

The HOME Program



IDIS Exercise Manual for PJs



U.S. Department of Housing and Urban Development

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Table of Contents

Lesson 1
SINGLE-ADDRESS RENTAL ACTIVITIES..... 1-1
 Exercise 1.1 Activity Setup 1-1
 Exercise 1.2 Activity Completion 1-7

Lesson 2
MULTI-ADDRESS RENTAL ACTIVITIES 2-1
 Exercise 2.1 Activity Setup 2-1
 Exercise 2.2 Activity Completion 2-6

Lesson 3
SINGLE-ADDRESS HOMEBUYER ACTIVITIES..... 3-1
 Exercise 3.1 Activity Setup 3-1
 Exercise 3.2 Activity Completion 3-6

Lesson 4
MULTI-ADDRESS HOMEBUYER ACTIVITIES 4-1
 Exercise 4.1 Activity Setup 4-1
 Exercise 4.2 Activity Completion 4-6

Lesson 5
SINGLE-ADDRESS HOMEOWNER REHAB ACTIVITIES 5-1
 Exercise 5.1 Activity Setup 5-1
 Exercise 5.2 Activity Completion 5-4

Lesson 6
MULTI-ADDRESS HOMEOWNER REHAB ACTIVITIES..... 6-1
 Exercise 6.1 Activity Setup 6-1
 Exercise 6.2 Activity Completion 6-5

Lesson 7
TBRA ACTIVITIES..... 7-1

Lesson 8
AD/CO/CC ACTIVITIES 8-1

Lesson 9
CHDO LOAN ACTIVITIES 9-1
 Exercise 9.1 The CHDO Loan Phase 9-1
 Exercise 9.2 The Going Forward Phase 9-7

Lesson 10
SEARCH HOME ACTIVITIES..... 10-1

Lesson 1

SINGLE-ADDRESS RENTAL ACTIVITIES

This lesson covers material presented in Chapter 4 of the Training Manual.

Scenario: Your PJ is funding the rehabilitation of the Winslow Apartments, a five-unit building located at 123 Elm Street. The building is owned by George Taylor, who lives with his wife in one of the units. The work is to be performed by Interfaith Housing, a faith-based CHDO. The estimated HOME cost of the activity is \$95,000.

Exercise 1.1 Activity Setup

1. On the Main Menu, select option **A**, Set Up Activity. Complete the Common Path screens, following the standards your PJ has adopted.

Jot down the following information for use in later exercises:

CPS Project Number _____

Program Year _____

HUD Activity Number _____

2. On the fourth Common Path screen (C04MA08), enter **95,000** in TOTAL ESTIMATED AMOUNT and **X** next to HOME. Press <Enter>. On the HOME Menu, select option **A**, Rental, and press <Enter>.
3. The Set Up Activity: CHDO Questions screen is displayed (except for Insular Area users):

```
SET UP ACTIVITY: CHDO QUESTIONS                                HM01
Grantee Activity ID                                           IDIS Activity ID    9766
Activity Name WINSLOW APARTMENTS
CR ACTIVITY? Will the activity be funded with CR (Y/N)? _
If yes:
  CHDO Acting As _
                1 Owner
                2 Sponsor
                3 Developer
Will initial funding be a CHDO Site
Control and/or Seed Money Loan (Y/N)? _
F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
```

Fill in the screen this way:

Field	Input
CR ACTIVITY? Will the activity be funded with CR (Y/N)?	For this exercise, enter Y .
CHDO Acting As	For this exercise, enter 3 .
Will initial funding be a CHDO Site Control and/or Seed Money Loan (Y/N)?	For this exercise, enter N or leave blank (the system will automatically set it to N).

When you are finished, press <Enter> to save your data and continue.

4. The Activity Setup: Outcome and Objective screen is displayed:

ACTIVITY SETUP: OBJECTIVE AND OUTCOME HM01-A

Grantee Activity ID _____ HUD Activity ID 9766
 Activity Name WINSLOW APARTMENTS

OBJECTIVE

- 1 Create suitable living environments
- 2 Provide decent affordable housing
- 3 Create economic opportunities

OUTCOME

- 1 Availability/accessibility
- 2 Affordability
- 3 Sustainability

F1=HELP F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE

Fill in the screen this way:

Field	Input
OBJECTIVE	Assume that your objective in carrying out this activity is to provide decent affordable housing. You can either: <ul style="list-style-type: none"> Press <F1> to display a help screen and select the OBJECTIVE code. Enter 2. Leave the field blank to have it automatically set to 2.
OUTCOME	Assume that the expected outcome of this activity is affordability. As with the OBJECTIVE field, you can either:

Field	Input
	<ul style="list-style-type: none"> • Press <F1> to display a help screen and select the OUTCOME code. • Enter 2. • Leave the field blank to have it automatically set to 2.

When you are finished, press <Enter> to save your data and continue.

5. The Set Up Activity: Special Characteristics screen is displayed:

```

SET UP ACTIVITY: SPECIAL CHARACTERISTICS                HM01-B
Grantee Activity ID                HUD Activity ID      9766
Activity Name                WINSLOW APARTMENTS

ACTIVITY LOCATION
Type 'Y' next to any that apply:
- CDBG strategy area
- Local target area
- Presidentially declared major disaster area
- Historic preservation area
- Brownfield redevelopment area
- Conversion from non-residential to residential use
- Colonia

FAITH-BASED ORGANIZATION Will this activity be carried out by a faith-based
organization (Y/N)? _

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Note: The COLONIA field is only displayed for PJs in Arizona, California, New Mexico, and Texas.

Fill in the screen this way:

Field	Input
ACTIVITY LOCATION	<F1> displays a help screen for these fields. For this exercise, enter Y in LOCAL TARGET AREA.
FAITH-BASED ORGANIZATION	Because the developer, Interfaith Housing, is a self-declared faith-based organization, enter Y .

When you are finished, press <Enter> to save your data and continue.

6. The Set Up Rental Activity screen is displayed:

```

                                SET UP RENTAL ACTIVITY                                HR01

Grantee Activity ID              IDIS Activity ID      9766
Activity Name                    WINSLOW APARTMENTS

ACTIVITY TYPE                    -
    1 Rehab Only                  4 Acquisition & Rehab
    2 New Construction Only      5 Acquisition & New
    3 Acquisition Only           Construction

PROPERTY ADDRESS
  Street                        123 ELM STREET
  City                          ROXBURY                St MA  Zip 02120 - ____
  County Code                    ____

ACTIVITY ESTIMATES  HOME Units ____    HOME Cost _____

MULTI-ADDRESS (Y/N)? _

LOAN GUARANTEE(Y/N)? _

CHDO ACTIVITY (Y/N)? Y    Review/update CHDO information (Y/N)? _

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	For this exercise, enter 1 .
PROPERTY ADDRESS Street, City, St, Zip	These fields are populated with the address you entered on the first Common Path screen (they can be changed here). If you did not input an address on the Common Path screen, enter it now.
PROPERTY ADDRESS County Code	Press <F1> to display a list of county codes for your state and select the appropriate one.
ACTIVITY ESTIMATES HOME Units	For this exercise, enter 5 .
ACTIVITY ESTIMATES HOME Cost	For this exercise, enter 95,000 .
MULTI-ADDRESS (Y/N)?	For this exercise, enter N or leave blank.
LOAN GUARANTEE (Y/N)?	Assume that HOME funds will be used to guarantee financing provided by a private lender. Enter Y .
CHDO ACTIVITY (Y/N)?	Because you answered Y to WILL THE ACTIVITY BE FUNDED WITH CR (Y/N)? on the CHDO QUESTIONS screen, this field is set to Y and protected from update. Note to Insular Area users: This field is not displayed for you.
Review/update CHDO information (Y/N)?	Inputting Y in this field and pressing <Enter> displays the CHDO QUESTIONS screen. Once you review/update the CHDO data, you must page through the OBJECTIVE AND

Field	Input
	<p>OUTCOME and SPECIAL CHARACTERISTICS screens to redisplay the SET UP RENTAL ACTIVITY screen.</p> <p>Note to Insular Area users: This field is not displayed for you.</p>

When you are finished, press <Enter> to save your data and continue.

7. The Set Up Rental Activity: Property Owner screen is displayed:

```

                SET UP RENTAL ACTIVITY: PROPERTY OWNER                HR02
Grantee Activity ID                IDIS Activity ID    9766
Activity Name      WINSLOW APARTMENTS
Activity Address   123 ELM STREET ROXBURY MA 02120

PROPERTY OWNED BY
  1 Individual      4 Not-for-Profit
  2 Partnership    5 Publicly Owned
  3 Corporation    9 Other

OWNER'S NAME      _____

OWNER'S ADDRESS   Enter only if different from PROPERTY ADDRESS
  Street          _____
  City            _____ St __ Zip _____ - ____

F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
PROPERTY OWNED BY	For this exercise, enter 1 .
OWNER'S NAME	This field is optional. Enter the property owner's name (George Taylor), if you wish.
OWNER'S ADDRESS	Since the owner's address and the property address are the same, leave these fields blank. IDIS will populate them with the property address from the previous screen.

When you are finished, press <Enter>. Setup is complete, and the HOME Menu is displayed. Notice that the Rental setup option is highlighted.

8. To make sure that you have input all of the required setup data, select HOME Menu option **F** and press <Enter> to display the Review Activity Status screen:

REVIEW HOME ACTIVITY STATUS				STAT
Grantee Activity ID		IDIS Activity ID		9766
Activity Name	WINSLOW APARTMENTS			
Activity Address	123 ELM STREET ROXBURY MA 02120			
TYPE	Rental/Rehab Only			
STATUS	FUNDS BUDGETED			
FUNDED	0.00	Initial Funding	None	
DRAWN	0.00	Last Draw Date	None	
ESTIMATES	HOME units	5	HOME cost	95,000.00
ACTUALS	HOME units	0	HOME cost	0.00
	Total units	0	Total cost	0.00
SETUP DATA	Complete			
COMPLETION	COST DATA	Incomplete	BENEFICIARY DATA	Incomplete
F4=MAIN MENU	F5=PROJ INFO	F7=PREV	F8=NEXT	

This read-only screen is explained in detail in Chapter 16 of the Training Manual. For now, notice the SETUP DATA field. If it shows a status of:

INCOMPLETE Required data is missing. If you were to try to commit money to the activity through the Activity Funding option, you would receive an error message.

COMPLETE All required data has been input, and the activity is ready to be funded.

Pressing <Enter>, <F7>, or <F8> on this screen displays the HOME Menu.

----- **End of Exercise 1.1** -----

Exercise 1.2 Activity Completion

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.
2. On the HOME Menu, select option **H**, Costs & Beneficiaries, and press <Enter>.
3. The Complete Rental Activity screen is displayed:

COMPLETE RENTAL ACTIVITY HR03

Grantee Activity ID _____ IDIS Activity ID 9766

Activity Name WINSLOW APARTMENTS

Activity Address 123 ELM STREET ROXBURY MA 02120

ACTIVITY TYPE 1

1 Rehab Only	4 Acquisition & Rehab
2 New Construction Only	5 Acquisition & New Construction
3 Acquisition Only	

PROPERTY TYPE -

1 Condominium	4 Apartment
2 Cooperative	5 Other
3 SRO	

YES OR NO (Y/N) FHA insured? _ Mixed use? _ Mixed income? _

COMPLETED UNITS Total number 5

HOME-assisted 5

F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	This field is populated with the ACTIVITY TYPE you entered at setup (for this exercise, 1). It can be changed here.
PROPERTY TYPE	For this exercise, enter 4 .
YES OR NO (Y/N) FHA insured? Mixed use? Mixed income?	For this exercise, assume that the property is not insured by the FHA, that it is 100% residential, and that all five units meet the HOME qualifications for affordable housing. Consequently, enter N in each field or leave blank to have it automatically set to N.
COMPLETED UNITS Total Number	This field is populated with the estimated number of units you entered at setup (for this exercise, 5), but may be changed.
COMPLETED UNITS HOME-assisted	This field is also populated with the estimated number of units you entered at setup, but may be changed. For this exercise, leave it at 5 .

When you are finished, press <Enter> to save your data and continue.

4. The Complete Rental Activity: Units screen is displayed:

```

                                COMPLETE RENTAL ACTIVITY: UNITS                                HR03-A
Grantee Activity ID              IDIS Activity ID      9766
Activity Name                    WINSLOW APARTMENTS
Activity Address                 123 ELM STREET ROXBURY MA 02120

COMPLETED UNITS      Total      5   HOME-Assisted      5

OF THE UNITS COMPLETED, THE NUMBER:
                                TOTAL      HOME-
                                ASSISTED

                                Meeting Energy Star standards:  ___  ___
                                504-accessible:                ___
                                Designated for persons with HIV/AIDS:  ___  ___
Of those, the number for the chronically homeless:  ___  ___
                                Designated for the homeless:      ___  ___
Of those, the number for the chronically homeless:  ___  ___

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
COMPLETED UNITS Total	This protected field displays the TOTAL NUMBER of units from the previous screen. The numbers you enter in the TOTAL column below cannot exceed this number.
COMPLETED UNITS HOME-Assisted	This protected field displays the number of HOME-ASSISTED completed units from the previous screen. The numbers you enter in the HOME-ASSISTED column below cannot exceed this number.
Meeting Energy Star standards	Press <F1> to display the help screen for this field. In the TOTAL column, enter the total number of units certified by Energy Star. In the HOME-ASSISTED column, enter the number of HOME-assisted units certified by Energy Star. It cannot be more than the number you entered in the TOTAL column.
504-accessible	Enter the total number of units that are 504-accessible.
Designated for persons with HIV/AIDS	In the TOTAL column, enter the total number of rental units developed specifically for occupancy by persons with HIV/AIDS. In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by persons with HIV/AIDS. It cannot be more than the number you entered in the TOTAL column.

Field	Input
Of those, the number for the chronically homeless	<p>In the TOTAL column, enter the total number of units developed specifically for occupancy by persons with HIV/AIDS who met the HUD definition of "chronically homeless" (provided on the <F1> help screen for this field) at entry. This number cannot be greater than the total number of units designated for persons with HIV/AIDS.</p> <p>In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by persons with HIV/AIDS who met the HUD definition of "chronically homeless" at entry. This number cannot be greater than the number of HOME-assisted units designated for persons with HIV/AIDS.</p>
Designated for the homeless	<p>In the TOTAL column, enter the total number of units developed specifically for occupancy by persons who met the HUD definition of "homeless" (provided on the <F1> help screen for this field) at entry.</p> <p>In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by persons who met the HUD definition of "homeless" at entry. It cannot be more than the number you entered in the TOTAL column.</p>
Of those, the number for the chronically homeless	<p>In the TOTAL column, enter the total number of units developed specifically for occupancy by homeless persons who met the HUD definition of "chronically homeless" at entry. This number cannot be greater than the total number of units designated for the homeless.</p> <p>In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by homeless persons who met the HUD definition of "chronically homeless" at entry. This number cannot be greater than the number of HOME-assisted units designated for the homeless.</p>

When you are finished, press <Enter> to save your data and continue.

5. The Complete Rental Activity: Period of Affordability screen is displayed:

```

                COMPLETE RENTAL ACTIVITY: PERIOD OF AFFORDABILITY          HR03-B

Grantee Activity ID          IDIS Activity ID          9766
Activity Name                WINSLOW APARTMENTS
Activity Address             123 ELM STREET ROXBURY MA 02120

PERIOD OF AFFORDABILITY     If you are imposing a period of affordability that is
                             longer than the regulatory minimum, enter the total
                             years (HOME minimum + additional) of affordability.

                             PJ-imposed period of affordability:  __ years

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
PJ-imposed period of affordability	<p>Press <F1> to display the help screen for this field.</p> <p>If your PJ is imposing a longer period of affordability (POA) than the HOME regulations require, enter the total number of years (HOME minimum plus additional) in this field. To indicate that the HOME-assisted units are to remain affordable in perpetuity, enter 99.</p> <p>If you are not imposing a longer-than-required POA, leave the field blank.</p>

When you are finished, press <Enter> to save your data and continue.

6. The default version of the Complete Rental Activity: Costs screen is displayed.

```

                COMPLETE RENTAL ACTIVITY: COSTS                                HR04
Grantee Activity ID                                IDIS Activity ID    9766
Activity Name      WINSLOW APARTMENTS
Activity Address   123 ELM STREET ROXBURY MA 02120

1. HOME FUNDS                                     Totals
   (Including PI)      Amortized Loan _____
                       Grant           _____
                       Deferred Payment Loan _____
                       Other           _____                                0.00

2. PUBLIC FUNDS      Other Federal Funds _____
                       State/Local Funds _____
                       Tax-Exempt Bond Proceeds _____                                0.00

3. PRIVATE FUNDS      Private Loans _____
                       Owner Cash Contributions _____
                       Private Grants _____                                0.00

4. LOW INCOME HOUSING TAX CREDIT PROCEEDS _____                                0.00
HOME Funds Disbursed      0.00      Activity Total      0.00
To display alternate costs screen, press <F15>.
F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE F15=ALT
    
```

Enter all amounts as dollars and cents. If you omit the decimal point and cents, IDIS appends '.00' when the amount is saved. Fields that you leave blank will automatically be set to '0.00'.

Fill in the screen this way (the sample data you are asked to input is not realistic, but is intended rather to illustrate how the alternate version of the cost screen works):

Field	Input
HOME FUNDS (Including PI)	<p>Enter the amount of HOME funds provided by form of assistance.</p> <p>For this exercise, enter the following:</p> <ul style="list-style-type: none"> • AMORTIZED LOAN: 89,000 • GRANT: 3,000 • DEFERRED PAYMENT LOAN: 2,000 • OTHER: 1,000 <p>The HOME total (displayed to the right of the OTHER column) must match HOME FUNDS DISBURSED (displayed at the lower left of the screen) to the penny before you will be allowed to set the status of the activity to "complete."</p>
PUBLIC FUNDS	<p>Enter the amount of activity costs paid for with other federal (non-HOME) funds, state or local government funds, and/or tax-exempt bond proceeds.</p> <p>For this exercise, enter 60,000 in OTHER FEDERAL FUNDS.</p>
PRIVATE FUNDS	<p>Enter the amount of activity costs paid for with private loans, owner cash contributions, and/or private grants.</p> <p>For this exercise, enter 40,000 in PRIVATE LOANS.</p>

Field	Input
LOW INCOME HOUSING TAX CREDIT PROCEEDS	Enter the amount of activity costs paid for with proceeds from the Low Income Housing Tax Credit (LIHTC) program. For this exercise, enter 20,000 .

When you are finished, press <F9> to save your data and display the totals.

7. Press <F15> (on most keyboards, <Shift + F3>) to display the alternate version of the cost screen.

```

                                COMPLETE RENTAL ACTIVITY: COSTS                                HR05
Grantee Activity ID                                IDIS Activity ID    9766
Activity Name      WINSLOW APARTMENTS
Activity Address   123 ELM STREET ROXBURY MA 02120

Source      Form of      Amount
of Funds    Assistance
  1          1          89,000.00
  1          2           3,000.00
  1          3           2,000.00
  1          5           1,000.00
  4          -          60,000.00
  7          -          40,000.00
  10         -          20,000.00
  ---        -
  ---        -          Activity Total    215,000.00

Total HOME funds      95,000.00
HOME funds disbursed    0.00

* Source Codes
  1 HOME funds (including PI)
  4 Other federal funds
  5 State/local funds
  6 Tax-exempt bond proceeds
  7 Private loans
  8 Owner cash contributions
  9 Private grants
  10 Low income tax credit

* Forms of HOME Assistance
  1 Amortized loan
  2 Grant
  3 Deferred payment loan
  5 Other

To display alternate costs screen, press <F15>.
F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE F15=ALT
    
```

You can see that the alternate version requires the same data as the default version, but in a different format. If you prefer the alternate version, press <F15> when the default version is first displayed.

When you have finished reviewing the screen, press <Enter> to continue.

8. The Complete Rental Activity: Beneficiaries screen is displayed:

```

                COMPLETE RENTAL ACTIVITY: BENEFICIARIES                                HR06
Grantee Activity ID          IDIS Activity ID          9766
Activity Name                WINSLOW APARTMENTS
Activity Address             123 ELM STREET ROXBURY MA 02120

Unit#   # of   Occu-   Total   -----HOUSEHOLD-----   Asst
        Bdrms  pant   Monthly Rent   %Med  Hisp?  Race  Size  Type  Type
-----  -    -      -         -    -    -    -    -    -
        -    -      -         -    -    -    -    -    -
        -    -      -         -    -    -    -    -    -
        -    -      -         -    -    -    -    -    -
        -    -      -         -    -    -    -    -    -

More units at this address(Y/N)? _                Unit Count    0 of    5

For vacant units: Enter Unit# and # of Bdrms. Change Occupant to 9.
F1=HELP  F3=VLDT  F4=MAIN MENU  F7=PREV  F8=NEXT  F9=SAVE
    
```

Notice that the number of input lines displayed is the same as the number of HOME-ASSISTED COMPLETED UNITS you entered on the first completion screen (for this exercise, 5).

An <F1> help screen is available for each field except UNIT# and TOTAL MONTHLY RENT. Use them until you become familiar with the codes.

Use the information below to fill in the beneficiary screen, or supply your own if you prefer.

Unit#	# of Bdrms	Occu-pant	Monthly Rent	%Med	Hisp?	Race	Size	Type	Asst Type
101	1	Owner		50-60	No	Black	1	Elderly	Section 8
102	2	Tenant	1,000	0-30	No	Black	2	Single parent	Local assistance
103	1	Tenant	850	0-30	Yes	White	1	Single, non-elderly	Local assistance
201	2	Tenant	975	0-30	No	Asian	2	Other	HOME TBRA
202	2	Tenant	975	30-50	No	White	3	Two parents	Section 8

When you are finished, press <Enter> to save your data. The HOME Menu is displayed.

9. To make sure that you have input all of the required completion data, select option **F** and press <Enter> to display the Review Activity Status screen:

REVIEW HOME ACTIVITY STATUS				STAT
Grantee Activity ID		IDIS Activity ID		9766
Activity Name	WINSLOW APARTMENTS			
Activity Address	123 ELM STREET ROXBURY MA 02120			
TYPE	Rental/Rehab Only			
STATUS	FUNDS BUDGETED			
FUNDED	95,000.00	Initial Funding	11-15-05	
DRAWN	0.00	Last Draw Date	None	
ESTIMATES	HOME units	5	HOME cost	95,000.00
ACTUALS	HOME units	5	HOME cost	95,000.00
	Total units	5	Total cost	320,000.00
SETUP DATA	Complete			
COMPLETION	COST DATA	Complete	BENEFICIARY DATA	Complete
F4=MAIN MENU	F5=PROJ INFO	F7=PREV	F8=NEXT	

This read-only screen is explained in detail in Chapter 16 of the Training Manual. For now, notice the two COMPLETION fields, COST DATA and BENEFICIARY DATA. The status of both must be COMPLETE before you will be allowed to change the Activity Status to "complete" on Common Path screen MA04. If the status of either is INCOMPLETE, you must first supply the missing cost and/or beneficiary data.

Also, compare the DRAWN and HOME COST fields. Because you haven't drawn down funds for this exercise, the DRAWN amount is \$0.00. The HOME COST field shows the total of the HOME amounts you entered on the cost screen (see page 1-11). The DRAWN and HOME COST amounts must match to the penny before the ACTIVITY STATUS CODE can be updated to "complete."

Pressing <Enter>, <F7>, or <F8> on this screen displays the HOME Menu.

Lesson 2

MULTI-ADDRESS RENTAL ACTIVITIES

This lesson covers material presented in Chapter 5 of the Training Manual.

Scenario: Your PJ is funding an activity to acquire and renovate the Creekview I and Creekview II Garden Apartments. The buildings are located at 236 and 238 West Allen Avenue, and are owned and managed by RBG Associates. There are four units in the first building and six units in the other. The work will be performed by The Three Sisters, a (non-CHDO) limited partnership. The estimated HOME cost is \$150,000.

Exercise 2.1 Activity Setup

1. On the Main Menu, select option **A**, Set Up Activity. Complete the Common Path screens, following the standards your PJ has adopted.

Jot down the following information for use in later exercises:

CPS Project Number _____

Program Year _____

HUD Activity Number _____

2. On the fourth Common Path screen (C04MA08), enter **150,000** in TOTAL ESTIMATED AMOUNT and **X** next to HOME. Press <Enter>. On the HOME MENU, select option **A**, Rental, and press <Enter>.
3. The Set Up Activity: CHDO Questions screen is displayed (except for Insular Area users):

```
SET UP ACTIVITY: CHDO QUESTIONS                                HM01
Grantee Activity ID                                           IDIS Activity ID    9769
Activity Name          CREEKVIEW GARDEN APARTMENTS I AND II
CR ACTIVITY?          Will the activity be funded with CR (Y/N)?  _
If yes:
    CHDO Acting As    _
                    1  Owner
                    2  Sponsor
                    3  Developer
Will initial funding be a CHDO Site
Control and/or Seed Money Loan (Y/N)?  _

F3=VALDT   F4=MAIN MENU   F5=PROJ INFO   F7=PREV   F8=NEXT   F9=SAVE
```

Since CHDO Reserve (CR) will not be used to fund this activity, you can just press <Enter> when the CHDO QUESTIONS screen is displayed. The system automatically sets CR ACTIVITY? and WILL INITIAL FUNDING BE... to **N** and CHDO ACTING AS to a blank.

4. After you press <Enter>, the Activity Setup: Outcome and Objective screen is displayed:

```

                                ACTIVITY SETUP: OBJECTIVE AND OUTCOME                                HM01-A
Grantee Activity ID              HUD Activity ID              9766
Activity Name                    WINSLOW APARTMENTS
OBJECTIVE                        -
                                1 Create suitable living environments
                                2 Provide decent affordable housing
                                3 Create economic opportunities
OUTCOME                          -
                                1 Availability/accessibility
                                2 Affordability
                                3 Sustainability
F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
```

Let's say your objective for this activity is to provide decent affordable housing (code **2**) and the expected outcome is affordability (also code **2**). The system automatically sets OBJECTIVE to **2** if it is left blank and OUTCOME to **2** if it is left blank, so you can just press <Enter> to continue to the next screen.

5. After you press <Enter>, the Set Up Activity: Special Characteristics screen is displayed:

```

                                SET UP ACTIVITY: SPECIAL CHARACTERISTICS                                HM01-B
Grantee Activity ID                                HUD Activity ID                                9769
Activity Name                                CREEKVIEW GARDEN APARTMENTS I AND II

ACTIVITY LOCATION                                Type 'Y' next to any that apply:
- CDBG strategy area
- Local target area
- Presidentially declared major disaster area
- Historic preservation area
- Brownfield redevelopment area
- Conversion from non-residential to residential use
- Colonia

FAITH-BASED ORGANIZATION                                Will this activity be carried out by a faith-based
organization (Y/N)? _

F1=HELP    F3=VALDT    F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT    F9=SAVE
    
```

Note: The COLONIA field is only displayed for PJs in Arizona, California, New Mexico, and Texas.

For this exercise, let's assume that the apartment buildings are not located in any of the areas listed on the screen and that the activity is not being carried out by a faith-based organization. When this is the case, you can just press <Enter> when the screen is displayed. The system sets all of the fields to **N**.

6. After you press <Enter>, the Set Up Rental Activity screen is displayed:

```

                                SET UP RENTAL ACTIVITY                                HR01
Grantee Activity ID                                IDIS Activity ID                                9769
Activity Name                                CREEKVIEW GARDEN APARTMENTS I AND II

ACTIVITY TYPE
-
1 Rehab Only                                4 Acquisition & Rehab
2 New Construction Only                    5 Acquisition & New
3 Acquisition Only                            Construction

PROPERTY ADDRESS
Street                                236 & 238 WEST ALLEN AVENUE
City                                HOLLAND                                St MI    Zip 49424 - ____
County Code                                ____

ACTIVITY ESTIMATES    HOME Units    ____    HOME Cost    ____

MULTI-ADDRESS (Y/N)? _
LOAN GUARANTEE(Y/N)? _
CHDO ACTIVITY (Y/N)? N

F1=HELP    F3=VALDT    F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT    F9=SAVE
    
```

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	For this exercise, enter 4 .
PROPERTY ADDRESS Street, City, St, Zip	These fields are populated with the address you entered on the first Common Path screen (they can be changed here). If you did not input an address on the Common Path screen, enter it now.
PROPERTY ADDRESS County Code	Press <F1> to display a list of county codes for your state and select the appropriate one.
ACTIVITY ESTIMATES HOME Units	Enter the total number of units at both addresses to be assisted with HOME funds—for this exercise, 10 .
ACTIVITY ESTIMATES HOME Cost	For this exercise, enter 150,000 .
MULTI-ADDRESS (Y/N)?	For this exercise, enter Y .
LOAN GUARANTEE (Y/N)?	For this exercise, assume that HOME funds will not be used to guarantee financing provided by a private lender. Enter N or leave blank to have the field automatically set to N.
CHDO ACTIVITY (Y/N)?	<p>Because you answered N to WILL THE ACTIVITY BE FUNDED WITH CR (Y/N)? on the CHDO QUESTIONS screen, this field is set to N.</p> <p>Should you change your mind about using CHDO funds, you can type Y over the N, press <Enter> to display the CHDO QUESTIONS screen, and update your input there. For this exercise, leave the field set to Y.</p> <p>Note to Insular Area users: This field is not displayed for you.</p>

When you are finished, press <Enter> to save your data and continue.

7. The Set Up Rental Activity: Developer screen is displayed:

```

                                SET UP RENTAL ACTIVITY: DEVELOPER                                HR02
Grantee Activity ID                                IDIS Activity ID                                9769
Activity Name                                CREEKVIEW GARDEN APARTMENTS I AND II
Activity Address                                236 & 238 WEST ALLEN AVENUE HOLLAND MI 49424

DEVELOPER TYPE
1 Individual                                4 Not-for-Profit
2 Partnership                                5 Publicly Owned
3 Corporation                                9 Other

DEVELOPER'S NAME                                _____

DEVELOPER'S ADDRESS
Street _____
City _____ St __ Zip _____ - ____

F3=VALDT    F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT    F9=SAVE
    
```

Fill in the screen this way:

Field	Input
DEVELOPER TYPE	For this exercise, enter 2 .
DEVELOPER'S NAME	This field is optional. Enter the name of the developer (The Three Sisters) if you wish.
DEVELOPER'S ADDRESS	Enter the address for The Three Sisters.

When you are finished, press <Enter>. Setup is complete, and the HOME Menu is displayed. Notice that the Rental setup option is highlighted.

To make sure that all required setup data has been input, select option **F** and press <Enter> to display the Review Activity Status screen. Confirm that the SETUP DATA status is COMPLETE.

----- End of Exercise 2.1 -----

Exercise 2.2 Activity Completion

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.
2. On the HOME Menu, select option **H**, Costs & Beneficiaries, and press <Enter>.
3. The Complete Rental Activity screen is displayed:

COMPLETE RENTAL ACTIVITY		HR03
Grantee Activity ID	IDIS Activity ID	9769
Activity Name	CREEKVIEW GARDEN APARTMENTS I AND II	
Activity Address	236 & 238 WEST ALLEN AVENUE HOLLAND MI 49424	
ACTIVITY TYPE	4	
	1 Rehab Only	4 Acquisition & Rehab
	2 New Construction Only	5 Acquisition & New
	3 Acquisition Only	Construction
PROPERTY TYPE	-	
	1 Condominium	4 Apartment
	2 Cooperative	5 Other
	3 SRO	
YES OR NO (Y/N)	FHA insured? _	Mixed use? _ Mixed income? _
COMPLETED UNITS	Total number	10
	HOME-assisted	10
F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE		

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	This field is populated with the ACTIVITY TYPE you entered at setup (for this exercise, 4). It can be changed here.
PROPERTY TYPE	For this exercise, enter 4 .
YES OR NO (Y/N) FHA insured? Mixed use? Mixed income?	For this exercise, assume that the property is insured by the FHA, that it is 100% residential, and that all units meet the HOME qualifications for affordable housing. Consequently, enter Y in FHA INSURED and leave the other two fields blank.
COMPLETED UNITS Total Number	This field is populated with the estimated number of units you entered at setup (for this exercise, 10), but may be changed.
COMPLETED UNITS HOME-assisted	This field is also populated with the estimated number of units you entered at setup, but may be changed. For this exercise, leave it at 10 .

When you are finished, press <Enter> to save your data and continue.

4. The Complete Rental Activity: Units screen is displayed:

```

                COMPLETE RENTAL ACTIVITY: UNITS                                HR03-A

Grantee Activity ID          IDIS Activity ID          9769
Activity Name                CREEKVIEW GARDEN APARTMENTS I AND II
Activity Address             236 & 238 WEST ALLEN AVENUE HOLLAND MI 49424

COMPLETED UNITS           Total    10    HOME-Assisted    10

OF THE UNITS COMPLETED, THE NUMBER:                                TOTAL    HOME-
                                                                    ASSISTED

                Meeting Energy Star standards:    ___    ___
                    504-accessible:                ___
                Designated for persons with HIV/AIDS:    ___    ___
Of those, the number for the chronically homeless:    ___    ___
                Designated for the homeless:          ___    ___
Of those, the number for the chronically homeless:    ___    ___

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
COMPLETED UNITS Total	This protected field displays the TOTAL NUMBER of units from the previous screen. The numbers you enter in the TOTAL column below cannot exceed this number.
COMPLETED UNITS HOME-Assisted	This protected field displays the number of HOME-ASSISTED units from the previous screen. The numbers you enter in the HOME-ASSISTED column below cannot exceed this number.
Meeting Energy Star standards	Press <F1> to display the help screen for this field. In the TOTAL column, enter the total number of units certified by Energy Star. In the HOME-ASSISTED column, enter the number of HOME-assisted units certified by Energy Star. It cannot be more than the number you entered in the TOTAL column.
504-accessible	Enter the total number of units that are 504-accessible.
Designated for persons with HIV/AIDS	In the TOTAL column, enter the total number of rental units developed specifically for occupancy by persons with HIV/AIDS. In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by persons with HIV/AIDS. It cannot be more than the number you entered in the TOTAL column.

Field	Input
Of those, the number for the chronically homeless	<p>In the TOTAL column, enter the total number of units developed specifically for occupancy by persons with HIV/AIDS who met the HUD definition of "chronically homeless" (provided on the <F1> help screen for this field) at entry. This number cannot be greater than the total number of units designated for persons with HIV/AIDS.</p> <p>In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by persons with HIV/AIDS who met the HUD definition of "chronically homeless" at entry. This number cannot be greater than the number of HOME-assisted units designated for persons with HIV/AIDS.</p>
Designated for the homeless	<p>In the TOTAL column, enter the total number of units developed specifically for occupancy by persons who met the HUD definition of "homeless" (provided on the <F1> help screen for this field) at entry.</p> <p>In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by persons who met the HUD definition of "homeless" at entry. It cannot be more than the number you entered in the TOTAL column.</p>
Of those, the number for the chronically homeless	<p>In the TOTAL column, enter the total number of units developed specifically for occupancy by homeless persons who met the HUD definition of "chronically homeless" at entry. This number cannot be greater than the total number of units designated for the homeless.</p> <p>In the HOME-ASSISTED column, enter the number of HOME-assisted units developed specifically for occupancy by homeless persons who met the HUD definition of "chronically homeless" at entry. This number cannot be greater than the number of HOME-assisted units designated for the homeless.</p>

When you are finished, press <Enter> to save your data and continue.

5. The Complete Rental Activity: Period of Affordability screen is displayed:

```

                COMPLETE RENTAL ACTIVITY: PERIOD OF AFFORDABILITY                HR03-B

Grantee Activity ID                IDIS Activity ID                9769
Activity Name                CREEKVIEW GARDEN APARTMENTS I AND II
Activity Address                236 & 238 WEST ALLEN AVENUE HOLLAND MI 49424

PERIOD OF AFFORDABILITY                If you are imposing a period of affordability that is
                                        longer than the regulatory minimum, enter the total
                                        years (HOME minimum + additional) of affordability.

                                        PJ-imposed period of affordability:  __ years

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
PJ-imposed period of affordability	<p>Press <F1> to display the help screen for this field.</p> <p>If your PJ is imposing a longer period of affordability (POA) than the HOME regulations require, enter the total number of years (HOME minimum plus additional) in this field. To indicate that the HOME-assisted units are to remain affordable in perpetuity, enter 99.</p> <p>If you are not imposing a longer-than-required POA, leave the field blank.</p>

When you are finished, press <Enter> to save your data and continue.

6. The Property Addresses screen is displayed:

```

PROPERTY ADDRESSES
Grantee Activity ID _____ IDIS Activity ID _____ ADRS 9769
Activity Name CREEKVIEW GARDEN APARTMENTS I AND II

Enter X to select, P to paste previous address, or D to delete

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

Add more addresses(Y/N)? _ Display cumulative totals(Y/N)? _

F1=HELP F3=VALDT F4=MAIN MENU F7=PREV F8=NEXT F9=SAVE
    
```

Fill in the first address block on the screen this way:

Field	Input
Name	This field is optional. For this exercise, enter Creekview Garden Apartments I .
Street	Enter the street name and number of the first property— for this exercise, 236 West Allen Avenue .
City, State, Zip, County	Enter this information for the property. If you do not know the COUNTY CODE, press <F1> to select one from the list displayed.

When you are finished, press <Enter>. Notice that <Enter> saves your input but does not advance to the next screen. To display the next rental completion screen, you must input an **X** in the selection field—the unnamed field located to the left of NAME—of one of the address blocks (you will do this shortly).

The three codes that can be entered in the selection field are shown at the top of the screen. They are:

- **X** – to access the cost and beneficiary screens for the address.
- **P** – to paste the previous address into the next empty address block
- **D** – to delete the address *and any cost and beneficiary data that has been entered for it*

To see how the “paste previous address” function works, type **P** in the selection field of the second address block and press <Enter>.

```

                                PROPERTY ADDRESSES                                ADRS
Grantee Activity ID              IDIS Activity ID              9769
Activity Name                    CREEKVIEW APARTMENTS I AND II

Enter X to select, P to paste previous address, or D to delete

_ Name      CREEKVIEW GARDEN APARTMENTS I
  Street    236 WEST ALLEN AVENUE
  City      HOLLAND                St MI  Zip 49424 - ____ County 25

_ Name      _____
  Street    236 WEST ALLEN AVENUE
  City      HOLLAND                St MI  Zip 49424 - ____ County 25

_ Name      _____
  Street    _____
  City      _____            St __  Zip ____ - ____ County ____

_ Name      _____
  Street    _____
  City      _____            St __  Zip ____ - ____ County ____
Add more addresses(Y/N)? _      Display cumulative totals(Y/N)? _

F1=HELP  F3=VALDT  F4=MAIN MENU  F7=PREV  F8=NEXT  F9=SAVE
    
```

You can now input the name of the second apartment building (for this exercise, **Creekview Garden Apartments II**) if you wish. Update the street number to **238**.

When you are finished, type **X** in the selection field of the first address block and press <Enter> to continue.

- The default version of the multi-address Complete Rental Activity: Costs screen is displayed. Notice that the address you selected on the previous screen is displayed in the PROPERTY ADDRESS field at the top of this screen.

```

                                COMPLETE RENTAL ACTIVITY: COSTS                                HR04

Grantee Activity ID              IDIS Activity ID              9769
Activity Name                    CREEKVIEW GARDEN APARTMENTS I AND II
Property Address                 236 WEST ALLEN AVENUE HOLLAND MI 49424
                                Address Totals

1. HOME FUNDS (Including PI)
   Amortized Loan _____
   Grant          _____
   Deferred Payment Loan _____
   Other          _____ 0.00

2. PUBLIC FUNDS
   Other Federal Funds _____
   State/Local Funds _____
   Tax-Exempt Bond Proceeds _____ 0.00

3. PRIVATE FUNDS
   Private Loans _____
   Owner Cash Contributions _____
   Private Grants _____ 0.00

4. LOW INCOME HOUSING TAX CREDIT PROCEEDS _____ 0.00
   Total This Address: _____ 0.00

To display alternate costs screen, press <F15>.
F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE  F15=ALT
    
```

Fill in this screen with the costs incurred at 236 West Allen Avenue. For this exercise, input the following values:

Field	Input
HOME FUNDS (Including PI)	AMORTIZED LOAN: 60,000
PUBLIC FUNDS	STATE/LOCAL FUNDS: 82,000
PRIVATE FUNDS	PRIVATE GRANTS: 64,000

When you are finished, press <Enter> to save your data and continue.

8. The Complete Rental Activity: Beneficiaries screen for the building at 236 West Allen is displayed:

```

                COMPLETE RENTAL ACTIVITY: BENEFICIARIES                                HR06

Grantee Activity ID                                IDIS Activity ID    9769
Activity Name      CREEKVIEW GARDEN APARTMENTS I AND II
Property Address   236 WEST ALLEN AVENUE HOLLAND MI 49424

Unit#    # of    Occu-    Total    -----HOUSEHOLD-----    Asst
         Bdrms  pant    Monthly Rent    %Med  Hisp?  Race  Size  Type  Type
-----  -    -      -      -    -    -    -    -    -
         -    -      -      -    -    -    -    -    -    -
         -    -      -      -    -    -    -    -    -    -
         -    -      -      -    -    -    -    -    -    -
         -    -      -      -    -    -    -    -    -    -
         -    -      -      -    -    -    -    -    -    -
         -    -      -      -    -    -    -    -    -    -
         -    -      -      -    -    -    -    -    -    -
         -    -      -      -    -    -    -    -    -    -
         -    -      -      -    -    -    -    -    -    -
         -    -      -      -    -    -    -    -    -    -
         -    -      -      -    -    -    -    -    -    -

More units at this address(Y/N)? _                                Unit Count    0 of 10

For vacant units: Enter Unit# and # of Bdrms. Change Occupant to 9.
F1=HELP  F3=VLDT  F4=MAIN MENU  F7=PREV  F8=NEXT  F9=SAVE
    
```

Notice the UNIT COUNT field at the lower right of your screen. The first number shows how many units you have entered data for on all the beneficiary screens for this activity; the second shows the number you entered in COMPLETED HOME-ASSISTED UNITS on the first completion screen. These two numbers have to be equal before you will be allowed to update the ACTIVITY STATUS CODE to "complete."

Use the information below (or supply your own if you prefer) to enter one line for each of the four units at 236 West Allen Avenue. An <F1> help screen is available for each field except UNIT NUMBER and TOTAL MONTHLY RENT.

Unit#	# of Bdrms	Occu-pant	Monthly Rent	%Med	Hisp?	Race	Size	Type	Asst Type
A	1	Tenant	650	60-80	No	Black	1	Single, non-elderly	Local assistance
B	2	Tenant	800	50-60	No	Asian	2	Single	Local

Unit#	# of Bdrms	Occupant	Monthly Rent	%Med	Hisp?	Race	Size	Type	Asst Type
						& White		parent	assistance
C	1	Tenant	650	50-60	Yes	Black & White	1	Other	Local assistance
D	2	Tenant	800	50-60	Yes	Other Multi-Racial	2	Two parents	Local assistance

When you have finished:

- a. Press <F9> to save your data.
 - b. Press <F7> twice to return to the Property Addresses screen.
9. Before entering the cost and beneficiary data for the second property, let's first look at the summary screens for a multi-address activity.

On the Property Addresses screen, press <Shift + Tab> to move the cursor to the DISPLAY CUMULATIVE TOTALS (Y/N)? field at the bottom right. Type **Y** and press <Enter>. The Multi-Address Activity Summary screen is displayed:

```

                                MULTI-ADDRESS ACTIVITY SUMMARY                                HR98
Grantee Activity ID                                IDIS Activity ID                                9769
Activity Name                                CREEKVIEW GARDEN APARTMENTS I AND II
Activity Address                                236 & 238 WEST ALLEN AVENUE HOLLAND MI 49424

ACTIVITY TOTALS, ALL ADDRESSES

HOME Funds (Including PI)                                60,000.00
Public Funds                                82,000.00
Private Funds                                64,000.00
Low-Income Tax Credit                                0.00

                                TOTAL                                206,000.00

Cost data entered for 1 of 2 addresses
Unit data entered for 4 of 10 units

Total HOME Funds Disbursed                                0.00

View cost details (Y/N)? _                                Select another address (Y/N)? _

F4=MAIN MENU      F7=PREV      F8=NEXT
    
```

This screen provides activity-level totals for the cost and beneficiary data you input separately for each address in a multi-address activity.

- Because data has been entered for only one address, the dollar amounts here are identical to the dollar amounts you input on the cost screen for the building at 236 West Allen Avenue. Before you will be able to set the activity status to "complete," the amounts in HOME FUNDS and TOTAL HOME FUNDS DISBURSED must be equal.

- In COST DATA ENTERED FOR, the first number shows how many addresses you have entered cost data for; the second number shows how many addresses have been input on the PROPERTY ADDRESSES screen.
- In UNIT DATA ENTERED FOR, the first number shows how many units you have entered data for on beneficiary screens; the second shows the number you entered in the HOME-ASSISTED UNITS field on the first completion screen. These two fields must be equal before the activity status can be set to "complete."
- Total HOME Funds Disbursed displays the amount of HOME funds drawn to date.

To see a breakdown of the cost data by form of assistance, enter **Y** in VIEW COST DETAILS (Y/N)? and press <Enter>:

MULTI-ADDRESS ACTIVITY COST SUMMARY			HR99
Grantee Activity ID		IDIS Activity ID	9769
Activity Name	CREEKVIEW GARDEN APARTMENTS I AND II		
Activity Address	236 & 238 WEST ALLEN AVENUE HOLLAND MI 49424		
			Totals
1. HOME FUNDS			
(Including PI)	Amortized Loan	60,000.00	
	Grant	0.00	
	Deferred Payment Loan	0.00	
	Other	0.00	60,000.00
2. PUBLIC FUNDS	Other Federal Funds	0.00	
	State/Local Funds	82,000.00	
	Tax-Exempt Bond Proceeds	0.00	82,000.00
3. PRIVATE FUNDS	Private Loans	0.00	
	Owner Cash Contributions	0.00	
	Private Grants	64,000.00	64,000.00
4. LOW INCOME HOUSING TAX CREDIT PROCEEDS			0.00
Total HOME Disbursed	0.00	Activity Total	206,000.00
F4=MAIN MENU	F7=PREV	F8=NEXT	

When you finish reviewing this screen:

- Press <F7> to return to the previous screen.
- <Tab> to the SELECT ANOTHER ADDRESS (Y/N)? field, input a **Y**, and press <Enter>.

10. The Property Addresses screen is displayed. Now input information for the second address, following the same procedure as before. When filling in the cost and beneficiary screens, remember that:

- The total HOME cost for the activity is \$150,000, and you entered \$60,000 for the first address.
- There are six units in the building at 238 West Allen, occupied as follows:

Unit#	# of Bdrms	Occupant	Monthly Rent	%Med	Hisp?	Race	Size	Type	Asst Type
-------	------------	----------	--------------	------	-------	------	------	------	-----------

Unit#	# of Bdrms	Occupant	Monthly Rent	%Med	Hisp?	Race	Size	Type	Asst Type
A	1	Tenant	650	30-50	No	White	1	Elderly	Section 8
B	3	Tenant	900	30-50	No	White	6	Two parents	None
C	1	Vacant							
D	3	Vacant							
E	2	Tenant	825	50-60	No	Other Multi-Racial	4	Two parents	None
F	2	Tenant	825	30-50	No	Black	3	Single Parent	Section 8

When you have completed the beneficiary screen, press <F9> to save your data and then press <F7> twice to return to the Property Addresses screen. Type **Y** in the DISPLAY CUMULATIVE TOTALS (Y/N)? field and press <Enter> to display the Multi-Address Activity Summary screen. It should now look similar to this:

```

                                MULTI-ADDRESS ACTIVITY SUMMARY                                HR98

Grantee Activity ID                IDIS Activity ID                9769
Activity Name                      CREEKVIEW GARDEN APARTMENTS I AND II
Activity Address                   236 & 238 WEST ALLEN AVENUE HOLLAND MI 49424

ACTIVITY TOTALS, ALL ADDRESSES

      HOME Funds (Including PI)      150,000.00
      Public Funds                  124,000.00
      Private Funds                  106,000.00
      Low-Income Tax Credit         0.00

                                TOTAL      380,000.00

      Cost data entered for 2 of 2 addresses
      Unit data entered for 10 of 10 units

Total HOME Funds Disbursed         0.00

View cost details (Y/N)? _         Select another address (Y/N)? _

F4=MAIN MENU      F7=PREV      F8=NEXT
    
```

On your screen, the amounts shown on your screen in PUBLIC FUNDS, PRIVATE FUNDS, and LOW-INCOME TAX CREDIT will, of course, depend on the amounts you entered on the cost screen.

11. Enter **Y** in VIEW COST DETAILS (Y/N)? and press <Enter> to see a breakdown of the HOME FUNDS total by form of assistance. When you are finished, press <Enter> to display the HOME Menu.
12. Before exiting the HOME Menu, select option **F** and press <Enter>. Confirm that COST DATA and BENEFICIARY DATA both show a status of COMPLETE.

----- End of Exercise 2.2 -----

Lesson 3

SINGLE-ADDRESS HOMEBUYER ACTIVITIES

This lesson covers material presented in Chapter 6 of the Training Manual.

Scenario: Your PJ is providing HOME funds for the purchase and rehabilitation of a duplex at 707 Alton Street, and \$5,000 in downpayment assistance. The homebuyers, Daniel and Shana Edwards, will live in one of the units and rent out the other. The estimated HOME cost of the activity, including downpayment and closing costs, is \$127,000.

Exercise 3.1 Activity Setup

1. On the Main Menu, select option **A**, Set Up Activity. Complete the Common Path screens, following the standards your PJ has adopted.

Jot down the following information for use in later exercises:

CPS Project Number _____
 Program Year _____
 HUD Activity Number _____

2. On the fourth Common Path screen (C04MA08), enter **127,000** in TOTAL ESTIMATED AMOUNT and **X** next to HOME. Press <Enter>. On the HOME MENU, select option **B**, Homebuyer, and press <Enter>.
3. The Set Up Activity: CHDO Questions screen is displayed (except for Insular Area users):

```

                                SET UP ACTIVITY: CHDO QUESTIONS                                HM01

Grantee Activity ID                IDIS Activity ID    9813
Activity Name                      DANIEL AND SHANA EDWARDS

CR ACTIVITY?                      Will the activity be funded with CR (Y/N)?  _

If yes:
    CHDO Acting As                _
                                    1 Owner
                                    2 Sponsor
                                    3 Developer

                                Will initial funding be a CHDO Site
                                Control and/or Seed Money Loan (Y/N)?  _

F3=VALDT    F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT    F9=SAVE
  
```

Because HOME funds will be spent on both property costs and downpayment assistance, this is a CHDO-eligible activity. It would not be eligible if HOME funds were only being used for downpayment assistance. Determine if you are going to fund the activity with CHDO Reserve and fill in the screen accordingly:

Field	Input
CR ACTIVITY? Will the activity be funded with CR (Y/N)?	Enter Y , N , or leave blank. Remember, funding the activity with CHDO Reserve will be an option only if you answer Y .
CHDO Acting As	If you entered Y in the previous field, enter one of the codes listed on the screen. Otherwise, this field must be left blank.
Will initial funding be a CHDO Site Control and/or Seed Money Loan (Y/N)	For this exercise, enter N or leave blank (the system will automatically set it to N).

When you are finished, press <Enter> to save your data and continue.

4. The Activity Setup: Outcome and Objective screen is displayed:

```

ACTIVITY SETUP: OBJECTIVE AND OUTCOME                                HM01-A

Grantee Activity ID          HUD Activity ID    9813
Activity Name                DANIEL AND SHANA EDWARDS

OBJECTIVE
  1 Create suitable living environments
  2 Provide decent affordable housing
  3 Create economic opportunities

OUTCOME
  1 Availability/accessibility
  2 Affordability
  3 Sustainability

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

To assign an OBJECTIVE of 2 and an OUTCOME of 2, press <Enter>. Otherwise, either press <F1> to display a help screen or input the correct code.

When you are finished, press <Enter> to save your data and continue.

5. The Set Up Activity: Special Characteristics screen is displayed:

```

                SET UP ACTIVITY: SPECIAL CHARACTERISTICS                HM01-B
Grantee Activity ID          HUD Activity ID          9813
Activity Name                DANIEL AND SHANA EDWARDS

ACTIVITY                    Type 'Y' next to any that apply:
LOCATION
    _ CDBG strategy area
    _ Local target area
    _ Presidentially declared major disaster area
    _ Historic preservation area
    _ Brownfield redevelopment area
    _ Conversion from non-residential to residential use
    _ Colonia

FAITH-BASED                 Will this activity be carried out by a faith-based
ORGANIZATION                organization (Y/N)?  _

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Note: The COLONIA field is only displayed for PJs in Arizona, California, New Mexico, and Texas.

Fill in the screen this way:

Field	Input
ACTIVITY LOCATION	<F1> displays a help screen for these fields. In each field, enter Y , N , or leave blank to have it automatically set to N.
FAITH-BASED ORGANIZATION	Enter Y , N , or leave blank to have the field automatically set to N.

When you are finished, press <Enter> to save your data and continue.

6. The Set Up Homebuyer Activity screen is displayed:

```

                                SET UP HOMEBUYER ACTIVITY                                HB01
Grantee Activity ID              IDIS Activity ID      9813
Activity Name                    DANIEL AND SHANA EDWARDS

ACTIVITY TYPE                    -
                                2 New Construction Only      4 Acquisition & Rehab
                                3 Acquisition Only              5 Acquisition & New
                                                Construction

PROPERTY ADDRESS
Homebuyer's Name                _____
Street                          _____
City                             _____ St __ Zip _____ - ____
County Code                      _____

ACTIVITY ESTIMATES  HOME Units _____ HOME Cost _____

MULTI-ADDRESS (Y/N)? _

LOAN GUARANTEE(Y/N)? _

CHDO ACTIVITY (Y/N)? N

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	For this exercise, enter 4 .
PROPERTY ADDRESS Homebuyer's Name	Optional. Enter the homebuyer's name (Daniel and Shana Edwards) if you wish.
PROPERTY ADDRESS Street, City, St, Zip	These fields are populated with the address you entered on the first Common Path screen (they can be changed here). If you did not input an address on the Common Path screen, enter it now.
PROPERTY ADDRESS County Code	Press <F1> to display a list of county codes for your state and select the appropriate one.
ACTIVITY ESTIMATES HOME Units	For this exercise, enter 2 .
ACTIVITY ESTIMATES HOME Cost	For this exercise, enter 127,000 .
MULTI-ADDRESS (Y/N)?	For this exercise, enter N .
LOAN GUARANTEE (Y/N)?	HOME funds will not be used to guarantee financing provided by a private lender, so enter N or leave blank to have the field automatically set to N.
CHDO ACTIVITY (Y/N)?	If your answer to WILL THE ACTIVITY BE FUNDED WITH CR (Y/N)? on the CHDO Questions screen was: N This field is also set to N. If you decide that you want to fund the activity with CR, change the N to

Field	Input
	<p>Y and press <Enter> to display the CHDO Questions screen and update the data.</p> <p>Y This field is also set to Y and protected from update.</p> <p>Note to Insular Area users: This field is not displayed for you.</p>
Review/update CHDO information (Y/N)?	This field is displayed only when the previous field is Y . If you need to update your input on the CHDO Questions screen, change the Y to N and press <Enter>.

When you are finished, press <Enter>. Setup is complete, and the HOME Menu is displayed. Notice that the Homebuyer setup option is highlighted.

If you want to verify that all required setup data has been input, select option **F** and press <Enter> to display the Review Activity Status screen. Confirm that the SETUP DATA status is COMPLETE.

----- End of Exercise 3.1 -----

Exercise 3.2 Activity Completion

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.
2. On the HOME Menu, select option **H**, Costs & Beneficiaries, and press <Enter>.
3. The Complete Homebuyer Activity screen is displayed:

COMPLETE HOMEBUYER ACTIVITY HB03

Grantee Activity ID IDIS Activity ID 9813

Activity Name DANIEL AND SHANA EDWARDS

Activity Address 707 ALTON STREET GREENSBORO NC 27480

ACTIVITY TYPE 4

2 New Construction Only 4 Acquisition & Rehab

3 Acquisition Only 5 Acquisition & New Construction

PROPERTY TYPE 1

1 1-4 Single Family 3 Cooperative

2 Condominium 4 Manufactured Home

FHA INSURED (Y/N)? _

LEASE PURCHASE? If yes, date of agreement __ - __ - ____

COMPLETED UNITS Total number 2

HOME-assisted 2

F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	This field is populated with the ACTIVITY TYPE you entered at setup (for this exercise, 4). It can be changed here.
PROPERTY TYPE	This field is initially populated with 1 . For this exercise, do not change it.
FHA INSURED (Y/N)?	For this exercise, enter Y .
LEASE PURCHASE? If yes, date of agreement	This field is optional. If a lease purchase agreement was made with the homebuyer, enter the date the agreement was signed as mm dd yyyy .
COMPLETED UNITS Total Number	This field is populated with the estimated number of units you entered at setup (for this exercise, 2), but may be changed.
COMPLETED UNITS HOME-assisted	This field is also populated with the estimated number of units, but may be changed. It cannot exceed the TOTAL NUMBER of units. For this exercise, leave it at 2.

When you are finished, press <Enter> to save your data and continue.

4. The Complete Homebuyer Activity: Units screen is displayed:

```

                COMPLETE HOMEBUYER ACTIVITY: UNITS                                HB03-A
Grantee Activity ID                                IDIS Activity ID    9813
Activity Name      DANIEL AND SHANA EDWARDS
Activity Address    707 ALTON STREET GREENSBORO NC 27480

COMPLETED UNITS      Total      2      HOME-Assisted      2

OF THE UNITS COMPLETED, THE NUMBER:                                HOME-
                                                                    TOTAL  ASSISTED
                                                                    Meeting Energy Star standards:  ___  ___
                                                                    504-accessible:  ___

PERIOD OF AFFORDABILITY  If you are imposing a period of affordability that is
                                                                    longer than the regulatory minimum, enter the total
                                                                    years (HOME minimum + additional) of affordability.

                                                                    PJ-imposed period of affordability:  __ years

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
COMPLETED UNITS Total	This protected field displays the TOTAL NUMBER of units from the previous screen. The numbers you enter in the TOTAL column below cannot exceed this number.
COMPLETED UNITS HOME-Assisted	This protected field displays the number of HOME-ASSISTED units from the previous screen. The number you enter in the HOME-ASSISTED column below cannot exceed this number.
Meeting Energy Star standards	Pressing <F1> displays the help screen for this field. In the TOTAL column, enter the total number of units certified by Energy Star. In the HOME-ASSISTED column, enter the number of HOME-assisted units certified by Energy Star. It cannot be more than the number you entered in the TOTAL column.
504-accessible	Enter the total number of units that are 504-accessible.
PJ-imposed period of affordability	Pressing <F1> displays the help screen for this field. If you are imposing a longer period of affordability (POA) than HOME regulations require, enter the total number of years (HOME minimum plus additional). If the units are to remain affordable in perpetuity, enter 99 . If you are not imposing a longer-than-required POA, leave the field blank.

When you are finished, press <Enter> to save your data and continue.

5. The first screen of the default version of the COMPLETE HOMEBUYER ACTIVITY: COSTS screen is displayed:

```

                COMPLETE HOMEBUYER ACTIVITY: COSTS                HB04

Grantee Activity ID          IDIS Activity ID          9813
Activity Name                DANIEL AND SHANA EDWARDS
Activity Address             707 ALTON STREET GREENSBORO NC 27480

Purchase Price _____  Value After Rehab _____  Totals

1. HOME FUNDS (Including PI)

  a. PROPERTY COSTS        Amortized Loan _____
                           Grant _____
                           Deferred Payment Loan _____
                           Other _____                0.00

  b. DOWNPAYMENT          Amortized Loan _____
      ASSISTANCE           Grant _____
                           Deferred Payment Loan _____
                           Other _____                0.00

HOME Funds Disbursed        0.00          HOME Total          0.00

To display alternate costs screen, press <F15>.
F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE  F15=ALT
    
```

Fill in the screen this way:

Field	Input
Purchase Price	For this exercise, enter 137000 (you can't enter commas or cents in this field).
Value After Rehab	For this exercise, enter 154000 (again, no commas or cents).
PROPERTY COSTS	HOME is providing a direct loan of 122,000 .
DOWNPAYMENT ASSISTANCE	The HOME downpayment assistance is a grant of 5,000 .
HOME Funds Disbursed	The amounts displayed in these two read-only fields must match to the penny before you will be allowed to set the status of the activity to "complete."
HOME Total	

When you are finished, press <Enter> to save your data and continue.

6. The second Complete Homebuyer Activity: Costs screen is displayed.

```

                COMPLETE HOMEBUYER ACTIVITY: COSTS                HB05
Grantee Activity ID          IDIS Activity ID          9813
Activity Name                DANIEL AND SHANA EDWARDS
Activity Address             707 ALTON STREET GREENSBORO NC 27480

                                                                 Totals
1. HOME FUNDS SUMMARY
   (Including PI)
   a. Property Costs        122,000.00
   b. Downpayment           5,000.00
   Assistance                127,000.00

2. PUBLIC FUNDS
   Other Federal Funds      _____
   State/Local Funds        _____
   Tax-Exempt Bond Proceeds _____                0.00

3. PRIVATE FUNDS
   Private Loans            _____
   Owner Cash Contributions _____
   Private Grants           _____                0.00

HOME Funds Disbursed        0.00    Activity Total    127,000.00

To display alternate costs screen, press <F15>.
F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE  F15=ALT
    
```

Enter all amounts as dollars and cents. If you omit the decimal point and cents, IDIS appends '.00' when the amount is saved.

Field	Input
HOME FUNDS SUMMARY (Including PI)	These display-only fields show totals for the property cost and downpayment assistance amounts entered on the previous screen.
Note	Before you will be able save your input on this screen, the sum of all the amounts entered for HOME, Public Funds, and Private Funds must be greater than or equal to the PURCHASE PRICE. Recall that the PURCHASE PRICE for this property was \$137,000.
PUBLIC FUNDS	Enter the amount of activity costs paid for with other federal (non-HOME) funds, state or local government funds, and/or tax-exempt bond proceeds.
PRIVATE FUNDS	Enter the amount of activity costs paid for with private loans, owner cash contributions, and/or private grants.

When you are finished, press <F9> to save your data and display the totals.

7. Press <F15> (on most keyboards, <Shift + F3>) to display the alternate version of the cost screen:

COMPLETE HOMEBUYER ACTIVITY: COSTS			HB06
Grantee Activity ID		IDIS Activity ID	9813
Activity Name	DANIEL AND SHANA EDWARDS		
Activity Address	707 ALTON STREET GREENSBORO NC 27480		
Purchase Price	137000	Value After Rehab	154000
Source of Funds	Form of Assistance	Amount	* Source Codes
1	1	122,000.00	1 HOME property costs
5	-	8,000.00	2 HOME downpayment assistance
7	-	2,000.00	4 Other federal funds
2	2	5,000.00	5 State/local funds
-	-	_____	6 Tax-exempt bond proceeds
-	-	_____	7 Private loans
-	-	_____	8 Owner cash contributions
-	-	_____	9 Private grants
-	-	_____	* Forms of HOME Assistance
-	-	_____	1 Amortized loan
Activity Total		137,000.00	2 Grant
Total HOME funds		127,000.00	3 Deferred payment loan
HOME funds disbursed		0.00	5 Other
To display alternate costs screen, press <F15>.			
F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE F15=ALT			

You can see that the alternate version requires the same data as the default version, but in a different format. If you prefer the alternate version, press <F15> when the default version is first displayed.

When you have finished reviewing the screen, press <Enter> to continue.

8. The Complete Homebuyer Activity: Beneficiaries screen is displayed:

```

                COMPLETE HOMEBUYER ACTIVITY: BENEFICIARIES                HB07
Grantee Activity ID                                IDIS Activity ID    9813
Activity Name          DANIEL AND SHANA EDWARDS
Activity Address       707 ALTON STREET GREENSBORO NC 27480

Unit#      # of   Occu-   -----HOUSEHOLD-----   Asst      Total
           Bdrms  pant   %Med  Hisp?  Race  Size  Type   Type      Monthly Rent
-----
           -     2     -     -     -     -     -     4         -
           -     -     -     -     -     -     -     -         -

HOMEBUYER   First-time homebuyer(Y/N)? _
            Coming from subsidized housing(Y/N)? _
            Receiving: _
                1 No counseling      3 Post-counseling
                2 Pre-counseling     4 Both

For vacant units: Enter Unit# and # of Bdrms. Change Occupant to 9.
F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

The number of input lines displayed is the same as the number of HOME-ASSISTED COMPLETED UNITS you entered on the first completion screen (for this exercise, **2**). Enter data about the homebuyer on the first line: its OCCUPANT code is pre-populated with 2 (owner) and cannot be changed.

On the first line:

- Input the unit number and the number of bedrooms in the homebuyer’s unit. There is an <F1> help screen for the # OF BDRMS field.
- Enter household information about the homebuyer. An <F1> help screen is available for each of these fields.
- The default assistance type of 4 (no assistance) should be changed to 1 (Section 8 mortgage assistance) when applicable. None of the other codes shown on the <F1> help screen for this field is valid for the owner-occupied unit.
- TOTAL MONTHLY RENT is not applicable to the homebuyer, so no input field is provided.

On the second line, provide data for the unit in the duplex that is occupied by tenants.

Fill in the bottom half of the screen this way:

Field	Input
First-time homebuyer	Assume that the Edwards meet the HOME Program definition of a first-time homebuyer. Enter Y .
Coming from subsidized housing (Y/N)?	Press <F1> to display the help screen for this field. Input Y or N (or leave blank to have it automatically set to N), as appropriate.

Field	Input
Receiving	Assume that the Edwards received both pre- and post-homebuyer counseling.

When you are finished, press <Enter> to save your data. The HOME Menu is displayed.

9. If you want to verify that all required completion data has been input, select option **F** and press <Enter> to display the Review Activity Status screen. Confirm that the COST DATA and BENEFICIARY DATA fields both show a status of Complete.

Homebuyer Activities and ADDI

Remember that homebuyer activity costs are charged against your ADDI account if:

- An ACTIVITY TYPE of **3**, **4**, or **5** is entered on the Set Up Homebuyer Activity screen, and
- DOWNPAYMENT ASSISTANCE is input on the HOME Funds Costs screen, and
- The FIRST-TIME HOMEBUYER question on the Beneficiaries screen is answered **Y**, and
- The ACTIVITY STATUS CODE is set to "complete."

The completion data you entered for the activity in this exercise meets the first two of these criteria. When the status code is updated to "complete," then, this activity would be included in the ADDI Accomplishment Report that HOME posts monthly on the web.

Because we are not drawing down funds in these exercises, the ACTIVITY STATUS CODE cannot be set to "complete." In production IDIS, that is always the final completion step for a HOME activity.

Lesson 4

MULTI-ADDRESS HOMEBUYER ACTIVITIES

This lesson covers material presented in Chapter 7 of the Training Manual.

Scenario: Your PJ is helping to fund the acquisition and new construction of four townhouses in the 900 block of Merritt Street. The land is currently owned by the Regent Company. The work will be carried out by the ABC Development Corporation, a non-profit that does not qualify as a CHDO. The estimated HOME cost is \$236,800.

Exercise 4.1 Activity Setup

1. On the Main Menu, select option **A**, Set Up Activity. Complete the Common Path screens, following the standards your PJ has adopted.

Jot down the following information for use in later exercises:

CPS Project Number _____
 Program Year _____
 HUD Activity Number _____

2. On the fourth Common Path screen (C04MA08), enter **236,800** in TOTAL ESTIMATED AMOUNT and **X** next to HOME. Press <Enter>. On the HOME MENU, select option **B**, Homebuyer, and press <Enter>.
3. The Set Up Activity: CHDO Questions screen is displayed (except for Insular Area users):

```

                                SET UP ACTIVITY: CHDO QUESTIONS                                HM01
Grantee Activity ID                IDIS Activity ID                9881
Activity Name                      ABC DEVELOPMENT CORPORATION
CR ACTIVITY?                      Will the activity be funded with CR (Y/N)?  _
If yes:
    CHDO Acting As                _
                                    1 Owner
                                    2 Sponsor
                                    3 Developer
Will initial funding be a CHDO Site
Control and/or Seed Money Loan (Y/N)?  _
  
```

F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE

Since CHDO Reserve (CR) will not be used to fund this activity, press <Enter>. The system automatically sets CR ACTIVITY? and WILL INITIAL FUNDING BE... to **N** and CHDO ACTING As to a blank.

4. After you press <Enter>, the Activity Setup: Outcome and Objective screen is displayed:

```

                                ACTIVITY SETUP: OBJECTIVE AND OUTCOME                                HM01-A
Grantee Activity ID              HUD Activity ID              9881
Activity Name                    ABC DEVELOPMENT CORPORATION
OBJECTIVE                        -
                                1 Create suitable living environments
                                2 Provide decent affordable housing
                                3 Create economic opportunities
OUTCOME                          -
                                1 Availability/accessibility
                                2 Affordability
                                3 Sustainability
F1=HELP   F3=VALDT   F4=MAIN MENU   F5=PROJ INFO   F7=PREV   F8=NEXT   F9=SAVE
```

Let's say your objective for this activity is to provide decent affordable housing (code **2**) and the expected outcome is affordability (also code **2**). The system automatically sets OBJECTIVE to **2** if it is left blank and OUTCOME to **2** if it is left blank, so just press <Enter> to continue to the next screen.

5. After you press <Enter>, the Set Up Activity: Special Characteristics screen is displayed:

```

                SET UP ACTIVITY: SPECIAL CHARACTERISTICS                HM01-B
Grantee Activity ID                HUD Activity ID    9881
Activity Name          ABC DEVELOPMENT CORPORATION

ACTIVITY LOCATION
Type 'Y' next to any that apply:
- CDBG strategy area
- Local target area
- Presidentially declared major disaster area
- Historic preservation area
- Brownfield redevelopment area
- Conversion from non-residential to residential use
- Colonia

FAITH-BASED ORGANIZATION Will this activity be carried out by a faith-based
organization (Y/N)? _

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Note: The COLONIA field is only displayed for PJs in Arizona, California, New Mexico, and Texas.

For this exercise, let's assume that the land is not located in any of the areas listed on the screen and that the ABC Development Corporation is not faith-based. When this is the case, you can just press <Enter> when the screen is displayed. The system sets all of the fields to **N**.

6. After you press <Enter>, the Set Up Homebuyer Activity screen is displayed:

```

                SET UP HOMEBUYER ACTIVITY                HB01
Grantee Activity ID                IDIS Activity ID    9881
Activity Name          ABC DEVELOPMENT CORPORATION

ACTIVITY TYPE
-
2 New Construction Only    4 Acquisition & Rehab
3 Acquisition Only        5 Acquisition & New
                           Construction

PROPERTY ADDRESS
Homebuyer's Name          _____
Street                   900 BLOCK OF MERRITT ST
City                     MELBOURNE           St FL  Zip 32901 - ____
County Code              _____

ACTIVITY ESTIMATES HOME Units ____ HOME Cost _____

MULTI-ADDRESS (Y/N)? _
LOAN GUARANTEE(Y/N)? _
CHDO ACTIVITY (Y/N)? N

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	For this exercise, enter 5 .
PROPERTY ADDRESS Homebuyer's Name	Leave this field blank for a multi-address activity. The homebuyers' names will be entered at completion.
PROPERTY ADDRESS Street, City, St, Zip	These fields are populated with the address you entered on the first Common Path screen (they can be changed here). If you did not input an address on the Common Path screen, enter it now.
PROPERTY ADDRESS County Code	Press <F1> to display a list of county codes for your state and select the appropriate one.
ACTIVITY ESTIMATES HOME Units	For this exercise, enter 4 .
ACTIVITY ESTIMATES HOME Cost	For this exercise, enter 236,800 .
MULTI-ADDRESS (Y/N)?	For this exercise, enter Y .
LOAN GUARANTEE (Y/N)?	HOME funds will not be used to guarantee a private loan, so enter N or leave blank to have the field automatically set to N.
CHDO ACTIVITY (Y/N)?	<p>Because you answered N to WILL THE ACTIVITY BE FUNDED WITH CR (Y/N)? on the CHDO QUESTIONS screen, this field is set to N.</p> <p>Should you change your mind about using CHDO funds, you can type Y over the N, press <Enter> to display the CHDO QUESTIONS screen, and update your input there. For this exercise, leave the field set to Y.</p> <p>Note to Insular Area users: This field is not displayed for you.</p>

When you are finished, press <Enter> to save your data and continue.

7. The Set Up Homebuyer Activity: Developer screen is displayed:

```

                                SET UP HOMEBUYER ACTIVITY: DEVELOPER                                HB02

Grantee Activity ID                                IDIS Activity ID                                9881
Activity Name                                     ABC DEVELOPMENT CORPORATION
Activity Address                                  900 BLOCK OF MERRITT ST MELBOURNE FL 32901

DEVELOPER TYPE
1 Individual                                     4 Not-for-Profit
2 Partnership                                    5 Publicly Owned
3 Corporation                                    9 Other

DEVELOPER'S NAME                                _____

DEVELOPER'S ADDRESS
Street _____
City _____ St __ Zip _____ - ____

F3=VALDT    F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT    F9=SAVE
    
```

Fill in the screen this way:

Field	Input
DEVELOPER TYPE	For this exercise, enter 4 .
DEVELOPER'S NAME	This field is optional. Enter the name of the developer (ABC Development Corporation) if you wish.
DEVELOPER'S ADDRESS	Enter the address for ABC Development Corporation.

When you are finished, press <Enter>. Setup is complete, and the HOME Menu is displayed. Notice that the Homebuyer setup option is highlighted.

To verify that all required setup data has been input, you can select option **F** and press <Enter> to display the Review Activity Status screen. Confirm that the SETUP DATA status is COMPLETE.

----- End of Exercise 4.1 -----

Exercise 4.2 Activity Completion

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.
2. On the HOME Menu, select option **H**, Costs & Beneficiaries, and press <Enter>.
3. The Complete Homebuyer Activity screen is displayed:

COMPLETE HOMEBUYER ACTIVITY HB03

Grantee Activity ID _____ IDIS Activity ID 9881

Activity Name ABC DEVELOPMENT CORPORATION

Activity Address 900 BLOCK OF MERRITT ST MELBOURNE FL 32901

ACTIVITY TYPE 5

2 New Construction Only	4 Acquisition & Rehab
3 Acquisition Only	5 Acquisition & New Construction

PROPERTY TYPE 1

1 1-4 Single Family	3 Cooperative
2 Condominium	4 Manufactured Home

COMPLETED UNITS Total number _____

HOME-assisted _____

F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	This field is populated with the ACTIVITY TYPE you entered at setup (for this exercise, 5). It can be changed here.
PROPERTY TYPE	This field is initially populated with 1 , but can be changed.
COMPLETED UNITS Total Number	This field is populated with the estimated number of units you entered at setup (for this exercise, 4), but may be changed.
COMPLETED UNITS HOME-assisted	This field is also populated with the estimated number of units, but may be changed. It cannot exceed the TOTAL NUMBER of units. For this exercise, leave it at 4.

When you are finished, press <Enter> to save your data and continue.

4. The Complete Homebuyer Activity: Units screen is displayed:

```

                COMPLETE HOMEBUYER ACTIVITY: UNITS                                HB03-A

Grantee Activity ID          IDIS Activity ID          9881
Activity Name                ABC DEVELOPMENT CORPORATION
Activity Address             900 BLOCK OF MERRITT ST MELBOURNE FL 32901

COMPLETED UNITS           Total      4      HOME-Assisted      4

OF THE UNITS COMPLETED, THE NUMBER:                TOTAL      HOME-
                                                    ASSISTED

                Meeting Energy Star standards:  ___      ___

                504-accessible:  ___

PERIOD OF AFFORDABILITY  If you are imposing a period of affordability that is
                        longer than the regulatory minimum, enter the total
                        years (HOME minimum + additional) of affordability.

                PJ-imposed period of affordability:  __ years

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
COMPLETED UNITS Total	This protected field displays the TOTAL NUMBER of units from the previous screen. The numbers you enter in the TOTAL column below cannot exceed this number.
COMPLETED UNITS HOME-Assisted	This protected field displays the number of HOME-ASSISTED units from the previous screen. The number you enter in the HOME-ASSISTED column below cannot exceed this number.
Meeting Energy Star standards	Pressing <F1> displays the help screen for this field. In the TOTAL column, enter the total number of units certified by Energy Star. In the HOME-ASSISTED column, enter the number of HOME-assisted units certified by Energy Star. It cannot be more than the number you entered in the TOTAL column.
504-accessible	Enter the total number of units that are 504-accessible.
PJ-imposed period of affordability	Pressing <F1> displays the help screen for this field. If you are imposing a longer period of affordability (POA) than HOME regulations require, enter the total number of years (HOME minimum plus additional). If the units are to remain affordable in perpetuity, enter 99 . If you are not imposing a longer-than-required POA, leave the field blank.

When you are finished, press <Enter> to save your data and continue.

5. The Property Addresses screen is displayed:

```

PROPERTY ADDRESSES
Grantee Activity ID _____ IDIS Activity ID _____ ADRS 9881
Activity Name ABC DEVELOPMENT CORPORATION

Enter X to select, P to paste previous address, or D to delete

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

Add more addresses(Y/N)? _ Display cumulative totals(Y/N)? _

F1=HELP F3=VALDT F4=MAIN MENU F7=PREV F8=NEXT F9=SAVE
    
```

Fill in the first address block on the screen this way:

Field	Input
Name	Optional. Enter the name of the homebuyer for 904 Merritt Street or any other identifier, if you wish.
Street	Enter the street name and number of one of the properties—for this exercise, 904 Merritt Street .
City, State, Zip, County	Enter this information for the property. If you do not know the COUNTY CODE, press <F1> to select one from the list displayed.

When you are finished, press <Enter>. Notice that <Enter> saves your input but does not advance to the next screen. To display the next completion screen, you must input an **X** in the selection field—the unnamed field located to the left of NAME—of one of the address blocks (you will do this shortly).

The three codes that can be entered in the selection field are shown at the top of the screen. They are:

- **X** – to access the cost and beneficiary screens for the address.
- **P** – to paste the previous address into the next empty address block
- **D** – to delete the address *and any cost and beneficiary data that has been entered for it*

To see how the “paste previous address” function works, type **P** in the selection field of the second address block and press <Enter>.

```

                                PROPERTY ADDRESSES                                ADRS
Grantee Activity ID                IDIS Activity ID                9881
Activity Name                      ABC DEVELOPMENT CORPORATION

Enter X to select, P to paste previous address, or D to delete

- Name      SYLVIA AND ENRIQUE HERRERA
  Street    904 MERRITT STREET
  City      MELBOURNE           St FL  Zip 32901 - ____ County 25

- Name      _____
  Street    904 MERRITT STREET
  City      MELBOURNE           St FL  Zip 32901 - ____ County 25

- Name      _____
  Street    _____
  City      _____         St __  Zip ____ - ____ County ____

- Name      _____
  Street    _____
  City      _____         St __  Zip ____ - ____ County ____
Add more addresses(Y/N)? _        Display cumulative totals(Y/N)? _

F1=HELP  F3=VALDT  F4=MAIN MENU  F7=PREV  F8=NEXT  F9=SAVE
    
```

You can now input the name of the second homebuyer and update the street number to **906**. Repeat the paste and update function two more times so that you have addresses for 904, 906, 908, and 910 Merritt Street.

When you are finished, type **X** in the selection field of the first address block and press <Enter>. to continue.

- The first Complete Homebuyer Activity: Costs screen is displayed. Notice that the address you selected on the previous screen is displayed in the PROPERTY ADDRESS field at the top of this screen.

```

                                COMPLETE HOMEBUYER ACTIVITY: COSTS                                HB04
Grantee Activity ID                IDIS Activity ID                9881
Activity Name                      ABC DEVELOPMENT CORPORATION
Property Address                   904 MERRITT STREET MELBOURNE FL 32901

Purchase Price _____

1. HOME FUNDS (Including PI)                                Address Totals

  a. PROPERTY COSTS      Amortized Loan _____
                           Grant           _____
                           Deferred Payment Loan _____
                           Other           _____                0.00

  b. DOWNPAYMENT         Amortized Loan _____
      ASSISTANCE          Grant           _____
                           Deferred Payment Loan _____
                           Other           _____                0.00

                                HOME Total This Address                0.00

To display alternate costs screen, press <F15>.
F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE  F15=ALT
    
```

Fill in this screen with the HOME costs incurred for the townhouse at 904 Merritt. For this exercise, the costs are to be pro-rated equally for the four properties. Input the following values:

Field	Input
Purchase Price	Enter the purchase price for the three-bedroom property at 904 Merritt, as evidenced on the deed. For this exercise, enter 142400 (you can't enter commas or cents in this field).
PROPERTY COSTS	HOME is providing a direct loan of 54,200 and a grant of 5,000 .
DOWNPAYMENT ASSISTANCE	No downpayment assistance is being provided.
HOME Funds Disbursed	The amounts displayed in these two read-only fields must match to the penny before you will be allowed to set the status of the activity to "complete."
HOME Total This Address	

When you are finished, press <Enter> to save your data and continue.

7. The second Complete Homebuyer Activity: Costs screen for the building at 904 Merritt is displayed:

```

                                COMPLETE HOMEBUYER ACTIVITY: COSTS                                HB05
Grantee Activity ID                                IDIS Activity ID                                9881
Activity Name                                     ABC DEVELOPMENT CORPORATION
Property Address                                  904 MERRITT STREET MELBOURNE FL 32901
                                                Address Totals
1. HOME FUNDS SUMMARY  a. Property Costs          59,200.00
   (Including PI)        b. Downpayment Assistance          0.00
                                                $59,200.00
2. PUBLIC FUNDS      Other Federal Funds _____
                    State/Local Funds _____
                    Tax-Exempt Bond Proceeds _____          0.00
3. PRIVATE FUNDS      Private Loans _____
                    Owner Cash Contributions _____
                    Private Grants _____          0.00
                                                Total This Address          $59,200.00
To display alternate costs screen, press <F15>.
F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE  F15=ALT
    
```

Fill in the screen this way:

Field	Input
HOME FUNDS SUMMARY (Including PI)	These display-only fields show totals for the property cost and downpayment assistance amounts entered on the previous screen.
Note	Before you will be able save your input on this screen, the sum of all the amounts entered for HOME, Public Funds,

Field	Input
	and Private Funds must be greater than or equal to the PURCHASE PRICE. Recall that the PURCHASE PRICE for this property was \$142,400.
PUBLIC FUNDS	Enter the pro-rated amount of activity costs paid for with other federal (non-HOME) funds, state or local government funds, and/or tax-exempt bond proceeds.
PRIVATE FUNDS	Enter the pro-rated amount of activity costs paid for with private loans, owner cash contributions, and/or private grants.

When you are finished, press <Enter> to save your data and continue.

8. The Complete Homebuyer Activity: Beneficiaries screen for the property at 904 Merritt is displayed:

```

                COMPLETE HOMEBUYER ACTIVITY: BENEFICIARIES                HB07
Grantee Activity ID                IDIS Activity ID                9881
Activity Name                      ABC DEVELOPMENT CORPORATION
Property Address                   904 MERRITT STREET MELBOURNE FL 32901

Unit#    # of    Occu-    -----HOUSEHOLD-----    Asst    Total
         Bdrms  pant  %Med  Hisp?  Race  Size  Type    Type    Monthly Rent
         -     -     -     -     -     -     -     -     -     -
         -     2     -     -     -     -     -     4     -     -
         -     -     -     -     -     -     -     -     -     -
         -     -     -     -     -     -     -     -     -     -

HOMEBUYER  First-time homebuyer(Y/N)? _
           Coming from subsidized housing(Y/N)? _
           Receiving: _
                1 No counseling      3 Post-counseling
                2 Pre-counseling     4 Both

PROPERTY   FHA insured(Y/N)? _
           If lease purchase, date of agreement: __ - __ - ____

For vacant units: Enter Unit# and # of Bdrms. Change Occupant to 9.
F1=HELP  F3=VLDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

The multi-address beneficiary screen has input lines for four units—the maximum number allowed at any one address for a homebuyer activity (IDIS knows the total number of HOME-assisted units in the activity but not the number of units at each address, and so must make four input lines available). For this exercise, assume that there are no rental units.

Like the single-address beneficiary screen, data about the homebuyer is to be entered on the first line: the OCCUPANT code is pre-populated with 2 (owner) and cannot be changed.

On the first line:

- Input the unit number and the number of bedrooms for 904 Merritt. There is an <F1> help screen for the # OF BDRMS field.

- Enter household information about the homebuyer. An <F1> help screen is available for each of these fields.
- The default assistance type of 4 (no assistance) should be changed to 1 (Section 8 mortgage assistance) when applicable. None of the other codes shown on the <F1> help screen for this field is valid for the owner-occupied unit.
- TOTAL MONTHLY RENT is not applicable to the homebuyer, so no input field is provided.

Fill in the bottom half of the screen this way:

Field	Input
First-time homebuyer	Enter Y , N , or leave blank to have it automatically set to N.
Coming from subsidized housing (Y/N)?	Input Y or N (or leave blank to have it automatically set to N). There is an <F1> help screen for this field.
Receiving	Enter one of the codes listed on the screen.

When you have finished:

- Press <F9> to save your data.
 - Press <F7> twice to return to the Property Addresses screen.
- <Tab> to the selection field for 906 Merritt Street. Enter **X** and press <Enter>. Repeat steps 6 through 8, this time entering cost and beneficiary data for the property at 906 Merritt. When you are finished, you should be back at the Property Addresses screen.
 - On the Property Addresses screen, press <Shift + Tab> to move the cursor to the DISPLAY CUMULATIVE TOTALS (Y/N)? field at the bottom right. Type **Y** and press <Enter>. The Multi-Address Activity Summary screen is displayed:

MULTI-ADDRESS ACTIVITY SUMMARY		HB98
Grantee Activity ID	IDIS Activity ID	9881
Activity Name	ABC DEVELOPMENT CORPORATION	
Activity Address	900 BLOCK OF MERRITT ST MELBOURNE FL 32901	
ACTIVITY TOTALS, ALL ADDRESSES		
HOME Funds (Including PI)	118,400.00	
Public Funds	165,600.00	
Private Funds	0.00	
TOTAL	284,000.00	
Cost data entered for	2 of	4 addresses
Unit data entered for	2 of	4 units
Total HOME Funds Disbursed	0.00	
View cost details (Y/N)?	_	Select another address (Y/N)? _
F4=MAIN MENU	F7=PREV	F8=NEXT

This screen provides totals for the cost and beneficiary data you have input for the properties at 904 and 906 Merritt. Before you will be able to set the activity status to "complete," the amounts in HOME FUNDS and TOTAL HOME FUNDS DISBURSED must be equal.

To view a cost breakdown by form of assistance, enter **Y** in the VIEW COST DETAILS (Y/N)? field and press <Enter>:

MULTI-ADDRESS ACTIVITY COST SUMMARY			HB99
Grantee Activity ID		IDIS Activity ID	9881
Activity Name	ABC DEVELOPMENT CORPORATION		
Activity Address	900 BLOCK OF MERRITT ST MELBOURNE FL 32901		
			Totals
1. HOME FUNDS	Amortized Loan	108,400.00	
(Including PI)	Grant	10,000.00	
	Deferred Payment Loan	0.00	
	Other	0.00	118,400.00
2. PUBLIC FUNDS	Other Federal Funds	48,200.00	
	State/Local Funds	117,400.00	
	Tax-Exempt Bond Proceeds	0.00	165,600.00
3. PRIVATE FUNDS	Private Loans	0.00	
	Owner Cash Contributions	0.00	
	Private Grants	0.00	0.00
Total HOME Disbursed	0.00	Activity Total	284,000.00
F4=MAIN MENU	F7=PREV	F8=NEXT	

When you finish reviewing the screen, press <Enter> to display the HOME Menu.

Lesson 5

SINGLE-ADDRESS HOMEOWNER REHAB ACTIVITIES

This lesson covers material presented in Chapter 8 of the Training Manual.

Scenario: Your PJ is carrying out an activity to rehab a single-family unit at 537 Girard Avenue. The home is owned by Joan Kershaw, a single mother with three children. The estimated HOME cost for the repairs is \$32,000.

Exercise 5.1 Activity Setup

1. On the Main Menu, select option **A**, Set Up Activity. Complete the Common Path screens, following the standards your PJ has adopted.

Jot down the following information for use in later exercises:

CPS Project Number _____

Program Year _____

HUD Activity Number _____

2. On the fourth Common Path screen (C04MA08), enter **32,000** in TOTAL ESTIMATED AMOUNT and **X** next to HOME. Press <Enter>. On the HOME MENU, select option **C**, Homeowner Rehab, and press <Enter>.
3. The Activity Setup: Outcome and Objective screen is displayed:

```
ACTIVITY SETUP: OBJECTIVE AND OUTCOME                                HM01-A
Grantee Activity ID                                HUD Activity ID    10403
Activity Name      JOAN KERSHAW

OBJECTIVE
-
1 Create suitable living environments
2 Provide decent affordable housing
3 Create economic opportunities

OUTCOME
-
1 Availability/accessibility
2 Affordability
3 Sustainability

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
```

Fill in the screen this way:

Field	Input
OBJECTIVE	You can either: <ul style="list-style-type: none"> • Press <F1> to display a help screen and select an OBJECTIVE code • Enter 1, 2, or 3. • Leave the field blank to have it automatically set to 2.
OUTCOME	Same as the OBJECTIVE field.

When you are finished, press <Enter> to save your data and continue.

4. The Set Up Activity: Special Characteristics screen is displayed:

```

                SET UP ACTIVITY: SPECIAL CHARACTERISTICS                HM01-B
Grantee Activity ID                HUD Activity ID    10403
Activity Name          JOAN KERSHAW

ACTIVITY LOCATION
Type 'Y' next to any that apply:
- CDBG strategy area
- Local target area
- Presidentially declared major disaster area
- Historic preservation area
- Brownfield redevelopment area
- Conversion from non-residential to residential use
- Colonia

FAITH-BASED ORGANIZATION Will this activity be carried out by a faith-based
organization (Y/N)?  _

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Note: The COLONIA field is only displayed for PJs in Arizona, California, New Mexico, and Texas.

Fill in the screen this way:

Field	Input
ACTIVITY LOCATION	<F1> displays a help screen for these fields. In each field, enter Y, N, or leave blank to have it automatically set to N.
FAITH-BASED ORGANIZATION	Enter Y, N, or leave blank to have the field automatically set to N.

When you are finished, press <Enter> to save your data and continue.

5. The Set Up Homeowner Rehab Activity screen is displayed:

```

SET UP HOMEOWNER REHAB ACTIVITY                                HO01
Grantee Activity ID                                           IDIS Activity ID    10403
Activity Name          JOAN KERSHAW
ACTIVITY TYPE         1 Rehab Only
PROPERTY ADDRESS
Homeowner's Name      _____
Street                _____
City                  _____ St __ Zip _____ - ____
County Code          _____
ACTIVITY ESTIMATES   HOME Units  ____ HOME Cost  _____
MULTI-ADDRESS (Y/N)? _
LOAN GUARANTEE(Y/N)? _
F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	Because the only valid Activity Type for a rehab activity is 1, this field is pre-populated and protected from update.
PROPERTY ADDRESS Homeowner's Name	This field is optional. Enter the homeowner's name (Joan Kershaw) if you wish.
PROPERTY ADDRESS Street, City, St, Zip	These fields are populated with the address you entered on the first Common Path screen (they can be changed here). If you did not input an address on the Common Path screen, enter it now.
PROPERTY ADDRESS County Code	Press <F1> to display a list of county codes for your state and select the appropriate one.
ACTIVITY ESTIMATES HOME Units	For this exercise, enter 1 .
ACTIVITY ESTIMATES HOME Cost	For this exercise, enter 32,000 .
MULTI-ADDRESS (Y/N)?	For this exercise, enter N .
LOAN GUARANTEE (Y/N)?	Enter Y , N , or leave blank to have the field automatically set to N.

When you are finished, press <Enter>. Setup is complete, and the HOME Menu is displayed. Notice that the Homeowner Rehab setup option is highlighted.

----- End of Exercise 5.1 -----

Exercise 5.2 Activity Completion

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.
2. On the HOME Menu, select option **H**, Costs & Beneficiaries, and press <Enter>.
3. The Complete Homeowner Rehab Activity screen is displayed:

```

                                COMPLETE HOMEOWNER REHAB ACTIVITY                                H003

Grantee Activity ID                                IDIS Activity ID    10403
Activity Name      JOAN KERSHAW
Activity Address   537 GIRARD AVENUE PORTLAND OR 97256

ACTIVITY TYPE      1 Rehab Only

PROPERTY TYPE      1
                   1 1-4 Single Family      3 Cooperative
                   2 Condominium           4 Manufactured Home

FHA INSURED (Y/N)?  -

COMPLETED UNITS  Total number      1
                   HOME-assisted    1

F3=VALDT      F4=MAIN MENU      F5=PROJ INFO      F7=PREV      F8=NEXT      F9=SAVE
  
```

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	Because the only valid Activity Type for a rehab activity is 1, this field is pre-populated and protected from update.
PROPERTY TYPE	This field is initially populated with 1 , but can be changed to one of the other codes listed on the screen.
FHA INSURED (Y/N)?	Enter Y , N , or leave blank to have the field automatically set to N.
COMPLETED UNITS Total Number	This field is populated with the estimated number of units you entered at setup (for this exercise, 1), but may be changed.
COMPLETED UNITS HOME-assisted	This field is also populated with the estimated number of units you entered at setup, but may be changed. It cannot exceed the TOTAL NUMBER of units. For this exercise, leave it at 1.

When you are finished, press <Enter> to save your data and continue.

4. The Complete Homeowner Rehab Activity: Units screen is displayed:

```

                COMPLETE HOMEOWNER REHAB ACTIVITY: UNITS                HO03-A
Grantee Activity ID                IDIS Activity ID                10403
Activity Name                JOAN KERSHAW
Activity Address                537 GIRARD AVENUE PORTLAND OR 97256

COMPLETED UNITS                Total                1                HOME-Assisted                1

OF THE UNITS COMPLETED, THE NUMBER:                TOTAL                HOME-
                Meeting Energy Star standards:                ____                ____
                504-accessible:                ____
    
```

F1=HELP F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE

Fill in the screen this way:

Field	Input
COMPLETED UNITS Total	This protected field displays the TOTAL NUMBER of units from the previous screen. The numbers you enter in the TOTAL column below cannot exceed this number.
COMPLETED UNITS HOME-Assisted	This protected field displays the number of HOME-ASSISTED units from the previous screen. The numbers you enter in the HOME-ASSISTED column below cannot exceed this number.
Meeting Energy Star standards	Press <F1> to display the help screen for this field. In the TOTAL column, enter the total number of units certified by Energy Star. In the HOME-ASSISTED column, enter the number of HOME-assisted units certified by Energy Star. It cannot be more than the number you entered in the TOTAL column.
504-accessible	Enter the total number of units that are 504-accessible.

When you are finished, press <Enter> to save your data and continue.

5. The default version of the Complete Homeowner Rehab Activity: Costs screen is displayed:

```

                COMPLETE HOMEOWNER REHAB ACTIVITY: COSTS                H004
Grantee Activity ID                IDIS Activity ID  10403
Activity Name      JOAN KERSHAW
Activity Address   537 GIRARD AVENUE PORTLAND OR 97256

Value After Rehab  _____

1. HOME FUNDS      Amortized Loan  _____
   (Including PI)   Grant           _____
                  Deferred Payment Loan _____
                  Other           _____
                                                    0.00

2. PUBLIC FUNDS   Other Federal Funds _____
                  State/Local Funds _____
                  Tax-Exempt Bond Proceeds _____
                                                    0.00

3. PRIVATE FUNDS  Private Loans      _____
                  Owner Cash Contributions _____
                  Private Grants      _____
                                                    0.00

Home Funds Disbursed      0.00      Activity Total      0.00
To display alternate costs screen, press <F15>.
F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE  F15=ALT
    
```

Enter all amounts as dollars and cents. If you omit the decimal point and cents, IDIS appends '.00' when the amount is saved. Fields that you leave blank will automatically be set to '0.00'.

Fill in the screen this way:

Field	Input
VALUE AFTER REHAB	For this exercise, enter 129,400 .
HOME FUNDS (Including PI)	Your PJ is providing 32,000 as a GRANT.
PUBLIC FUNDS	3,200 of OTHER FEDERAL FUNDS have been leveraged for the activity.
PRIVATE FUNDS	A PRIVATE GRANT of 6,500 has been secured.

When you are finished, press <F9> to save your data and display the totals.

7. The Complete Homeowner Rehab Activity: Beneficiaries screen is displayed:

```

                                COMPLETE HOMEOWNER REHAB ACTIVITY: BENEFICIARIES                                H006
Grantee Activity ID                                IDIS Activity ID                                10403
Activity Name                                    JOAN KERSHAW
Activity Address                                537 GIRARD AVENUE PORTLAND OR 97256

Unit#      # of      Occu-      -----HOUSEHOLD-----
           Bdrms    pant      %Med  Hisp?  Race  Size  Type
-----    -      -      -    -    -    -    -
           -      2      -    -    -    -    -

For vacant units: Enter Unit# and # of Bdrms. Change Occupant to 9.
F1=HELP  F3=VLDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
```

Notice that the number of input lines displayed is the same as the number of HOME-ASSISTED COMPLETED UNITS you entered on the first completion screen (for this exercise, 1). The OCCUPANT field is pre-populated with 2 (owner) and cannot be changed.

Fill in the required information about the Kershaw unit and household. An <F1> help screen is available for each field except UNIT#.

When you are finished, press <Enter> to save your data. The HOME Menu is displayed.

8. To verify that you have input all of the required completion data, select option **F** and press <Enter> to display the Review Activity Status screen. Confirm that COST DATA and BENEFICIARY DATA both show a status of COMPLETE.

Lesson 6

MULTI-ADDRESS HOMEOWNER REHAB ACTIVITIES

This lesson covers material presented in Chapter 9 of the Training Manual.

Scenario: Your PJ is funding the rehabilitation of two row houses at 805 and 807 Trinity Place. Both properties are jointly owned by Carter Williams and his father, Samuel. Carter Williams, his wife, and two children live in the house at 805. His parents live next door. The estimated HOME cost for the rehab of both properties is \$16,850.

Exercise 6.1 Activity Setup

1. On the Main Menu, select option **A**, Set Up Activity, and complete the Common Path screens.

Jot down the following information for use in later exercises:

CPS Project Number _____
Program Year _____
HUD Activity Number _____

2. On the fourth Common Path screen (C04MA08), enter **16,850** in TOTAL ESTIMATED AMOUNT and **X** next to HOME. Press <Enter>. On the HOME MENU, select option **C**, Homeowner Rehab, and press <Enter>.
3. The Activity Setup: Outcome and Objectives screen is displayed:

```

                                ACTIVITY SETUP: OBJECTIVE AND OUTCOME                                HM01-A
Grantee Activity ID              HUD Activity ID              9898
Activity Name                    805-807 TRINITY PLACE - WILLIAMS
OBJECTIVE
-
1 Create suitable living environments
2 Provide decent affordable housing
3 Create economic opportunities
OUTCOME
-
1 Availability/accessibility
2 Affordability
3 Sustainability
F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
```

Assuming your objective for this activity is to provide decent affordable housing (code **2**) and the expected outcome is affordability (also code **2**), press <Enter> to continue to the next screen.

4. The Set Up Activity: Special Characteristics screen is displayed:

```

                                SET UP ACTIVITY: SPECIAL CHARACTERISTICS                HM01-B
Grantee Activity ID                HUD Activity ID    9898
Activity Name                805-807 TRINITY PLACE - WILLIAMS

ACTIVITY                        Type 'Y' next to any that apply:
LOCATION
- CDBG strategy area
- Local target area
- Presidentially declared major disaster area
- Historic preservation area
- Brownfield redevelopment area
- Conversion from non-residential to residential use
- Colonia

FAITH-BASED                      Will this activity be carried out by a faith-based
ORGANIZATION                      organization (Y/N)?  _

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
```

Note: The COLONIA field is only displayed for PJs in Arizona, California, New Mexico, and Texas.

If the activity is located in an area listed on the screen, enter **Y**. More than one may be selected, but none have to be. Also answer the FAITH-BASED ORGANIZATION question.

When you are finished, press <Enter> to save your data and continue.

5. The Setup Homeowner Rehab Activity screen is displayed:

```

SET UP HOMEOWNER REHAB ACTIVITY                                HO01
Grantee Activity ID                                           IDIS Activity ID    9898
Activity Name          805-807 TRINITY PLACE - WILLIAMS

ACTIVITY TYPE          1 Rehab Only

PROPERTY ADDRESS
Homeowner's Name      _____
Street                805-807 TRINITY PLACE
City                  WASHINGTON           St DC Zip 20002 - ____
County Code          _____

ACTIVITY ESTIMATES  HOME Units  ____    HOME Cost  _____

MULTI-ADDRESS (Y/N)? _

LOAN GUARANTEE(Y/N)? _

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
PROPERTY ADDRESS Homeowner's Name	Leave this field blank for a multi-address activity. The homeowners' names will be entered at completion.
PROPERTY ADDRESS Street, City, St, Zip	If you did not input an address on the Common Path screen, enter it now.
PROPERTY ADDRESS County Code	Press <F1> to display a list of county codes for your state and select the appropriate one.
ACTIVITY ESTIMATES HOME Units	For this exercise, enter 2 .
ACTIVITY ESTIMATES HOME Cost	For this exercise, enter 16,850 .
MULTI-ADDRESS (Y/N)?	For this exercise, enter Y .
LOAN GUARANTEE (Y/N)?	Enter Y , N , or leave blank to have the field automatically set to N.

When you are finished, press <Enter> to save your data and continue.

6. The Set Up Homeowner Rehab Activity: Contractor screen is displayed:

```

                                SET UP HOMEOWNER REHAB ACTIVITY: CONTRACTOR                                HO02
Grantee Activity ID                                IDIS Activity ID                                9898
Activity Name                                     805-807 TRINITY PLACE - WILLIAMS
Activity Address                                  805-807 TRINITY PLACE WASHINGTON DC 20002

CONTRACTOR TYPE
1 Individual          4 Not-for-Profit
2 Partnership        5 Publicly Owned
3 Corporation        9 Other

CONTRACTOR'S NAME _____

CONTRACTOR'S ADDRESS
Street _____
City _____ St __ Zip _____ - ____

F3=VALDT   F4=MAIN MENU   F5=PROJ INFO   F7=PREV   F8=NEXT   F9=SAVE
```

Input the name (optional) and address (required) of the contractor performing the work.

When you are finished, press <Enter>. Setup is complete, and the HOME Menu is displayed. Notice that the Homeowner Rehab setup option is highlighted.

Exercise 6.2 Activity Completion

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.
2. On the HOME Menu, select option **H**, Costs & Beneficiaries, and press <Enter>.
3. The Complete Homeowner Rehab Activity screen is displayed:

```

                                COMPLETE HOMEOWNER REHAB ACTIVITY                                H003

Grantee Activity ID                                IDIS Activity ID                                9898
Activity Name      805-807 TRINITY PLACE - WILLIAMS
Activity Address   805-807 TRINITY PLACE WASHINGTON DC 20002

ACTIVITY TYPE      1 Rehab Only

PROPERTY TYPE      1
                   1 1-4 Single Family      3 Cooperative
                   2 Condominium           4 Manufactured Home

FHA INSURED (Y/N)? -

COMPLETED UNITS  Total number      2
                   HOME-assisted    2

F3=VALDT      F4=MAIN MENU      F5=PROJ INFO      F7=PREV      F8=NEXT      F9=SAVE
  
```

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	Because the only valid Activity Type for a rehab activity is 1, this field is pre-populated and protected from update.
PROPERTY TYPE	This field is initially populated with 1 , but can be changed to one of the other codes listed on the screen.
FHA INSURED (Y/N)?	Enter Y , N , or leave blank to have the field automatically set to N.
COMPLETED UNITS Total Number	This field is populated with the estimated number of units you entered at setup (for this exercise, 2), but may be changed.
COMPLETED UNITS HOME-assisted	This field is also populated with the estimated number of units you entered at setup, but may be changed. It cannot exceed the TOTAL NUMBER of units. For this exercise, leave it at 2.

When you are finished, press <Enter> to save your data and continue.

4. The Complete Homeowner Rehab Activity: Units screen is displayed:

```

                COMPLETE HOMEOWNER REHAB ACTIVITY: UNITS                HO03-A

Grantee Activity ID          IDIS Activity ID          9898
Activity Name                805-807 TRINITY PLACE - WILLIAMS
Activity Address             805-807 TRINITY PLACE WASHINGTON DC 20002

COMPLETED UNITS          Total      2    HOME-Assisted      2

OF THE UNITS COMPLETED, THE NUMBER:                TOTAL      HOME-
                                                    ASSISTED

                Meeting Energy Star standards:  _____  _____
                                                    TOTAL      HOME-
                                                    ASSISTED

                504-accessible:  _____

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Fill in the screen this way:

Field	Input
COMPLETED UNITS Total	This protected field displays the TOTAL NUMBER of units from the previous screen. The numbers you enter in the TOTAL column below cannot exceed this number.
COMPLETED UNITS HOME-Assisted	This protected field displays the number of HOME-ASSISTED units from the previous screen. The numbers you enter in the HOME-ASSISTED column below cannot exceed this number.
Meeting Energy Star standards	Pressing <F1> displays the help screen for this field. In the TOTAL column, enter the total number of units certified by Energy Star. In the HOME-ASSISTED column, enter the number of HOME-assisted units certified by Energy Star. It cannot be more than the number you entered in the TOTAL column.
504-accessible	Enter the total number of units that are 504-accessible.

When you are finished, press <Enter> to save your data and continue.

5. The Property Addresses screen is displayed:

```

PROPERTY ADDRESSES
Grantee Activity ID _____ IDIS Activity ID 9898
Activity Name 805-807 TRINITY PLACE - WILLIAMS

Enter X to select, P to paste previous address, or D to delete

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

- Name _____
  Street _____
  City _____ St __ Zip _____ - _____ County _____

Add more addresses(Y/N)? _ Display cumulative totals(Y/N)? _

F1=HELP F3=VALDT F4=MAIN MENU F7=PREV F8=NEXT F9=SAVE
    
```

Fill in the first address block on the screen this way:

Field	Input
Name	Optional. Enter the name of the homeowner or any other identifier, if you wish.
Street	Enter the street name and number of one of the properties—for this exercise, 805 Trinity Place .
City, State, Zip, County	Enter this information for the property. If you do not know the COUNTY CODE, press <F1> to select one from the list displayed.

When you are finished, press <Enter>. Notice that <Enter> saves your input but does not advance to the next screen. To display the next completion screen, you must input an **X** in the selection field—the unnamed field located to the left of NAME—of one of the address blocks (you will do this shortly).

The three codes that can be entered in the selection field are shown at the top of the screen. They are:

- **X** – to access the cost and beneficiary screens for the address.
- **P** – to paste the previous address into the next empty address block
- **D** – to delete the address *and any cost and beneficiary data that has been entered for it*

To see how the “paste previous address” function works, type **P** in the selection field of the second address block and press <Enter>.

```

                                PROPERTY ADDRESSES                                ADRS
Grantee Activity ID                                IDIS Activity ID                                9898
Activity Name                                805-807 TRINITY PLACE - WILLIAMS

Enter X to select, P to paste previous address, or D to delete

- Name                                CARTER WILLIAMS
  Street                                805 TRINITY PLACE
  City                                WASHINGTON                                St DC Zip 20002 - County 25

- Name                                _____
  Street                                805 TRINITY PLACE
  City                                WASHINGTON                                St DC Zip 32901 - County ____

- Name                                _____
  Street                                _____
  City                                _____                                St __ Zip ____ - County ____

- Name                                _____
  Street                                _____
  City                                _____                                St __ Zip ____ - County ____

Add more addresses(Y/N)? _                                Display cumulative totals(Y/N)? _

F1=HELP F3=VALDT F4=MAIN MENU F7=PREV F8=NEXT F9=SAVE
    
```

You can now input the name of the second homeowner (**Samuel Williams**) and update the street number to **807**.

When you are finished, type **X** in the selection field of the first address block and press <Enter> to continue.

- The Complete Homeowner Rehab Activity: Costs screen is displayed. Notice that the address you selected on the previous screen is displayed in the PROPERTY ADDRESS field at the top of this screen.

```

                                COMPLETE HOMEOWNER REHAB ACTIVITY: COSTS                                H004
Grantee Activity ID                                IDIS Activity ID                                9898
Activity Name                                805-807 TRINITY PLACE - WILLIAMS
Property Address                                805 TRINITY PLACE WASHINGTON DC 20002

Value After Rehab                                _____

1. HOME FUNDS                                Amortized Loan                                _____
   (Including PI)                                Grant                                _____
   Deferred Payment Loan                                _____
   Other                                _____                                0.00

2. PUBLIC FUNDS                                Other Federal Funds                                _____
   State/Local Funds                                _____
   Tax-Exempt Bond Proceeds                                _____                                0.00

3. PRIVATE FUNDS                                Private Loans                                _____
   Owner Cash Contributions                                _____
   Private Grants                                _____                                0.00

Total This Address                                0.00

To display alternate costs screen, press <F15>.
F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE F15=ALT
    
```

Fill in this screen with the HOME costs for the rehab of 805 Trinity Place. Input the following values:

Field	Input
Value After Rehab	Enter the value of the property at 805 Trinity Place after rehab (no commas or cents).
PROPERTY COSTS	HOME is providing a direct loan of 9,000 .
PUBLIC FUNDS	None.
PRIVATE FUNDS	None.

When you are finished, press <Enter> to save your data and continue.

7. The Complete Homeowner Rehab Activity: Beneficiaries screen for the property at 805 Trinity Place is displayed:

```

                COMPLETE HOMEOWNER REHAB ACTIVITY: BENEFICIARIES                HO06
Grantee Activity ID                IDIS Activity ID                9898
Activity Name                805-807 TRINITY PLACE - WILLIAMS
Property Address                805 TRINITY PLACE WASHINGTON DC 20002

Unit#    # of    Occu-    -----HOUSEHOLD-----    Asst    Total
         Bdrms  pant    %Med Hisp? Race Size Type    Type    Monthly Rent
-----  -      -      - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
         -      2      - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
         -      -      - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
         -      -      - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
         -      -      - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

FHA insured (Y/N)?  _

For vacant units: Enter Unit# and # of Bdrms. Change Occupant to 9.
F1=HELP  F3=VLDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

The multi-address beneficiary screen has input lines for four units—the maximum number allowed at any one address for a homeowner rehab activity (IDIS knows the total number of HOME-assisted units in the activity but not the number of units at each address, and so must make four input lines available). For this exercise, assume that there are no rental units.

Like the single-address beneficiary screen, data about the homeowner is to be entered on the first line: the OCCUPANT code is pre-populated with 2 (owner) and cannot be changed.

On the first line:

- Input the unit number and the number of bedrooms for 805 Trinity Place. There is an <F1> help screen for the # OF BDRMS field.
- Enter household information about the homeowner. An <F1> help screen is available for each of these fields.

- The default assistance type of 4 (no assistance) should be changed to 1 (Section 8 mortgage assistance) when applicable. None of the other codes shown on the <F1> help screen for this field is valid for the owner-occupied unit.
- TOTAL MONTHLY RENT is not applicable to a homeowner, so no input field is provided.

In the FHA INSURED (Y/N)? field, enter **Y**, **N**, or leave blank to have it automatically set to N.

When you have finished:

- Press <F9> to save your data.
 - Press <F7> twice to return to the Property Addresses screen.
- <Tab> to the selection field for 807 Trinity Place. Enter **X** and press <Enter>. Repeat steps 6 and 7, this time entering cost and beneficiary data for the property at 807. When you are finished, you should be back at the Property Addresses screen.
 - On the Property Addresses screen, press <Shift + Tab> to move the cursor to the DISPLAY CUMULATIVE TOTALS (Y/N)? field at the bottom right. Type **Y** and press <Enter>. The Multi-Address Activity Summary screen is displayed:

```

                                MULTI-ADDRESS ACTIVITY SUMMARY                                HO98
Grantee Activity ID                IDIS Activity ID                9898
Activity Name                      805-807 TRINITY PLACE - WILLIAMS
Activity Address                   805-807 TRINITY PLACE WASHINGTON DC 20002

ACTIVITY TOTALS, ALL ADDRESSES

      HOME Funds (Including PI)      16,850.00
      Public Funds                   0.00
      Private Funds                  0.00

                                TOTAL      16,850.00

      Cost data entered for  2 of  2 addresses
      Unit data entered for  2 of  2 units

Total HOME Funds Disbursed          0.00

View cost details (Y/N)? _          Select another address (Y/N)? _

F4=MAIN MENU    F7=PREV    F8=NEXT
    
```

This screen provides totals for the cost and beneficiary data you have input for the two properties. Before you will be able to set the activity status to "complete," the amounts in HOME FUNDS and TOTAL HOME FUNDS DISBURSED must be equal.

To view a cost breakdown by form of assistance, enter **Y** in the VIEW COST DETAILS (Y/N)? field and press <Enter>:

MULTI-ADDRESS ACTIVITY COST SUMMARY			HO99
Grantee Activity ID		IDIS Activity ID	9898
Activity Name	805-807 TRINITY PLACE - WILLIAMS		
Activity Address	805-807 TRINITY PLACE WASHINGTON DC 20002		
			Totals
1. HOME FUNDS	Amortized Loan	16,850.00	
(Including PI)	Grant	0.00	
	Deferred Payment Loan	0.00	
	Other	0.00	16,850.00
2. PUBLIC FUNDS	Other Federal Funds	0.00	
	State/Local Funds	0.00	
	Tax-Exempt Bond Proceeds	0.00	0.00
3. PRIVATE FUNDS	Private Loans	0.00	
	Owner Cash Contributions	0.00	
	Private Grants	0.00	0.00
Total HOME Disbursed	0.00	Activity Total	16,850.00
F4=MAIN MENU	F7=PREV	F8=NEXT	

When you finish reviewing the screen, press <Enter> to display the HOME Menu.

----- End of Exercise 6.2 -----

Lesson 7

TBRA ACTIVITIES

This lesson covers material presented in Chapter 10 of the Training Manual.

Scenario: Your PJ is funding a scattered-site TBRA activity to provide rental assistance to the very low- and low-income elderly.

1. On the Main Menu, select option **A**, Set Up Activity. Complete the Common Path screens, following the standards your PJ has adopted.

Jot down the following information for use in later exercises:

CPS Project Number _____

Program Year _____

HUD Activity Number _____

2. On the fourth Common Path screen (C04MA08), enter a TOTAL ESTIMATED AMOUNT and an **X** next to HOME. Press <Enter>. On the HOME MENU, select option **D**, Tenant-Based Rental Assistance (TBRA) and press <Enter>.
3. The Activity Setup: Outcome and Objective screen is displayed:

```
ACTIVITY SETUP: OBJECTIVE AND OUTCOME                                HM01-A
Grantee Activity ID                                                    HUD Activity ID    8080
Activity Name                  TBRA 2006

OBJECTIVE
-
1 Create suitable living environments
2 Provide decent affordable housing
3 Create economic opportunities

OUTCOME
-
1 Availability/accessibility
2 Affordability
3 Sustainability

F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
```


5. The TBRA: Units screen is displayed:

```

                                TBRA: UNITS                                TBRA-2
Grantee Activity ID                                IDIS Activity ID    8080
Activity Name      HOME TBRA
NUMBER OF TBRA UNITS:  3

                                Designated for the homeless:  ___
Of those, the number for the chronically homeless:  ___

FAITH-BASED ORGANIZATION:  Was this activity carried out by a
                                faith-based organization (Y/N)?  _

F3=VALDT    F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT    F9=SAVE
    
```

Fill in the screen this way:

Field	Input
NUMBER OF TBRA UNITS	This protected field displays the number of units you entered on the previous screen.
Designated for the homeless	Enter the total number of units developed specifically for occupancy by persons who met the HUD definition of "homeless" (provided on the <F1> help screen for this field) at entry. This number cannot be greater than NUMBER OF TBRA UNITS.
Of those, the number for the chronically homeless	Enter the number of units developed specifically for occupancy by homeless persons who met the HUD definition of "chronically homeless" (provided on the <F1> help screen for this field) at entry. This number cannot be greater than the number of units DESIGNATED FOR THE HOMELESS.
FAITH-BASED ORGANIZATION	Assuming that your PJ administers the TBRA program itself, enter N or leave blank.

When you are finished, press <Enter>. The HOME Menu is displayed. Notice that the TBRA setup option is highlighted.

----- End of Lesson 7 -----

Lesson 8

AD/CO/CC ACTIVITIES

This lesson covers material presented in Chapter 11 of the Training Manual.

Scenario: You want to set up an admin activity for your 2006 homebuyer program.

1. On the Main Menu, select option **A**, Set Up Activity. Complete the Common Path screens, following the standards your PJ has adopted.

Jot down the following information for use in later exercises:

CPS Project Number _____

Program Year _____

HUD Activity Number _____

2. On the fourth Common Path screen (C04MA08), enter a TOTAL ESTIMATED AMOUNT and an **X** next to HOME. Press <Enter>. On the HOME MENU, select option **E**, Activity Funded Only with AD/CO/CC and press <Enter>.

The HOME Menu is redisplayed with the message "Setup is complete: activity may now be funded with AD/CO/CC."

There are no additional setup screens. To complete an AD/CO/CC activity, all you need to do is update the ACTIVITY STATUS CODE.

----- End of Lesson 8 -----

Lesson 9

CHDO LOAN ACTIVITIES

This lesson covers material presented in Chapter 12 of the Training Manual.

Scenario: Your PJ is funding the rehabilitation of the Leland Apartments. The work is to be performed by one of your CHDOs. This CHDO lacks the working capital to pay for the upfront costs of the rehab, so you are providing a seed-money loan of \$25,000.

Exercise 9.1 The CHDO Loan Phase

1. On the Main Menu, select option **A**, Set Up Activity. Complete the Common Path screens, following the standards your PJ has adopted.

Jot down the following information for use in later exercises:

CPS Project Number _____

Program Year _____

HUD Activity Number _____

2. On the fourth Common Path screen (C04MA08), enter **25,000** in TOTAL ESTIMATED AMOUNT and **X** next to HOME. Press <Enter>. On the HOME MENU, select option **A**, Rental, and press <Enter>.

3. The Set Up Activity: CHDO Questions screen is displayed:

```

                                SET UP ACTIVITY: CHDO QUESTIONS                                HM01
Grantee Activity ID              IDIS Activity ID              9991
Activity Name                    LELAND APARTMENTS REHAB
CR ACTIVITY?                    Will the activity be funded with CR (Y/N)?  _
                                If yes:
                                CHDO Acting As      _
                                1 Owner
                                2 Sponsor
                                3 Developer
                                Will initial funding be a CHDO Site
                                Control and/or Seed Money Loan (Y/N)?  _

F3=VALDT   F4=MAIN MENU   F5=PROJ INFO   F7=PREV   F8=NEXT   F9=SAVE
```

Fill in the screen this way:

Field	Input
CR ACTIVITY? Will the activity be funded with CR (Y/N)?	For this exercise, enter Y .
CHDO Acting As	For this exercise, enter 3 .
Will initial funding be a CHDO Site Control and/or Seed Money Loan (Y/N)	For this exercise, enter Y .

When you are finished, press <Enter>. The CHDO Questions screen is redisplayed with this message:

```

                                SET UP ACTIVITY: CHDO QUESTIONS                                HM01

Grantee Activity ID              IDIS Activity ID      9991
Activity Name                    LELAND APARTMENTS REHAB

CR ACTIVITY?                    Will the activity be funded with CR (Y/N)?  Y

                                If yes:
                                  CHDO Acting As    3
                                      1  Owner
                                      2  Sponsor
                                      3  Developer

                                Will initial funding be a CHDO Site
                                Control and/or Seed Money Loan (Y/N)?  Y

Setup for loan phase is complete: activity can now be funded with CL.
At the end of the loan phase, return to this screen to indicate whether
the activity is going forward or if it is complete.

F3=VALDT   F4=MAIN MENU   F5=PROJ INFO   F7=PREV   F8=NEXT   F9=SAVE
    
```

No additional setup screens can be accessed until CHDO Loan (CL) funds have been committed to the activity and the full amount drawn down. Press <F4> to display the Main Menu.

4. **CREATING THE CL SUBFUND.** If a CHDO Loan subfund already exists, you won't need to perform this step. Otherwise, select Main Menu option **G** and press <Enter> to display the Subgrant & Subfund Menu:


```

06/10/06      THE INTEGRATED DISBURSEMENT AND INFORMATION SYSTEM      C04MM01
16:53:38

                                SUBGRANT & SUBFUND MENU

                                01 CREATE SUBGRANTS
                                02 MAINTAIN SUBGRANTS
                                03 CREATE SUBFUNDS (AD,CR,CO,CC,TA,SU)
                                04 MAINTAIN SUBFUNDS

TYPE SELECTION AND PRESS ENTER      G 00

F4 = MAIN MENU      F7 = PREV
    
```

Select option **03** and press <Enter> to display the Create Sub-Fund(s) screen:

```

06/10/06      16:54                                CREATE SUB-FUND(S)                                C04MG06
-----

PGM   FISCAL   SOURCE   FUND      SUB-ALLOCATION   AVAILABLE GRANT
CODE  YEAR     TYPE     TYPE      AMOUNT          BALANCE
-----

  _   _   _   _   _   _   _   _   _   _   _   _
GRANT NUMBER: _____ $0.00 _____

  _   _   _   _   _   _   _   _   _   _   _   _
GRANT NUMBER: _____ $0.00 _____

  _   _   _   _   _   _   _   _   _   _   _   _
GRANT NUMBER: _____ $0.00 _____

  _   _   _   _   _   _   _   _   _   _   _   _
GRANT NUMBER: _____ $0.00 _____

ENTER YOUR SUBFUND REQUEST(S)

F1 = HELP  F3 = VALDT  F4 = MAIN MENU  F6 = CLEAR SCREEN
F7 = PREV  F9 = SAVE
    
```

Fill in the screen this way:

Field	Input
PGM CODE	Enter M .
FISCAL YEAR	Enter the last two digits of the year of one of your HOME grants that still has CHDO Reserve (CR) available for activity funding.

Field	Input
SOURCE TYPE	Enter the type of that HOME grant: DC Consortium MC Metropolitan City SG State ST Insular Area UC Urban County
FUND TYPE	Enter CL for CHDO Loan.

When you are finished, press <Enter> to save your data. Notice the message that is displayed: \$0 SUB-FUND CREATED. USE MAINTAIN SUB-FUND TO REVISE AMOUNT. Press <F7> to return to the Subgrant & Subfund Menu, and select option **04**. The Maintain Subfunds screen is displayed:

```

06/12/06  08:48                MAINTAIN  SUBFUNDS                C04MG07
-----
PROGRAM CODE:  _   FISCAL YEAR:  ____   SOURCE TYPE:  __
SELECTION: X - INQUIRE, C - CANCEL, R - REVISE

PRESS ENTER TO CONTINUE; PROGRAM CODE, FISCAL YR AND TYPE ARE OPTIONAL
F1 = HELP  F3 = VALDT  F4 = MAIN MENU  F6 = CLEAR SCREEN
F7 = PREV  F17 = UP    F18 = DOWN
    
```

Enter a PROGRAM CODE of **M** and the same FISCAL YEAR and SOURCE TYPE you input on the Create Sub-Fund(s) screen. Press <Enter> to display a list of the subfunds that meet the criteria you entered. Type **R** (for revise) next to the CL subfund you just created and press <Enter>. The Revise Subfund screen is displayed.

For this exercise, enter a CHDO Loan subfund amount of **25,000** in the NEW AUTH field, then press <Enter>. The Maintain Subfunds screen is displayed with the message SELECTION(S) PROCESSED SUCCESSFULLY. Press <F7> to display the Subgrant and Subfund Menu.

5. **CREATING THE CL SUBGRANT.** Select Subgrant & Subfund Menu option **01** and press <Enter> to display the Create Sub-Grant(s) screen:

```

06/12/06  15:46                CREATE  SUB-GRANT(S)                C04MG01
-----
 UOG      UOG      PGM  FSCL  SCE  FUND  SUBALLOC  AVAILABLE
 CDE      NBR      CDE  YEAR  TYPE TYPE  AMOUNT    GRANT BALANCE
-----
          -      -      -      -      -      $0.00
RECIPI NM: _____ GRANT NUMBER: _____
          RECIPIENT HAS BANKING? (Y/N) _

          -      -      -      -      -      $0.00
RECIPI NM: _____ GRANT NUMBER: _____
          RECIPIENT HAS BANKING? (Y/N) _

          -      -      -      -      -      $0.00
RECIPI NM: _____ GRANT NUMBER: _____
          RECIPIENT HAS BANKING? (Y/N) _

          -      -      -      -      -      $0.00
RECIPI NM: _____ GRANT NUMBER: _____
          RECIPIENT HAS BANKING? (Y/N) _

ENTER YOUR SUBGRANT REQUEST(S)
F1 = HELP  F3 = VALDT  F4 = MAIN MENU  F6 = CLEAR SCREEN
F7 = PREV  F9 = SAVE
    
```

Fill in the screen this way:

Field	Input
UOG CDE and UOG NBR	Enter the UOG code and number for one of your CHDOs.
PGM CDE	Enter M .
FSCL YEAR	Enter the fiscal year of the CL subfund.
SCE TYPE	Enter the same source type that you input when you created the CL subfund: DC Consortium MC Metropolitan City SG State ST Insular Area UC Urban County
FUND TYPE	Enter CL .
RECIPIENT HAS BANKING? (Y/N)	Enter N or leave blank.

When you are finished, press <F9> to save your data. Notice the message that is displayed: \$0 SUB-GRANT CREATED. USE MAINTAIN SUB-GRANT TO REVISE AMOUNT. Press <F7> to return to the Subgrant & Subfund Menu, and select option **02**. The Maintain Subgrants screen is displayed:

```
06/12/06 08:48                MAINTAIN SUBGRANTS                C04MG02
-----
PROGRAM CODE:  _  FISCAL YEAR:  ____  SOURCE TYPE:  __
SELECTION: X - INQUIRE, C - CANCEL, R - REVISE

PRESS ENTER TO CONTINUE; PROGRAM CODE, FISCAL YR AND TYPE ARE OPTIONAL
F1 = HELP  F3 = VALDT  F4 = MAIN MENU  F6 = CLEAR SCREEN
F7 = PREV  F17 = UP    F18 = DOWN
```

Enter a PROGRAM CODE of **M** and the same FISCAL YEAR and SOURCE TYPE you input on the Create Sub-Grant(s) screen. Press <Enter> to display a list of the subfunds that meet the criteria you entered. Type **R** (for revise) next to the CL subgrant you just created and press <Enter>. The Revise Subgrant screen is displayed:

For this exercise, enter an amount of **25,000** in the New AUTH field, then press <Enter>. The Maintain Subgrants screen is displayed with the message SELECTION(S) PROCESSED SUCCESSFULLY. Press <F4> to display the Subgrant and Subfund Menu.

Press <F4> to return to the Main Menu.

6. **FUNDING AND DRAWING DOWN FOR THE CHDO LOAN PHASE.** The next step is to commit and draw down the \$25,000 of CL. These procedures are performed as usual, except the only fund type you will be allowed to commit is CL.

The draw must be approved before you can continue with this exercise.

----- End of Exercise 9.1 -----

Exercise 9.2 The Going Forward Phase

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR for your CHDO Loan activity, and press <Enter>. Page to the last Common Path screen. Type **X** next to HOME and press <Enter>.
2. On the HOME Menu, select option **A** (it should be highlighted) and press <Enter> to display the CHDO Questions screen:

```

                                SET UP ACTIVITY: CHDO QUESTIONS                                HM01
Grantee Activity ID              IDIS Activity ID      9991
Activity Name                    LELAND APARTMENTS REHAB
CR ACTIVITY?                    Will the activity be funded with CR (Y/N)?  Y
                                If yes:
                                CHDO Acting As      3
                                                1 Owner
                                                2 Sponsor
                                                3 Developer
                                Will initial funding be a CHDO Site
                                Control and/or Seed Money Loan (Y/N)?  Y
GOING FORWARD?                 Loan funds have been fully disbursed.
                                Is the activity going forward (Y/N)?  _
F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
```

For this exercise, assume that the rehab of the Leland Apartments will proceed to the development phase. Enter **Y** in the GOING FORWARD? field and press <Enter> to finish setting up the activity.

3. The Set Up Rental Activity screen is displayed:

```

                                SET UP RENTAL ACTIVITY                                HR01
Grantee Activity ID              IDIS Activity ID      9991
Activity Name                    LELAND APARTMENTS REHAB
ACTIVITY TYPE
1  Rehab Only                    4  Acquisition & Rehab
2  New Construction Only         5  Acquisition & New
3  Acquisition Only              Construction
PROPERTY ADDRESS
Street                          119 SHERIDAN STREET
City                            LITTLE ROCK           St AR  Zip 72216 - ____
County Code                    _____
ACTIVITY ESTIMATES  HOME Units  _____  CHDO Loan      25,000.00
Other HOME          _____
HOME Total          25,000.00
MULTI-ADDRESS (Y/N)? _
LOAN GUARANTEE(Y/N)? _
CHDO ACTIVITY (Y/N)? N
F1=HELP  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
    
```

Notice that the estimated cost field for an activity initially funded with a CHDO loan is a little different from the regular screen. CHDO LOAN is a read-only field showing the amount of CL funds drawn for the activity. In the OTHER HOME field, input your estimate of the additional (non-CL) HOME funds needed for the activity.

Other than that, the setup, funding, and drawdown processes for CHDO loan and regular activities are identical. For this exercise, complete the three setup screens and return to the HOME Menu.

4. The completion screens for a CHDO loan activity are identical to those for a regular activity except for one read-only field on the cost screen. Select option **H** and press <Enter> to display the Complete Rental Activity screen:

```

                                COMPLETE RENTAL ACTIVITY                                HR03

Grantee Activity ID                IDIS Activity ID    9991
Activity Name                      LELAND APARTMENTS REHAB
Activity Address                   119 SHERIDAN STREET LITTLE ROCK AR 72216

ACTIVITY TYPE                      1
                                   1 Rehab Only                4 Acquisition & Rehab
                                   2 New Construction Only     5 Acquisition & New
                                   3 Acquisition Only          Construction

PROPERTY TYPE                      -
                                   1 Condominium                4 Apartment
                                   2 Cooperative                5 Other
                                   3 SRO

YES OR NO (Y/N)                   FHA insured? _   Mixed use? _   Mixed income? _

COMPLETED UNITS                   Total number      5
                                   HOME-assisted     5

F3=VALDT   F4=MAIN MENU   F5=PROJ INFO   F7=PREV   F8=NEXT   F9=SAVE
    
```

Complete this and the next two screens (Units and Period of Affordability) exactly as you do for a non-CHDO loan activity.

- When the Complete Rental Activity: Costs screen is displayed, notice that a line has been added showing the amount of the CHDO loan amount. It cannot be updated.

```

                                COMPLETE RENTAL ACTIVITY: COSTS                                HR04

Grantee Activity ID                IDIS Activity ID    9991
Activity Name                      LELAND APARTMENTS REHAB
Activity Address                   119 SHERIDAN STREET LITTLE ROCK AR 72216

1. HOME FUNDS                      CHDO Loan          25,000.00          Totals
   (Including PI)                   Amortized Loan    _____
                                   Grant              _____
                                   Deferred Payment Loan _____
                                   Other              _____          25,000.00

2. PUBLIC FUNDS                    Other Federal Funds _____
                                   State/Local Funds  _____
                                   Tax-Exempt Bond Proceeds _____          0.00

3. PRIVATE FUNDS                   Private Loans      _____
                                   Owner Cash Contributions _____
                                   Private Grants    _____          0.00

4. LOW INCOME HOUSING TAX CREDIT PROCEEDS _____          0.00
HOME Funds Disbursed              38,000.00          Activity Total    25,000.00
To display alternate costs screen, press <F15>.
F3=VALDT   F4=MAIN MENU   F5=PROJ INFO   F7=PREV   F8=NEXT   F9=SAVE   F15=ALT
    
```


Lesson 10

SEARCH HOME ACTIVITIES

This lesson covers material presented in Chapter 14 of the Training Manual.

1. On the Main Menu, select option **B** and press <Enter>. On the next screen, Revise Activity MA09, <tab> to HUD ACTIVITY NBR and input the ID for one of the activities you have added. Press <Enter>.
2. Page to the last Common Path screen, enter **X** next to HOME and press <Enter>. On the HOME MENU, select option **G**, Search Activities, and press <Enter>.
3. The Search HOME Activities screen is displayed:

Enter search criteria	SEARCH HOME ACTIVITIES	FIND
PROGRAM YEARS	from ____ to ____	
PROJECT IDS	from ____ to ____	
SET UP DATES	between __ - __ - ____ and __ - __ - ____	
COMPLETION DATES	between __ - __ - ____ and __ - __ - ____	
STATUS CODES	_ and _ and _ (1 Canceled 3 Budgeted 2 Complete 4 Underway)	
TENURE TYPES	_ and _ and _ (1 Rental 3 Homeowner Rehab 2 Homebuyer 4 TBRA 5 Admin)	
OCCUPANT CODES	_ and _ (1 Tenant 9 Vacant 2 Owner)	
ACTIVITY NAMES	beginning with _____ containing text _____	
F2=PROJECT LIST F6=CLEAR F7=PREV		

Input as few or as many search values as you like. For example, to identify:

- All of your open activities, enter STATUS CODES of **3** and **4**.
- All completed rental activities with vacant units, enter a STATUS CODE of **2**, a TENURE TYPE of **1**, and an OCCUPANT CODE of **9**.

When you are finished, press <Enter> to start the search.

4. When the system finishes retrieving the activities that meet the criteria you specified, the Search Results screen is displayed.

```

SEARCH RESULTS
100 Activities Found

Enter X to select

      IDIS
Select Act ID  Grantee Activity ID Activity Name
-----
      5138      1101 NORTH 8TH STREET
      5013      717 RUTH LANE
      5010      2400 E. FIRST STREET
      4314      1500 ECHOLS ST.
      4274      100 COMMERCIANTES BLVD
      4200      3500 N BUTLER
      4187      360 BIANES STREET
      4167      S. TENNYSON AND E. POPLAR
      4115      3420 SANOSTEE DRIVE
      4014      100 YUCCA STREET
      3993      3309,3313,3305,3301 VINTON, 3300 JEFFERS
      3843      1101 WEST FIR STREET
      3829      NW CORNER: GARWOOD STREET & AVENUE F
      3781      113,117,121,124 CHERRY ST & 210 MONROE
      3745      CURRY COURT

F4=MAIN  F7=PREV  F8=NEXT  F14=SORT BY COL  F16=SORT ASC/DSC  F18=DOWN

```

The number of activities retrieved is displayed under the screen title.

Activities are initially displayed in descending order by IDIS ACTIVITY ID (highest to lowest). You can change the sort order from descending to ascending with the <F16> (<Shift + F4>) key.

To change the sort column from IDIS ACTIVITY ID to GRANTEE ACTIVITY ID, press < F14> (<Shift + F2>) once. Press <F14> again to sort by ACTIVITY NAME. Pressing it again sorts by IDIS ACTIVITY ID.

To edit/view an activity listed on the results screen, enter **X** in the SELECT field to the left of the activity ID and press <Enter>. The HOME Menu is displayed, ready to process the activity you selected.

Otherwise, you can press <F7> to return to the Search screen. Be sure to press <F6> to clear the screen of the parameters you input for the last search.

Note: If you want to print the results, do so before exiting the Search Results screen. Otherwise, you will have to conduct the search again.