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            HM01

  Grantee Activity ID                        IDIS Activity ID    9766
  Activity Name        WINSLOW APARTMENTS

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

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

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




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

Fill in the screen this way:

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

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

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

```
                 ACTIVITY SETUP: OBJECTIVE AND OUTCOME          HM01-A

   Grantee Activity ID                          HUD Activity ID    9766
   Activity Name      WINSLOW APARTMENTS


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

   OUTCOME               _
                        1  Availability/accessibility
                        2  Affordability
                        3  Sustainability








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

Fill in the screen this way:

Field	Input
OBJECTIVE	Assume that your objective in carrying out this activity is to provide decent affordable housing. You can either: • Press <F1> to display a help screen and select the OBJECTIVE code. • Enter **2**. • Leave the field blank to have it automatically set to 2.
OUTCOME	Assume that the expected outcome of this activity is affordability. As with the OBJECTIVE field, you can either:

Field	Input
	• Press <F1> to display a help screen and select the OUTCOME code.
	• Enter **2**.
	• Leave the field blank to have it automatically set to 2.

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

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

```
                   SET UP ACTIVITY: SPECIAL CHARACTERISTICS          HM01-B

  Grantee Activity ID                             HUD Activity ID    9766
  Activity Name        WINSLOW APARTMENTS

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


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




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

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

Fill in the screen this way:

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

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

6.   The Set Up Rental Activity screen is displayed:

```
                       SET UP RENTAL ACTIVITY                    HR01

    Grantee Activity ID                        IDIS Activity ID    9766
    Activity Name      WINSLOW APARTMENTS

    ACTIVITY TYPE      _
                       1  Rehab Only              4  Acquisition & Rehab
                       2  New Construction Only   5  Acquisition & New
                       3  Acquisition Only           Construction
    PROPERTY ADDRESS
           Street    123 ELM STREET
             City    ROXBURY                  St MA  Zip 02120 - ____
       County Code   _____


    ACTIVITY ESTIMATES   HOME Units  ____      HOME Cost  _____

    MULTI-ADDRESS (Y/N)? _

    LOAN GUARANTEE(Y/N)? _

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

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

Fill in the screen this way:

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

Field	Input
	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:

```
                SET UP RENTAL ACTIVITY: PROPERTY OWNER          HR02

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

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

   OWNER'S NAME        _____

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






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

Fill in the screen this way:

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

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

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

```
                     REVIEW HOME ACTIVITY STATUS               STAT

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

   TYPE           Rental/Rehab Only

   STATUS         FUNDS BUDGETED

   FUNDED                  0.00        Initial Funding   None
   DRAWN                   0.00        Last Draw Date    None

   ESTIMATES      HOME units       5   HOME cost       95,000.00

   ACTUALS        HOME units       0   HOME cost            0.00
                  Total units      0   Total cost           0.00

   SETUP DATA     Complete

   COMPLETION     COST DATA  Incomplete  BENEFICIARY DATA  Incomplete


    F4=MAIN MENU     F5=PROJ INFO     F7=PREV     F8=NEXT
```

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

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

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

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

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

Exercise 1.2 Activity Completion

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD Aᴄᴛɪᴠɪᴛʏ Nʙʀ you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.

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

3. The Complete Rental Activity screen is displayed:

```
                    COMPLETE RENTAL ACTIVITY                    HR03

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

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

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

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

  COMPLETED UNITS      Total number      5
                       HOME-assisted     5




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

Fill in the screen this way:

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

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

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

```
                    COMPLETE RENTAL ACTIVITY: UNITS              HR03-A

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

   COMPLETED UNITS      Total    5   HOME-Assisted    5

                                                         HOME-
   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:  ____    ____



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

Fill in the screen this way:

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

Field	Input
Of those, the number for the chronically homeless	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: PERIOD OF AFFORDABILITY      HR03-B

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

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

                    PJ-imposed period of affordability:  __ years













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

Fill in the screen this way:

Field	Input
PJ-imposed period of affordability	Press <F1> to display the help screen for this field. 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**. If you are not imposing a longer-than-required POA, leave the field blank.

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

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

```
                        COMPLETE RENTAL ACTIVITY: COSTS            HR04

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

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

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

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

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

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

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

Field	Input
HOME FUNDS (Including PI)	Enter the amount of HOME funds provided by form of assistance. For this exercise, enter the following: • AMORTIZED LOAN: **89,000** • GRANT: **3,000** • DEFERRED PAYMENT LOAN: **2,000** • OTHER: **1,000** The HOME total (displayed to the right of the OTHER column) must match HOME FUNDS DISBURSED (displayed at the lower left of the screen) to the penny before you will be allowed to set the status of the activity to "complete."
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. For this exercise, enter **60,000** in OTHER FEDERAL FUNDS.
PRIVATE FUNDS	Enter the amount of activity costs paid for with private loans, owner cash contributions, and/or private grants. For this exercise, enter **40,000** in PRIVATE LOANS.

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

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

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

```
                    COMPLETE RENTAL ACTIVITY: COSTS              HR05

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

    Source      Form of                    * Source Codes
   of Funds   Assistance       Amount       1  HOME funds (including PI)
      1           1         89,000.00       4  Other federal funds
      1           2          3,000.00       5  State/local funds
      1           3          2,000.00       6  Tax-exempt bond proceeds
      1           5          1,000.00       7  Private loans
      4           _         60,000.00       8  Owner cash contributions
      7           _         40,000.00       9  Private grants
     10           _         20,000.00      10  Low income tax credit
     __           _        _____
     __           _        _____    * Forms of HOME Assistance
        Activity Total    215,000.00        1  Amortized loan
                                            2  Grant
      Total HOME funds     95,000.00        3  Deferred payment loan
   HOME funds disbursed         0.00        5  Other

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

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

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

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

```
              COMPLETE RENTAL ACTIVITY: BENEFICIARIES                 HR06

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

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




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

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

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

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

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

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

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

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

```
                         REVIEW HOME ACTIVITY STATUS               STAT

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

     TYPE            Rental/Rehab Only

     STATUS          FUNDS BUDGETED

     FUNDED             95,000.00          Initial Funding  11-15-05
     DRAWN                   0.00          Last Draw Date    None

     ESTIMATES     HOME units      5     HOME cost       95,000.00

     ACTUALS       HOME units      5     HOME cost       95,000.00
                   Total units     5     Total cost     320,000.00

     SETUP DATA    Complete

     COMPLETION    COST DATA  Complete   BENEFICIARY DATA  Complete


     F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT
```

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

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

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

-- **End of Exercise 1.2** --

Lesson 2
MULTI-ADDRESS RENTAL ACTIVITIES

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

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

Exercise 2.1 Activity Setup

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

    Jot down the following information for use in later exercises:

    CPS Project Number   _____

    Program Year   _____

    HUD Activity Number   _____

2. On the fourth Common Path screen (C04MA08), enter **150,000** in TOTAL ESTIMATED AMOUNT and **X** next to HOME. Press <Enter>. On the HOME MENU, select option **A**, Rental, and press <Enter>.

3. The Set Up Activity: CHDO Questions screen is displayed (except for Insular Area users):

```
                    SET UP ACTIVITY: CHDO QUESTIONS                  HM01

    Grantee Activity ID                        IDIS Activity ID    9769
    Activity Name         CREEKVIEW GARDEN APARTMENTS I AND II

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

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

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




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

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

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

```
                    ACTIVITY SETUP: OBJECTIVE AND OUTCOME          HM01-A

   Grantee Activity ID                          HUD Activity ID    9766
   Activity Name      WINSLOW APARTMENTS

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

   OUTCOME                 _
                          1  Availability/accessibility
                          2  Affordability
                          3  Sustainability




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

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

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

```
                  SET UP ACTIVITY: SPECIAL CHARACTERISTICS          HM01-B

   Grantee Activity ID                         HUD Activity ID    9769
   Activity Name        CREEKVIEW GARDEN APARTMENTS I AND II

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


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




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

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

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

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

```
                     SET UP RENTAL ACTIVITY                      HR01

   Grantee Activity ID                         IDIS Activity ID    9769
   Activity Name        CREEKVIEW GARDEN APARTMENTS I AND II

   ACTIVITY TYPE           _
                           1  Rehab Only            4  Acquisition & Rehab
                           2  New Construction Only  5  Acquisition & New
                           3  Acquisition Only          Construction
   PROPERTY ADDRESS
           Street      236 & 238 WEST ALLEN AVENUE
             City      HOLLAND             St MI  Zip 49424 - ____
      County Code      _____


   ACTIVITY ESTIMATES   HOME Units  ____      HOME Cost  _____

   MULTI-ADDRESS (Y/N)? _

   LOAN GUARANTEE(Y/N)? _

   CHDO ACTIVITY (Y/N)? N

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

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	For this exercise, enter **4**.
PROPERTY ADDRESS Street, City, St, Zip	These fields are populated with the address you entered on the first Common Path screen (they can be changed here). If you did not input an address on the Common Path screen, enter it now.
PROPERTY ADDRESS County Code	Press <F1> to display a list of county codes for your state and select the appropriate one.
ACTIVITY ESTIMATES HOME Units	Enter the total number of units at both addresses to be assisted with HOME funds—for this exercise, **10**.
ACTIVITY ESTIMATES HOME Cost	For this exercise, enter **150,000**.
MULTI-ADDRESS (Y/N)?	For this exercise, enter **Y**.
LOAN GUARANTEE (Y/N)?	For this exercise, assume that HOME funds will not be used to guarantee financing provided by a private lender. Enter **N** or leave blank to have the field automatically set to N.
CHDO ACTIVITY (Y/N)?	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**. 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 Rental Activity: Developer screen is displayed:

```
                       SET UP RENTAL ACTIVITY: DEVELOPER              HR02

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

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

     DEVELOPER'S NAME       _____

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




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

Fill in the screen this way:

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

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

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

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

Exercise 2.2 Activity Completion

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.

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

3. The Complete Rental Activity screen is displayed:

```
                    COMPLETE RENTAL ACTIVITY                   HR03

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

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

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

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

  COMPLETED UNITS     Total number     10
                      HOME-assisted    10




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

Fill in the screen this way:

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

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

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

```
                    COMPLETE RENTAL ACTIVITY: UNITS              HR03-A

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

   COMPLETED UNITS     Total   10   HOME-Assisted   10

                                                            HOME-
   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:  ____    ____



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

Fill in the screen this way:

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

Field	Input
Of those, the number for the chronically homeless	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: PERIOD OF AFFORDABILITY      HR03-B

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

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

                PJ-imposed period of affordability:  __ years




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

Fill in the screen this way:

Field	Input
PJ-imposed period of affordability	Press <F1> to display the help screen for this field.
	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**.
	If you are not imposing a longer-than-required POA, leave the field blank.

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

6. The Property Addresses screen is displayed:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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             HR04

  Grantee Activity ID                      IDIS Activity ID    9769
  Activity Name       CREEKVIEW GARDEN APARTMENTS I AND II
  Property Address    236 WEST ALLEN AVENUE HOLLAND MI 49424
                                                        Address Totals
  1. HOME FUNDS
     (Including PI)       Amortized Loan  _____
                                  Grant  _____
                  Deferred Payment Loan  _____
                                  Other  _____           0.00

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

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

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

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

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

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

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

```
                COMPLETE RENTAL ACTIVITY: BENEFICIARIES             HR06

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

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

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

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

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

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

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

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

When you have finished:

    a. Press <F9> to save your data.

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

9.   Before entering the cost and beneficiary data for the second property, let's first look at the summary screens for a multi-address activity.

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

```
                    MULTI-ADDRESS ACTIVITY SUMMARY              HR98

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

    ACTIVITY TOTALS, ALL ADDRESSES

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

                          TOTAL      206,000.00

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

    Total HOME Funds Disbursed          0.00


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

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

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

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

- In COST DATA ENTERED FOR, the first number shows how many addresses you have entered cost data for; the second number shows how many addresses have been input on the PROPERTY ADDRESSES screen.

- In UNIT DATA ENTERED FOR, the first number shows how many units you have entered data for on beneficiary screens; the second shows the number you entered in the HOME-ASSISTED UNITS field on the first completion screen. These two fields must be equal before the activity status can be set to "complete."

- Total HOME Funds Disbursed displays the amount of HOME funds drawn to date.

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

```
                    MULTI-ADDRESS ACTIVITY COST SUMMARY              HR99

  Grantee Activity ID                              IDIS Activity ID    9769
  Activity Name        CREEKVIEW GARDEN APARTMENTS I AND II
  Activity Address     236 & 238 WEST ALLEN AVENUE HOLLAND MI 49424
                                                                  Totals
  1. HOME FUNDS
     (Including PI)         Amortized Loan      60,000.00
                                     Grant          0.00
                    Deferred Payment Loan          0.00
                                     Other          0.00       60,000.00

  2. PUBLIC FUNDS      Other Federal Funds         0.00
                         State/Local Funds     82,000.00
                    Tax-Exempt Bond Proceeds        0.00       82,000.00

  3. PRIVATE FUNDS         Private Loans           0.00
                   Owner Cash Contributions        0.00
                           Private Grants      64,000.00       64,000.00

  4. LOW INCOME HOUSING TAX CREDIT PROCEEDS                         0.00
  Total HOME Disbursed            0.00     Activity Total     206,000.00

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

When you finish reviewing this screen:

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

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

- The total HOME cost for the activity is $150,000, and you entered $60,000 for the first address.

- There are six units in the building at 238 West Allen, occupied as follows:

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

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

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

```
                    MULTI-ADDRESS ACTIVITY SUMMARY                 HR98

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

   ACTIVITY TOTALS, ALL ADDRESSES

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

                              TOTAL      380,000.00

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

   Total HOME Funds Disbursed             0.00


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

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

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

11.   Enter **Y** in VIEW COST DETAILS (Y/N)? and press <Enter> to see a breakdown of the HOME FUNDS total by form of assistance. When you are finished, press <Enter> to display the HOME Menu.

12.   Before exiting the HOME Menu, select option **F** and press <Enter>. Confirm that COST DATA and BENEFICIARY DATA both show a status of COMPLETE.

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

Lesson 3
SINGLE-ADDRESS HOMEBUYER ACTIVITIES

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

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

Exercise 3.1 Activity Setup

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

    Jot down the following information for use in later exercises:

    CPS Project Number _____

    Program Year _____

    HUD Activity Number _____

2. On the fourth Common Path screen (C04MA08), enter **127,000** in TOTAL ESTIMATED AMOUNT and **X** next to HOME. Press <Enter>. On the HOME MENU, select option **B**, Homebuyer, and press <Enter>.

3. The Set Up Activity: CHDO Questions screen is displayed (except for Insular Area users):

```
                      SET UP ACTIVITY: CHDO QUESTIONS                HM01

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

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

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

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




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

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

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

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

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

```
                   ACTIVITY SETUP: OBJECTIVE AND OUTCOME          HM01-A

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

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

   OUTCOME                   _
                            1  Availability/accessibility
                            2  Affordability
                            3  Sustainability




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

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

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

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

```
                    SET UP ACTIVITY: SPECIAL CHARACTERISTICS         HM01-B

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


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


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




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

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

Fill in the screen this way:

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

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

6.   The Set Up Homebuyer Activity screen is displayed:

```
                       SET UP HOMEBUYER ACTIVITY                    HB01

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

   ACTIVITY TYPE        _
                        2  New Construction Only   4  Acquisition & Rehab
                        3  Acquisition Only        5  Acquisition & New
   PROPERTY ADDRESS                                   Construction
   Homebuyer's Name     _____
           Street       _____
             City       _____ St __  Zip _____ - ____
        County Code      _____


   ACTIVITY ESTIMATES   HOME Units  ____      HOME Cost  _____

   MULTI-ADDRESS (Y/N)? _

   LOAN GUARANTEE(Y/N)? _

   CHDO ACTIVITY (Y/N)? N

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

Fill in the screen this way:

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

Field	Input
	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

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.

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

3. The Complete Homebuyer Activity screen is displayed:

```
                    COMPLETE HOMEBUYER ACTIVITY                 HB03

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

  ACTIVITY TYPE       4
                      2  New Construction Only   4  Acquisition & Rehab
                      3  Acquisition Only        5  Acquisition & New
                                                    Construction
  PROPERTY TYPE       1
                      1  1-4 Single Family       3  Cooperative
                      2  Condominium             4  Manufactured Home

  FHA INSURED (Y/N)?  _

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

  COMPLETED UNITS     Total number    2
                      HOME-assisted   2



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

Fill in the screen this way:

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

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

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

```
                  COMPLETE HOMEBUYER ACTIVITY: UNITS              HB03-A

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

 COMPLETED UNITS     Total   2   HOME-Assisted    2

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

                         Meeting Energy Star standards:  ____    ____

                                    504-accessible:  ____

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

                PJ-imposed period of affordability:  __ years


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

Fill in the screen this way:

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

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

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

```
                    COMPLETE HOMEBUYER ACTIVITY: COSTS              HB04

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

   Purchase Price  _____     Value After Rehab  _____         Totals

   1. HOME FUNDS (Including PI)

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

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

   HOME Funds Disbursed            0.00         HOME Total          0.00

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

Fill in the screen this way:

Field	Input
Purchase Price	For this exercise, enter **137000** (you can't enter commas or cents in this field).
Value After Rehab	For this exercise, enter **154000** (again, no commas or cents).
PROPERTY COSTS	HOME is providing a direct loan of **122,000**.
DOWNPAYMENT ASSISTANCE	The HOME downpayment assistance is a grant of **5,000**.
HOME Funds Disbursed

HOME Total | 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." |

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

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

```
                  COMPLETE HOMEBUYER ACTIVITY: COSTS              HB05

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

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

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

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

       HOME Funds Disbursed          0.00     Activity Total   127,000.00

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

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

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

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

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

```
                    COMPLETE HOMEBUYER ACTIVITY: COSTS               HB06

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

  Purchase Price   137000                     Value After Rehab   154000
   Source     Form of                     * Source Codes
  of Funds   Assistance        Amount       1  HOME property costs
     1           1          122,000.00       2  HOME downpayment assistance
     5           _            8,000.00       4  Other federal funds
     7           _            2,000.00       5  State/local funds
     2           2            5,000.00       6  Tax-exempt bond proceeds
     _           _         _____      7  Private loans
     _           _         _____      8  Owner cash contributions
     _           _         _____      9  Private grants
     _           _         _____     * Forms of HOME Assistance
     _           _         _____      1  Amortized loan
        Activity Total     137,000.00        2  Grant
                                             3  Deferred payment loan
      Total HOME funds      127,000.00       5  Other
   HOME funds disbursed           0.00
  To display alternate costs screen, press <F15>.
   F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE  F15=ALT
```

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

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

On the first line:

- Input the unit number and the number of bedrooms in the homebuyer's unit. There is an <F1> help screen for the # OF BDRMS field.

- Enter household information about the homebuyer. An <F1> help screen is available for each of these fields.

- The default assistance type of 4 (no assistance) should be changed to 1 (Section 8 mortgage assistance) when applicable. None of the other codes shown on the <F1> help screen for this field is valid for the owner-occupied unit.

- TOTAL MONTHLY RENT is not applicable to the homebuyer, so no input field is provided.

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

Fill in the bottom half of the screen this way:

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

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

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

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

Homebuyer Activities and ADDI

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

- An ACTIVITY TYPE of **3**, **4**, or **5** is entered on the Set Up Homebuyer Activity screen, and

- DOWNPAYMENT ASSISTANCE is input on the HOME Funds Costs screen, and

- The FIRST-TIME HOMEBUYER question on the Beneficiaries screen is answered **Y**, and

- The ACTIVITY STATUS CODE is set to "complete."

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

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

--- **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              HM01

   Grantee Activity ID                      IDIS Activity ID     9881
   Activity Name       ABC DEVELOPMENT CORPORATION

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

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

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




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

Since CHDO Reserve (CR) will not be used to fund this activity, press <Enter>. The system automatically sets CR Aᴄᴛɪᴠɪᴛʏ? and Wɪʟʟ Iɴɪᴛɪᴀʟ Fᴜɴᴅɪɴɢ Bᴇ… to **N** and CHDO Aᴄᴛɪɴɢ As to a blank.

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

```
              ACTIVITY SETUP: OBJECTIVE AND OUTCOME          HM01-A

  Grantee Activity ID                      HUD Activity ID    9881
  Activity Name       ABC DEVELOPMENT CORPORATION

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

  OUTCOME             _
                      1  Availability/accessibility
                      2  Affordability
                      3  Sustainability




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

Let's say your objective for this activity is to provide decent affordable housing (code **2**) and the expected outcome is affordability (also code **2**). The system automatically sets Oʙᴊᴇᴄᴛɪᴠᴇ to **2** if it is left blank and Oᴜᴛᴄᴏᴍᴇ 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 'Y' next to any that apply:
   LOCATION
                        _  CDBG strategy area
                        _  Local target area
                        _  Presidentially declared major disaster area
                        _  Historic preservation area
                        _  Brownfield redevelopment area
                        _  Conversion from non-residential to residential use
                        _  Colonia


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




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

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

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
```

Fill in the screen this way:

Field	Input
ACTIVITY TYPE	For this exercise, enter **5**.
PROPERTY ADDRESS Homebuyer's Name	Leave this field blank for a multi-address activity. The homebuyers' names will be entered at completion.
PROPERTY ADDRESS Street, City, St, Zip	These fields are populated with the address you entered on the first Common Path screen (they can be changed here). If you did not input an address on the Common Path screen, enter it now.
PROPERTY ADDRESS County Code	Press <F1> to display a list of county codes for your state and select the appropriate one.
ACTIVITY ESTIMATES HOME Units	For this exercise, enter **4.**
ACTIVITY ESTIMATES HOME Cost	For this exercise, enter **236,800**.
MULTI-ADDRESS (Y/N)?	For this exercise, enter **Y**.
LOAN GUARANTEE (Y/N)?	HOME funds will not be used to guarantee a private loan, so enter **N** or leave blank to have the field automatically set to N.
CHDO ACTIVITY (Y/N)?	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**. 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:

```
                    SET UP HOMEBUYER ACTIVITY: DEVELOPER            HB02

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

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

    DEVELOPER'S NAME     _____

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




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

Fill in the screen this way:

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

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

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

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

Exercise 4.2 Activity Completion

1.   On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.

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

3.   The Complete Homebuyer Activity screen is displayed:

```
                      COMPLETE HOMEBUYER ACTIVITY                 HB03

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

     ACTIVITY TYPE       5
                         2  New Construction Only   4  Acquisition & Rehab
                         3  Acquisition Only        5  Acquisition & New
                                                       Construction
     PROPERTY TYPE       1
                         1  1-4 Single Family       3  Cooperative
                         2  Condominium             4  Manufactured Home

     COMPLETED UNITS     Total number    ____
                         HOME-assisted   ____




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

Fill in the screen this way:

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

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

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

```
                    COMPLETE HOMEBUYER ACTIVITY: UNITS              HB03-A

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

COMPLETED UNITS       Total   4    HOME-Assisted    4

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

                         Meeting Energy Star standards: ____    ____

                                   504-accessible:  ____

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

               PJ-imposed period of affordability:  __ years



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

Fill in the screen this way:

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

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

5.   The Property Addresses screen is displayed:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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.

```
              COMPLETE HOMEBUYER ACTIVITY: COSTS            HB04

   Grantee Activity ID                        IDIS Activity ID    9881
   Activity Name        ABC DEVELOPMENT CORPORATION
   Property Address     904 MERRITT STREET MELBOURNE FL 32901

   Purchase Price  _____

   1. HOME FUNDS (Including PI)                         Address Totals

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

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

                             HOME Total This Address              0.00

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

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

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

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

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

```
              COMPLETE HOMEBUYER ACTIVITY: COSTS              HB05

   Grantee Activity ID                      IDIS Activity ID    9881
   Activity Name       ABC DEVELOPMENT CORPORATION
   Property Address    904 MERRITT STREET MELBOURNE FL 32901

                                                 Address Totals

   1. HOME FUNDS SUMMARY  a. Property Costs      59,200.00
      (Including PI)      b. Downpayment              0.00
                             Assistance                          $59,200.00

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

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

                             Total This Address        $59,200.00

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

Fill in the screen this way:

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

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

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

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

```
              COMPLETE HOMEBUYER ACTIVITY: BENEFICIARIES          HB07

 Grantee Activity ID                           IDIS Activity ID    9881
 Activity Name      ABC DEVELOPMENT CORPORATION
 Property Address   904 MERRITT STREET MELBOURNE FL 32901

          # 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

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

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

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

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

On the first line:

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

- Enter household information about the homebuyer. An <F1> help screen is available for each of these fields.

- The default assistance type of 4 (no assistance) should be changed to 1 (Section 8 mortgage assistance) when applicable. None of the other codes shown on the <F1> help screen for this field is valid for the owner-occupied unit.

- TOTAL MONTHLY RENT is not applicable to the homebuyer, so no input field is provided.

Fill in the bottom half of the screen this way:

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

When you have finished:

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

9. <Tab> to the selection field for 906 Merritt Street. Enter **X** and press <Enter>. Repeat steps 6 through 8, this time entering cost and beneficiary data for the property at 906 Merritt. When you are finished, you should be back at the Property Addresses screen.

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

```
                    MULTI-ADDRESS ACTIVITY SUMMARY                 HB98

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

   ACTIVITY TOTALS, ALL ADDRESSES

          HOME Funds (Including PI)      118,400.00
          Public Funds                  165,600.00
          Private Funds                       0.00

                            TOTAL        284,000.00

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


   Total HOME Funds Disbursed           0.00


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

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

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

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

```
                    MULTI-ADDRESS ACTIVITY COST SUMMARY              HB99

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

                                                               Totals
   1. HOME FUNDS           Amortized Loan     108,400.00
      (Including PI)                Grant      10,000.00
                     Deferred Payment Loan          0.00
                                    Other          0.00      118,400.00

   2. PUBLIC FUNDS     Other Federal Funds     48,200.00
                         State/Local Funds    117,400.00
                  Tax-Exempt Bond Proceeds          0.00     165,600.00

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


   Total HOME Disbursed            0.00     Activity Total    284,000.00

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

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

-- **End of Exercise 4.2** --

Lesson 5
SINGLE-ADDRESS HOMEOWNER REHAB ACTIVITIES

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

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

Exercise 5.1 Activity Setup

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

Jot down the following information for use in later exercises:

CPS Project Number   _____

Program Year   _____

HUD Activity Number   _____

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

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

```
                   ACTIVITY SETUP: OBJECTIVE AND OUTCOME          HM01-A

  Grantee Activity ID                          HUD Activity ID     10403
  Activity Name        JOAN KERSHAW


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


  OUTCOME             _
                      1  Availability/accessibility
                      2  Affordability
                      3  Sustainability







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

Fill in the screen this way:

Field	Input
OBJECTIVE	You can either: • Press <F1> to display a help screen and select an OBJECTIVE code • Enter **1**, **2**, or **3**. • Leave the field blank to have it automatically set to 2.
OUTCOME	Same as the OBJECTIVE field.

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

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

```
                    SET UP ACTIVITY: SPECIAL CHARACTERISTICS        HM01-B

   Grantee Activity ID                          HUD Activity ID    10403
   Activity Name       JOAN KERSHAW

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


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




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

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

Fill in the screen this way:

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

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

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

```
                      SET UP HOMEOWNER REHAB ACTIVITY              HO01

    Grantee Activity ID                        IDIS Activity ID    10403
    Activity Name      JOAN KERSHAW

    ACTIVITY TYPE      1  Rehab Only

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


    ACTIVITY ESTIMATES   HOME Units  ____      HOME Cost  _____

    MULTI-ADDRESS (Y/N)? _

    LOAN GUARANTEE(Y/N)? _



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

Fill in the screen this way:

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

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

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

Exercise 5.2 Activity Completion

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.

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

3. The Complete Homeowner Rehab Activity screen is displayed:

```
                    COMPLETE HOMEOWNER REHAB ACTIVITY              HO03

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

    ACTIVITY TYPE       1   Rehab Only

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

    FHA INSURED (Y/N)?   _

    COMPLETED UNITS     Total number    1
                        HOME-assisted   1




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

Fill in the screen this way:

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

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

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

```
                    COMPLETE HOMEOWNER REHAB ACTIVITY: UNITS          HO03-A

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

    COMPLETED UNITS      Total   1    HOME-Assisted    1

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

                            Meeting Energy Star standards:  ____     ____

                                   504-accessible:  ____




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

Fill in the screen this way:

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

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

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

```
                COMPLETE HOMEOWNER REHAB ACTIVITY: COSTS          HO04

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

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

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

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

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

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

Fill in the screen this way:

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

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

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

```
               COMPLETE HOMEOWNER REHAB ACTIVITY: COSTS          HO05

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

 Value After Rehab    129400
  Source     Form of                         * Sources of Funds
 of Funds   Assistance        Amount           1  HOME funds (including PI)
    1           2          32,000.00           4  Other federal funds
    4           _           3,200.00           5  State/local funds
    9           _           6,500.00           6  Tax-exempt bond proceeds
    _           _         _____         7  Private loans
    _           _         _____         8  Owner cash contributions
    _           _         _____         9  Private grants
    _           _         _____
    _           _         _____       * Forms of HOME Assistance
    _           _         _____         1  Amortized loan
       Activity Total     41,700.00            2  Grant
                                               3  Deferred payment loan
     Total HOME funds     32,000.00            5  Other
  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.

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

```
              COMPLETE HOMEOWNER REHAB ACTIVITY: BENEFICIARIES        HO06

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

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












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

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

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

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

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

-- **End of Exercise 5.2** --

Lesson 6
MULTI-ADDRESS HOMEOWNER REHAB ACTIVITIES

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

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

Exercise 6.1 Activity Setup

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

Jot down the following information for use in later exercises:

CPS Project Number   _____

Program Year   _____

HUD Activity Number   _____

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

3.   The Activity Setup: Outcome and Objectives screen is displayed:

```
                      ACTIVITY SETUP: OBJECTIVE AND OUTCOME            HM01-A

    Grantee Activity ID                              HUD Activity ID    9898
    Activity Name        805-807 TRINITY PLACE - WILLIAMS

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

    OUTCOME             _
                        1  Availability/accessibility
                        2  Affordability
                        3  Sustainability




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

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

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

```
                 SET UP ACTIVITY: SPECIAL CHARACTERISTICS          HM01-B

    Grantee Activity ID                          HUD Activity ID    9898
    Activity Name        805-807 TRINITY PLACE - WILLIAMS

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


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




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

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

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

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

5.   The Setup Homeowner Rehab Activity screen is displayed:

```
                    SET UP HOMEOWNER REHAB ACTIVITY                HO01

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

   ACTIVITY TYPE     1  Rehab Only

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


   ACTIVITY ESTIMATES   HOME Units  ____      HOME Cost  _____

   MULTI-ADDRESS (Y/N)? _

   LOAN GUARANTEE(Y/N)? _



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

Fill in the screen this way:

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

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

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

```
                SET UP HOMEOWNER REHAB ACTIVITY: CONTRACTOR          HO02

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

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

   CONTRACTOR'S NAME      _____

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




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

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

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

-- **End of Exercise 6.1** --

Exercise 6.2 Activity Completion

1. On the Main Menu, select option **B**, Revise Activity. On the Revise Activity (C04MA09) screen, fill in the HUD ACTIVITY NBR you jotted down at setup and press <Enter>. Page to Common Path screen C04MA08, Setup Activity. Type **X** next to HOME, and press <Enter>.

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

3. The Complete Homeowner Rehab Activity screen is displayed:

```
                   COMPLETE HOMEOWNER REHAB ACTIVITY               HO03

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

    ACTIVITY TYPE        1  Rehab Only

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

    FHA INSURED (Y/N)?   _

    COMPLETED UNITS      Total number    2
                         HOME-assisted   2




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

Fill in the screen this way:

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

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

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

```
              COMPLETE HOMEOWNER REHAB ACTIVITY: UNITS          HO03-A

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

   COMPLETED UNITS      Total    2   HOME-Assisted    2

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

                            Meeting Energy Star standards:  ____    ____

                                       504-accessible:  ____




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

Fill in the screen this way:

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

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

5.   The Property Addresses screen is displayed:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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.

```
            COMPLETE HOMEOWNER REHAB ACTIVITY: COSTS          HO04

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

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

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

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

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

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

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

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

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

```
              COMPLETE HOMEOWNER REHAB ACTIVITY: BENEFICIARIES        HO06

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

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

   FHA insured (Y/N)?  _




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

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

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

On the first line:

- Input the unit number and the number of bedrooms for 805 Trinity Place. There is an <F1> help screen for the # OF BDRMS field.

- Enter household information about the homeowner. An <F1> help screen is available for each of these fields.

- The default assistance type of 4 (no assistance) should be changed to 1 (Section 8 mortgage assistance) when applicable. None of the other codes shown on the <F1> help screen for this field is valid for the owner-occupied unit.

- TOTAL MONTHLY RENT is not applicable to a homeowner, so no input field is provided.

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

When you have finished:

    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:

```
                MULTI-ADDRESS ACTIVITY SUMMARY              HO98

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

  ACTIVITY TOTALS, ALL ADDRESSES

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

                            TOTAL       16,850.00

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


  Total HOME Funds Disbursed             0.00


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

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

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

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

```
             MULTI-ADDRESS ACTIVITY COST SUMMARY              HO99

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


                                                        Totals
  1. HOME FUNDS          Amortized Loan      16,850.00
     (Including PI)              Grant           0.00
                    Deferred Payment Loan        0.00
                               Other             0.00      16,850.00

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

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


  Total HOME Disbursed         0.00    Activity Total     16,850.00

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

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

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

Lesson 7
TBRA ACTIVITIES

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

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

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

Jot down the following information for use in later exercises:

CPS Project Number   _____

Program Year   _____

HUD Activity Number   _____

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

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

```
                    ACTIVITY SETUP: OBJECTIVE AND OUTCOME            HM01-A

   Grantee Activity ID                          HUD Activity ID     8080
   Activity Name        TBRA 2006

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

   OUTCOME             _
                        1  Availability/accessibility
                        2  Affordability
                        3  Sustainability




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

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:

```
                    TENANT-BASED RENTAL ASSISTANCE (TBRA)              TBRA

   Grantee Activity ID                             IDIS Activity ID    8080
   Activity Name        HOME TBRA

   Last  # of  Sec  ---MONTHLY RENT--- -------HOUSEHOLD-------- -TENANT CONTRACT-
   Name  Bdrms Dep Tenant   TBRA Total %Med Hisp Race Size Type Paid To New?  Mth
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __
   ____  _  ____  ____  ____        _   _  ___   _    _    _    _    _   __

   More units (Y/N)? _                                    Unit count      0

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

<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.

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

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

5.   The TBRA: Units screen is displayed:

```
                            TBRA: UNITS                              TBRA-2

        Grantee Activity ID                       IDIS Activity ID    8080
        Activity Name       HOME TBRA

        NUMBER OF TBRA UNITS:  3

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



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








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

Fill in the screen this way:

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

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

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

Lesson 8
AD/CO/CC ACTIVITIES

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

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

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

　　Jot down the following information for use in later exercises:

　　　　CPS Project Number　　　_____

　　　　Program Year　　　_____

　　　　HUD Activity Number　　　_____

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

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

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

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

Lesson 9
CHDO LOAN ACTIVITIES

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

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

Exercise 9.1 The CHDO Loan Phase

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

    Jot down the following information for use in later exercises:

    CPS Project Number   _____

    Program Year   _____

    HUD Activity Number   _____

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

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

```
                     SET UP ACTIVITY: CHDO QUESTIONS              HM01

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

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

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

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




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

Fill in the screen this way:

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

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

```
                    SET UP ACTIVITY: CHDO QUESTIONS              HM01

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

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

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

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




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

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

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

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

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

                         SUBGRANT & SUBFUND MENU

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

 TYPE SELECTION AND PRESS ENTER   G 00

 F4 = MAIN MENU   F7 = PREV
```

Select option **O3** and press <Enter> to display the Create Sub-Fund(s) screen:

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

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

  _       __        __        __                  $0.00     _____
 GRANT NUMBER: _____

  _       __        __        __                  $0.00     _____
 GRANT NUMBER: _____

  _       __        __        __                  $0.00     _____
 GRANT NUMBER: _____

  _       __        __        __                  $0.00     _____
 GRANT NUMBER: _____


 ENTER YOUR SUBFUND REQUEST(S)

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

Fill in the screen this way:

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

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

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

```
06/12/06   08:48              MAINTAIN  SUBFUNDS                    C04MG07
                              --------------------
PROGRAM CODE:  _    FISCAL YEAR:  ____      SOURCE TYPE:  __

SELECTION: X - INQUIRE, C - CANCEL, R - REVISE












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

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

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

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

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


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


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


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



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

Fill in the screen this way:

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

When you are finished, press <F9> to save your data. Notice the message that is displayed: $0 SUB-GRANT CREATED. USE MAINTAIN SUB-GRANT TO REVISE AMOUNT. Press <F7> to return to the Subgrant & Subfund Menu, and select option **O2**. The Maintain Subgrants screen is displayed:

```
 06/12/06   08:48              MAINTAIN SUBGRANTS                 C04MG02
                               --------------------
 PROGRAM CODE:  _     FISCAL YEAR:  ____     SOURCE TYPE:  __

 SELECTION: X - INQUIRE, C - CANCEL, R - REVISE















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

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

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

Press <F4> to return to the Main Menu.

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

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

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

Exercise 9.2 The Going Forward Phase

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

2. On the HOME Menu, select option **A** (it should be highlighted) and press <Enter> to display the CHDO Questions screen:

```
                      SET UP ACTIVITY: CHDO QUESTIONS               HM01

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

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

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

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

    GOING FORWARD?        Loan funds have been fully disbursed.
                          Is the activity going forward (Y/N)?  _




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

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

3.   The Set Up Rental Activity screen is displayed:

```
                      SET UP RENTAL ACTIVITY                      HR01

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

    ACTIVITY TYPE          _
                       1  Rehab Only            4  Acquisition & Rehab
                       2  New Construction Only 5  Acquisition & New
                       3  Acquisition Only         Construction
    PROPERTY ADDRESS
            Street     119 SHERIDAN STREET
              City     LITTLE ROCK            St AR  Zip 72216 - ____
         County Code     _____

                                            CHDO Loan      25,000.00
    ACTIVITY ESTIMATES    HOME Units  ____   Other HOME  _____
                                            HOME Total     25,000.00
    MULTI-ADDRESS (Y/N)? _

    LOAN GUARANTEE(Y/N)? _

    CHDO ACTIVITY (Y/N)? N

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

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

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

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

```
                      COMPLETE RENTAL ACTIVITY                    HR03

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

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

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

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

  COMPLETED UNITS    Total number      5
                     HOME-assisted     5




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

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

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.

```
                      COMPLETE RENTAL ACTIVITY: COSTS            HR04

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

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

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

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

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

The CHDO loan amount is also displayed in read-only fields on the alternate version of the cost screen:

```
                    COMPLETE RENTAL ACTIVITY: COSTS                HR05

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

  Source      Form of                         * Source Codes
 of Funds    Assistance        Amount          1  HOME funds (including PI)
    1            4           25,000.00          4  Other federal funds
   __           _          _____       5  State/local funds
   __           _          _____       6  Tax-exempt bond proceeds
   __           _          _____       7  Private loans
   __           _          _____       8  Owner cash contributions
   __           _          _____       9  Private grants
   __           _          _____      10  Low income tax credit
   __           _          _____
   __           _          _____    * Forms of HOME Assistance
        Activity Total     25,000.00           1  Amortized loan
                                               2  Grant
       Total HOME funds    25,000.00           3  Deferred payment loan
   HOME funds disbursed    25,000.00           4  CHDO Loan
                                                5  Other
  To display alternate costs screen, press <F15>.
  F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE  F15=ALT
```

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:

```
                        SEARCH HOME ACTIVITIES                    FIND
       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 _____

     F2=PROJECT LIST     F6=CLEAR     F7=PREV
```

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

- All of your open activities, enter STATUS CODES of **3** and **4**.

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

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

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

```
                              SEARCH RESULTS
                            100 Activities Found
     Enter X to select

             IDIS
     Select  Act ID  Grantee Activity ID Activity Name

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

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

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

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

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

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

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

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

--- **End of Lesson 10** ---