## Guidance for New CDBG Screens IDIS Release 9.0

Release 9.0 changes the information collected on the CDBG path in IDIS primarily to address specific issues raised by OMB in its PART review of the CDBG program, increase navigation efficiency for grantees, and provide more uniform data collection to increase data accuracy. Every effort has been made to minimize data entry for grantees.

The CDBG screens have been renamed and numbered as follows. These screens will appear only when applicable to the type of activity being carried out. In addition to these screens, users may want to review new reports that have been added to IDIS. These include grantee expenditure and accomplishment reports by program year, reports summarizing the types of organizations carrying out grantee activities, and housing rehabilitation reports providing information on average costs for each grantee.

CDBGO1-CDBG National Objective
CDBG02-Funding Sources
CDBG03-Organization Carrying Out Activity
CDBG04 for entitlement activities carried out by subrecipients-Subrecipient Questions
CDBG04 for entitlement activities carried out by CBDOs-CBDO Questions
CDBGO4 for state activities carried out by non-governmental organizationsOrganization Carrying Out Activity Cont.
CDBGO5-Form of Assistance
CDBG06-CDBG Activity Information (formerly the MC01 screen)
CDBG07-CDBG Area Benefit Data (formerly the MX03 screen)
CDBG08-CDBG Direct Benefit Data (formerly the MA05 screen)
CDBG09-CDBG Housing Rehabilitation
CDBG10-CDBG Nature/Location (same as the current MA06 screen)
CDBG11-CDBG Job Creation/Retention (formerly the MA07 screen)
CDBG12-Slum/Blight Area (same as the current MX02 screen)
CDBG13-CDBG Beneficiary Income Levels-by Household (formerly the MC02 screen)
CDBG14-CDBG Multi-Unit Housing Activity (formerly the MC04 screen)
CDBG15-CDBG Displacement (same as the current MC03 screen)
CDBG16-1-1 Replacement (formerly the MC06 screen)
The following new screens display cumulative totals and are for display purposes only:

CDBG51-Beneficiary Summary
CDBG52-Income Category Summary
CDBG53-Job Creation/Retention Summary
The following are new names for help screens and other screens not on the main CDBG path:

CDBG-H1-Revise CDFI
CDBG-H2-CDFI Areas
CDBG-H3-Strategy Selection Screen
CDBG-H4-Strategy Areas
CDBG-H5-CDBG Error Resolution
CDBG-H6-Matrix Code Help Screen
CDBG-H7-National Objective Code Help Screen
CDBG-H8-Accomplishment Code Help Screen

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CDBG-H9-CDBG Displacement Balance Resolution Screen
CDBG-H10-Race Code Help Screen
Guidance for entering data on the new screens follows. More detailed guidance
will be provided as soon as possible.
CDBG National Objective
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DESCRIPTION: This new screen appears at the start of the CDBG path. The matrix code will be brought forward from the common path and the grantee will enter the national objective code; these two codes will dictate the remaining screens that will appear for a given activity. Users will also have ability on this screen to switch to a different IDIS activity ID within the same grantee rather than having to return to the common path to do so.

For administration and planning activities (unless it is a State grantee using matrix code 20 and a national objective code), this will be the only screen the user will see in the CDBG path. The Unliquidated Obligations field has been moved to this screen because it is the only field out of the current CDBG path that may apply to administration and planning activities. Unliquidated Obligations is an optional field.

JUSTIFICATION: This screen eases navigation for grantees. It contains no new data elements.

## CDBG Funding Sources



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DESCRIPTION: This screen appears for all activities except planning and administration. The amount for CDBG Funds is brought forward from Activity Funding. At activity completion, this amount will reflect the actual amount of CDBG funds drawn down for an activity. The amounts of funds from other sources used for this activity must be entered by the grantee. Leveraging Ratio and subtotals and total are calculated fields.

JUSTIFICATION: In its PART review, OMB rated the CDBG program "Ineffective," citing that insufficient information exists regarding the leveraging of funds and the cost effectiveness of program activities. The information on funding sources from this screen will enable CDBG to address these issues by providing comprehensive information on leveraging and enabling the CDBG program to more accurately measure costs and cost efficiency. This screen will also satisfy the performance measurement requirement for leveraging information.

## For use on Entitlement/Insular Areas activities:

## Organization Carrying Out Activity

```
    1 2 3 4 5 5 8
12345678901234567890123456789012345678901234567890123456789012345678901234567890
```



```
12345678901234567890123456789012345678901234567890123456789012345678901234567890
```

DESCRIPTION: This version of the CDBG03 screen is for activities carried out by entitlement grantees and Insular Areas. Feedback from grantees since this screen was released into IDIS in July 2005 has resulted in two changes. For activities not carried out by the grantee, there is now a field to enter Organization Name. An additional selection-Another unit of local government-has also been added primarily to accommodate urban counties that distribute funds to other localities within their jurisdiction.

JUSTIFICATION: CDBG program legislation and regulations require that CDBG-funded activities be carried out by specific types of organizations. The information is needed to ensure that grantees are in compliance with those requirements. In addition, the CDBG program receives requests from the Office of Management and Budget, the White House, the Office of the Inspector General, and Congress regarding the amount of expenditures by subrecipients and other specific types of organizations. In the past, the CDBG program has responded by providing estimates. Collecting information on the types of organizations carrying out CDBG activities will enable the program to respond to these requests more accurately and in a more timely and cost efficient manner.

## For use on State Grantee activities:

## Organization Carrying Out Activity

```
    1 2 3 4 5 5 5 % 8
12345678901234567890123456789012345678901234567890123456789012345678901234567890
```



```
12345678901234567890123456789012345678901234567890123456789012345678901234567890
```

DESCRIPTION: This version of the CDBG03 screen is for activities carried out by State grantees. Feedback from grantees since this screen was released into IDIS in July 2005 has resulted in two changes. For activities not carried out by the grantee, there is now a field to enter Organization Name. An additional selection-Another unit of local government-has also been added to accommodate state grant recipients that make funds available to other units of general local government to carry-out eligible activities.

JUSTIFICATION: CDBG program legislation and regulations require that CDBG-funded activities be carried out by specific types of organizations. The information is needed to ensure that grantees are in compliance with those requirements. In addition, the CDBG program receives requests from the Office of Management and Budget, the White House, the Office of the Inspector General, and Congress regarding the amount of expenditures by surecipients and other specific types of organizations. In the past, the CDBG program has responded by providing estimates. Collecting information on the types of organizations carrying out CDBG activities will enable the program to respond to these requests more accurately and in a more timely and cost efficient manner.

## For use on Entitlement/Insular Areas activities

## Activity Carried Out By Subrecipient Screen

```
    1 2 <rllllll
12345678901234567890123456789012345678901234567890123456789012345678901234567890
MM/DD/YY HH:MM CDBG ACTIVITY: SUBRECIPIENT QUESTIONS CDBGO4
Grantee Activity ID xxxxxxxxxxxxxxxxxx IDIS Activity ID zzzzzzz9
Activity Name xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx Natl/Obj xxxxx
Enter "X" by the appropriate designation:
    Subrecipient is:
            _ Non-profit organization
            OR
            _ For-profit authorized under 570.201(o)
Enter "X" by all that apply:
    Subrecipient is:
            _ A faith-based organization
            - An institution of higher education
(This line reserved for messages)
F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE
12345678901234567890123456789012345678901234567890123456789012345678901234567890
```

DESCRIPTION: This version of the CDBG04 screen appears for entitlement and Insular Area grantees that checked subrecipient on the CDBG03 screen. On this screen, grantees enter information about the subrecipient carrying out this activity. No changes have been made to this screen since its introduction in July 2005.

JUSTIFICATION: CDBG program legislation and regulations require that CDBG-funded activities be carried out by specific types of organizations. The information is needed to ensure that grantees are in compliance with those requirements. In addition, the CDBG program receives requests from the Office of Management and Budget, the White House, the Office of the Inspector General, and Congress regarding the amount of expenditures by subrecipients and other specific types of organizations. In the past, the CDBG program has responded by providing estimates. Collecting information on the types of organizations carrying out CDBG activities will enable more timely and cost efficient manner.

## For use on Entitlement/Insular Areas activities:

## Activity Carried Out By CBDO Screen



```
12345678901234567890123456789012345678901234567890123456789012345678901234567890
MM/DD/YY HH:MM CDBG ACTIVITY: CBDO QUESTIONS CDBG04
    Grantee Activity ID xxxxxxxxxxxxxxxxxx IDIS Activity ID zzzzzzz9
```



```
    Enter "X" by the appropriate designation:
        CBDO is:
            _ Non-profit organization
            - OR
            _ For-profit entity
Enter "X" by all that apply:
        CBDO is:
            _ A faith-based organization
            - An institution of higher education
    (This line reserved for messages)
F3=VALDT 
12345678901234567890123456789012345678901234567890123456789012345678901234567890
```

DESCRIPTION: This version of the CDBG04 screen appears for entitlement and Insular Area grantees that checked CBDO on the CDBG03 screen. On this screen, grantees enter information about the CBDO carrying out this activity. No changes have been made to this screen since its introduction in July 2005.

JUSTIFICATION: CDBG program legislation and regulations require that CDBG-funded activities be carried out by specific types of organizations. The information is needed to ensure that grantees are in compliance with those requirements. In addition, the CDBG program receives requests from the Office of Management and Budget, the White House, the Office of the Inspector General, and Congress regarding the amount of expenditures by subrecipients and other specific types of organizations. In the past, the CDBG program has responded by providing estimates. Collecting information on the types of organizations carrying out CDBG activities will enable more timely and cost efficient manner.

## For use on State Grantee activities:

## Organization Carrying Out Activity Continued



```
12345678901234567890123456789012345678901234567890123456789012345678901234567890
MM/DD/YY HH:MM CDBG ACTIVITY CARRIED OUT BY CONT. CDBG04
    Grantee Activity ID xxxxxxxxxxxxxxxxxx IDIS Activity ID zzzzzzz9
```



```
    Enter "X" by the appropriate designation:
        105(a)(15) entity is:
            _ Non-profit organization
            OR
            _ For-profit entity
Enter "X" by all that apply:
    105(a)(15) entity is:
            A faith-based organization
            - An institution of higher education
    (This line reserved for messages)
F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE
12345678901234567890123456789012345678901234567890123456789012345678901234567890
```

DESCRIPTION: This version of the CDBG04 screen appears for State grantees that checked 105(a)(15) entity on the CDBG03 screen. On this screen, grantees enter information about the entity carrying out this activity. No changes have been made to this screen since its introduction in July 2005.

JUSTIFICATION: CDBG program legislation and regulations require that CDBG-funded activities be carried out by specific types of organizations. The information is needed to ensure that grantees are in compliance with those requirements. In addition, the CDBG program receives requests from the Office of Management and Budget, the White House, the Office of the Inspector General, and Congress regarding the amount of expenditures by subrecipients and other specific types of organizations. In the past, the CDBG program has responded by providing estimates. Collecting information on the types of organizations carrying out CDBG activities will enable more timely and cost efficient manner.

Loan Information

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12345678901234567890123456789012345678901234567890123456789012345678901234567890
DESCRIPTION: This screen appears for all activities except planning and administration. If the organization carrying out the activity is providing assistance in the form of loans or grants, provide the number of grants or loans issued. If the organization carrying out the activity does not provide loans or grants, no entry is required on this screen. If the organization carrying out the activity provides a loan, enter the interest rate, amortization period and loan amount. For multiple loans, enter the average interest rate and amortization period and the total dollar amount of all loans.

JUSTIFICATION; This screen will provide information on potential program income and enable the CDBG program to more accurately respond to inquiries from various government oversight agencies.

## CDBG Activity Information



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DESCRIPTION: This is a revision of the current MC01 screen.
Presumed Benefit and Nature/Location have been moved to this screen from the old MA05 screen. These fields would only be displayed for LMC* activities.

Multi-Unit Housing question will only be displayed for LMH* activities.
Colonia and Brownfield Activity designations have been added.
Local Target Area has been added. Users will not need to specify an area identifier for Local Target Area activities until phase I of the IDIS re-engineering. Indicate local target area only when an area is not a Strategy or CDFI area.

JUSTIFICATION: Colonia and Brownfield Activity have been added to more efficiently track assistance to activities in such areas. Local Target Area was added in response to OMB's PART review of the CDBG program which questions the extent to which the CDBG program effectively targets distressed areas. This new data element will enable HUD to show targeting by grantees, even when they are not using designated Strategy and CDFI areas.

## Area Benefit/Census Tract Screen



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DESCRIPTION: This screen is a revision of the current MX03. It will appear for all LMA* activities.
(1) If Census data is being used, enter "C" and then enter the census tract/block group data for the activity's service area. IDIS will then:
show the Total \# of Low/Mod in Service Area; show the Total Low/Mod Universe Population in Service Area; and calculate and display \% of Low/Mod in Service Area.
(2) If a survey is being used, enter " $S$ " and then enter: Total \# of Low/Mod in Service Area and Total Low/Mod Universe Population in Service Area*. IDIS will then calculate the percent low/mod.
(*Low/Mod Universe Population: When reporting the use of survey data, enter the total number of respondents in this field; it will be used as the denominator in calculating the percent low/mod. When "C" is used and this field is automatically populated by IDIS, this represents the number of persons in the area with the potential to be low/mod and is used as the denominator in calculating the percent low/mods in a census tract(s)/block group(s).)
"LMISD Date" applies only to entitlement grantees and is automatically populated, but will be seen only if " C " is selected. This field represents the effective date of the data being used by IDIS to calculate the percent low/mod in the identified service area.

The LMISD (low/mod income summary data) is the census data HUD provides to grantees for use in making determinations of activity compliance with the low/mod area benefit national objective, as required by the CDBG
statute and regulations. A grantee's LMISD will change when there are: (1) changes in the configuration of its geography or (2) changes to income data. Changes to a grantee's geography may increase/decrease the number of census tracts and/or blocks groups within its boundaries, but the values associated with the data will change only when there are changes to income data. When there are changes to a grantee's geography, the LMISD available for that grantee will reflect those changes in census tracts/ block groups included within the grantee's boundaries.

Message: "Capped data was used for the calculation" will show for almost $95 \%$ of entitlement grantees. The remaining grantees have the option to use uncapped data and will record that election in IDIS, as briefly described below. The LMISD is prepared by HUD using the Section 8 income limits, which are calculated using fair market rent area definitions. The income limits are based on HUD estimates of median family income, with adjustments for areas that have unusually high or low income to housing cost relationships. Based on this, the Section 8 income limits are considered "capped." A 1998 legislative change allowed HUD to grant an exception to 10 jurisdictions (metropolitan areas) from the cap on low/mod income levels; based on this change, the entitlement grantees in these 10 jurisdictions (metropolitan areas) may elect to use either the capped or uncapped LMISD.

The message shown for a grantee that may choose to use the capped or uncapped data will be dependent on the choice it has recorded in IDIS. (For the December 2005 release, HUD will load the capped/uncapped selection based on input from the HUD field offices; for subsequent program years, these grantees may change this selection, as appropriate.)

JUSTIFICATION: Grantees have been required to enter the census tracts/block groups for the service area of LMA activities, and calculate and enter the low/mod percent as well. The changes to this screen will result in IDIS calculating the low/mod percent based on the census tracts/ block groups entered, allowing HUD to report on CDBG beneficiaries, including the number low/mod, for all activities. It will ensure that the correct data is being used and will enable HUD to provide more complete and accurate data to Congress and other stakeholders.

Direct Benefit Screen


DESCRIPTION: This screen is a revision of the current MA05 screen. This new version allows for information on race/ethnicity to be reported for housing activities by owner or renter and allows grantees to report this data on a program year basis; cumulative data will be available for display.

For entitlement grantees: This screen will appear for all housing and homeownership assistance activities with an LMH national objective.

For State grantees: This screen will appear for all housing and homeownership activities with an LMH national objective, as well as those meeting the slum blight or urgent need national objectives.

The following new functions are associated with this screen:
(1) Race: grantees will enter the appropriate race code for the beneficiaries being reported. Information on the race codes is provided in a "Help" screen.
(2) "Insert/Delete program year (I/D)": this is a feature similar to that used on the MA04 to add a new program year, i.e., selecting "l" will bring up a blank screen for a new program year.

JUSTIFICATION: The CDBG program has been unable to respond to numerous requests both from within and outside the Department to provide information on housing assistance activities by tenure type. For example, over the past three years, OMB, HUD's Chief Financial Officer, the Secretary's Office, and others have requested such information for inclusion in various housing performance reports, including CDBG's goals for homeownership and housing assistance as part of the Department's annual performance report. CPD has provided estimates based on the matrix codes used to identify the eligibility of CDBG activities, but has otherwise been unable to provide complete and accurate data. This information will correct this serious deficiency in determining CDBG performance when used for housing activities, strengthen the program's contributions to the Department's housing strategies, and help to resolve OMB concerns reflected in the PART,
which gave the program a rating of "Ineffective." Housing is one of the largest categories of expenditures in the CDBG program and it is important that information be collected to validate performance in this area.

Currently, grantees are required to enter cumulative data concerning beneficiaries on the MA05 and MC02 screens and, on the MA04 screen, are required to enter annual data. This inconsistency in how grantees are asked to report accomplishments has resulted in a significant number of errors in CDBG data in IDIS. This change will reduce the number of errors and result in more accurate CDBG accomplishment data.

These changes will also enable HUD to produce annual performance data in a more cost efficient, less timeconsuming manner. The changes will negate the need for manipulation of IDIS data by HUD and/or contractor staff to obtain annual beneficiary information and will enable HUD to respond more rapidly to stakeholder requests regarding CDBG beneficiaries.

## Non-housing Direct Benefit Screen



DESCRIPTION: This screen is a revision of the current MA05 screen for non-housing activities. This new version allows grantees to report this data on a program year basis; cumulative data will be available for display.

For entitlement grantees: This screen will appear for all activities with an LMC* or LMJ $^{*}$ national objective.
For State grantees: This screen will appear for all non-housing and homeownership activities.
The following new functions are associated with this screen:
(1) Race: grantees will enter the appropriate race code for the beneficiaries being reported. Information on the race codes is provided in a "Help" screen.
(2) "Insert/Delete program year (I/D)": this is a feature similar to that used on the MA04 to add a new program year, i.e., selecting "l" will bring up a blank screen for a new program year.

JUSTIFICATION: Currently, grantees are required to enter cumulative data concerning beneficiaries on the MA05 and MC02 screens and, on the MA04 screen, are required to enter annual data. This inconsistency in how grantees are asked to report accomplishments has resulted in a significant number of errors in CDBG data in IDIS. This change will reduce the number of errors and result in more accurate CDBG accomplishment data.

These changes will also enable HUD to produce annual performance data in a more cost efficient, less timeconsuming manner. The changes will negate the need for manipulation of IDIS data by HUD and/or contractor staff to obtain annual beneficiary information and will enable HUD to respond more rapidly to stakeholder requests regarding CDBG beneficiaries.

## Housing Flags Screen



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DESCRIPTION: This screen will only appear for housing rehabilitation matrix codes and is to be used ONLY when the activity is limited to one or more of the types of assistance listed. Examples:

- if a rehabilitation activity involves installation of security devices and roof replacement, do not use this screen. F8 forward.
- if the activity is limited to installing security devices and emergency housing repairs, this screen should be completed.
- if a grantee reports the rehabilitation of more than one property in a single activity and only one property is limited to installation of smoke detectors, do not complete this screen. F8 forward.

JUSTIFCATION: This change request addresses deficiencies identified in CDBG's PART review, which gave the CDBG program a rating of "Ineffective." Housing rehabilitation under the CDBG program may encompass a wide range of activities, from replacement of major systems to installing smoke detectors. The disparity among these activities leads to average per unit costs that are skewed and that cannot be compared among grantees. In sections 3.4 and 4.3 of its PART review, OMB concluded that the CDBG program did not have efficiency measures and was not able to compare cost per units in a systematic way. This new housing rehabilitation screen will enable HUD to more accurately report on the use of CDBG for activities eligible under housing rehabilitation. This screen also responds to comments to grantee requests to be able to report on the use of funds for emergency housing repairs.

## Nature/Location Screen



DESCRIPTION: This screen has been renamed; it was formerly the MA06 screen. No information on this screen has been changed. This screen only appears on LMC* activities where the user enter " $Y$ " to the Nature/Location question on the CDBG06 screen.


DESCRIPTION: This is a revision of current MA07 screen. Information on funding and loans are now collected on other screens. This screen collects actual jobs created and retained on a program year basis. This screen will only be displayed for LMJ activities or activities with matrix code of 18A or 18B.

The following new functions are associated with this screen:
(1) "Insert/Delete program year (I/D)": this is a feature similar to that used on the MA04 to add a new program year, i.e., selecting "l" will bring up a blank screen for a new program year.

JUSTIFICATION: Currently, grantees are required to enter cumulative data concerning beneficiaries on the MA07, MA05 and MC02 screens and, on the MA04 screen, are required to enter annual data. This inconsistency in how grantees are asked to report accomplishments has resulted in a significant number of errors in CDBG data in IDIS. This change will reduce the number of errors and result in more accurate CDBG accomplishment data.

These changes will also enable HUD to produce annual performance data in a more cost efficient, less timeconsuming manner. The changes will negate the need for manipulation of IDIS data by HUD and/or contractor staff to obtain annual beneficiary information and will enable HUD to respond more rapidly to stakeholder requests regarding CDBG beneficiaries.

## Slum/Blight Area



DESCRIPTION: Same as current MX02 screen. This screen appears only for activities with a SBA national objective.

## Low Mod Information for housing activities



DESCRIPTION: This screen is a revision of the current MC02 screen. Grantees will now report beneficiary data by specific income level, by renter or owner and by program year. IDIS will calculate Percent Low/Mod and Total.

For entitlement grantees: This screen will appear for all housing and homeownership assistance activities with an LMH national objective.

For State grantees: This screen will appear for all housing and homeownership activities with an LMH national objective, as well as those meeting the slum blight or urgent need national objectives.

The following new functions are associated with this screen:
(1) "Insert/Delete program year (I/D)": this is a feature similar to that used on the MA04 to add a new program year, i.e., selecting "l" will bring up a blank screen for a new program year. When a new program year is inserted on the CDBG08 screen, it will automatically be inserted on this screen. If a new program year is inserted on this screen first, it will automatically be inserted on the CDBG08 screen.

JUSTIFICATION: Both Congress and OMB are examining the extent to which the CDBG program targets funds to assist low- and moderate-income persons. Congress directed HUD to prepare a report on this issue, and OMB, in Section 1.5 of the PART, states that the CDBG program does not effectively target beneficiaries and address the purpose of the program. The current design of the MC02 screen allows grantees to enter aggregate information regarding the income status of beneficiaries, a significant number of grantees are entering data only in the TOTAL LOW/MOD BENEFICIARIES field rather than in more specific income categories. This results in the loss of critical information on the number of low- and extremely low-income persons assisted by the CDBG program and the erroneous appearance that the CDBG program is not targeting funds to our most needy citizens. A prime example of the extent of this problem is a Public Housing

Modernization activity in which the grantee reported thousands of beneficiaries under total low/mod with no beneficiaries reported under the low- or extremely low-income categories. This, of course, is highly unlikely considering that it was rehabilitation of a public housing complex. Redesigning the MC02 screen so that it allows grantees to enter data only for specific income categories and so that the total is automatically calculated will reduce the undercounting of low- and extremely low-beneficiaries and provide HUD and its stakeholders with more accurate information on the program's targeting.

```
MM/DD/YY HH:MM CDBG BENEFICIARY INCOME LEVELS - by Persons CDBG13
    Grantee Activity ID xxxxxxxxxxxxxxxxxx IDIS Activity ID zzzzzzz9
```



```
        Persons Benefiting: 99,999
[ Program year: YYYY]
[ Totals for pgm year: YYYY]
    Income Level Total All Yrs
    Extremely Low 999,999
                                    Low - 999,999
                            Moderate 999,999
                Non-Low/Moderate 999,999
                                    Total 9,\overline{999,999 9,999,999}
                            Percent Low/Mod 999.99% 999.99%
    Insert/Delete program year(I/D)? _
    XXXXXXXXXXXXXX message line XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
    F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE
    F15=SWITCH TO COUNTS BY PERSONS F17=PREV YEAR F18=NEXT YEAR
```

DESCRIPTION: This screen is a revision of the current MC02 screen. Grantees will now report beneficiary data by specific income level and by program year. IDIS will calculate Percent Low/Mod and Total.

For entitlement grantees: This screen will appear for all activities with a LMC* or LMJ* national objective.
For State grantees: This screen will appear for all non-housing and homeownership activities.
The following new functions are associated with this screen:
(1) "Insert/Delete program year (I/D)": this is a feature similar to that used on the MA04 to add a new program year, i.e., selecting "I" will bring up a blank screen for a new program year. When a new program year is inserted on the CDBG08 screen, it will automatically be inserted on this screen. If a new program year is inserted on this screen first, it will automatically be inserted on the CDBG08 screen.

PRESUMED BENEFIT ACTIVITIES: If a CDBG assisted LMC activity is limited to assisting one or more of the groups of persons that are presumed to be low-and moderate-income, the number of persons benefiting should be reported under the following income categories unless a grantee has information that would support reporting such beneficiaries under another income category(ies):

| Abused children: | extremely low income |
| :--- | :--- |
| Battered spouses: | low income |
| Severely disabled adults: | low income |
| Homeless persons: | extremely low income |
| Illiterate adults: | low income |
| Persons with AIDS: | low income |
| Migrant farm workers: | low income |

Elderly: (a) if assistance is to acquire, construct, convert and/or rehabilitate a senior center or to pay for providing center-based senior services, report the beneficiaries as moderate income;
(b) if assistance is for other services (not center-based),
report the elderly beneficiaries as low income.
If an activity serves a combination of these groups, estimate the number under each group and report those numbers under the appropriate income levels.

NATURE/LOCATION: If the nature/location option is used for a CDBG assisted LMC activity, report all beneficiaries as moderate income unless information is available that would support reporting such beneficiaries under another income category(ies).

JUSTIFICATION: Congress and OMB are examining the extent to which the CDBG program targets funds to assist low- and moderate-income persons. Congress directed HUD to prepare a report on this issue, and OMB, in Section 1.5 of the PART, states that the CDBG program does not effectively target beneficiaries and address the purpose of the program. The current design of the MC02 screen allows grantees to enter aggregate information regarding the income status of beneficiaries, a significant number of grantees are entering data only in the TOTAL LOW/MOD BENEFICIARIES field rather than in more specific income categories. This results in the loss of critical information on the number of low- and extremely low-income persons assisted by the CDBG program and the erroneous appearance that the CDBG program is not targeting funds to our most needy citizens. A prime example of the extent of this problem is a Public Housing Modernization activity in which the grantee reported thousands of beneficiaries under total low/mod with no beneficiaries reported under the low- or extremely low-income categories. This, of course, is highly unlikely considering that it was rehabilitation of a public housing complex. Redesigning the MC02 screen so that it allows grantees to enter data only for specific income categories and so that the total is automatically calculated will reduce the undercounting of low- and extremely low-beneficiaries and provide HUD and its stakeholders with more accurate information on the program's targeting.

## Multi-Unit Housing Activities

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12345678901234567890123456789012345678901234567890123456789012345678901234567890
DESCRIPTION: Revision of current MC04 screen. Authorized Costs information, formerly on the MC04 screen, will be covered by on the new Funding Sources screen. The MC05, the Multi-Unit Activity Completion screen, has been eliminated.

## Dsplacement

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |



DESCRIPTION: Same as current MC03 screen. No changes except to be renamed CDBG15.


DESCRIPTION: Revision to current MC06 screen. We have added ability to provide a Description field for each address.

## THE FOLLOWING NEW SCREENS ARE FOR DISPLAY ONLY:



New screen. For display only.

## CDBG Summary by Income Category



## CDBG Jobs Summary



New screen. For display only.

The following are included for informational purposes only. For the most part, these were pre-existing screens that had modifications made to them so that they would conform to the newer screen naming convention and fit within the new environment model. They include CDFI and Strategy area screens, error resolution screens, and help screens.




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