construction of housing units, is funded from other sources, then the accomplishments for this project must be reported in the CDBG activity that funded the activity delivery costs. All the accomplishments derived from the actual assistance must be reported in the CDBG activity funding the activity delivery costs. Otherwise, the CDBG program will not get credit for its part in funding that project. It is very important to demonstrate that each CDBG activity has results. The CDBG program believes that it is situations like this where it loses a significant amount of data resulting in the underreporting of CDBG accomplishments and the misrepresentation of program results.

> **Example:** If Amyville used CDBG funds to cover the activity delivery costs for a HOME new construction activity that produced 150 housing units occupied by 100 low-income households and 50 extremely low-income households, Amyville would report those beneficiaries along with their race/ethnicity data in its CDBG activity covering the activity delivery costs. That activity would need to remain open in IDIS until all units were occupied in order to report complete beneficiary data. The matrix code for the CDBG activity would be 14J, a recent addition to the CDBG codes, to be assigned when using CDBG funds for activity delivery costs for HOME activities. Accomplishments for this project would also be reported for the HOME program. Both CDBG and the HOME program need to get credit for the results their funds have helped to achieve.

Below is a chart demonstrating when grantees must report accomplishments for 14H and 14J activities. This is especially important for activities with a matrix code of 14H because this code is used so frequently and does not require accomplishments when those accomplishments are reported in another CDBG activity. When the latter situation exists, the question asking "Will accomplishments be reported at another activity?" is answered "Yes" and the IDIS Activity ID must be provided for the activity reporting the accomplishments.

Activity	**Hard Costs Paid With:**	**Report Accomplishments in IDIS?**
14H: Housing Rehab Admin	CDBG	Generally reported under other activities
14H: Housing Rehab Admin	Non-CDBG	Yes
14J: Housing Services	HOME	Yes

While activities with a matrix code of 14H and 14J are the most common activities that are set up expressly for the purpose of funding activity delivery costs, other matrix codes may be set up solely for that purpose. However, it is only necessary to set up activity delivery activities separately when the costs for the actual activity are being funded by another source. It is then that those activities must report accomplishments, since they would be the only place in IDIS to provide credit to the CDBG program for those accomplishments. For example, when a grantee pays for the activity delivery costs for an 18A activity using CDBG funds but the actual loans to for-profit businesses are made using an EDA grant, then the grantee must report the accomplishments from the loans in the CDBG activity set up to cover the activity delivery costs for that economic development program. By doing so, the CDBG program will get credit for supporting that program. Otherwise, it would appear that those funds produced no results. This would, of course, not portray an accurate picture of the productive use of CDBG funds and implies that no national objective was met.

Except for 14H and 14J, there are no specific matrix codes for activities that solely cover activity delivery costs. Therefore, when an activity is not a housing rehabilitation activity or when an activity's hard costs are not funded by the HOME program, and a grantee uses CDBG funds solely to pay for activity delivery costs, the grantee should use the same matrix code for the activity delivery costs as it would if CDBG funds were used for providing the actual assistance. In these cases, when other funding sources are used to provide the actual assistance, accomplishments must be reported in the CDBG activity covering the activity delivery costs. Otherwise, the CDBG program would not get credit for those accomplishments and the activity would not meet a national objective.

In addition to CDBG activities that only provide activity delivery funds for projects, CDBG funds are often used for acquisition of real property, with other funding sources used to construct or rehabilitate buildings on that property. The end use would, of course, need to qualify as a CDBG-eligible use and meet a national objective. For instance, when a grantee uses CDBG funds to pay for the acquisition of a piece of property on which Habitat for Humanity will rehabilitate a house, the grantee will set up a CDBG activity with a matrix code of 14G Acquisition for Rehabilitation. Once Habitat has rehabilitated the house and it is occupied, then all the accomplishment, beneficiary, and performance measurement data must be reported in the CDBG activity with the 14G matrix code. Therefore, that acquisition activity will need to stay open until the rehabilitation is completed and the housing unit is occupied. Once again, the accomplishments for this project must be reported in the 14G activity because it is the only place in IDIS to demonstrate the results of the use of CDBG funds for that project.

Generally, matrix code 01 Acquisition of Real Property is the most common matrix code assigned for which CDBG funds would be used solely for acquisition. However, other codes may apply, including 17A Acquisition for Economic Development.

Answering "Yes"

While it is important to ensure that all accomplishments supported with CDBG funding are reported in IDIS under CDBG activities, it is also important not to duplicate accomplishment reporting. This also would misrepresent the results of the program. While it is necessary, for instance, to report the same results for a project that has both CDBG and HOME funds under each program in IDIS, it is not permissible to report the same results under two different CDBG activities. Grantees should only report a specific accomplishment once under one activity if the activity is not funded with other CPD formula grant funds.

Duplicate reporting most often occurs when grantees set up two separate activities in support of a single or single set of accomplishments. This is most prevalent in the following situations:

- When a grantee sets up one CDBG activity for activity delivery costs and separate CDBG activity that is actually providing the assistance

- When a grantee sets up a separate activity for Acquisition of Real Property and a separate activity for the construction or rehabilitation to take place on the property
- When a grantee sets up a new activity for each program year for a project that will not be completed and have accomplishments until year two or after

In each of the above scenarios, it is important that accomplishments be reported in only one of the activities. In the remaining activity or activities, the question, "Are accomplishments reported at another activity?" should be answered, "Yes," and the IDIS Activity ID of the activity reporting the accomplishments should be entered. A general rule for the above situations is to report accomplishments in the following activities, respectively:

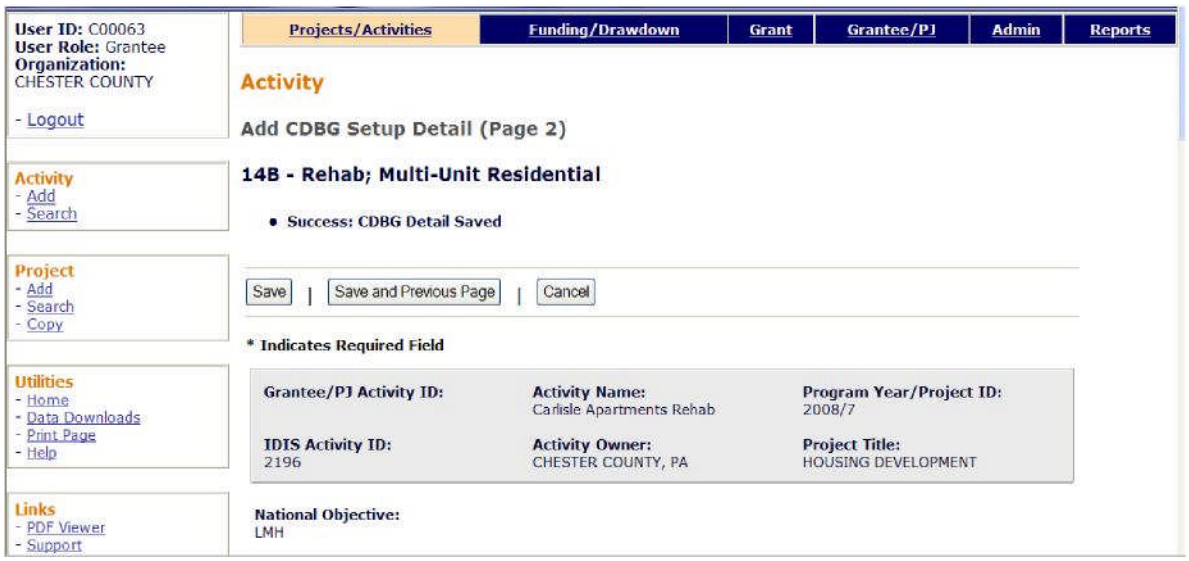
- The activity that is actually providing the assistance
- The actual construction or rehabilitation activity
- The activity under which the project was completed, i.e. the activity that was set up in the most recent program year

  Example: When CDBG grantees undertake housing rehabilitation activities, the actual rehabilitation hard costs should be reported in an activity coded 14A-D, 14F, 14G, or 14I. The activity delivery costs for those activities are reported separately using 14H as the matrix code. Grantees should only report accomplishments for those activities in which the actual rehabilitation is taking place.

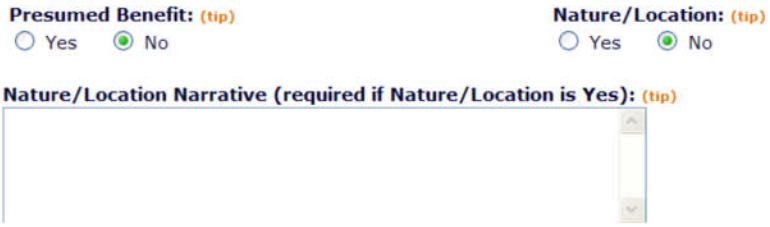
It should be noted that many grantees do not set up separate activities for activity delivery costs, but instead, include those costs in the activity that is actually providing the assistance. This method of setting up activities reduces the risk of double counting accomplishments; however, both methods are acceptable. It is also important to note that all of the activities must have the same national objective as the activity that contains the accomplishments.

CDBG Setup Detail (Page 2)

On this screen, data on **funding sources** and forms of assistance are collected for all activities, except for planning, and administration activities and activities for the repayment of Section 108. Additional data items are displayed based on the activity's national objective.
The top part of the screen is the same for all activities:



The fields that are displayed next depend on the activity's national objective:

Objective	Fields Displayed
LMA*	Area Benefit Data Indicate whether CENSUS data or a HUD-approved SURVEY was used to determine the eligibility of the activity.
LMC*	Presumed Benefit: Click **Yes** if the activity exclusively benefits clientele presumed by HUD to be at least 51% LMI. Presumed benefit clientele groups are limited to abused children, battered spouses, elderly persons, adults meeting the Census definition of severely disabled, homeless persons, illiterate adults, persons living with AIDS, and migrant farm workers.  Nature/Location: Click **Yes** if it may be concluded from the nature and location of the activity that the clientele will primarily be LMI. An example of such an activity is a child care center serving a public housing complex. Nature/Location Narrative: If the previous field is **Yes**, describe how the nature/location of the activity benefits a limited clientele, of whom at least 51% are LMI.
LMH* and some SB*/URG	 Multi-Unit Housing: Change to **Yes** if the activity involves housing with two or more units per structure. Includes Rental Housing: Change to **Yes** if appropriate.

The following data fields are displayed for all activities:

HUD Funds

Source of Funds	Amount
CDBG	$ 0.00
Section 108 Loan Guarantee	$
ESG	$
HOME	$
HOPWA	$

Other Funds

Source of Funds	Amount
Appalachian Regional Commission	$
Other Federal Funds	$
State/Local Funds	$
Private Funds	$
Other:	$

Activity Costs (HUD + Other Funds)

	Amount
Total	$ 0.00

Leveraging Ratio
(CDBG + 108 : All Other Funds)

CDBG + 108	All Other Funds
0	0

Grant/Loan Assistance

Enter the number of grants or loans provided to beneficiaries of this activity (tip)

Grants	(tip)
Loans	(tip)

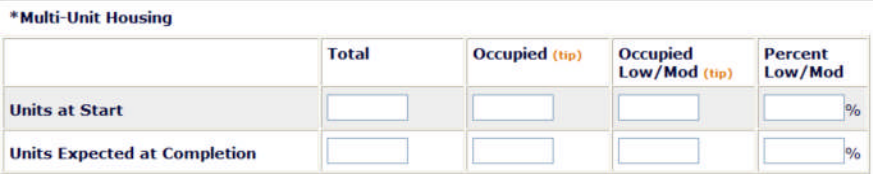
Loan(s) provided

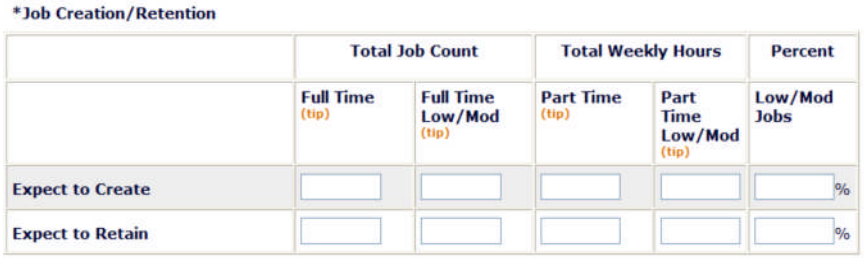
	Average Interest Rate (tip) (ex: 99.99%)	Average Amortization Period (in Months) (tip)	Total Amount
Amortized Loan			$
Deferred Payment Loan			$

Field	Description
Source of Funds	***Important Guidance: Accurately Reporting Leveraged Funds*** It is important that grantees enter **all leveraged funds** for each of their activities. Leveraged funds demonstrate that the CDBG program generates additional investment in their communities and are a key indicator for many of the program's stakeholders. Enter accurate leveraging data. Grantees should not enter leveraging amounts for the Appalachian Regional Commission (ARC), unless they are located in the Appalachian region and the activity is jointly funded with ARC funding. The system will automatically enter the CDBG amounts for each activity.
HUD Funds	
CDBG	This read-only field is blank on initial setup. It will be populated by the system once CDBG funds are committed to the activity through the Activity Funding option. When the ACTIVITY STATUS is set to Completed, the field shows the total amount of CDBG funds disbursed.
Section 108 Loan Guarantee	Enter the amount of Section 108 loan funds spent on this activity. Do not input the amount of CDBG funds (which the system will display in the previous field once the activity is funded) in this field.
ESG	Enter the amount of any ESG funds spent on this activity.
HOME	Enter the amount of any HOME funds spent on this activity.
HOPWA	Enter the amount of any HOPWA funds spent on this activity.
Other Funds	
Appalachian Regional Commission	Enter the amount of any Appalachian Regional Commission funds leveraged for this activity. Grantees should not enter leveraging amounts for the Appalachian Regional Commission (ARC), unless they are located in the Appalachian region and the activity is jointly funded with ARC funding. The system will automatically enter the CDBG amounts for each activity.
Other Federal Funds	Enter the amount of any non-CPD federal funds leveraged for this activity.
State/Local Funds	Enter the amount of any state/local funds leveraged for this
Private Funds	Enter the amount of any private funds leveraged for this activity.
Other	Enter the name(s) and the amount of funds leveraged from other sources for this activity.
Activity Costs (HUD + Other Funds) Total	This read-only field displays the total amount of all funds entered.
Leveraging Ratio (CDBG + 108 : All Other Funds)	
CDBG + 108	This read-only field is always **1**.
All Other Funds	This automatically calculated is equal to the sum of the CDBG and Section 108 amounts divided into all other amounts.

Field	Description
Enter the number of grants or loans provided to beneficiaries of this activity	
Grants	Enter the number of grants provided to beneficiaries of this activity.
Loans	Enter the number of loans provided to beneficiaries of this activity.
Loans Provided	
Amortized Loan Deferred Payment Loan	Enter the AVERAGE INTEREST RATE, the AVERAGE AMORTIZATION PERIOD (in months), and the TOTAL AMOUNT (whole dollars) of the amortized and/or deferred payment loan(s). If the term of the loan is unknown (e.g., the loan is due upon sale or transfer of the property), enter **99** in AMORTIZATION PERIOD. If more than one loan was provided, enter the average interest rate, the average amortization period, and the total amount of the loans.

From this point to the bottom of the screen, only fields specific to a national objective are displayed, including:

Objective	Fields Displayed
LMH* and some SB*/URG	 ***Fill in these fields only if you answered Yes to the MULTI-UNIT HOUSING question above.*** **Units at Start** Enter the **Total** number of units, the number that were **Occupied** and the number that were **Occupied by Low/Mod** households at the start of the activity (before CDBG funds were obligated to the activity). **Percent Low/Mod** is a protected field that calculates the percentage of units occupied by low/mod households. **Units Expected at Completion** Enter the number of **Total**, **Occupied**, and **Occupied by Low/Mod** you expect will be available upon completion of the activity.
LMH* and SB*/URG, matrix code of 14A-D, 14F-G, or 16A	 Fill in these fields *only* if the rehabilitation of all the housing units reported in the activity is limited to one or more of the items listed. Otherwise, skip over them. Example: If the rehab is limited to installing smoke detectors in an apartment building, check **Install Smoke Detectors**. If smoke detectors are installed *and* the building's roof is replaced, leave it blank.

Objective	Fields Displayed
SBA	 ▪ **% Deteriorated Buildings/Qualified Properties** Enter the percentage of deteriorated buildings/properties in the area at the time it was designated a slum/blight area. You must provide input in either this field or the next one. ▪ **Public Improvement Type/Condition** If the activity qualifies for CDBG assistance on the basis that public improvements throughout the area are in a general state of deterioration, enter a description of each type of improvement in the area and its condition at the time the area was designated as slum/blight. ▪ **Boundaries** Describe the boundaries of the slum/blight area. Do not use this field to document the Census tract/block group data required for an LMA activity. For an SBA activity, the boundaries of the area must be specified. ▪ **Slum/Blight Designation Year** Enter the year the area was designated a slum/blight area.
LMJ* LMAFI, LMASA, LMCMC	 **Expect to Create** Enter the **Full-Time** jobs, **Full-Time Low/Mod** jobs, weekly **Part- Time** job *hours* (not jobs), and **Part-Time Low/Mod** job *hours* that are expected to be created. **Expect to Retain** Enter the **Full-Time** jobs, **Full-Time Low/Mod** jobs, weekly **Part- Time** job *hours* (not jobs), and **Part-Time Low/Mod** job *hours* that are expected to be retained.

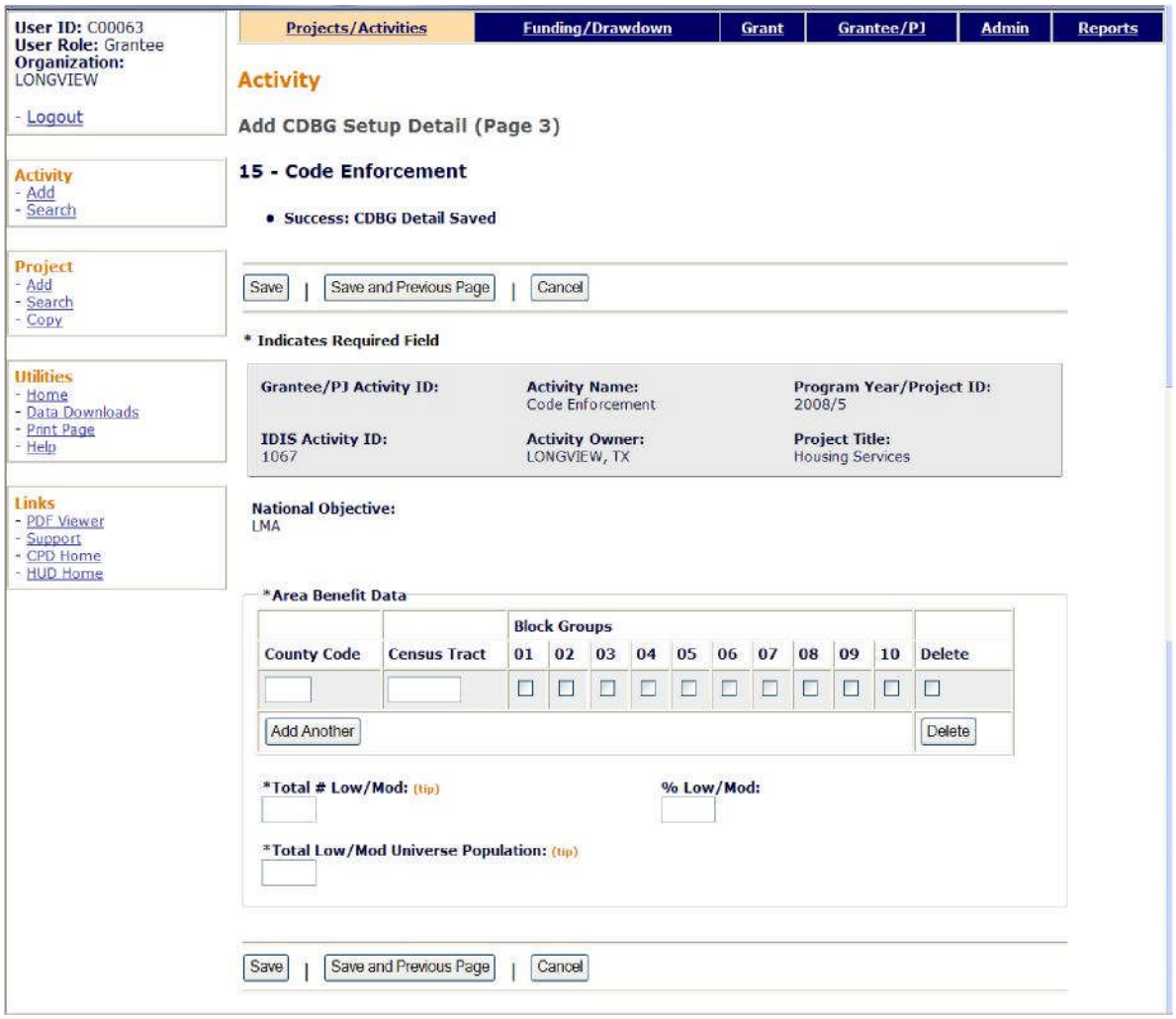
For all but LMA* activities, this is the last setup screen. Clicking the <Save> button displays the Edit Activity screen. For LMA* activities, click the <Save and Continue> button to display the next setup screen.

CDBG Setup Detail (Page 3) (For LMA Activities Only)

You are asked to provide data on this screen if you answered Survey in the DETERMINED BY field on the previous screen:

If your answer was **Census**, please turn to page 26 to view the CDBG Setup Detail (Page 3) screen.

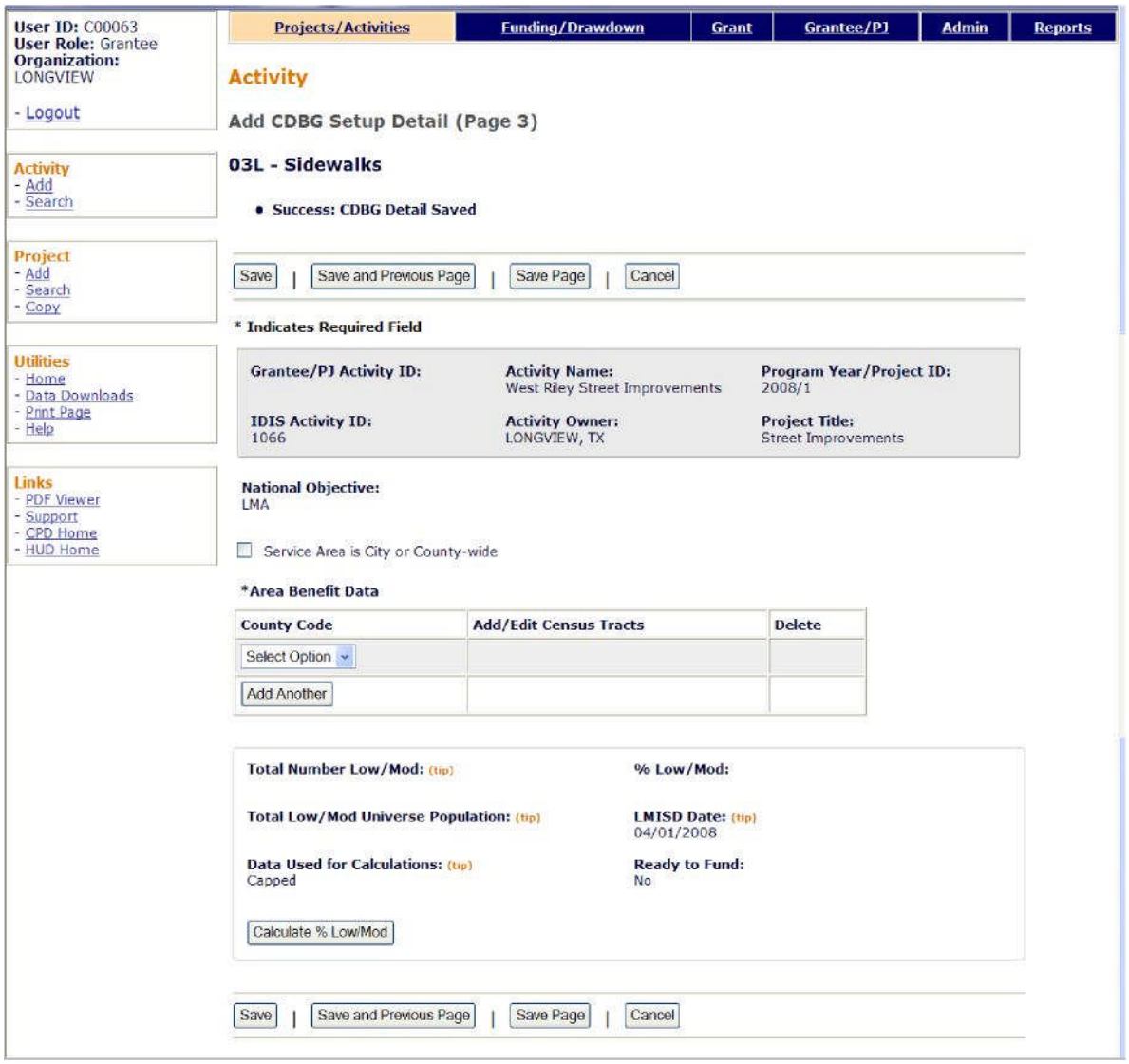
If it was **Survey**, this screen is shown:



Field	Description
Fields in gray box	These read-only fields identify the activity you are processing. They are populated with information from the Add Activity screen.
National Objective	A read-only field showing the objective input for the activity on the first CDBG setup screen.
County Code	Enter the FIPS county code for the area being assisted. (See: http://www.itl.nist.gov/fipspubs/)
Census Tract	Identify the Census tract contained in the service area. The required format for Census tracts is "nnnn.nn"(e.g., input Census tract 7 as "0007.00").
Block Groups	If the service area includes the entire Census tract, leave these fields blank. Otherwise, check each block group covered in whole or in part by the service area.
<Add Another> button	Click to add another COUNTY CODE/CENSUS TRACT.
<Delete> button	Check the box in the Delete column of the row(s) you want to delete, then click the <Delete> button.
Total # Low/Mod	Enter the number of survey respondents who are LMI.
Total Low/Mod Universe Population	Enter the total number of survey respondents. This must be greater than or equal to TOTAL # LOW/MOD.
% Low/Mod	This read-only field shows the percentage of low/mod persons in the service area. It is equal to (TOTAL # LOW/MOD divided by TOTAL LOW/MOD UNIVERSE POPULATION) times 100.

For LMA* activities using survey data to determine activity eligibility, this is the last setup screen. Clicking the <Save> button displays the Edit Activity screen.

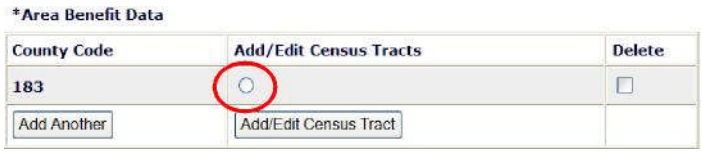
When Census data is used for an LMA* activity, the (Page 3) setup screen looks like this:



Field	Description
Fields in gray box	These read-only fields identify the activity you are processing. They are populated with information from the Add Activity screen.
National Objective	A read-only field showing the objective input for the activity on the first CDBG setup screen.
Service Area is City or County-Wide	Check if appropriate. The service area would only be citywide or countywide if all city or county residents have access or will be affected by improvements.
County Code	Select the FIPS code for the correct county from the dropdown. The FIPS code is required for all LMA activities. (FIPS code information is available here: http://www.itl.nist.gov/fipspubs/)

The remaining fields on this screen are calculated by the system once Census tract and block group data has been entered and saved on the next two setup screens.

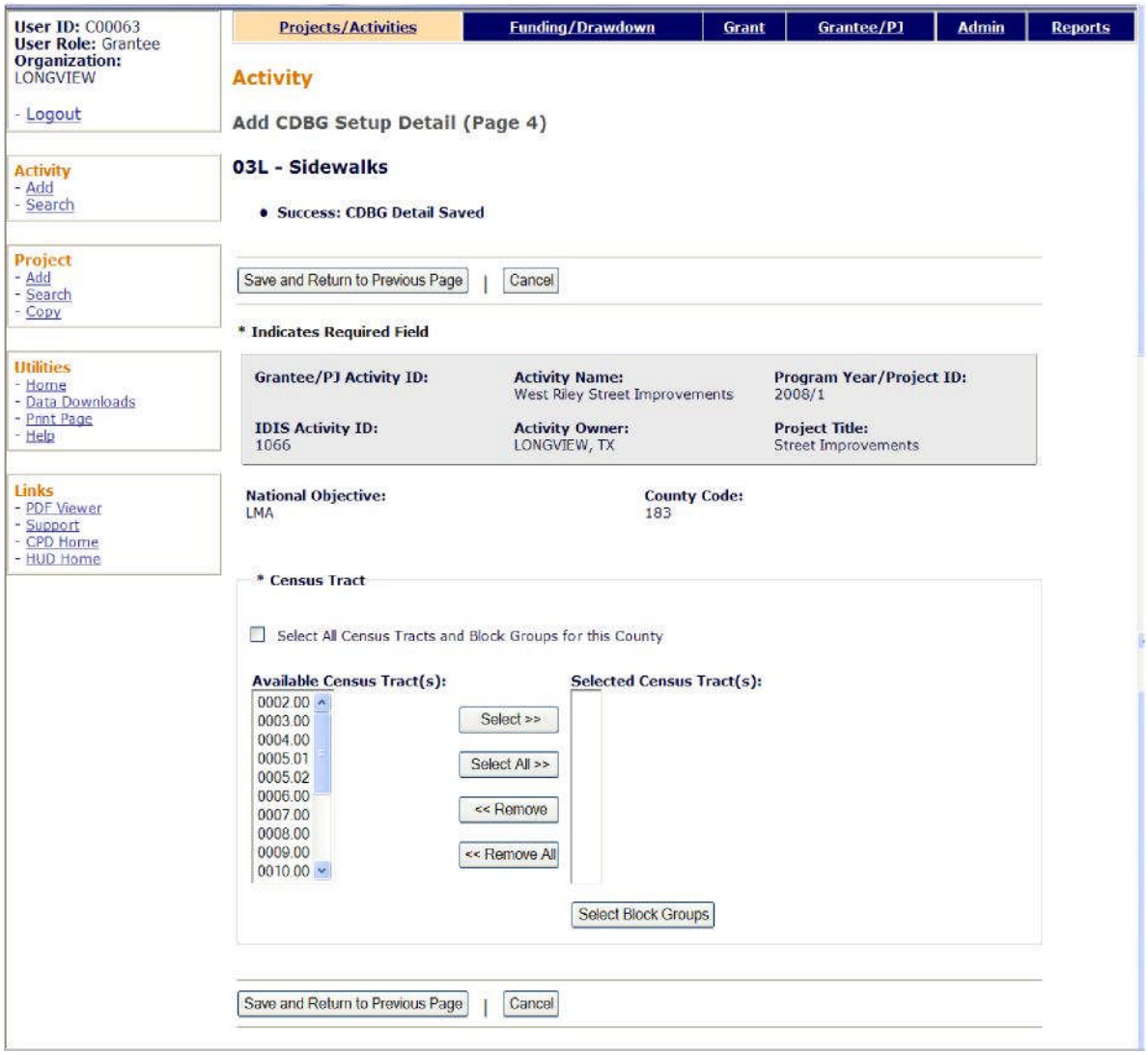
After selecting a COUNTY CODE, click the <Save Page> button. When you do, a radio button appears in the Add/Edit Census Tracts column:



Click the radio button and then click the <Add/Edit Census Tract> button below it to display the fourth setup page.

CDBG Setup Detail (Page 4) (Only for LMA Activities Determined by Census Data)

On this screen, you will identify the Census tracts contained in the service area.



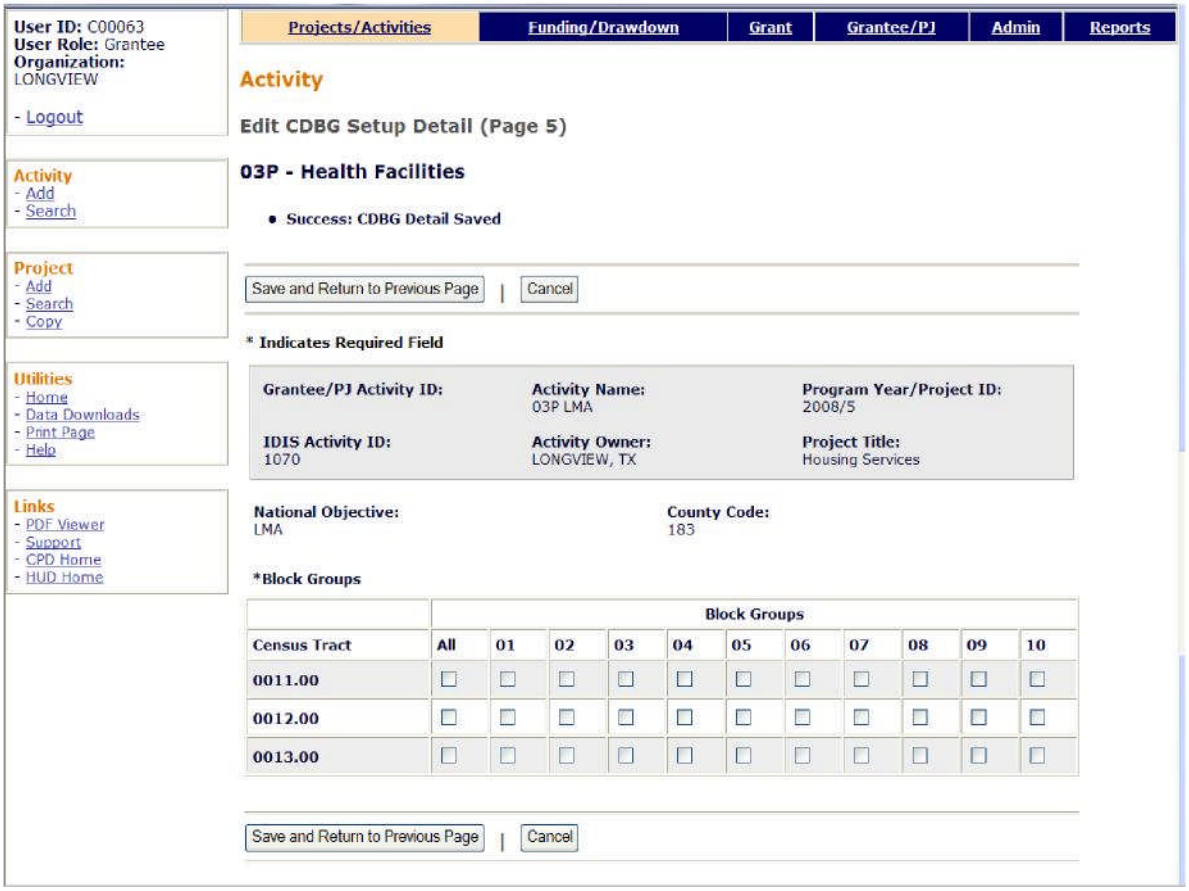
Field	Description
Fields in gray box	These read-only fields identify the activity you are processing. They are populated with information from the Add Activity screen.
National Objective	A read-only field showing the national objective input for the activity on the first CDBG setup screen.
County Code	A read-only field showing the county selected on the previous screen.
Select All Census Tracts and Block Groups for this County	If the service area is county-wide, check this box and click the <Save and Return to Previous Page> button.

Available Census Tract(s)	To identify a Census tract as being in the service area, first click on it and then on the <Select> button. It will be added to the Selected Census Tract(s) list. Select as many Census tracts as necessary. To select all of the Census tracts listed, click the <Select All> button.
Selected Census Tract(s)	This dropdown lists the Census tracts you have selected. To remove a Census tract from the list, first click on it and then click the <Remove> button. To remove all of the selected Census tracts, click the <Remove All> button.

When you are finished, click the <Select Block Groups> button at the bottom of the Selected Census Tracts list to display the final LMA setup screen.

CDBG Setup Detail (Page 5) (Only for LMA Activities Determined by Census Data)

On this screen, you will identify the block groups in each Census tract covered by the service area.



If an entire Census tract is included in the service area, check the **All** box in the first column. Otherwise, click each block group in the service area.

When you are finished, click the <Save and Return to Previous Page> button.

When CDBG Setup Detail Page 3 is displayed, click the <Calculate % Low/Mod> button near the bottom of the screen.

Using the Census Tract and Block Group data you entered, the system now populates all of the fields.

Field	Description
Total Number Low/Mod	The total number of LMI persons in the service area.
Total Low/Mod Universe Population	The number of persons in the service area with the potential of being deemed low/mod.
Data Used for Calculations	For most users, this will be **Capped**. The calculations are based on HUD's Low/Mod Income Summary Data (LMISD). It is prepared using Section 8 income limits, which are calculated using fair market rent area definitions. The income limits are based on HUD estimates of median family income, with adjustments for areas that have unusually high or low income-to-housing cost ratios. Based on this, the Section 8 income limits are considered "capped." A 1998 legislative change allowed HUD to grant an exception from the cap on low/mod income levels to 10 jurisdictions (metropolitan areas). Entitlement grantees in these 10 jurisdictions may elect to use either the capped or "uncapped" LMISD to calculate the percentage of low/mod persons in the service area. These jurisdictions can be found at the following website: http://www.hud.gov/offices/cpd/affordablehousing/programs/home/limits/income/2012/
% Low/Mod	The percentage of low/mod persons in the service area. It is equal to (TOTAL NUMBER LOW/MOD divided by TOTAL LOW/MOD UNIVERSE POPULATION) times 100.
LMISD Date	The effective date of the low/mod income summary data (LMISD) used to populate the TOTAL NUMBER LOW/MOD and TOTAL LOW/MOD UNIVERSE POPULATION fields.
Ready to Fund	This field will be **No** until the % LOW/MOD field is a minimum of 51% (the minimum will be different for exception grantees). Once % Low/Mod is greater than 51%, READY TO FUND is changed to **Yes** and the activity can be funded with CDBG money using the funding function.

When you are finished click the <Save> button.

Reporting Accomplishments for LMA Activities

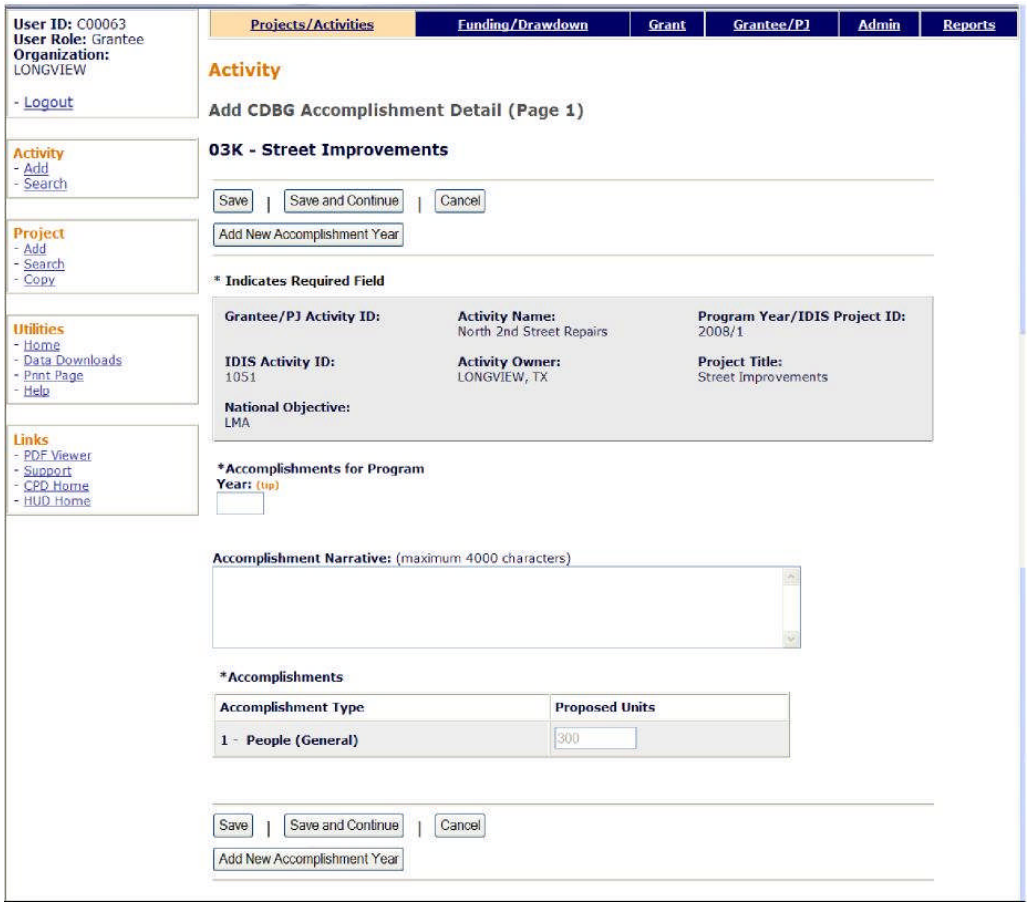
This is the accomplishment screen that is completed for activities with a national objective of:

- LMA: Low/mod area benefit
- LMAFI: Low/mod area benefit, community development financial institution (CDFI)
- LMASA: Low/mod area benefit, neighborhood revitalization strategy area (NRSA)

To access the Accomplishment screens for an activity, go to the Edit Activity screen and click the <Add CDBG Accomp.> or <Edit CDBG Accomp.>.

CDBG Accomplishment Detail (Page 1) For LMA Activities

For most LMA* activities, the only two input fields on this screen are PROGRAM YEAR and ACCOMPLISHMENT NARRATIVE:

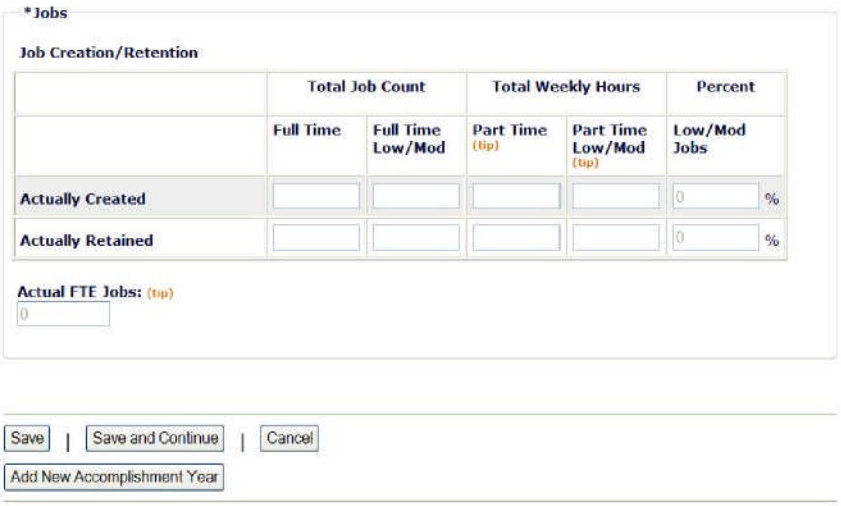


Field	Description
Fields in gray box	These read-only fields identify the activity you are processing. They are populated with data from the activity setup screens.
Accomplishments for Program Year	On the add screen, this field is blank. Enter the program year that you are reporting accomplishments for. On the edit screen, the program year is read-only. A new field, SELECT ANOTHER YEAR, is displayed for use with multi-year activities. For multi-year activities, make sure you input annual counts for the correct program year. To add accomplishments for the second and subsequent years of an activity, click the <Add New Accomplishment Year> button at the top/bottom of the screen, type in the new year, and enter the new accomplishments. Do not include accomplishments that have been reported in a previous year. Once accomplishments have been entered for more than one year, use the SELECT ANOTHER YEAR field to view accomplishments for a different year. Before updating information, make sure that the year displayed in ACCOMPLISHMENTS FOR PROGRAM YEAR is the year you are reporting data for.
Accomplishment Narrative	Describe the progress toward achieving accomplishments in the program year specified in the previous field. You may want to cite the percentage of the activity that has been completed, explain undue delays, provide a timeframe for completing the activity and meeting a national objective, and/or explain why accomplishments have not yet been reported.
Accomplishments	
Accomplishment Type	This read-only field shows the accomplishment type assigned at activity setup (see Appendix D).
Proposed Units	This read-only field shows the proposed number of accomplishments entered at activity setup.
Actual Units	This field is displayed on this screen only if the matrix code is 04 – Clearance and Demolition or 04A – Cleanup of Contaminated Sites. Enter the number of accomplishments achieved during the program year being reported.

When you have finished, click the <Save and Continue> key.

Job Creation/Retention

For LMAFI/LMASA activities with an ACCOMPLISHMENT TYPE of jobs, the LMA accomplishment screen also includes these fields. These data will be included in the total jobs and total low-mod jobs created and retained by the CDBG program.



Field	Description
Actually Created	
Total Job Count Full Time	Enter the total number of full-time jobs created.
Total Job Count Full Time Low/Mod	Of the total number of full-time jobs created, enter the number created for LMI persons.
Total Weekly Hours Part Time	Enter the total number of weekly part-time job *hours* (not the number of part-time jobs) created.
Total Weekly Hours Part Time Low/Mod	Of the total number of weekly part-time job hours created, enter the number created for LMI persons.
Actually Retained	
Total Job Count Full Time	Enter the total number of fulltime jobs retained.
Total Job Count Full Time Low/Mod	Of the total number of full-time jobs retained, enter the number retained for LMI persons.
Total Weekly Hours Part Time	Enter the total number of weekly part-time job *hours* (not the number of part-time jobs) retained.
Total Weekly Hours Part Time Low/Mod	Of the total number of weekly part-time job hours retained, enter the number retained for LMI persons.
Actual FTE Jobs	This read-only field shows the number of full-time equivalent (FTE) jobs created and/or retained. Part-time hours are converted to FTEs on the basis of one FTE equaling 40 hours.

When you are finished, click the <Save and Continue> button.

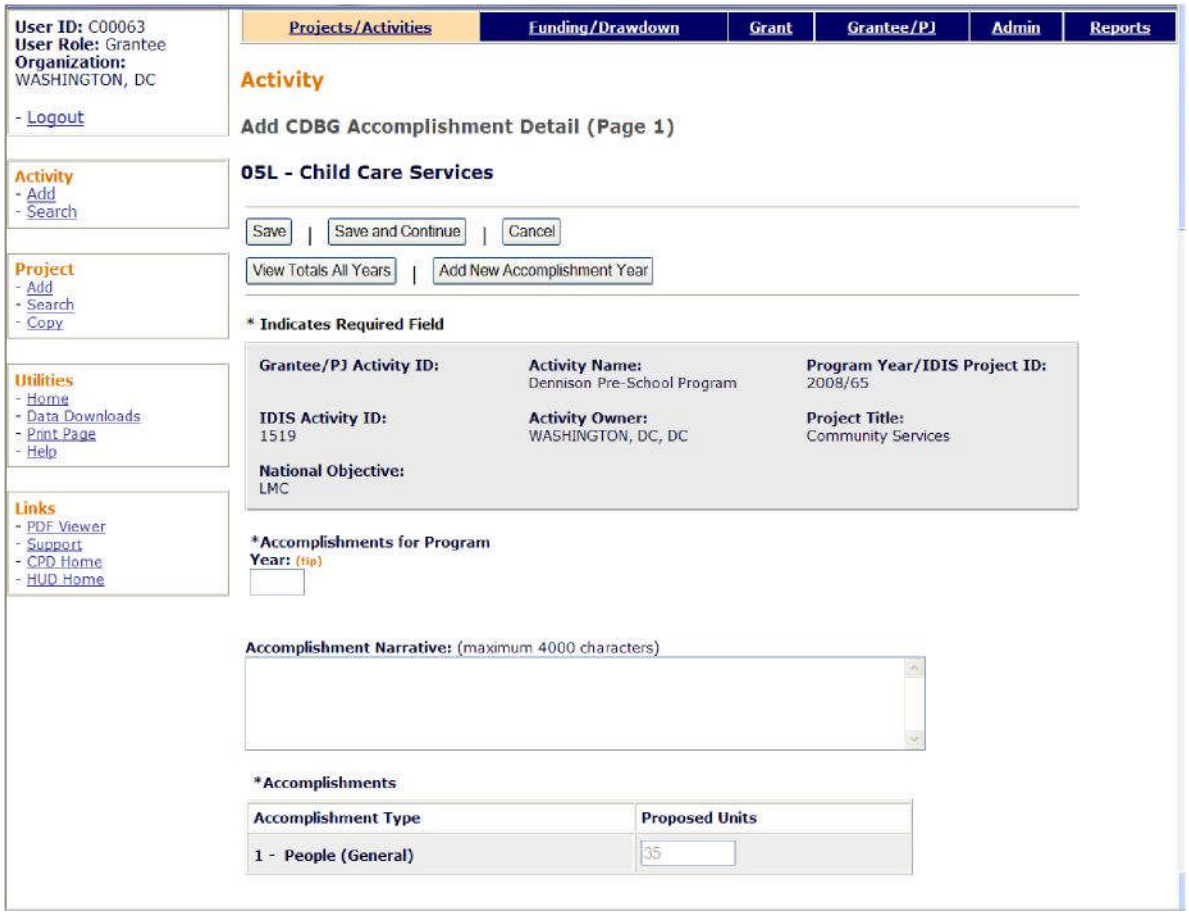
Entering Race/Ethnicity and Income Data for Direct Benefit Activities

Accomplishment Detail Screen (Page 1) for LMC, LMH* AND LMJ* Activities*

Guidance is provided for LMC, LMH, and LMJ activities on entering race/ethnicity and income level data.

To access the accomplishment screens for an activity, go to the Edit Activity screen and click the <Add CDBG Accomp.> or <Edit CDBG Accomp.> button

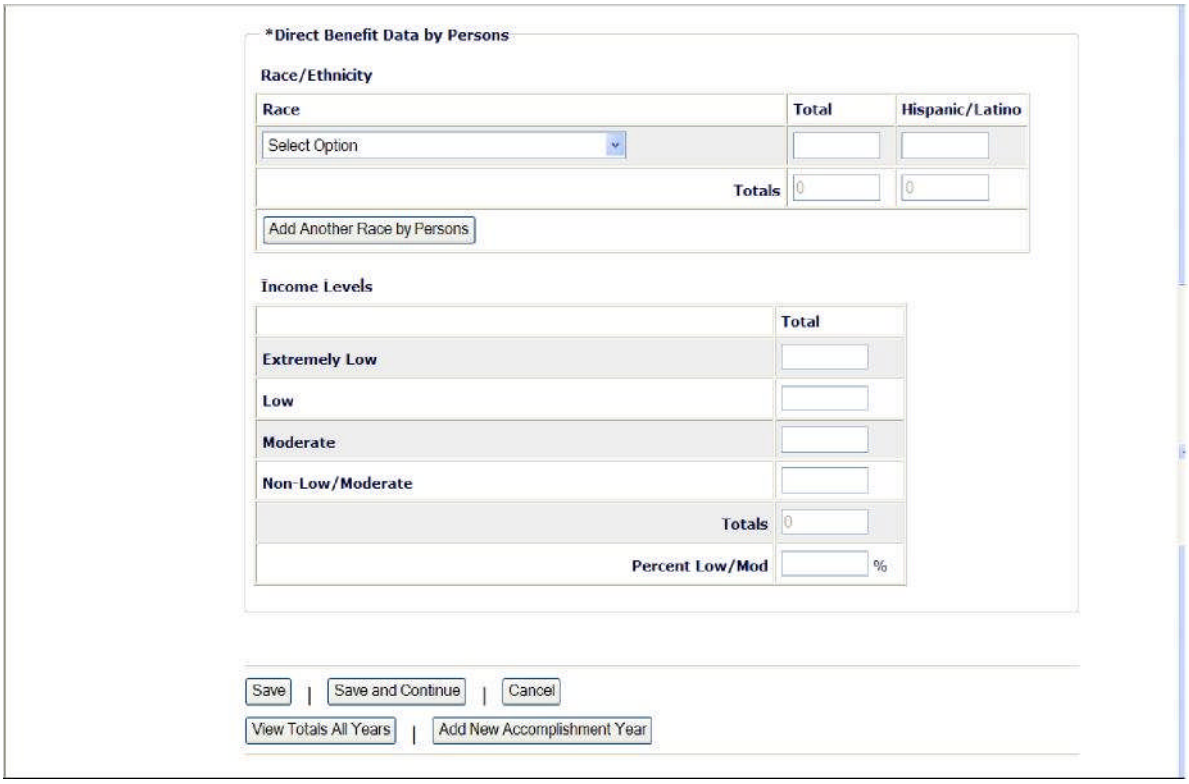
The top part of this screen is the same for all LMC* activities



Field	Description
Fields in gray box	These read-only fields identify the activity you are processing. They are populated with data from the activity setup screens.
Accomplishments for Program Year	On the add screen, this field is blank. Enter the program year that you are reporting accomplishments for. On the edit screen, the program year is read-only. A new field, SELECT ANOTHER YEAR, is displayed for use with multi-year activities: **For multi-year activities, make sure you input annual counts for the correct program year**: To add accomplishments for the second and subsequent years of an activity, click the <Add New Accomplishment Year> button at the top/bottom of the screen, type in the new year, and enter the new accomplishments. Do not include accomplishments that have been reported in a previous year. Once accomplishments have been entered for more than one year, use the SELECT ANOTHER YEAR field to view accomplishments for a different year. Before updating information, make sure that the year displayed in ACCOMPLISHMENTS FOR PROGRAM YEAR is the year you are reporting data for.
Accomplishment Narrative	Describe the progress toward achieving accomplishments in the program year specified in the previous field. You may want to cite the percentage of the activity that has been completed, explain undue delays, provide a timeframe for completing the activity and meeting a national objective, and/or explain why accomplishments have not yet been reported.
Accomplishments	
Accomplishment Type	This read-only field shows the accomplishment type assigned at activity setup. See Appendix D for Accomplishment Type.
Proposed Units	This read-only field shows the proposed number of accomplishments entered at activity setup.

Direct Benefit Data by Persons

For LMJ activities and for LMC activities, grantees must report race/ethnicity and income levels data by persons, except for a few instances related to housing activities (such as activities with matrix codes 05S, 05T, and 05U):



Race/Ethnicity

Field	Description
Race	Select the race for which counts by persons are to be entered. The HUD definitions are: **White**: A person having origins in any of the original peoples of Europe, North Africa, or the Middle East. **Black/African American**: A person having origins in any of the black racial groups of Africa. **Asian**: A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. **American Indian/Alaskan Native**: A person having origins in any of the original peoples of North and South America (including Central America) and who maintains a tribal affiliation or community attachment.

	Native Hawaiian/Other Pacific Islander: A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. **American Indian/Alaskan Native and White**: A person having these multiple racial origins as defined above. **Asian and White**: A person having these multiple racial origins as defined above. **Black/African American and White**: A person having these multiple racial origins as defined above. **American Indian/Alaskan Native and Black/African American**: A person having these multiple racial origins as defined above. **Other Multi-Racial**: Category used for reporting individual responses that are not included in any of the categories listed above.
Total	Enter the total number of beneficiaries of this race.
Hispanic/Latino	Of the total beneficiaries of this race, enter the number who are Hispanic/Latino.
Totals: Total	This read-only field shows the total number of beneficiaries of all races.
Totals: Hispanic/Latino	This read-only field shows the total number of beneficiaries of all races who are Hispanic.
<Add Another Race by Persons> button	Click this button to add beneficiary counts for another race.

Below are instructions on reporting race and ethnicity data for activities that involve removing architectural barriers or making ADA improvements to public buildings.

Important Guidance: Reporting Race/Ethnicity Data for Activities Providing Access for Persons with Disabilities

If you are assisting an eligible activity under the LMC national objective at 570.208(a)(2)(ii) [Entitlements] and 570.483(b)(2)(ii)(A) [States], and cannot obtain information on the beneficiaries with disabilities, use the following guidelines for reporting race and ethnicity data on the LMA accomplishment screen.

HUD has a website with Census data on the number of persons with disabilities, by race and ethnicity, at the Census tract level. The web address is: http://www.hud.gov/offices/cpd/systems/census/statemap.cfm

On this website, select a state. On the next page, scroll down to "Disability by Race & Ethnicity" and click on "Download Excel Spreadsheet."

Select the data you want by using the Place Name filter arrow in Column K. Once you have selected a place, use data from the following columns:

Column L:	Census tract
Column O:	Number of persons with disabilities in the Census tract
Columns P–U:	Number of persons with disabilities by race
Column V:	Number of persons with disabilities of Hispanic ethnicity

If more than one Census tract is served by the activity, total the columns for the appropriate Census tracts and use those totals to complete the accomplishment screen.

Note that the data in Column V on persons of Hispanic ethnicity is not broken down by race, which is how the information must be reported on the accomplishment screen. Grantees may use their own judgment in determining how to break down ethnicity by race.

Income Levels

Important Guidance: Not Benefiting Moderate-Income Persons to the Exclusion of Low-Income Persons

It is important to always report income levels in the appropriate categories. Some grantees, solely to minimize data entry, report all beneficiaries in the moderate income category. This practice conveys the impression in reports to Congress and other Federal oversight agencies that grantees are ignoring the program's legislative mandate not to benefit moderate-income persons to the exclusion of low-income persons.

Field	Description
Extremely Low	Enter the number of persons benefiting whose income is at or below 30% of the median family income for the area.
Low	Enter the number of persons benefiting whose income is above 30% and at or below 50% of the median family income for the area.
Moderate	Enter the number of persons benefiting whose income is above 50% and at or below 80% of the median family income for the area.
Non-Low/Moderate	Enter the number of persons benefiting whose income is above 80% of the median family income for the area.
Totals	This read-only field shows the sum of the values input in the previous four fields. The Income Levels TOTALS field and the Race/Ethnicity TOTALS by race field must be equal.
Percent Low/Mod	This read-only field shows the percentage of beneficiaries who are low/mod. It is equal to (EXTREMELY LOW + LOW + MODERATE) divided by TOTALS.

Important Guidance: Reporting Income Data for Presumed Benefit Activities

If an LMC* activity is limited to assisting one or more of the presumptive benefit groups, report the number of persons benefiting under the following income categories unless you have information that supports reporting them under a different income category:

Group	Income Level
Abused children	Extremely low income
Battered spouses	Low income
Severely disabled adults	Low income
Homeless persons	Extremely low income
Illiterate adults	Low income
Persons with AIDS	Low income
Migrant farm workers	Low income
Elderly	If assistance is to acquire, construct, convert, and/or rehabilitate a senior center or to pay for providing center-based senior services, report the beneficiaries as moderate income. If assistance is for other services (not center-based), report the elderly beneficiaries as low income.

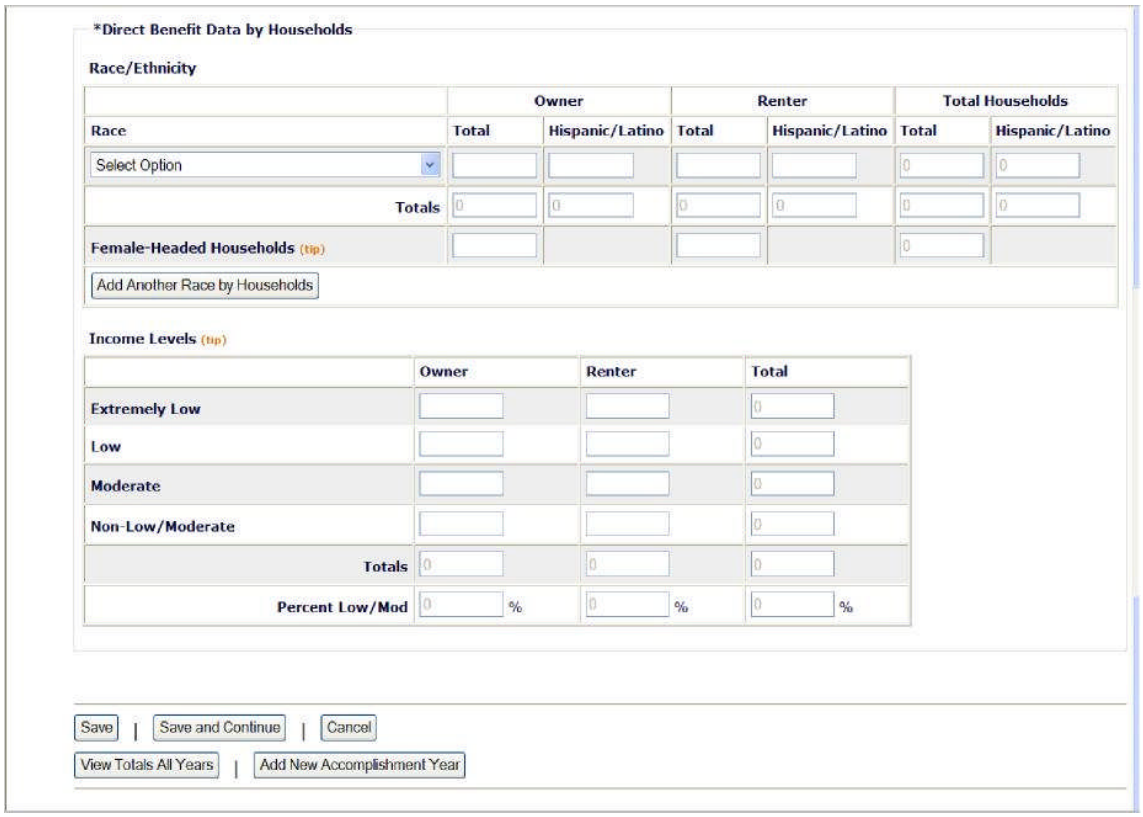
If an activity serves a combination of these groups, identify the number in each group and report those numbers under the appropriate income levels. Estimate race/ethnicity categories either by observation or by using numbers proportionate to the general population.

- ***Nature/Location Activities*:** Report all beneficiaries as moderate income unless you have information to support reporting them under another income category.

- ***Activities Providing Access for Persons with Disabilities*:** For LMC activities carried out under 570.208(a)(2)(ii), report all beneficiaries as low income unless you have information to support reporting them under another income category.

Direct Benefit Data by Households

For LMH* activities and LMC* activities with an accomplishment type of 04-Households or 10-Housing Units, race/ethnicity and income levels data is reported by households. Count each household as one, regardless of the number of persons in the household. Household means all the persons who occupy a housing unit. The occupants may be a single family, one person living alone, two or more families living together, or any group of related or unrelated persons who share living arrangements.



Currently, the renter/owner categories appear for LMC, as well as LMH, activities. This is a mistake in the system. Until this is corrected, report race data for LMC activities that require information by Household under the owner category.

Race/Ethnicity

Field	Description
Race	Select the race for which counts are to be entered. The HUD definitions are provided at PROVIDE LINK
Owner: Total	Enter the number of owner households of this race.
Owner: Hispanic/Latino	Of the total owner households of this race, enter the numbers that are Hispanic/Latino.
Renter: Total	Enter the number of renter households of this race.
Renter: Hispanic/Latino	Of the total renter households of this race, enter the numbers that are Hispanic/Latino.
Total Households: Total	This read-only field shows the sum of OWNER TOTAL and RENTER TOTAL for this race.

Field	Description
Total Households: Hispanic/Latino	This read-only field shows the sum of OWNER HISPANIC/LATINO and RENTER HISPANIC/LATINO for this race.
Totals	These six read-only fields show the totals for all races.
Female-Headed Households: Owner	Of the total owner households of all races, enter the total number that are headed by females.
Female-Headed Households: Renter	Of the total renter households of all races, enter the total number that are headed by females.
<Add Another Race by Households> button	Click this button to add beneficiary counts for another race.

Income Levels

Important Guidance: Reporting Accurate Income Data
It is important to always report income levels in the appropriate categories. Some grantees, solely to minimize data entry, report all beneficiaries in the moderate income category. This practice conveys the impression in reports to Congress and other Federal oversight agencies that grantees are ignoring the program's legislative mandate not to benefit moderate-income households to the exclusion of low-income households. Therefore, it is important that you always report income levels in the appropriate categories.

Field	Description
Extremely Low: Owner and Renter	Enter the number of owner households and the number of renter households whose income is at or below 30% of the median family income for the area.
Extremely Low: Total	This read-only field shows the sum of the previous two fields.
Low: Owner and Renter	Enter the number of owner households and the number of renter households whose income is above 30% and at or below 50% of the median family income for the area.
Low: Total	This read-only field shows the sum of the previous two fields.
Moderate: Owner and Renter	Enter the number of owner households and the number of renter households whose income is above 50% and at or below 80% of the median family income for the area.
Moderate: Total	This read-only field shows the sum of the previous two fields.
Non-Low/Moderate: Owner and Renter	Enter the number of owner households and the number of renter households whose income is above 80% of the median family income for the area.
Totals	The Income Levels OWNER TOTAL must equal the Race/Ethnicity OWNER TOTAL and the Income Levels RENTER TOTAL must equal the Race/Ethnicity RENTAL TOTAL.
Percent Low/Mod	The calculation for each of these read-only fields showing the percentage of households that are low/mod is (EXTREMELY LOW + LOW + MODERATE) divided by TOTALS.

When you are finished, click the <Save and Continue> button.

Lead-Based Paint Compliance Information for Housing Rehabilitation Activities

The fields below appear for all housing rehabilitation activities, except for rehabilitation limited to one or more of the following:

- Installation of smoke detectors or safety locks
- Tool lending libraries
- Painting supply programs
- Graffiti removal

The fields below will be displayed for all housing rehabilitation matrix codes (14A-14D, 14F, 14H-14J, 16A), except for 14G.

Applicable Lead Paint Requirement:

Housing constructed before 1978	
Exempt: housing constructed 1978 or later	
Otherwise exempt	
Total	

Lead Hazard Remediation Actions: (For rehabilitation only)

Lead Safe Work Practices (24 CFR 35.930(b)) (Hard costs <= $5,000)	
Interim Controls or Standard Practices (24 CFR 35.930(c)) (Hard costs $5,000 - $25,000)	
Abatement (24 CFR 35.930(d)) (Hard costs > $25,000)	
Total	

Field	Description
Applicable Lead Paint Requirement	
Housing constructed before 1978	Enter the number of housing units in this activity that were constructed prior to 1978.
Exempt: housing constructed 1978 or later	Enter the number of housing units in this activity for which construction was completed on or after January 1, 1978 or, in the case of jurisdictions which banned the sale or residential use of lead-containing paint prior to 1978, an earlier date as HUD may designate (see §35.160).
Otherwise exempt	Enter the number of housing units in this activity to which one or more of the following apply: • 0 bedrooms • Elderly/disabled person(s) with no children under the age of 6 • Lead-based paint free • Used no more than 100 days per year
Lead hazard remediation actions (for rehabilitation only)	For all matrix codes **(14A-14D, 14F, 14H-14J, 16A),** the system provides the ability to capture the type of lead hazard remediation conducted.
Lead safe work practices (24 CFR 35.930(b))	Where hard costs are less than $5,000, enter the number of housing units for which lead safe work practices were conducted
Interim controls or standard practices (24 CFR 35.930(c))	When hard costs are $5,000 to $25,000, enter the number of units for which interim controls or standard practices were conducted.
Abatement (24 CFR 35.930(d))	When hard costs are greater than $25,000, enter the number of units for which abatement was conducted.

The following fields will be displayed for the matrix code 14G, Acquisition for Rehabilitation.

Applicable Lead Paint Requirement:

	# Units
Housing constructed before 1978	
Exempt: housing constructed 1978 or later	
Exempt: Hard costs <= $5,000	
Otherwise exempt	
Total for Applicable Lead Paint Requirement	

Lead Hazard Remediation Actions: (For acquisition only)

	# Units
Visual Assessment/Paint Stabilization (24 CFR 35.1015)	
Other Actions required by Local/State Codes	

Lead Hazard Remediation Actions: (For acquisition and rehabilitation)

	# Units
Lead Safe Work Practices (24 CFR 35.930(b)) (Hard costs <= $5,000)	
Interim Controls or Standard Practices (24 CFR 35.930(c)) (Hard costs $5,000 - $25,000)	
Abatement (24 CFR 35.930(d)) (Hard costs > $25,000)	

Total for Lead Hazard Remediation Actions	

Field	Description
Applicable Lead Paint Requirement	
Housing constructed before 1978	Enter the number of housing units in this activity that were constructed prior to 1978.
Exempt: housing constructed 1978 or later	Enter the number of housing units in this activity for which construction was completed on or after January 1, 1978 or, in the case of jurisdictions which banned the sale or residential use of lead-containing paint prior to 1978, an earlier date as HUD may designate (see §35.160).
Otherwise exempt	Enter the number of housing units in this activity to which one or more of the following apply: ▪ 0 bedrooms ▪ Elderly/disabled person(s) with no children under the age of 6 ▪ Lead-based paint free ▪ Used no more than 100 days per year
Lead hazard remediation actions (for acquisition only)	For activities with a matrix code of **14G only,** the system provides the ability to capture Lead Hazard remediation conducted when the sole function of the activity is to acquire the property. Enter information in these fields only when acquisition is the sole function for an activity.
Visual Assessment/Paint Stabilization	Enter the number of housing units in this activity for which a visual assessment or paint stabilization was conducted.
Other actions required by State or local governments	Enter the number of housing units in this activity for which other remediation actions were required by a State or local jurisdiction.
Lead Hazard Remediation Actions (For acquisition and rehabilitation)	For matrix code **14G,** the system provides the ability to capture Lead Hazard Remediation conducted when the activity's functions include both acquisition and rehabilitation. Enter information in these fields only when the activity includes both functions.
Lead Safe Work Practices (24 CFR 35.930(b))	Where hard costs are less than $5,000, enter the number of housing units for which lead safe work practices were conducted.
Interim Controls or Standard Practices (24 CFR 35.930(c)	When hard costs are $5,000 to $25,000, enter the number of units for which Interim Controls or Standard Practices were conducted.
Abatement (24 CFR 35.930(d))	When hard costs are greater than $25,000, enter the number of units for which abatement was conducted.

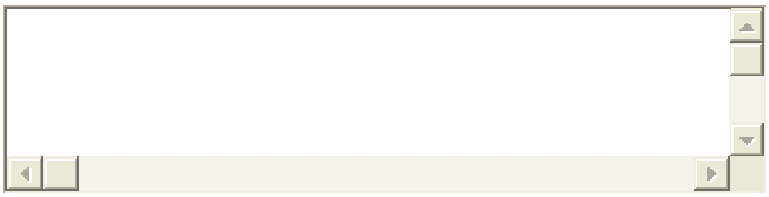
Fields for Code Enforcement Activities

Guidance is provided below on the accomplishment fields for code enforcement activities (matrix code 15) when accomplishment type = 10, housing units.

Code Enforcement

* Housing units receiving violations	
Housing units where code violations have been corrected using CDBG funds	
Housing units where code violations have been corrected by the owner	
Housing units where code violations have been corrected using other funds	

***Describe specific public and private improvements or services provided in the code enforcement area**



IDIS Activity IDs where code corrections are being tracked

Field	Description
Housing units receiving violations	Enter number of housing units receiving code violations
Housing units where code violations have been corrected using CDBG funds	Enter number of housing units where code violations have been corrected using CDBG funds. The sum of numbers of violations corrected using CDBG, owner, and other funds should equal the total number.
Housing units where code violations have been corrected by the owner	Enter number of housing units where code violations have been corrected by the owner. The sum of numbers of violations corrected using CDBG, owner, and other funds should equal the total number.
Housing units where code violations have been corrected using other funds	Enter number of housing units where code violations have been corrected using other funds. The sum of numbers of violations corrected using CDBG, owner, and other funds should equal the total number.
Describe specific public and private improvements or services provided in the code enforcement area	Code enforcement must be conducted in deteriorated or deteriorating areas when such enforcement together with public or private improvements, rehabilitation, or services to be provided may be expected to arrest decline in an area
IDIS Activity IDs where code corrections are being tracked	Enter IDIS Activity IDs when code violations are corrected using CDBG funds

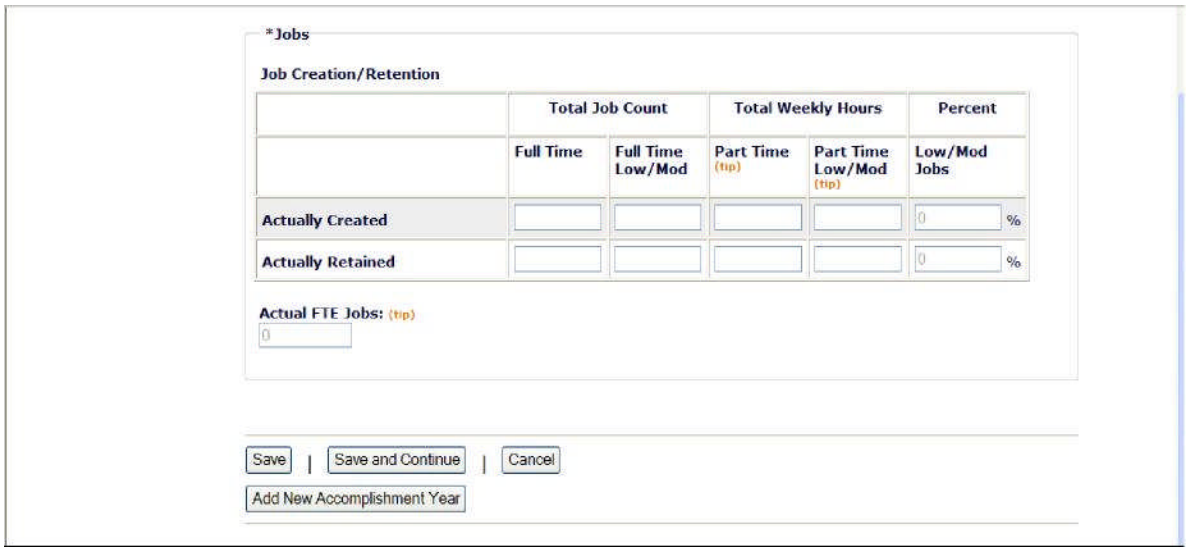
Entering Job Creation/Retention Data

CDBG Accomplishment Detail (Page 1)

Below is guidance for entering data on job creation and retention. On the CDBG set-up detail (page 2) screen, grantees entered the number of jobs expected to be created and retained. This screen asks for the number of jobs actually created and retained. The number of jobs actually created and retained does not have to equal the number of jobs expected to be created and retained. Job creation and retention data are reported for activities with the following national objectives:

- LMJ*
- LMAFI
- LMASA
- LMCMC

Job Creation/Retention



Field	Description
Actually Created	
Total Job Count Full Time	Enter the total number of full-time jobs created.
Total Job Count Full Time Low/Mod	Of the total number of full-time jobs created, enter the number created for LMI persons.
Total Weekly Hours Part Time	Enter the total number of weekly part-time job *hours* (not the number of part-time jobs) created.
Total Weekly Hours Part Time Low/Mod	Of the total number of weekly part-time job hours created, enter the number created for LMI persons.
Actually Retained	
Total Job Count Full Time	Enter the total number of full-time jobs retained.

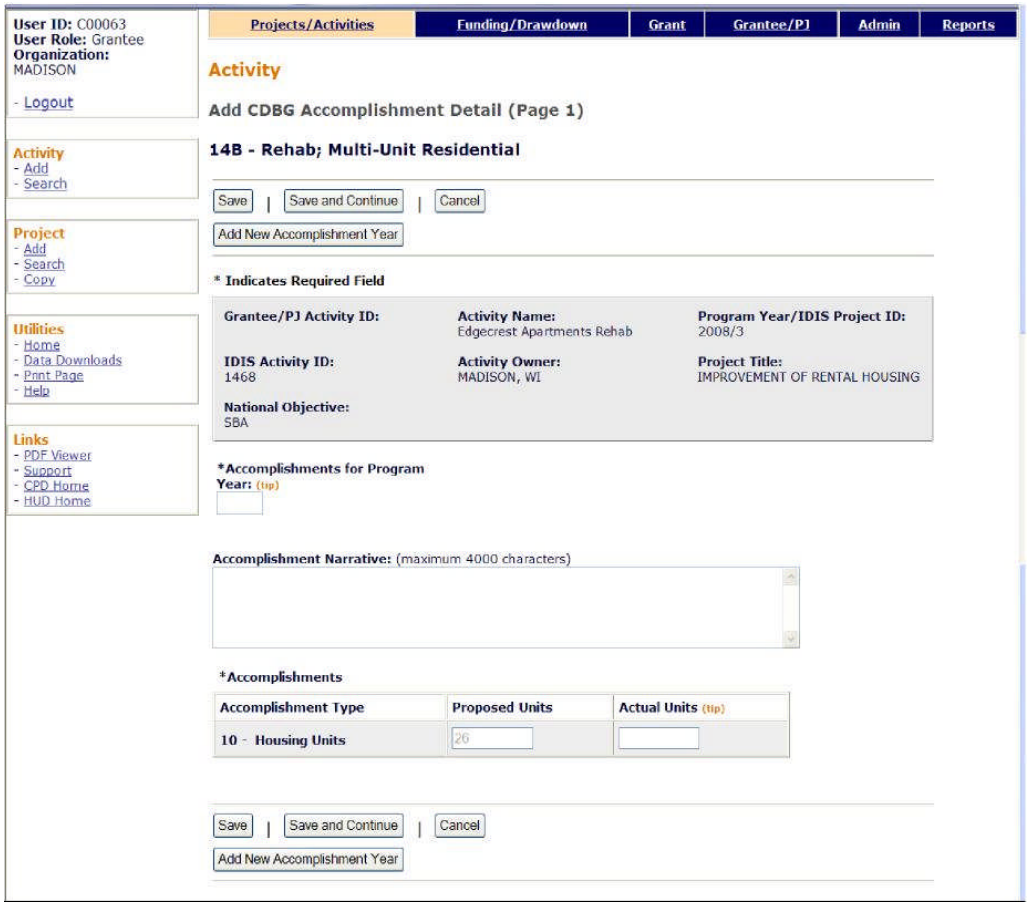
Total Job Count Full Time Low/Mod	Of the total number of full-time jobs retained, enter the number retained for LMI persons.
Total Weekly Hours Part Time	Enter the total number of weekly part-time job *hours* (not the number of part-time jobs) retained.
Total Weekly Hours Part Time Low/Mod	Of the total number of weekly part-time job hours retained, enter the number retained for LMI persons.
Actual FTE Jobs	This read-only field shows the number of fulltime equivalent (FTE) jobs created and/or retained. To determine compliance with the national objective, part-time hours are converted to FTEs on the basis of one FTE equaling 40 hours.

When you are finished, click the <Save and Continue> button.

Entering Accomplishments for SB* and URG Activities

CDBG Accomplishment Detail (Page 1)

This accomplishment screen is the same for all SB*/URG activities:



Field	Description
Fields in gray box	These read-only fields identify the activity you are processing. They are populated with data from the activity setup screens.
Accomplishments for Program Year	On the add screen, this field is blank. Enter the program year that you are reporting accomplishments for. On the edit screen, the program year is read-only. A new field, SELECT ANOTHER YEAR, is displayed for use with multi-year activities: For multi-year activities, make sure you input annual counts for the correct program year: To add accomplishments for the second and subsequent years of an activity, click the <Add New Accomplishment Year> button at the top/bottom of the screen, type in the new year, and enter the new accomplishments. Do not include accomplishments that have been reported in a previous year. Once accomplishments have been entered for more than one year, use the SELECT ANOTHER YEAR field to view accomplishments for a different year. Before updating information, make sure that the year displayed in ACCOMPLISHMENTS FOR PROGRAM YEAR is the year you are reporting data for.
Accomplishment Narrative	Describe the progress toward achieving accomplishments in the program year specified in the previous field. You may want to cite the percentage of the activity that has been completed, explain undue delays, provide a timeframe for completing the activity and meeting a national objective, and/or explain why accomplishments have not yet been reported.
Accomplishments	
Accomplishment Type	This read-only field shows the accomplishment type assigned at activity setup.
Proposed Units	This read-only field shows the proposed number of accomplishments entered at activity setup.
Actual Units	Enter the number of accomplishments achieved during the program year being reported.

Reporting Performance Measures

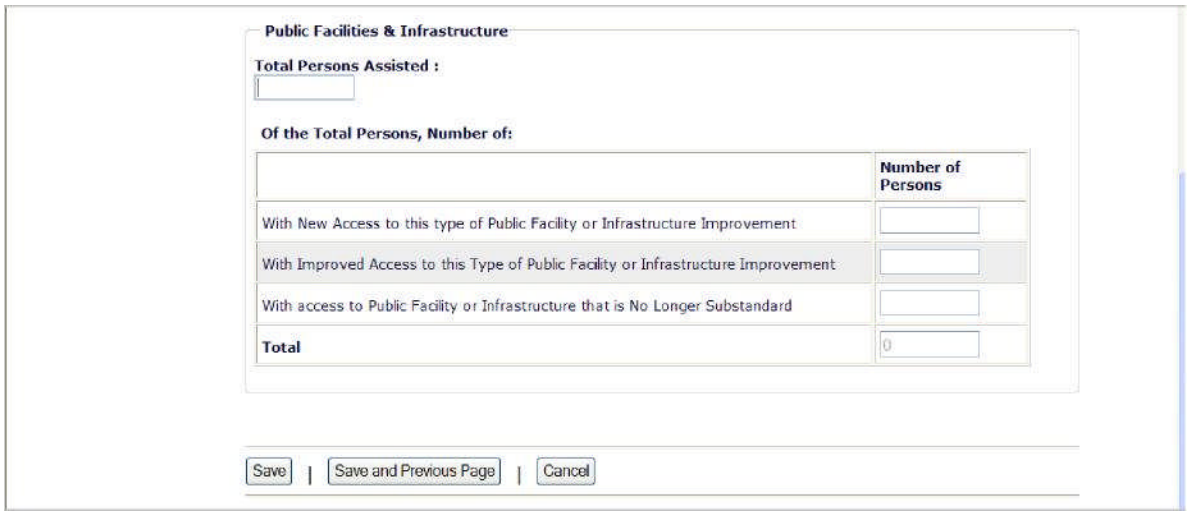
CDBG Accomplishment Detail (Page 2)

The top part of the second Accomplishment screen is the same for all activities. This screen reports on the **performance measures** for an activity. Performance measures are determined by the matrix code and/or the national objective of an activity.

Field	Description
Fields in gray box	These read-only fields identify the activity you are processing. They are populated with data from the activity setup screens. Notice that ACCOMPLISHMENTS FOR PROGRAM YEAR is now a protected field. It can only be changed on the previous screen.

Public Facilities and Infrastructure

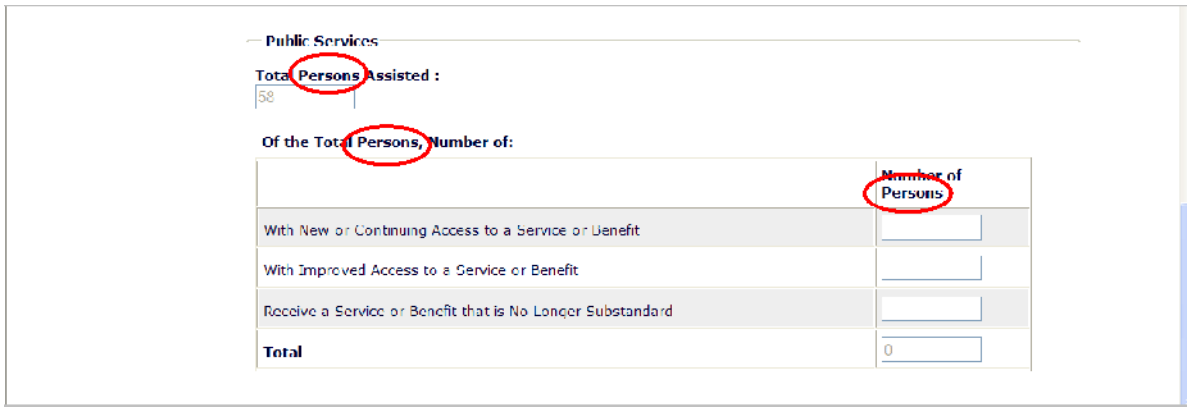
Below are the performance measures displayed for all public facilities and infrastructure activities, activities with a matrix code of 03* (except 03T, Operating Costs for Homeless/AIDS Patient Programs—see page 57 for more information on matrix code 03T).



Field	Description
Total Persons Assisted	If the activity ACCOMPLISHMENT TYPE is: ▪ People: This is a read-only field showing the ACTUAL UNITS reported on the previous screen. ▪ Public Facilities: This is an input field. Enter the number of persons served by the facility of persons for whom the facility is available.
Of the Total Persons, Number:	
With New Access to this Type of Public Facility or Infrastructure Improvement	When the activity provides a new facility, enter the number of persons with access to the facility. If the activity is funded in subsequent years, persons benefiting in the subsequent years continue to be reported as having new access.
With Improved Access to this Type of Public Facility or Infrastructure Improvement	When the activity provides improved access to a facility, enter the number of persons who have improved access.
With Access to Public Facility or Infrastructure that is No Longer Substandard	When the activity provides a service that is no longer substandard, enter the number of persons no longer subject to substandard facilities.
Total	This read-only field must equal the number in TOTAL PERSONS ASSISTED before the activity can be completed.

Public Services

Below are the performance measures displayed for all public service activities with a matrix code of 05*.



Note that if the activity ACCOMPLISHMENT TYPE is Households or Housing Units, the three labels circled on the above screen print will be Total *Households* Assisted, Of the Total *Households*, and Number of *Households*. Count each household as <u>one,</u> regardless of the number of persons in the household. Grantees will report households instead of persons when the beneficiaries are more accurately counted as such (e.g., housing counseling activities with a matrix code of 05U).

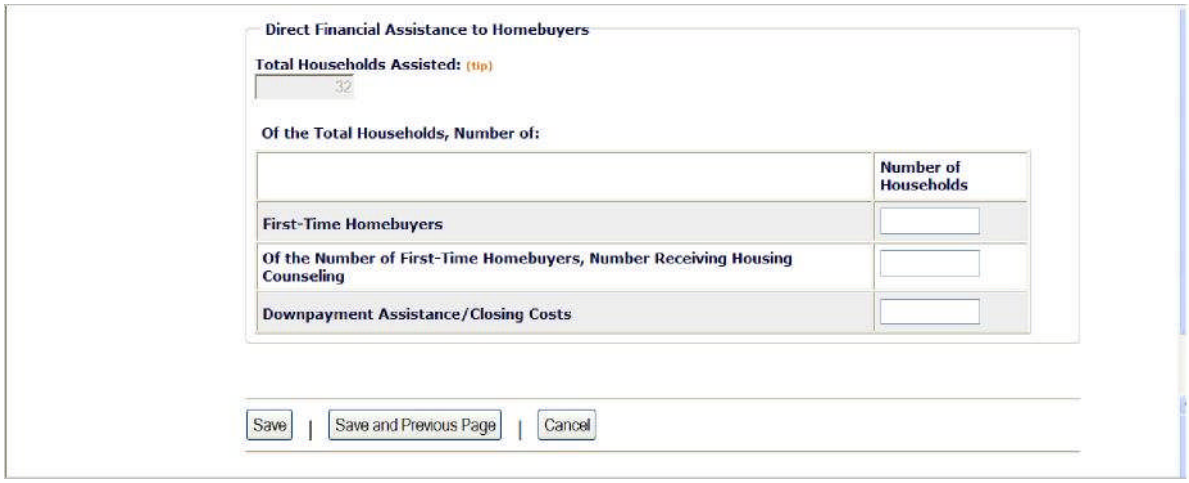
Field	Description
Total Persons Assisted	This read-only field shows the total number of people reported on the previous screen.
Of the Total Persons, Number:	
With New or Continuing Access to a Service or Benefit	When the activity provides a new service, enter the number of people with access to the service or benefit. If the activity is funded in subsequent years, people benefiting in the subsequent years continue to be reported as having new access.
With Improved Access to a Service or Benefit	When the activity provides improved access to a service, enter the number of persons who have improved access.
Receive a Service or Benefit that is No Longer Substandard	When the activity provides a service that is no longer substandard, enter the number of people no longer subject to a substandard service.
Total	This read-only field must equal the number in TOTAL PERSONS ASSISTED before the activity can be completed.

Direct Financial Assistance to Homebuyers

Below are additional performance measures displayed for matrix code 05R. These measures are also displayed for matrix code 13, Indirect Financial Assistance to Homebuyers.

Important Guidance: Accurately Reporting Housing Counseling and Direct Homeownership Assistance

The total number of households assisted with direct financial assistance to homebuyers is the number of households receiving financial assistance to purchase a house and is brought forward from the CDBG Accomplishment Detail (Page 1). It is only on this performance measurement screen below that the grantee may report the number of first-time homebuyers receiving housing counseling for activities with a 05R or 13 matrix code. For activities with these matrix codes, the grantee should not report the number of households receiving housing counseling on any other fields. Only for activities with a matrix code of 05U Housing Counseling may grantees can report the number of households receiving housing counseling as the accomplishment.



Field	Description
Total Households Assisted	This read-only field shows the total number of households reported on the previous screen.
Of the Total Households, Number of:	
First-Time Homebuyers	Of the TOTAL HOUSEHOLDS ASSISTED, enter the numbers that are first-time homebuyers.
Of the Number of First- Time Homebuyers, Number Receiving Housing Counseling	Of the households that are first-time homebuyers, enter the number receiving housing counseling. This cannot exceed FIRST-TIME HOMEBUYERS.
Downpayment Assistance/Closing Costs	Of the TOTAL HOUSEHOLDS ASSISTED, enter the number receiving downpayment assistance and/or assistance with closing costs.

Short-Term Rental Assistance

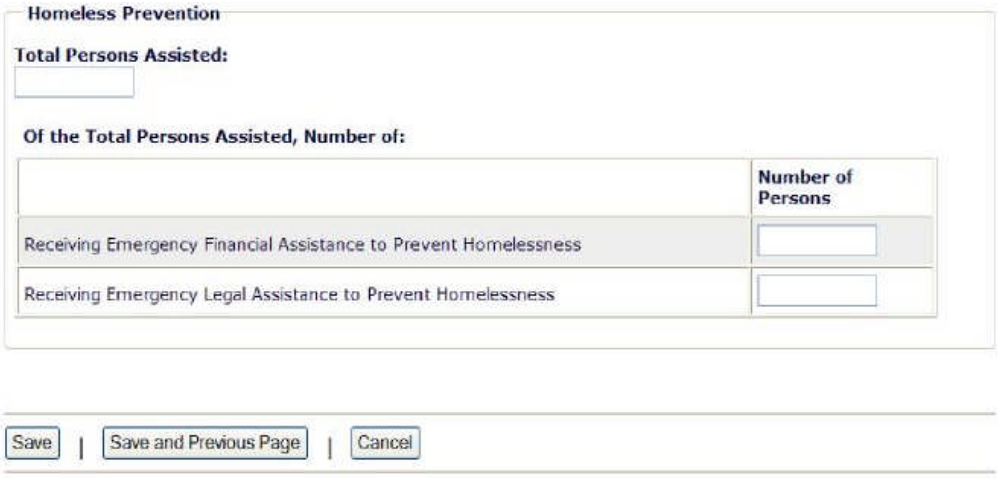
Below are the performance measures displayed for with a matrix code of 5S.

Field	Description
Total Households Assisted	This read-only field shows the total number of households reported on the previous screen.
Of the Households Assisted, the Number:	
Receiving short-term rental assistance (not more than three months)	Of the TOTAL HOUSEHOLDS ASSISTED, enter the number that received short-term rental assistance.
That were previously homeless	Of the TOTAL HOUSEHOLDS ASSISTED, enter the numbers that were previously homeless. ***Important Guidance: New HUD Definition of "Homeless"*** In December 2011, HUD published the Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH): Defining "Homeless" Final Rule, which redefined "homeless" in four broad categories: ▪ Literally homeless ▪ Imminent risk of homelessness ▪ Homeless under other Federal statutes ▪ Fleeing/attempting to flee domestic violence Refer to Federal Register / Vol. 76, No. 233 / Monday, December 5, 2011 - [Docket No. FR–5333–F–02] for more information on the Final Rule and the current definition of "homeless," including the criteria which must be met for each category.

Field	Description
Of those, the number that were chronically homeless	Of the households THAT WERE PREVIOUSLY HOMELESS, enter the number that were chronically homeless. ***Important Guidance: New HUD Definition of "Chronically Homeless"*** The HUD definition of "chronically homeless" was revised by the December 2011 Homeless Emergency Assistance and Rapid Transition to Housing: Emergency Solutions Grants Program and Consolidated Plan Conforming Amendments Interim Rule. "Chronically homeless" is defined as: 1. An individual who: is homeless and lives in a place not meant for human habitation, a safe haven, or in an emergency shelter; and has been in this state continuously for at least one year or on at least four separate occasions in the last 3 years, where each homeless occasion was at least 15 days; and can be diagnosed with one or more of the following conditions: substance use disorder, serious mental illness, developmental disability, post-traumatic stress disorder, cognitive impairments resulting from brain injury, or chronic physical illness or disability; 2. An individual who has been residing in an institutional care facility, including a jail, substance abuse or mental health treatment facility, hospital, or other similar facility, for fewer than 90 days and met all of the criteria in paragraph (1) of this definition, before entering that facility; or 3. A family with an adult head of household (or if there is no adult in the family, a minor head of household) who meets all of the criteria in paragraph (1) of this definition, including a family whose composition has fluctuated while the head of household has been homeless.

Homelessness Prevention

Below are performance measures displayed for activities with a matrix code of 05C, 05Q, or 05T.

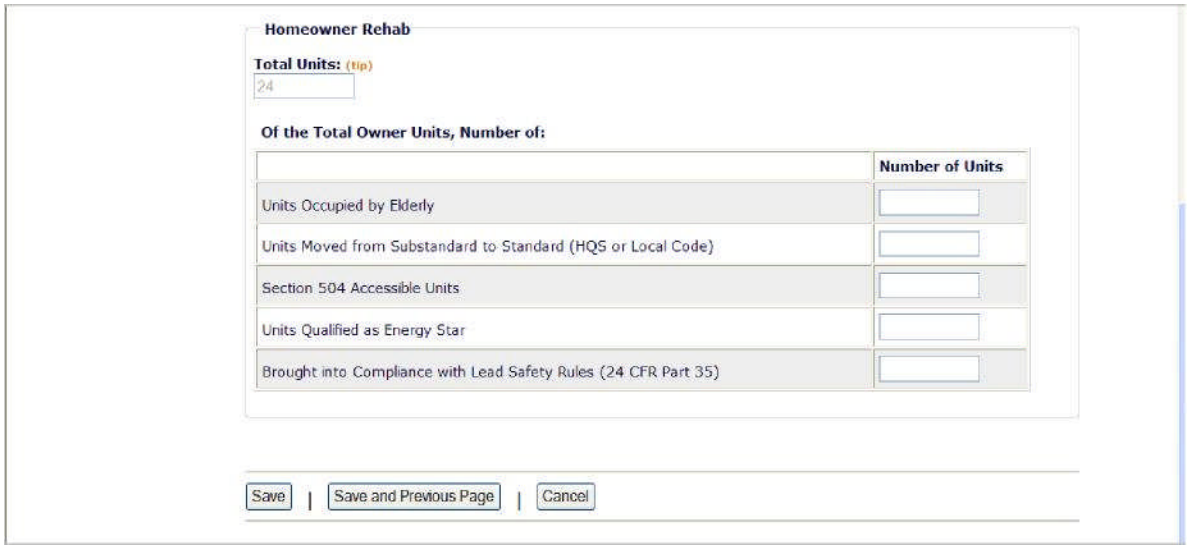


If a person received both financial and legal assistance, include that person in the counts for both fields.

Field	Description
Total Persons Assisted	This read-only field shows the total number of persons reported on the previous screen.
Of the Total Persons Assisted, the Number:	
Receiving Emergency Financial Assistance...	Of the TOTAL PERSONS ASSISTED, enter the number that received short-term rental assistance.
Receiving Emergency Legal Assistance...	Of the TOTAL PERSONS ASSISTED, enter the number that received emergency financial assistance to prevent homelessness.

Homeowner Housing Rehabilitation

These performance measures appear for activities that include the rehabilitation of housing units for homeowners. The measures below are displayed for activities with a matrix code of 14A-14D, or 14F-14J with a national objective of LMH* or with a national objective of SB*/URG when the ACCOMPLISHMENT TYPE is housing units and homeowner units are rehabilitated.



If the activity did not involve the rehabilitation of homeowner units, skip this section.

Field	Description
Total Units	This read-only field shows the ACTUAL UNITS reported on the first accomplishment screen. It includes all rental and homeowner units in the activity, not just homeowner rehab units.
Of the Total Owner-Occupied Units, Number of:	
Units Occupied by Elderly	Of the total owner-occupied units (this may or may not be the same as TOTAL UNITS), enter the number occupied by one or more persons age 62 or over.
Units Moved from Substandard to Standard (HQS or Local Code)	Of the total owner-occupied units, enter the number that were substandard prior to rehabilitation that now meet Housing Quality Standards (HQS) or local code, whichever is applicable. This is not a requirement under CDBG, but any units that have been brought from substandard to standard condition should be reported.
Section 504 Accessible Units	Of the total rental units, enter the number that meet Uniform Federal Accessibility Standards (UFAS). http://www.access-board.gov/ufas/ufas-html/ufas.htm
Units Qualified as Energy Star	Of the total owner units, enter the number qualifying for Energy Star certification. ***Please see important guidance below.***

Field	Description
Brought into Compliance with Lead Safety Rules (24 CFR Part 35)	Of the total owner units, enter the number made lead-safe. The only units to be included in the count are pre-1978 units where the rehabilitation work exceeds the $5,000 threshold. Do not count units that are free of lead-based paint (e.g., built in 1978 or later, a lead-based paint inspection report shows no lead paint) or units where the rehabilitation does not address all surfaces that could pose a lead hazard (e.g., rehabilitation work less than $5,000 a unit).

Important Guidance: Accurately Reporting Energy Star-Certified Units

Grantees must enter Energy Star-related data correctly. Installing replacement windows, performing weatherization improvements, or installing Energy Star-certified appliances alone does not make a home Energy Star-certified. Energy Star is **a system** for achieving and verifying a certain level of performance with respect to energy efficiency. To earn the Energy Star certification for an entire home, the home must meet strict guidelines for energy efficiency set by the U. S. Environmental Protection Agency. Homes achieve this level of performance through a **combination** of energy-efficient improvements, including effective insulation systems, high-performance windows, tight construction and ducts, efficient heating and cooling equipment, and Energy Star-certified lighting and appliances. Energy Star certification for a home requires third-party verification by a certified Home Energy Rater (or the equivalent), who works closely with the builder throughout the construction process and inspect the housing unit to determine compliance with requirements.

At the time this guidance was released, Energy Star-certified housing units funded by CDBG will be either newly constructed single-family detached homes, newly constructed multifamily properties, or multifamily properties that undergo significant gut rehabilitation, defined as requiring a change of use, the reconstruction of a vacant structure, or cause for the building to be out of service for at least 30 consecutive days. Gut or substantial rehabilitation of single family housing units with CDBG funds may also earn the Energy Star label. CDBG grantees initiating new Energy Star gut rehabilitation projects must meet or exceed Energy Star standards for New Homes, until the release of specific guidelines for gut rehabilitation by EPA. Please visit http://www.energystar.gov to find a wealth of information about Energy Star housing.

Many CDBG grantees are incorrectly identifying housing units as Energy Star-certified in IDIS, resulting in inflated, inaccurate numbers in IDIS reports and intensive efforts to determine the correct number of CDBG units that actually attained Energy Star certification. The number of Energy Star-certified units produced by CDBG grantees is reported to the Secretary of HUD and to the Office of Management and Budget each quarter to assess CDBG's progress in meeting the Energy Star goal in HUD's Strategic Plan. CDBG must be able to obtain Energy Star data in IDIS that is reliable and that does not routinely require verification. The following table demonstrates reporting discrepancies identified for new housing construction Energy Star units during the past four years.

Fiscal Year	Number of New Construction Energy Star-Certified Units Reported in IDIS by Grantees	Number of Units Verified as Energy Star, after HUD Staff Review	Number of Units Incorrectly Reported as Energy Star
2011	371	281	90
2010	631	369	262
2009	724	376	348
2008	447	290	157

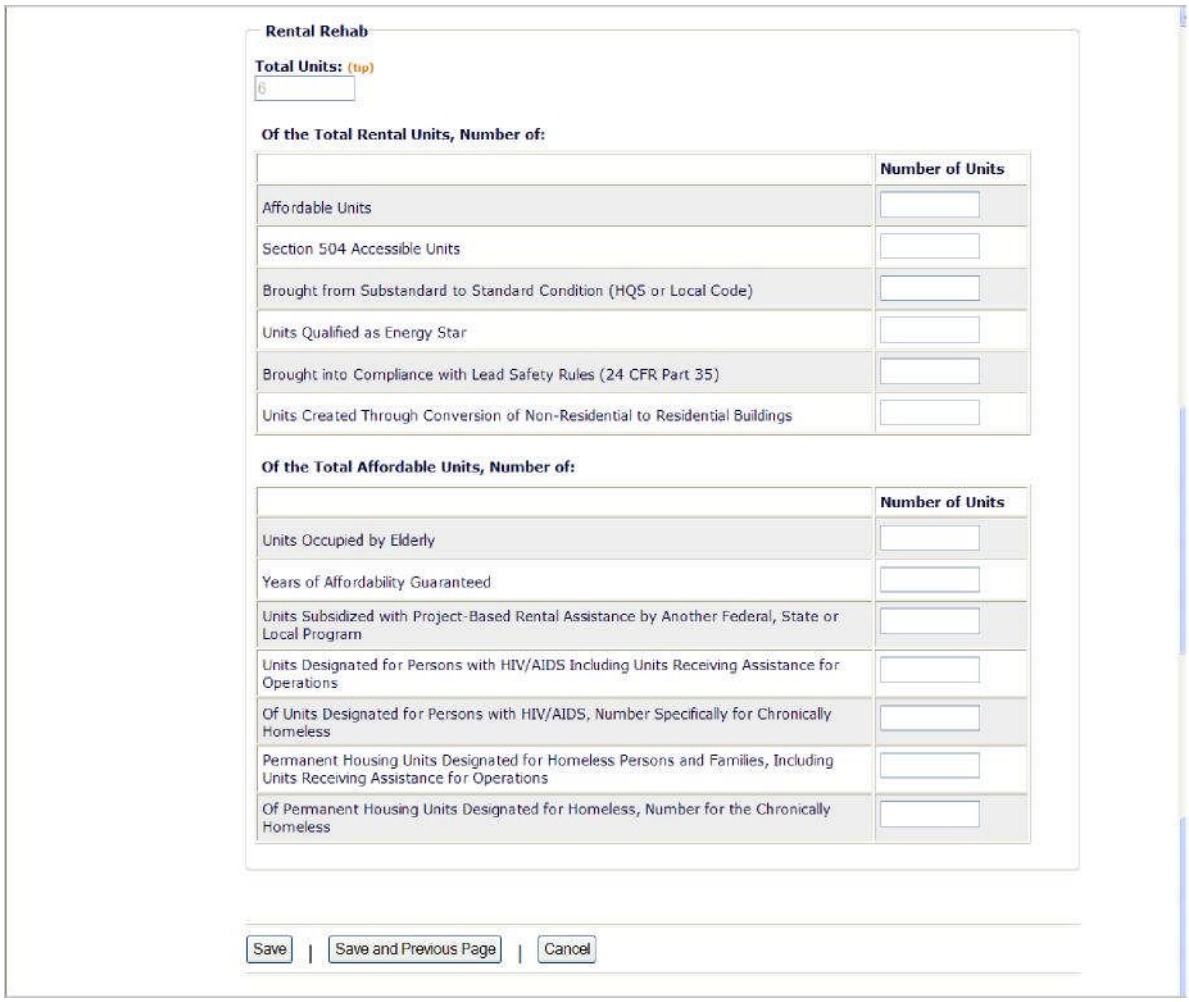
Grantees should carefully review the New Home and Multifamily High Rise Energy Star requirements on http://www.energystar.gov to prevent recurrence of these types of reporting errors. It should also be reiterated that performing one or more of the following improvements alone does **not** earn the housing unit the Energy Star label:

- Installation of replacement windows
- Installation of Energy Star-rated appliances
- Installation of insulation
- Installation of water efficient toilets
- Weatherization projects

While these are commendable energy conservation measures that the CDBG program encourages, they do not earn a housing unit Energy Star certification by themselves. Therefore, they should not be reported as Energy Star-certified housing units in IDIS.

Rental Rehabilitation

When the setup field INCLUDES RENTAL HOUSING is answered YES, these performance measures are displayed for activities with a matrix code of 14A-14D, or 14F-14J with a national objective of LMH*, or, when the ACCOMPLISHMENT TYPE is housing units, with a national objective of SB*/URG.



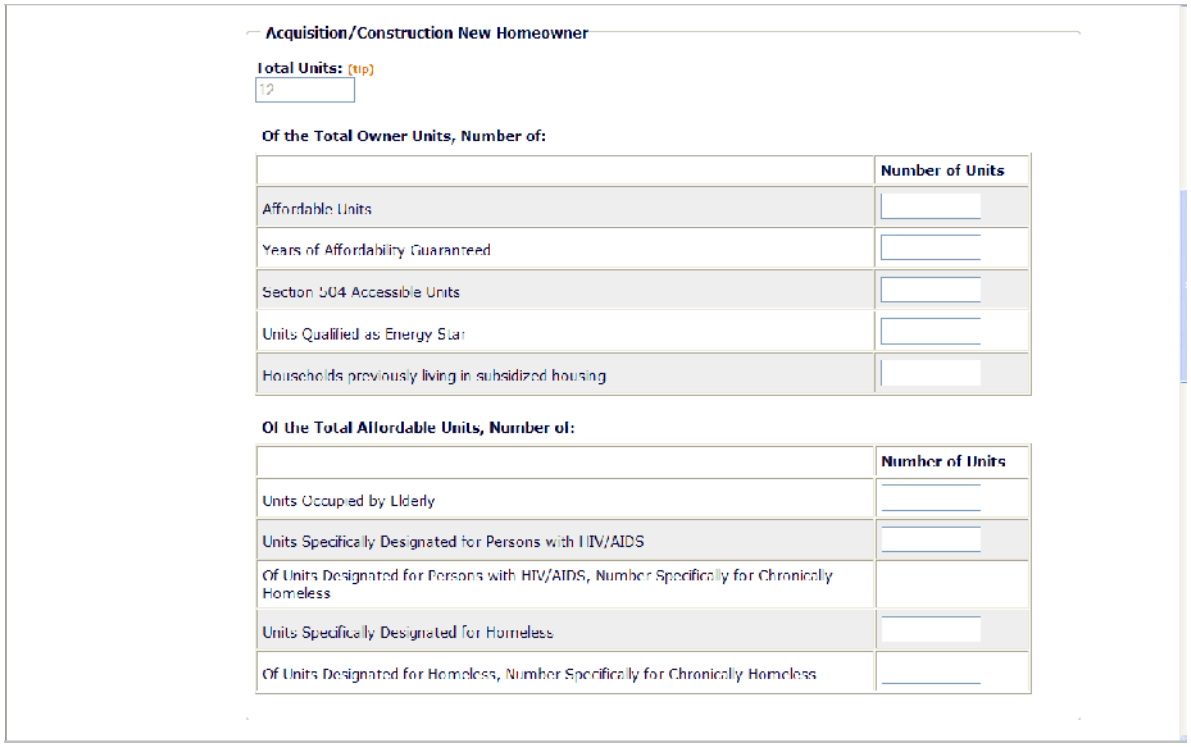
Field	Description
Total Units	This read-only field shows the ACTUAL UNITS reported on the first accomplishment screen. It will include all rental and homeowner units, not just homeowner rehab units.
Of the Total Rental Units, Number of:	
Affordable Units	Of the total rental units (this may or may not be the same as TOTAL UNITS), enter the number that are affordable, according to definitions for affordability established by the grantee.
Section 504 Accessible Units	Of the total rental units, enter the number that meet Uniform Federal Accessibility Standards (UFAS). http://www.access-board.gov/ufas/ufas-html/ufas.htm

Field	Description
Brought from Substandard to Standard Condition (HQS or Local Code)	Of the total rental units, enter the number that were substandard prior to rehabilitation that now meet Housing Quality Standards or local code, whichever is applicable. This is not a CDBG requirement, but any units brought from substandard to standard condition should be reported.
Units Qualified as Energy Star	Of the total rental units, enter the number qualifying for Energy Star certification. ***Please refer to page 59 for IMPORTANT GUIDANCE on correctly reporting Energy Star units.***
Brought into Compliance with Lead Safety Rules (24 CFR Part 35)	Of the total rental units, enter the number made lead-safe. The only units to be included in the count are pre-1978 units where the rehabilitation work exceeds the $5,000 threshold. Do not count units that are free of lead-based paint (e.g., built in 1978 or later, a lead-based paint inspection report shows no lead paint) or units where the rehabilitation does not address all surfaces that could pose a lead hazard (e.g., rehabilitation work less than $5,000 a unit).
Units Created Through Conversion of Non- Residential to Residential Buildings	Of the total rental units, enter the numbers that were created by converting non-residential buildings to residential buildings.
Of the Total Affordable Units, Number of:	
Units Occupied by Elderly	Of the AFFORDABLE UNITS, enter the number occupied by one or more persons age 62 or over.
Years of Affordability Guaranteed	Enter the total number of years of affordability the grantee has imposed for the units being reported. For activities with more than one unit, this is the sum of the number of years of affordability imposed for each unit.
Units Subsidized with Project-Based Rental Assistance by Another Federal, State or Local Program	Of the AFFORDABLE UNITS, enter the numbers that are subsidized with project-based rental assistance. Note that this only applies to assistance that is project-based: if the assistance is portable (e.g., Section 8 vouchers), do not include the unit(s) in your count.
Units Designated for Persons with HIV/AIDS, Including Units Receiving Assistance for Operations	Of the AFFORDABLE UNITS, enter the number designated for persons with HIV/AIDS.
Of Units Designated for Persons with HIV/AIDS, Number Specifically for Chronically Homeless	Of the UNITS DESIGNATED FOR PERSONS WITH HIV/AIDS, enter the number who were also chronically homeless (see definition on next page) at the point of entry.

Field	Description
Permanent Housing Units Designated for Homeless Persons and Families, Including Units Receiving Assistance for Operations	Of the AFFORDABLE UNITS, enter the number of permanent housing units designated for the homeless. Of the TOTAL HOUSEHOLDS ASSISTED, enter the numbers that were previously homeless. For more information on the definition of "homeless" see page 55.
Of Permanent Housing Units Designated for Homeless Persons and Families, Number for the Chronically Homeless	Of the PERMANENT HOUSING UNITS DESIGNATED FOR HOMELESS PERSONS AND FAMILIES, enter the number who were chronically homeless at the point of entry. For more information on the definition of "chronically homeless" see page 56.

Acquisition/Construction of New Homeowner Housing

The following performance measures are displayed for all LMH* activities when the matrix code is 01 or 12, and for SB* or URG activities when the matrix code is 01 or 12 and the Accomplishment Type is Housing Units or Households.

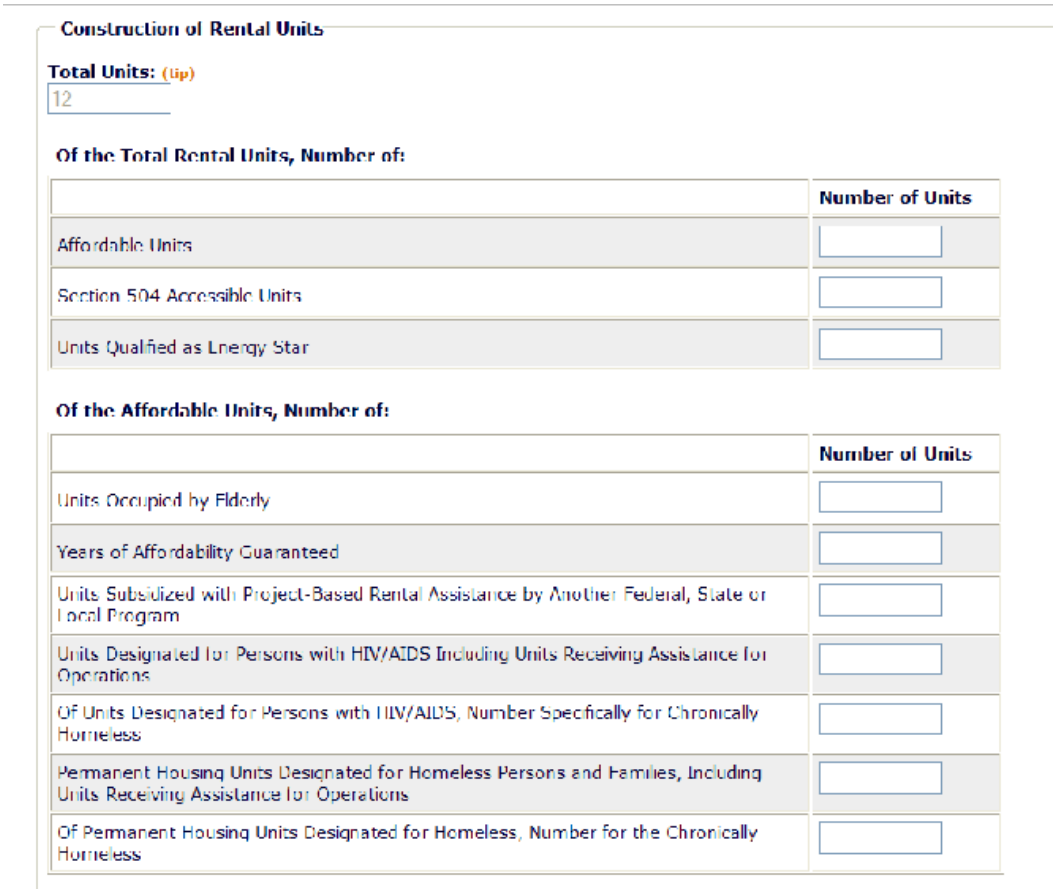


Field	Description
Total Units	This read-only field shows the ACTUAL UNITS reported on the first accomplishment screen. It will include all new rental and owner-occupied units, not just new owner-occupied units.
Of the Total Owner Units, Number of:	
Affordable Units	Of the total owner units (this may or may not be the same as TOTAL UNITS), enter the number that are affordable, according to definitions for affordability established by the grantee.
Years of Affordability Guaranteed	Enter the total number of years of affordability the grantee has imposed for the units being reported. For activities with more than one unit, this is the sum of the number of years of affordability imposed for each unit.
Section 504 Accessible Units	Of the total owner units, enter the number that meet Uniform Federal Accessibility Standards (UFAS). http://www.access-board.gov/ufas/ufas-html/ufas.htm
Units Qualified as Energy Star	Of the total owner units, enter the number qualifying for Energy Star certification. ***Please refer to page 59 for IMPORTANT GUIDANCE on correctly reporting Energy Star units.***

Field	Description
Households previously living in subsidized housing	Of the total owner units, enter the number of households that were living in public housing or receiving rental assistance from a federal, state, or local program immediately prior to CDBG assistance.
Of the Total Affordable Units, Number of:	
Units Occupied by Elderly	Of the AFFORDABLE UNITS, enter the number occupied by one or more persons age 62 or over.
Units Specifically Designated for Persons with HIV/AIDS	Of the AFFORDABLE UNITS, enter the number designated for persons with HIV/AIDS.
Of Units Designated for Persons with HIV/AIDS, Number Specifically for Chronically Homeless	Of the UNITS SPECIFICALLY DESIGNATED FOR PERSONS WITH HIV/AIDS, enter the number designated for those who were chronically homeless (see definition below) at the point of entry.
Units Specifically Designated for Homeless	Of the AFFORDABLE UNITS, enter the number designated for the homeless. Of the AFFORDABLE UNITS, enter the number of permanent housing units designated for the homeless. For more information on the definition of "homeless" see page 55.
Of Units Designated for Homeless, Number Specifically for Chronically Homeless	Of the Units Specifically Designated for Homeless, enter the number designated for those who are chronically homeless. Of the PERMANENT HOUSING UNITS DESIGNATED FOR HOMELESS PERSONS AND FAMILIES, enter the number who were chronically homeless at point of entry. For more information on the definition of "chronically homeless" see page 56.

Construction of Rental Units

The following performance measures are displayed for all LMH* activities when the matrix code is 01 or 12 and the setup field INCLUDES RENTAL HOUSING is Yes on the Setup Detail (PAGE 2) screen, and for SB* or URG activities when the matrix code is 01 or 12, the Accomplishment Type is Housing Units or Households, and the setup field INCLUDES RENTAL HOUSING is Yes on the Setup Detail (PAGE 2) screen.

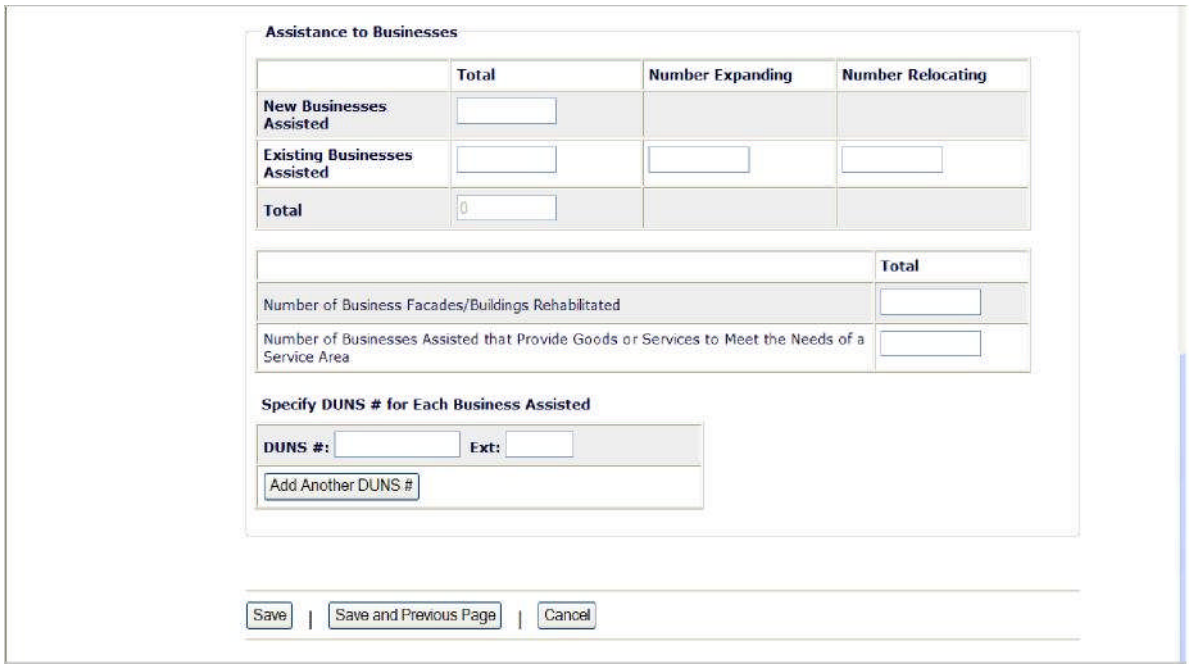


Field	Description
Total Units	This read-only field shows the ACTUAL UNITS reported on the first accomplishment screen. It will include all new rental and owner-occupied units, not just new rental units.
Of the Total Rental Units, Number of:	
Affordable Units	Of the total rental units (this may or may not be the same as TOTAL UNITS), enter the number that are affordable, according to definitions for affordability established by the grantee.
Section 504 Accessible Units	Of the total rental units, enter the number that meet Uniform Federal Accessibility Standards (UFAS). http://www.access-board.gov/ufas/ufas-html/ufas.htm
Units Qualified as Energy Star	Of the total rental units, enter the number qualifying for Energy Star certification. ***Please refer to page 59 for IMPORTANT GUIDANCE on correctly reporting Energy Star units.***
Of the Affordable Units, Number of:	
Units Occupied by Elderly	Of the AFFORDABLE UNITS, enter the number occupied by one or more persons age 62 or over.
Years of Affordability Guaranteed	Enter the total number of years of affordability the grantee has imposed for the units being reported.
Units Subsidized with Project-Based Rental Assistance by Another Federal, State or Local Program	Of the AFFORDABLE UNITS, enter the numbers that are subsidized with project-based rental assistance. This only applies to assistance that is project-based: if the assistance is portable (e.g., Section 8 vouchers), do not include the unit(s) in your count.
Units Designated for Persons with HIV/AIDS, Including Units...	Of the AFFORDABLE UNITS, enter the number designated for persons with HIV/AIDS.
Of Units Designated for Persons with HIV/AIDS, Number Specifically for Chronically Homeless	Of the UNITS DESIGNATED FOR PERSONS WITH HIV/AIDS, enter the number who were also chronically homeless (see definition below) at the point of entry.

Field	Description
Permanent Housing Units Designated for Homeless Persons and Families, Including Units Receiving Assistance for Operations	Of the AFFORDABLE UNITS, enter the number designated for the homeless. Of the AFFORDABLE UNITS, enter the number of permanent housing units designated for the homeless. For more information on the definition of "homeless" see page 55.
Of Permanent Housing Units Designated for Homeless Persons and Families, Number for the Chronically Homeless	Of the PERMANENT HOUSING UNITS DESIGNATED FOR HOMELESS PERSONS AND FAMILIES, enter the number who were chronically homeless at the point of entry. For more information on the definition of "chronically homeless" see page 56.

Assistance to Businesses

These performance measures are displayed for activities with a matrix code of 14E, 17*, or 18* and a national objective of LMJ*, SB*, or URG.



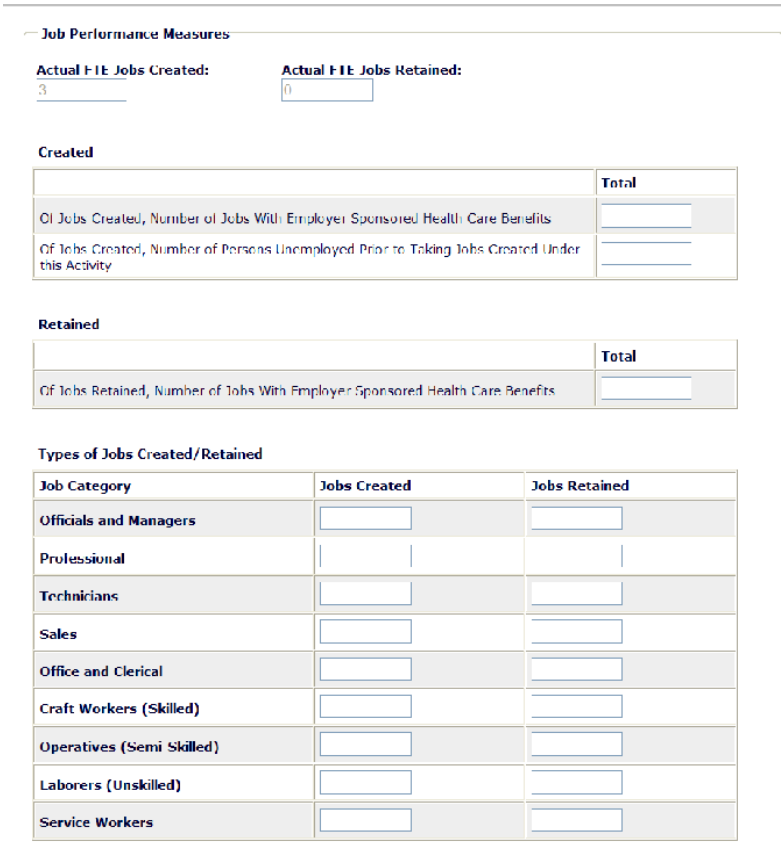
If the matrix code is 18A or 18C: The fact that this screen lets you report more than one business assisted does not mean that assistance to individual businesses under 18A or 18C may be aggregated in one activity. Unless the activity is one identified at 570.208(a)(4)(vi) [Entitlements] or 570.483 (b)(4)(vi) [States] for which job aggregation is allowed, each business assisted under 18A or 18C must be set up as a separate activity.

Field	Description
New Businesses Assisted	Enter the number of start-up businesses assisted in this program year.
Existing Businesses Assisted	Enter the number of existing businesses assisted in this program year.
Number Expanding	Of the EXISTING BUSINESSES ASSISTED, enter the numbers that are expanding as a result of the assistance.
Number Relocating	Of the EXISTING BUSINESSES ASSISTED, enter the numbers that are relocating as a result of the assistance.
Total	A read-only field showing the total number of new and existing businesses assisted.

Field	Description
Number of Business Facades/Buildings Rehabilitated	Of the TOTAL businesses, enter the number receiving assistance for the rehabilitation of business facades/ buildings.
Number of Businesses that Provide Goods or Services to Meet the Needs of a Service Area	Of the TOTAL businesses, enter the number that provides goods or services to meet the needs of a service area, neighborhood, or community.
Specify DUNS # for Each Business Assisted	A DUNS number is required for a business that receives direct financial assistance. Otherwise it is optional.
DUNS #	Enter the 9-digit DUNS number.
Ext.	Enter the 4-digit extension.
<Add Another DUNS #> button	Click this button to add a DUNS number for another business, for activities where aggregation of businesses is permitted.

Job Performance Measures

These data are reported for all LMJ* activities, for LMCMC activities and for LMAFI and LMASA activities with an ACCOMPLISHMENT TYPE of Jobs.



Field	Description
Actual FTE Jobs Created	This read-only field shows the number of FTE (full-time equivalent) jobs created from the previous screen.
Actual FTE Jobs Retained	This read-only field shows the number of FTE jobs retained from the previous screen.
Created	
Of Jobs Created, Number of Jobs with Employer Sponsored Health Care Benefits	Enter a value only if ACTUAL FTE JOBS CREATED is greater than zero.
Of Jobs Created, Number of Persons Unemployed Prior to Taking Jobs Created Under this Activity	Enter a value only if ACTUAL FTE JOBS CREATED is greater than zero.

Retained	
Of Jobs Retained, Number of Jobs with Employer Sponsored Health Care Benefits	Enter a value only if ACTUAL FTE JOBS RETAINED is greater than zero.
Types of Jobs Created/Retained	For each of the nine job categories, enter the number of jobs created in this program year in the first column and the number of jobs retained in this program year in the second column. The job categories are based on Economic Development Administration (EDA) job classifications, and are defined on HUD's website: http://www.hud.gov/offices/cpd/systems/idis/cdbg/Job%20Category%20Definitions.pdf ***Important Guidance: Accurately Reporting Jobs Created and Retained*** If ACTUAL FTE JOBS CREATED is greater than zero, the sum of the values entered in the Jobs Created column must be greater than zero before you will be allowed to complete the activity. If ACTUAL FTE JOBS RETAINED is greater than zero, the sum of the values entered in the Jobs Created column must be greater than zero before the system will allow you to complete the activity.

This is the last accomplishment screen. When you click <Save>, the Edit Activity screen will be displayed.