Purpose: To practice setting up activities in the User Acceptance Testing (UAT) server

Scenario: The city of Chesapeake, Department of Community Development (DCD), received $500,000 to implement HOPWA services. DCD has contracted out with one project sponsor to provide the following:

- Chesapeake Housing Provider (CHP) will receive $451,050 to provide Tenant Based Rental Assistance and $33,950 for Administration costs.
- DCD will retain $15,000 for Grantee Administration Costs.

This is the second year the Grantee has received formula funds for HOPWA. For this Accomplishment Year, the Grantee plans to use some funds still available from Grant Year 2011 and some from Grant Year 2012. Last year the grantee labeled activities as Program Year 2011.

Decision Points:

1. For which organization(s) will you set up projects?
2. What program year is associated with the projects?
3. How will you name the projects?
4. Are these projects expected to generate program income?

Exercise: Use the steps below to set up projects for the agencies described in the scenario.

1. Go to http://www.hud.gov/offices/cpd/systems/idis/idis.cfm
2. Scroll to the bottom of the page until you see **Training on the UAT Test Server**
3. Click on **External Users (Grantees)**
4. Log into the UAT Test Server using your IDIS account number and password
5. Click the **Plans/Projects/Activities** tab at the top of the screen.
6. Click **Add** under **Projects** in the left side of the screen.
7. Complete the Project Set Up Screen by following the steps below:
    a. Select the **Program Year** for the Project. Remember the Grantee may use one of the following methods to determine which Program Year to use:
        i. If the grantee has been using multiple program years to fund activities and projects, the Grantee may use the grant allocation year that will be the primary basis for funding the bulk of activities during the operating year.
        ii. If the grantee has been using multiple program years to fund activities and projects, the Grantee may use the next allocation year.
        iii. If the grantee has been using a single program year for all funded projects and activities, use the next year in the succession.
    b. Enter the **Project Title** using the Naming Convention in HANDOUT 1.
    c. Assign a **Grantee/PJ ID**. This step is optional but may be for used for the Grantee for internal tracking purposes (e.g., project sponsor contract numbers).
    d. Enter a brief description of the project in **Description**. The description must provide enough detail for HUD field offices and headquarters to understand the type of agency (e.g., housing authority, faith-based organization), target population to be served (e.g., formerly incarcerated women and

their families), and the type of program or mix of services (e.g., permanent facility-based housing and supportive services) to be supported by HOPWA. For Grantees, the description must include information about the procedures used to administer and to provide oversight of the grant including distribution of the funds in the service area, process for identifying Project Sponsors and Subrecipients (e.g. Request for Proposal (RFP) procedures), procedures for contracting with Project Sponsors and subrecipients, financial management protocols and guidelines for monitoring.

    e.   Under **Assign Sponsor for this Project (only for HOPWA and HOPWA-C Projects)**, click **Select Sponsor Organization** if the project being created is for a Project Sponsor agency. This is required and is how IDIS will be able to differentiate between projects set up for the Grantee and the Project Sponsors.   IDIS Online will only allow one agency to be associated with each Project.

    f.   Under **Estimated Amount** in the **HOPWA** pathway, enter the estimated amount of HOPWA dollars and program income that will be used to fund this Project. ***Note:*** *Organizations that receive both HOPWA formula and HOPWA competitive dollars should set up separate projects for each funding source***.**

8. Click **Save** button. IDIS has now saved the project and the user can establish activities under the project. ***Note:*** *Be sure to write down the Project ID number for each project established. The user will need this number throughout the year for setting up activities, searching for activities and for tracking purposes (See Appendix A in the Using IDIS for the HOPWA Program Guide for sample tracking tool).*