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The
HOME Program

IDIS Exercise Manual for PJs

U.S. Department of Housing and Urban Development
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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

   Grantee Activity ID IDIS Activity ID
   WINSTON APARTMENTS 9766

   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)? _
Exercise 1.1  Set up single-address rental activity

Fill in the screen this way:

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

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

OUTCOME
1  Availability/accessibility
2  Affordability
3  Sustainability
```

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>OBJECTIVE</td>
<td>Assume that your objective in carrying out this activity is to</td>
</tr>
<tr>
<td></td>
<td>provide decent affordable housing. You can either:</td>
</tr>
<tr>
<td></td>
<td>• Press &lt;F1&gt; to display a help screen and select the OBJECTIVE code.</td>
</tr>
<tr>
<td></td>
<td>• Enter 2.</td>
</tr>
<tr>
<td></td>
<td>• Leave the field blank to have it automatically set to 2.</td>
</tr>
<tr>
<td>OUTCOME</td>
<td>Assume that the expected outcome of this activity is affordability.</td>
</tr>
<tr>
<td></td>
<td>As with the OBJECTIVE field, you can either:</td>
</tr>
</tbody>
</table>
Exercise 1.1  Set up single-address rental activity

Field | Input
--- | ---
• 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](image)

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

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY LOCATION</td>
<td>&lt;F1&gt; displays a help screen for these fields.</td>
</tr>
<tr>
<td></td>
<td>For this exercise, enter Y in LOCAL TARGET AREA.</td>
</tr>
<tr>
<td>FAITH-BASED ORGANIZATION</td>
<td>Because the developer, Interfaith Housing, is a self-declared faith-based organization, enter Y.</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
6. The Set Up Rental Activity screen is displayed:

```
<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY TYPE</td>
<td>For this exercise, enter 1.</td>
</tr>
<tr>
<td>PROPERTY ADDRESS</td>
<td>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.</td>
</tr>
<tr>
<td>Street, City, St, Zip</td>
<td></td>
</tr>
<tr>
<td>PROPERTY ADDRESS</td>
<td>Press &lt;F1&gt; to display a list of county codes for your state and select the appropriate one.</td>
</tr>
<tr>
<td>County Code</td>
<td></td>
</tr>
<tr>
<td>ACTIVITY ESTIMATES</td>
<td>For this exercise, enter 5.</td>
</tr>
<tr>
<td>HOME Units</td>
<td></td>
</tr>
<tr>
<td>HOME Cost</td>
<td>For this exercise, enter 95,000.</td>
</tr>
<tr>
<td>MULTI-ADDRESS (Y/N)?</td>
<td>For this exercise, enter N or leave blank.</td>
</tr>
<tr>
<td>LOAN GUARANTEE (Y/N)?</td>
<td>Assume that HOME funds will be used to guarantee financing provided by a private lender. Enter Y.</td>
</tr>
<tr>
<td>CHDO ACTIVITY (Y/N)?</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Note to Insular Area users: This field is not displayed for you.</td>
</tr>
<tr>
<td>Review/update CHDO</td>
<td>Inputting Y in this field and pressing &lt;Enter&gt; displays the CHDO QUESTIONS screen. Once you review/update the CHDO data, you must page through the OBJECTIVE AND</td>
</tr>
<tr>
<td>information (Y/N)?</td>
<td></td>
</tr>
</tbody>
</table>
```
Field | Input
--- | ---
OUTCOME and SPECIAL CHARACTERISTICS screens to redisplay the SET UP RENTAL ACTIVITY screen.  
Note to Insular Area users: This field is not displayed for you.

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

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

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROPERTY OWNED BY</td>
<td>For this exercise, enter <strong>1</strong>.</td>
</tr>
<tr>
<td>OWNER’S NAME</td>
<td>This field is optional. Enter the property owner’s name <strong>George Taylor</strong>, if you wish.</td>
</tr>
<tr>
<td>OWNER’S ADDRESS</td>
<td>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.</td>
</tr>
</tbody>
</table>

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 Activity Status Screen]

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.
Exercise 1.2  Activity Completion


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  Rehab Only
  2  New Construction Only
  3  Acquisition Only
PROPERTY TYPE
  1  Condominium
  2  Cooperative
  3  SRO
YES OR NO (Y/N)
  FHA insured?  _
  Mixed use?  _
  Mixed income?  _
COMPLETED UNITS
  Total number  5
  HOME-assisted  5
```

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY TYPE</td>
<td>This field is populated with the ACTIVITY TYPE you entered at setup (for this exercise, 1). It can be changed here.</td>
</tr>
<tr>
<td>PROPERTY TYPE</td>
<td>For this exercise, enter 4.</td>
</tr>
<tr>
<td>YES OR NO (Y/N) FHA insured? Mixed use? Mixed income?</td>
<td>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.</td>
</tr>
<tr>
<td>COMPLETED UNITS Total Number</td>
<td>This field is populated with the estimated number of units you entered at setup (for this exercise, 5), but may be changed.</td>
</tr>
<tr>
<td>COMPLETED UNITS HOME-assisted</td>
<td>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.</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
Exercise 1.2 Complete single-address rental activity

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPLETED UNITS</td>
<td>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.</td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>COMPLETED UNITS HOME-Assisted</td>
<td>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.</td>
</tr>
<tr>
<td>Meeting Energy Star standards</td>
<td>Press &lt;F1&gt; to display the help screen for this field.</td>
</tr>
<tr>
<td>504-accessible</td>
<td>Enter the total number of units that are 504-accessible.</td>
</tr>
<tr>
<td>Designated for persons with HIV/AIDS</td>
<td>In the TOTAL column, enter the total number of rental units developed specifically for occupancy by persons with HIV/AIDS.</td>
</tr>
<tr>
<td>Designated for the homeless</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Input</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Of those, the number for the chronically homeless | 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.  

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. |
| Designated for the homeless                | 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.  

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.                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Of those, the number for the chronically homeless | 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.  

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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

When you are finished, press <Enter> to save your data and continue.
5. The Complete Rental Activity: Period of Affordability screen is displayed:

```
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
```

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>PJ-imposed period of affordability</td>
<td>Press &lt;F1&gt; to display the help screen for this field.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>If you are not imposing a longer-than-required POA, leave the field blank.</td>
</tr>
</tbody>
</table>

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 Screen]

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):

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOME FUNDS (Including PI)</td>
<td>Enter the amount of HOME funds provided by form of assistance.</td>
</tr>
<tr>
<td></td>
<td>For this exercise, enter the following:</td>
</tr>
<tr>
<td></td>
<td>• AMORTIZED LOAN: <strong>89,000</strong></td>
</tr>
<tr>
<td></td>
<td>• GRANT: <strong>3,000</strong></td>
</tr>
<tr>
<td></td>
<td>• DEFERRED PAYMENT LOAN: <strong>2,000</strong></td>
</tr>
<tr>
<td></td>
<td>• OTHER: <strong>1,000</strong></td>
</tr>
<tr>
<td></td>
<td>The HOME total (displayed to the right of the OTHER column) must</td>
</tr>
<tr>
<td></td>
<td>match HOME FUNDS DISBURSED (displayed at the lower left of the screen)</td>
</tr>
<tr>
<td></td>
<td>to the penny before you will be allowed to set the status of the</td>
</tr>
<tr>
<td></td>
<td>activity to “complete.”</td>
</tr>
<tr>
<td>PUBLIC FUNDS</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>For this exercise, enter <strong>60,000</strong> in OTHER FEDERAL FUNDS.</td>
</tr>
<tr>
<td>PRIVATE FUNDS</td>
<td>Enter the amount of activity costs paid for with private loans, owner cash contributions, and/or private grants.</td>
</tr>
<tr>
<td></td>
<td>For this exercise, enter <strong>40,000</strong> in PRIVATE LOANS.</td>
</tr>
</tbody>
</table>
Exercise 1.2  Complete single-address rental activity

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW INCOME HOUSING TAX CREDIT PROCEEDS</td>
<td>Enter the amount of activity costs paid for with proceeds from the Low Income Housing Tax Credit (LIHTC) program. For this exercise, enter <strong>20,000</strong>.</td>
</tr>
</tbody>
</table>

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.

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:

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.

<table>
<thead>
<tr>
<th>Unit#</th>
<th># of Bdrms</th>
<th>Occupant</th>
<th>Monthly Rent</th>
<th>% Med</th>
<th>Hisp?</th>
<th>Race</th>
<th>Size</th>
<th>Type</th>
<th>Asst Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>101</td>
<td>1</td>
<td>Owner</td>
<td>50-60</td>
<td>No</td>
<td>Black</td>
<td>1</td>
<td>Elderly</td>
<td>Section 8</td>
<td></td>
</tr>
<tr>
<td>102</td>
<td>2</td>
<td>Tenant</td>
<td>1,000</td>
<td>0-30</td>
<td>No</td>
<td>2</td>
<td>Single parent</td>
<td>Local assistance</td>
<td></td>
</tr>
<tr>
<td>103</td>
<td>1</td>
<td>Tenant</td>
<td>850</td>
<td>0-30</td>
<td>Yes</td>
<td>1</td>
<td>Single, non-elderly</td>
<td>Local assistance</td>
<td></td>
</tr>
<tr>
<td>201</td>
<td>2</td>
<td>Tenant</td>
<td>975</td>
<td>0-30</td>
<td>No</td>
<td>2</td>
<td>Other</td>
<td>HOME TBRA</td>
<td></td>
</tr>
<tr>
<td>202</td>
<td>2</td>
<td>Tenant</td>
<td>975</td>
<td>30-50</td>
<td>No</td>
<td>3</td>
<td>Two parents</td>
<td>Section 8</td>
<td></td>
</tr>
</tbody>
</table>

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 \textbf{F} and press \textit{<Enter>} to display the Review Activity Status screen:

\begin{tabular}{|l|l|}
\hline
Grantee Activity ID & IDIS Activity ID \\
\hline
Activity Name & WINSLOW APARTMENTS \\
Activity Address & 123 ELM STREET ROXBURY MA 02120 \\
\hline
TYPE & Rental/Rehab Only \\
STATUS & FUNDS BUDGETED \\
\hline
FUNDED & 95,000.00 \\
DRAWN & 0.00 \\
Initial Funding & 11-15-05 \\
Last Draw Date & None \\
\hline
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 \\
\hline
SETUP DATA & Complete \\
COMPLETION & COST DATA Complete BENEFICIARY DATA Complete \\
\hline
F4=MAIN MENU & F5=PROJ INFO \\
F7=PREV & F8=NEXT \\
\hline
\end{tabular}

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

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

Pressing \textit{<Enter>}, \textit{<F7>}, or \textit{<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
   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
Exercise 2.1   Set up multi-address rental activity

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:

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:

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:
Exercise 2.1  Set up multi-address rental activity

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY TYPE</td>
<td>For this exercise, enter 4.</td>
</tr>
<tr>
<td>PROPERTY ADDRESS</td>
<td>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.</td>
</tr>
<tr>
<td>STREET, CITY, ST, ZIP</td>
<td></td>
</tr>
<tr>
<td>PROPERTY ADDRESS</td>
<td>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.</td>
</tr>
<tr>
<td>COUNTY CODE</td>
<td>Press &lt;F1&gt; to display a list of county codes for your state and select the appropriate one.</td>
</tr>
<tr>
<td>ACTIVITY ESTIMATES HOME Units</td>
<td>Enter the total number of units at both addresses to be assisted with HOME funds—for this exercise, 10.</td>
</tr>
<tr>
<td>ACTIVITY ESTIMATES HOME Cost</td>
<td>For this exercise, enter 150,000.</td>
</tr>
<tr>
<td>MULTI-ADDRESS (Y/N)?</td>
<td>For this exercise, enter Y.</td>
</tr>
<tr>
<td>LOAN GUARANTEE (Y/N)?</td>
<td>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.</td>
</tr>
<tr>
<td>CHDO ACTIVITY (Y/N)?</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Should you change your mind about using CHDO funds, you can type Y over the N, press &lt;Enter&gt; to display the CHDO QUESTIONS screen, and update your input there. For this exercise, leave the field set to Y.</td>
</tr>
<tr>
<td></td>
<td>Note to Insular Area users: This field is not displayed for you.</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
7. The Set Up Rental Activity: Developer screen is displayed:

```
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 _____ - ___
```

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEVELOPER TYPE</td>
<td>For this exercise, enter 2.</td>
</tr>
<tr>
<td>DEVELOPER'S NAME</td>
<td>This field is optional. Enter the name of the developer (The Three Sisters) if you wish.</td>
</tr>
<tr>
<td>DEVELOPER'S ADDRESS</td>
<td>Enter the address for The Three Sisters.</td>
</tr>
</tbody>
</table>

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


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
```

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY TYPE</td>
<td>This field is populated with the ACTIVITY TYPE you entered at setup (for this exercise, 4). It can be changed here.</td>
</tr>
<tr>
<td>PROPERTY TYPE</td>
<td>For this exercise, enter 4.</td>
</tr>
<tr>
<td>YES OR NO (Y/N) FHA insured? Mixed use? Mixed income?</td>
<td>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.</td>
</tr>
<tr>
<td>COMPLETED UNITS Total Number</td>
<td>This field is populated with the estimated number of units you entered at setup (for this exercise, 10), but may be changed.</td>
</tr>
<tr>
<td>COMPLETED UNITS HOME-assisted</td>
<td>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.</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
Exercise 2.2  Complete multi-address rental activity

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

```
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  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:  ____    ____
```

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPLETED UNITS Total</td>
<td>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.</td>
</tr>
<tr>
<td>COMPLETED UNITS HOME-Assisted</td>
<td>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.</td>
</tr>
<tr>
<td>Meeting Energy Star standards</td>
<td>Press &lt;F1&gt; 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.</td>
</tr>
<tr>
<td>504-accessible</td>
<td>Enter the total number of units that are 504-accessible.</td>
</tr>
<tr>
<td>Designated for persons with HIV/AIDS</td>
<td>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.</td>
</tr>
</tbody>
</table>
Exercise 2.2  Complete multi-address rental activity

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
</table>
| Of those, the number for the chronically homeless | 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.  
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. |
| Designated for the homeless                | 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.  
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. |
| Of those, the number for the chronically homeless | 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.  
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. |

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 Screen]

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>PJ-imposed period of affordability</td>
<td>Press &lt;F1&gt; to display the help screen for this field.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>If you are not imposing a longer-than-required POA, leave the field blank.</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
6. The Property Addresses screen is displayed:

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

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

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>.
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.

7. 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
    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
       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>.
Exercise 2.2  Complete multi-address rental activity

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOME FUNDS (Including PI)</td>
<td>AMORTIZED LOAN: 60,000</td>
</tr>
<tr>
<td>PUBLIC FUNDS</td>
<td>STATE/LOCAL FUNDS: 82,000</td>
</tr>
<tr>
<td>PRIVATE FUNDS</td>
<td>PRIVATE GRANTS: 64,000</td>
</tr>
</tbody>
</table>

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:

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.

<table>
<thead>
<tr>
<th>Unit#</th>
<th># of Bdrms</th>
<th>Occupant</th>
<th>Monthly Rent</th>
<th>% Med</th>
<th>Hisp?</th>
<th>Race</th>
<th>Size</th>
<th>Type</th>
<th>Asst Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>1</td>
<td>Tenant</td>
<td>650</td>
<td>60-80</td>
<td>No</td>
<td>Black</td>
<td>1</td>
<td>Single, non-elderly</td>
<td>Local assistance</td>
</tr>
<tr>
<td>B</td>
<td>2</td>
<td>Tenant</td>
<td>800</td>
<td>50-60</td>
<td>No</td>
<td>Asian</td>
<td>2</td>
<td>Single</td>
<td>Local</td>
</tr>
</tbody>
</table>

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
## Exercise 2.2  Complete multi-address rental activity

<table>
<thead>
<tr>
<th>Unit#</th>
<th># of Bdrms</th>
<th>Occupant</th>
<th>Monthly Rent</th>
<th>% Med</th>
<th>Hisp?</th>
<th>Race &amp; White</th>
<th>Size</th>
<th>Type</th>
<th>Asst Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>1</td>
<td>Tenant</td>
<td>650</td>
<td>50-60</td>
<td>Yes</td>
<td>Black &amp; White</td>
<td>1</td>
<td>Other</td>
<td>Local assistance</td>
</tr>
<tr>
<td>D</td>
<td>2</td>
<td>Tenant</td>
<td>800</td>
<td>50-60</td>
<td>Yes</td>
<td>Other Multi-Racial</td>
<td>2</td>
<td>Two parents</td>
<td>Local assistance</td>
</tr>
</tbody>
</table>

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.
Exercise 2.2 Complete multi-address rental activity

- 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>:

- 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>:

```
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

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
```

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:

<table>
<thead>
<tr>
<th>Unit#</th>
<th># of Bdrms</th>
<th>Occupant</th>
<th>Monthly Rent</th>
<th>% Med</th>
<th>Hisp?</th>
<th>Race</th>
<th>Size</th>
<th>Type</th>
<th>Asst Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Exercise 2.2  Complete multi-address rental activity

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

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

2-15
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
Exercise 3.1  Set up single-address homebuyer activity

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:

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

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

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

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:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY LOCATION</td>
<td>&lt;F1&gt; displays a help screen for these fields. In each field, enter Y, N, or leave blank to have it automatically set to N.</td>
</tr>
<tr>
<td>FAITH-BASED ORGANIZATION</td>
<td>Enter Y, N, or leave blank to have the field automatically set to N.</td>
</tr>
</tbody>
</table>

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

When you are finished, press <Enter> to save your data and continue.
Exercise 3.1  Set up single-address homebuyer activity

6. The Set Up Homebuyer Activity screen is displayed:

![Set Up Homebuyer Activity Screen]

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY TYPE</td>
<td>For this exercise, enter 4.</td>
</tr>
<tr>
<td>PROPERTY ADDRESS</td>
<td>Optional. Enter the homebuyer's name (Daniel and Shana Edwards) if you wish.</td>
</tr>
<tr>
<td>HOME Units</td>
<td>For this exercise, enter 2.</td>
</tr>
<tr>
<td>HOME Cost</td>
<td>For this exercise, enter 127,000.</td>
</tr>
<tr>
<td>MULTI-ADDRESS (Y/N)?</td>
<td>For this exercise, enter N.</td>
</tr>
<tr>
<td>LOAN GUARANTEE (Y/N)?</td>
<td>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.</td>
</tr>
<tr>
<td>CHDO ACTIVITY (Y/N)?</td>
<td>If your answer to Will the activity be funded with CR (Y/N)? on the CHDO Questions screen was:</td>
</tr>
<tr>
<td></td>
<td>N  This field is also set to N. If you decide that you want to fund the activity with CR, change the N to</td>
</tr>
</tbody>
</table>
Exercise 3.1  Set up single-address homebuyer activity

**Field** | **Input**
---|---
| Y and press <Enter> to display the CHDO Questions screen and update the data.
| Y This field is also 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)? | 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


2. On the HOME Menu, select option H, Costs & Beneficiaries, and press <Enter>.

3. The Complete Homebuyer Activity screen is displayed:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY TYPE</td>
<td>This field is populated with the ACTIVITY TYPE you entered at setup (for this exercise, 4). It can be changed here.</td>
</tr>
<tr>
<td>PROPERTY TYPE</td>
<td>This field is initially populated with 1. For this exercise, do not change it.</td>
</tr>
<tr>
<td>FHA INSURED (Y/N)?</td>
<td>For this exercise, enter Y.</td>
</tr>
<tr>
<td>LEASE PURCHASE?</td>
<td>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.</td>
</tr>
<tr>
<td>COMPLETED UNITS</td>
<td>This field is populated with the estimated number of units you entered at setup (for this exercise, 2), but may be changed.</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
4. The Complete Homebuyer Activity: Units screen is displayed:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPLETED UNITS</td>
<td>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.</td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>COMPLETED UNITS</td>
<td>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.</td>
</tr>
<tr>
<td>HOME-Assisted</td>
<td></td>
</tr>
<tr>
<td>Meeting Energy Star standards</td>
<td>Pressing &lt;F1&gt; displays the help screen for this field.</td>
</tr>
<tr>
<td></td>
<td>In the TOTAL column, enter the total number of units certified by Energy Star.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>504-accessible</td>
<td>Enter the total number of units that are 504-accessible.</td>
</tr>
<tr>
<td>PJ-imposed period of affordability</td>
<td>Pressing &lt;F1&gt; displays the help screen for this field.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>If you are not imposing a longer-than-required POA, leave the field blank.</td>
</tr>
</tbody>
</table>

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](image)

**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 | **0.00**

When you are finished, press <Enter> to save your data and continue.
6. The second Complete Homebuyer Activity: Costs screen is displayed.

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

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.
Exercise 3.2  Complete single-address homebuyer activity

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

```
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 Assistance Amount
1 HOME property costs 122,000.00
5 HOME downpayment assistance 8,000.00
7 Other federal funds 2,000.00
2 State/local funds 5,000.00
_ Private loans
_ Owner cash contributions
_ Private grants

Activity Total 137,000.00

Total HOME funds 127,000.00
HOME funds disbursed 0.00

To display alternate costs screen, press <F15>.
```

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

  # of     Occu-     --------HOUSEHOLD--------    Asst      Total
Unit#   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=VALID  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:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>First-time homebuyer</td>
<td>Assume that the Edwards meet the HOME Program definition of a first-time homebuyer. Enter Y.</td>
</tr>
<tr>
<td>Coming from subsidized housing (Y/N)?</td>
<td>Press &lt;F1&gt; to display the help screen for this field. Input Y or N (or leave blank to have it automatically set to N), as appropriate.</td>
</tr>
</tbody>
</table>
Exercise 3.2  Complete single-address homebuyer activity

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving</td>
<td>Assume that the Edwards received both pre- and post-homebuyer counseling.</td>
</tr>
</tbody>
</table>

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.

End of Exercise 3.2
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

   Grantee Activity ID     IDIS Activity ID  9881
   Activity Name           ABC DEVELOPMENT CORPORATION
   CR ACTIVITY?            Will the activity be funded with CR (Y/N)? _
   Will initial funding be a CHDO Site Control and/or Seed Money Loan (Y/N)? _

   CHDO Acting As
   1 Owner
   2 Sponsor
   3 Developer

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:

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 TYPE        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)?  _
```

Note: The Colonia field is only displayed for PJ's 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
PROPERTY ADDRESS                                   Construction
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
Exercise 4.1  Set up multi-address homebuyer activity

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY TYPE</td>
<td>For this exercise, enter 5.</td>
</tr>
<tr>
<td>PROPERTY ADDRESS</td>
<td></td>
</tr>
<tr>
<td>Homebuyer’s Name</td>
<td>Leave this field blank for a multi-address activity. The homebuyers’ names will be entered at completion.</td>
</tr>
<tr>
<td>STREET, CITY, ST, ZIP</td>
<td>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.</td>
</tr>
<tr>
<td>PROPERTY ADDRESS</td>
<td></td>
</tr>
<tr>
<td>County Code</td>
<td>Press &lt;F1&gt; to display a list of county codes for your state and select the appropriate one.</td>
</tr>
<tr>
<td>ACTIVITY ESTIMATES</td>
<td></td>
</tr>
<tr>
<td>HOME Units</td>
<td>For this exercise, enter 4.</td>
</tr>
<tr>
<td>ACTIVITY ESTIMATES</td>
<td></td>
</tr>
<tr>
<td>HOME Cost</td>
<td>For this exercise, enter 236,800.</td>
</tr>
<tr>
<td>MULTI-ADDRESS (Y/N)?</td>
<td>For this exercise, enter Y.</td>
</tr>
<tr>
<td>LOAN GUARANTEE (Y/N)?</td>
<td>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.</td>
</tr>
<tr>
<td>CHDO ACTIVITY (Y/N)?</td>
<td>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.</td>
</tr>
</tbody>
</table>

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.

Note to Insular Area users: This field is not displayed for you.

When you are finished, press <Enter> to save your data and continue.
7. The Set Up Homebuyer Activity: Developer screen is displayed:

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEVELOPER TYPE</td>
<td>For this exercise, enter 4.</td>
</tr>
<tr>
<td>DEVELOPER’S NAME</td>
<td>This field is optional. Enter the name of the developer (ABC Development Corporation) if you wish.</td>
</tr>
<tr>
<td>DEVELOPER’S ADDRESS</td>
<td>Enter the address for ABC Development Corporation.</td>
</tr>
</tbody>
</table>

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.
Exercise 4.2 Activity Completion


2. On the HOME Menu, select option H, Costs & Beneficiaries, and press <Enter>.

3. The Complete Homebuyer Activity screen is displayed:

![Complete Homebuyer Activity Screen]

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY TYPE</td>
<td>This field is populated with the ACTIVITY TYPE you entered at setup (for this exercise, 5). It can be changed here.</td>
</tr>
<tr>
<td>PROPERTY TYPE</td>
<td>This field is initially populated with 1, but can be changed.</td>
</tr>
<tr>
<td>COMPLETED UNITS Total Number</td>
<td>This field is populated with the estimated number of units you entered at setup (for this exercise, 4), but may be changed.</td>
</tr>
<tr>
<td>COMPLETED UNITS HOME-assisted</td>
<td>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.</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
4. The Complete Homebuyer Activity: Units screen is displayed:

![Screen shot of the Complete Homebuyer Activity: Units screen]

**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.

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Grantee Activity ID</strong></td>
<td><strong>IDIS Activity ID</strong> 9881</td>
</tr>
<tr>
<td><strong>Activity Name</strong></td>
<td>ABC DEVELOPMENT CORPORATION</td>
</tr>
<tr>
<td><strong>Activity Address</strong></td>
<td>900 BLOCK OF MERRITT ST MELBOURNE FL 32901</td>
</tr>
<tr>
<td><strong>COMPLETED UNITS</strong></td>
<td>Total 4 HOME-Assisted 4</td>
</tr>
<tr>
<td><strong>Meeting Energy Star standards</strong></td>
<td>____ ____</td>
</tr>
<tr>
<td><strong>504-accessible</strong></td>
<td>____</td>
</tr>
<tr>
<td><strong>PJ-imposed period of affordability</strong></td>
<td>___ years</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
Fill in the first address block on the screen this way:

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

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>. 
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.

6. 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.
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:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Price</td>
<td>Enter the purchase price for the three-bedroom property at 904 Merritt, as evidenced on the deed. For this exercise, enter <strong>142400</strong> (you can't enter commas or cents in this field).</td>
</tr>
<tr>
<td>PROPERTY COSTS</td>
<td>HOME is providing a direct loan of <strong>54,200</strong> and a grant of <strong>5,000</strong>.</td>
</tr>
<tr>
<td>DOWNPAYMENT ASSISTANCE</td>
<td>No downpayment assistance is being provided.</td>
</tr>
<tr>
<td>HOME Funds Disbursed</td>
<td>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.”</td>
</tr>
<tr>
<td>HOME Total This Address</td>
<td></td>
</tr>
</tbody>
</table>

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:

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOME FUNDS SUMMARY (Including PI)</td>
<td>These display-only fields show totals for the property cost and downpayment assistance amounts entered on the previous screen.</td>
</tr>
</tbody>
</table>

**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 match the total address cost.
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:

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.
Exercise 4.2  Complete multi-address homebuyer activity

- 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:

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

When you have finished:

a. Press <F9> to save your data.
b. Press <F7> twice to return to the Property Addresses screen.

d. 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:
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>:

<table>
<thead>
<tr>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOME FUNDS</td>
</tr>
<tr>
<td>Amortized Loan (Including PI) 108,400.00</td>
</tr>
<tr>
<td>Grant 10,000.00</td>
</tr>
<tr>
<td>Deferred Payment Loan 0.00</td>
</tr>
<tr>
<td>Other 0.00</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>PUBLIC FUNDS</td>
</tr>
<tr>
<td>Other Federal Funds 48,200.00</td>
</tr>
<tr>
<td>State/Local Funds 117,400.00</td>
</tr>
<tr>
<td>Tax-Exempt Bond Proceeds 0.00</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>PRIVATE FUNDS</td>
</tr>
<tr>
<td>Private Loans 0.00</td>
</tr>
<tr>
<td>Owner Cash Contributions 0.00</td>
</tr>
<tr>
<td>Private Grants 0.00</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Total HOME Disbursed 0.00</td>
</tr>
<tr>
<td>Activity Total 284,000.00</td>
</tr>
</tbody>
</table>

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
   Grantee 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
Exercise 5.1  Set up single-address homeowner rehab activity

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>OBJECTIVE</td>
<td>You can either:</td>
</tr>
<tr>
<td></td>
<td>• Press &lt;F1&gt; to display a help screen and select an OBJECTIVE code</td>
</tr>
<tr>
<td></td>
<td>• Enter 1, 2, or 3.</td>
</tr>
<tr>
<td></td>
<td>• Leave the field blank to have it automatically set to 2.</td>
</tr>
<tr>
<td>OUTCOME</td>
<td>Same as the OBJECTIVE field.</td>
</tr>
</tbody>
</table>

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

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

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

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY LOCATION</td>
<td>&lt;F1&gt; displays a help screen for these fields.</td>
</tr>
<tr>
<td></td>
<td>In each field, enter Y, N, or leave blank to have it automatically set to N.</td>
</tr>
<tr>
<td>FAITH-BASED ORGANIZATION</td>
<td>Enter Y, N, or leave blank to have the field automatically set to N.</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
Exercise 5.1  Set up single-address homeowner rehab activity

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

```
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

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        Press <F1> to display a list of county codes for your state and select the appropriate one.
County Code             
ACTIVITY ESTIMATES      For this exercise, enter 1.
  HOME Units            
ACTIVITY ESTIMATES      For this exercise, enter 32,000.
  HOME Cost             
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


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
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
```

Fill in the screen this way:

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

When you are finished, press <Enter> to save your data and continue.
4. The Complete Homeowner Rehab Activity: Units screen is displayed:

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPLETED UNITS Total</td>
<td>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.</td>
</tr>
<tr>
<td>COMPLETED UNITS HOME-Assisted</td>
<td>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.</td>
</tr>
<tr>
<td>Meeting Energy Star standards</td>
<td>Press &lt;F1&gt; 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.</td>
</tr>
<tr>
<td>504-accessible</td>
<td>Enter the total number of units that are 504-accessible.</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
The default version of the Complete Homeowner Rehab Activity: Costs screen is displayed:

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:

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

When you are finished, press <F9> to save your data and display the totals.
6. Press <F15> (on most keyboards, <Shift + F3>) to display the alternate version of the cost screen:

```
Grantee Activity ID       IDIS Activity ID  10403
Activity Name            JOAN KERSHAW
Activity Address         537 GIRARD AVENUE PORTLAND OR 97256
Value After Rehab        129400
Source of Funds          Form of Assistance Amount
1  2  32,000.00
4  __  3,200.00
9  __  6,500.00
__  __ ______________
__  __ ______________
__  __ ______________
__  __ ______________
__  __ ______________
__  __ ______________
__  __ ______________
Activity Total           41,700.00
Total HOME funds         32,000.00
HOME funds Disbursed     0.00
```

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

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
   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 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)? _
```

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:

![Setup Homeowner Rehab Activity Screen]

Fill in the screen this way:

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

When you are finished, press <Enter> to save your data and continue.
Exercise 6.1  Set up multi-address homeowner rehab activity

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.

End of Exercise 6.1
Exercise 6.2 Activity Completion


2. On the HOME Menu, select option H, Costs & Beneficiaries, and press <Enter>.

3. The Complete Homeowner Rehab Activity screen is displayed:

```
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
```

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY TYPE</td>
<td>Because the only valid Activity Type for a rehab activity is 1, this field is pre-populated and protected from update.</td>
</tr>
<tr>
<td>PROPERTY TYPE</td>
<td>This field is initially populated with 1, but can be changed to one of the other codes listed on the screen.</td>
</tr>
<tr>
<td>FHA INSURED (Y/N)?</td>
<td>Enter Y, N, or leave blank to have the field automatically set to N.</td>
</tr>
<tr>
<td>COMPLETED UNITS Total Number</td>
<td>This field is populated with the estimated number of units you entered at setup (for this exercise, 2), but may be changed.</td>
</tr>
<tr>
<td>COMPLETED UNITS HOME-assisted</td>
<td>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.</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
The Complete Homeowner Rehab Activity: Units screen is displayed:

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPLETED UNITS Total</td>
<td>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.</td>
</tr>
<tr>
<td>COMPLETED UNITS HOME-Assisted</td>
<td>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.</td>
</tr>
<tr>
<td>Meeting Energy Star standards</td>
<td>Pressing &lt;F1&gt; 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.</td>
</tr>
<tr>
<td>504-accessible</td>
<td>Enter the total number of units that are 504-accessible.</td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
Exercise 6.2 Complete multi-address homeowner rehab activity

5. The Property Addresses screen is displayed:

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

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

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>. 

6-7
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.

6. 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.
Fill in this screen with the HOME costs for the rehab of 805 Trinity Place. Input the following values:

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

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:

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.
Exercise 6.2  Complete multi-address homeowner rehab activity

- 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:

a. Press <F9> to save your data.

b. Press <F7> twice to return to the Property Addresses screen.

8. <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.

9. 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:

   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 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
Exercise 6.2  Complete multi-address homeowner rehab activity

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

<table>
<thead>
<tr>
<th>MULTI-ADDRESS ACTIVITY COST SUMMARY</th>
<th>H099</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grantee Activity ID</td>
<td>IDIS Activity ID 9898</td>
</tr>
<tr>
<td>Activity Name</td>
<td>805-807 TRINITY PLACE - WILLIAMS</td>
</tr>
<tr>
<td>Activity Address</td>
<td>805-807 TRINITY PLACE WASHINGTON DC 20002</td>
</tr>
</tbody>
</table>

#### Totals

1. **HOME FUNDS**
   - Amortized Loan (Including PI): 16,850.00
   - Grant: 0.00
   - Deferred Payment Loan: 0.00
   - Other: 0.00
   **Total HOME Disbursed**: 16,850.00

2. **PUBLIC FUNDS**
   - Other Federal Funds: 0.00
   - State/Local Funds: 0.00
   - Tax-Exempt Bond Proceeds: 0.00
   **Total HOME Disbursed**: 0.00

3. **PRIVATE FUNDS**
   - Private Loans: 0.00
   - Owner Cash Contributions: 0.00
   - Private Grants: 0.00
   **Total HOME Disbursed**: 0.00

**Activity Total**: 16,850.00

F4=MAIN MENU  F7=PREV  F8=NEXT

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
   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
The objective for this activity is to provide decent affordable housing (code 2) and the expected outcome is affordability (also code 2). Since the system defaults both OBJECTIVE and OUTCOME to 2, just press <Enter> to continue to the next screen.

4. The Tenant-Based Rental Assistance (TBRA) screen is displayed:

![TBRA screen](image)

<F1> help screens are available for all fields except LAST NAME and the security deposit, tenant monthly rent, and monthly TBRA amount fields.

Fill in the screen using this information:

- All of the households are elderly and are newly assisted with TBRA.
- The HOME subsidies for all households will be paid to the owner.
- All tenant contracts are for two years.

<table>
<thead>
<tr>
<th>Last Name</th>
<th># of Bdrms</th>
<th>Sec Dep</th>
<th>Tenant Rent</th>
<th>TBRA Rent</th>
<th>% Med</th>
<th>Hisp?</th>
<th>Race</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wilson</td>
<td>1</td>
<td>275</td>
<td>475</td>
<td>0-30</td>
<td>N</td>
<td>Black</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Lawrence</td>
<td>2</td>
<td>300</td>
<td>500</td>
<td>0-30</td>
<td>N</td>
<td>White</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Yao</td>
<td>2</td>
<td>300</td>
<td>525</td>
<td>30-50</td>
<td>N</td>
<td>Asian</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Maloney</td>
<td>1</td>
<td>240</td>
<td>480</td>
<td>0-30</td>
<td>N</td>
<td>White</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Cortez</td>
<td>1</td>
<td>260</td>
<td>510</td>
<td>30-50</td>
<td>Y</td>
<td>Black</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>DuPree</td>
<td>2</td>
<td>325</td>
<td>500</td>
<td>30-50</td>
<td>N</td>
<td>White</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

When you are finished, press <Enter> to save your data and continue.
5. The TBRA: Units screen is displayed:

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

When you are finished, press <Enter>. The HOME Menu is displayed. Notice that the TBRA setup option is highlighted.
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
   Grantee Activity ID
   Activity Name LELAND APARTMENTS REHAB
   IDIS Activity ID 9991
   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:

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

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

```
SET UP ACTIVITY: CHDO QUESTIONS
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.
```

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

Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>PGM CODE</td>
<td>Enter M.</td>
</tr>
<tr>
<td>FISCAL YEAR</td>
<td>Enter the last two digits of the year of one of your HOME grants that still has CHDO Reserve (CR) available for activity funding.</td>
</tr>
</tbody>
</table>
Exercise 9.1  The CHDO Loan Phase

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>SOURCE TYPE</td>
<td>Enter the type of that HOME grant:</td>
</tr>
<tr>
<td></td>
<td><strong>DC</strong>  Consortium</td>
</tr>
<tr>
<td></td>
<td><strong>MC</strong>  Metropolitan City</td>
</tr>
<tr>
<td></td>
<td><strong>SG</strong>  State</td>
</tr>
<tr>
<td></td>
<td><strong>ST</strong>  Insular Area</td>
</tr>
<tr>
<td></td>
<td><strong>UC</strong>  Urban County</td>
</tr>
<tr>
<td>FUND TYPE</td>
<td>Enter <strong>CL</strong> for CHDO Loan.</td>
</tr>
</tbody>
</table>

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:

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:
Fill in the screen this way:

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>UOG CDE and UOG NBR</td>
<td>Enter the UOG code and number for one of your CHDOs.</td>
</tr>
<tr>
<td>PGM CDE</td>
<td>Enter M.</td>
</tr>
<tr>
<td>FSCL YEAR</td>
<td>Enter the fiscal year of the CL subfund.</td>
</tr>
</tbody>
</table>
| 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:
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.
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
   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:

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

5. 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.

<table>
<thead>
<tr>
<th>COMPLETE RENTAL ACTIVITY: COSTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grantee Activity ID: IDIS Activity ID</td>
</tr>
<tr>
<td>Activity Name: LELAND APARTMENTS REHAB</td>
</tr>
<tr>
<td>Activity Address: 119 SHERIDAN STREET LITTLE ROCK AR 72216</td>
</tr>
<tr>
<td>1. HOME FUNDS: CHDO Loan 25,000.00 Totals</td>
</tr>
<tr>
<td>(Including PI) Amortized Loan Grant Deferred Payment Loan Other 25,000.00</td>
</tr>
<tr>
<td>2. PUBLIC FUNDS: Other Federal Funds State/Local Funds Tax-Exempt Bond Proceeds 0.00</td>
</tr>
<tr>
<td>3. PRIVATE FUNDS: Private Loans Owner Cash Contributions Private Grants 0.00</td>
</tr>
<tr>
<td>4. LOW INCOME HOUSING TAX CREDIT PROCEEDS 0.00</td>
</tr>
<tr>
<td>HOME Funds Disbursed 38,000.00 Activity Total 25,000.00</td>
</tr>
</tbody>
</table>

To display alternate costs screen, press <F15>.

F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE  F15=ALT
The CHDO loan amount is also displayed in read-only fields on the alternate version of the cost screen:

---

Complete the cost screen (either version) and the beneficiary screen exactly as you do for a non-CHDO loan activity.

---

End of Exercise 9.2
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

F2=PROJECT LIST     F6=CLEAR     F7=PREV

Enter search criteria

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 ___________

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.
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.