

Chapter 6: Management Reviews

Table of Contents

Chapter 6: Management Reviews	6-1
8.1 Management Review List.....	6-2
8.2 Management Review Detail	6-3
6.1.1 Project Actions.....	6-7

List of Figures

Figure 6-1. Management Review List page	6-3
Figure 6-2. Management Review Detail page.....	6-4
Figure 6-3. Management Review List page	6-4
Figure 6-4. Management Review Detail - ADD page.....	6-5
Figure 6-5. Delete confirmation	6-6
Figure 6-6. Delete Successful	6-6
Figure 6-7. Management Review Detail page.....	6-7
Figure 6-8. Project Action List page.....	6-8
Figure 6-9. Project Action Detail page	6-9

6

Management Reviews

HUD Multifamily Housing requires that information about the management of a property be maintained in the **iREMS** database for easy access. The management agent contact is responsible for all actions pertaining to properties issues. Assigned HUD and PBCA users can add, update, and delete management reviews. Reviews can be reviewed as a list or from a detail page.

Objectives:

By the end of this chapter, you will be able to:

- Enter management reviews
- Update and record notes pertaining to the review of properties
- View any related project actions


8.1 Management Review List

A list of management reviews are displayed on the **Management Review List** page. The list is in a table format and displays the *scheduled date*, the *performed date*, the *report date*, the *Response due date*, the *closed date* and the *overall rating*. The table can be sorted by either of these columns.

Assigned HUD and PBCA users with rights to the property can add management reviews by adding the details of the review on the **Management Review Detail** page. Once added, the review displays in the list on the **Management Review List** page.

Accessing the Management Review Page:

To access the **Management Review** page you must first select a specific property . Once you have selected a property, the **Property Attributes** page displays. From the **Property Attributes** page you can select *Management Review* link from the **Asset Management** sidebar. (See *Chapter 3: Portfolio/Dashboard* or *Chapter 2. Getting Started* for detailed information.)

 *Note: The Property Header located at the top of the page, displays the Property ID, Name, Contract/FHA#, Active Status, Watch List and Troubled Status. This Header will appear on most of the pages in iREMS. There is also a search feature in the header that allows the user to select a different property without having to return to the **Portfolio/Dashboard** page to make the change.*

To view the Management Review List page:

1. Click on the *Management Review* sidebar option and the **Management Review List** page displays.

The screenshot shows the 'Management Review List' page. The header includes property details: Property ID: 800003891, Name: Acorn Trace Apartments, Contract/FHAW#: 067EH065, Active Status: Y, Watch List: N, Troubled Status: Not Troubled, DEC Status: NONE. The sidebar on the left lists various menu items, with 'Management Reviews' highlighted. The main content area displays a table of management reviews with columns for Scheduled Date, Performed Date, Report Date, Response Due Date, Closed Date, and Overall Rating. There are 4 reviews listed.

	Scheduled Date	Performed Date	Report Date	Response Due Date	Closed Date	Overall Rating
1	09/26/2007	09/07/2007	10/02/2007	11/01/2007		Satisfactory
2	09/26/2006	09/13/2006	10/10/2006	11/10/2006	11/21/2006	Below Average
3	09/26/2005	09/14/2005	09/26/2005	10/26/2005	10/31/2005	Satisfactory
4	08/30/1999	08/30/1999	11/19/1999	12/18/1999	01/04/2000	Superior

Figure 6-1. Management Review List page

2. View the data.

*Note: To view detailed information on a specific review, the user must select a Management Review listed in the table and the **Management Review Detail** page, for that review, will display. (see section 8.2)*

8.2 Management Review Detail

The **Management Review Detail** page displays detailed information related to a specific management review. On this page you can enter new information on a management review, edit, delete or view related property actions regarding a specific management review.

The **Portfolio/Dashboard** page has an **Open Management Reviews** tab that provides a list of all open management reviews for each property. (See *Chapter 3: Portfolio/Dashboard*). From this list the user can access the **Management Review Detail** page.

To view the Management Review Detail page:

1. Click on the *Management Review* sidebar link and the **Management Review List** page displays.
2. Click on a specific review from the *Management Review List* table and the **Management Review Detail** page displays.

Figure 6-2. Management Review Detail page

3. View detail data.

To Add a Management Review:

1. Click on the Management Review sidebar option and the **Management Review List** page displays.

	Scheduled Date	Performed Date	Report Date	Response Due Date	Closed Date	Overall Rating
1	09/26/2007	09/07/2007	10/02/2007	11/01/2007		Satisfactory
2	09/26/2006	09/13/2006	10/10/2006	11/10/2006	11/21/2006	Below Average
3	09/26/2005	09/14/2005	09/26/2005	10/26/2005	10/31/2005	Satisfactory
4	08/30/1999	08/30/1999	11/19/1999	12/18/1999	01/04/2000	Superior

Figure 6-3. Management Review List page

2. Click on **Add** and the **Management Review Detail** page displays.

Figure 6-4. Management Review Detail - ADD page

3. Enter the following information:

- *Schedule Date*, calendar pop-up
- *Review Type*, from drop-down list
 - Occupancy Review only
 - Management Review only
 - Management & Occupancy Review
 - FHEO Review only
 - Occupancy &FHEO Review
- *Person/Role Responsible for Review*, responsible person and title assigned to a property
- *Perform Date*, calendar pop-up
- *Report Date*, calendar pop-up
- *Date Report Date Entered*
- *Owner Response Due*, radio button
- *Response Due Date*, calendar pop-up
- *Response Received Date*
- *Closed Date*
- *Overall Rating*, drop-down list
 - *Superior*
 - *Satisfactory*
 - *Below average*
 - *Unsatisfactory*
 - *Not Available*
 - *Above Average*

4. Click on and the save was successful message displays.

To update a Management Review:

1. From the **Management Review List** page, click on a link and the **Management Review Detail** page displays.
2. Enter the new data.
3. Click on and the save was successful message displays.

*Note: If any of the data on the **Management Review Detail** page has been newly entered or edited, you must remember to click on before closing or linking to another section. If you find that you have entered data incorrectly, click on to refresh.*

To delete a Management Review:

1. From the **Management Review List** page, click on the management review you want to delete and the **Management Review Detail** page displays.
2. Click on and the delete confirmation message displays.

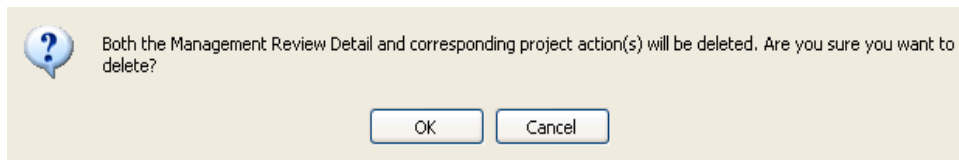


Figure 6-5. Delete confirmation

3. Click on and the delete was successful message displays.

Management Review List	Management Review Detail					Add
Management Review List Delete successful (x)						
Management Review 1 to 5 of 5						
<input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/>						
	Scheduled Date	Performed Date	Report Date	Response Due Date	Closed Date	Overall Rating
1	07/19/2007	07/19/2007	08/17/2007	09/18/2007	09/05/2007	Satisfactory
2	08/28/2006	08/28/2006	09/11/2006	10/13/2006	10/10/2006	Satisfactory
3	08/23/2005	08/23/2005	09/02/2005	10/03/2005	10/12/2005	Satisfactory

Figure 6-6. Delete Successful

6.1.1 Project Actions

Some project actions related to management reviews will be created automatically and will appear on the user's individual workload reports under the **Workload Management** sidebar option. Once there are project actions related to a review, the **Related Project Actions** button displays on the **Management Review Detail** page. This button links to a page that displays the project actions specifically related to that management review. The **Related Project Actions** button does not display if there are no related project actions.

If you enter a *report date* and a *response due date* but not a *closed date* on the **Management Review Detail** page, a project action is automatically created when you save the data. Click on the **Related Project Actions** button to view the project action. This automatically selects the *Workload Management* sidebar option and displays the **Project Action List** page. All related project actions are displayed in a table.

For additional information on the Workload Management sidebar option, see *Chapter 16: Workload Management*.

To view Project Actions:

1. From the **Management Review List** page, highlight and click on a review. The Management Review Detail page displays with the **Related Project Actions** button active.

The screenshot shows the 'Management Review Detail' page. At the top, there is a header with 'Asset Management' and 'Subsidy Administration' tabs. Below this, property information is displayed: 'Property ID: 800003891', 'Name: Acorn Trace Apartments', 'Contract/FHA#: 067EH065', 'Active Status: Y', 'Watch List: N', 'Troubled Status: Not Troubled', and 'DEC Status: NONE'. A search bar is on the right. The left sidebar contains a menu with 'Management Reviews' selected. The main content area has a 'Management Review Detail' title and a 'Related Project Actions' button. Below the title are several form fields: 'Scheduled Date' (09/26/2007), 'Review Type' (Management, Occupancy & FHEO Review), 'Person/Role Responsible for Review' (JOSE MORILLO - Role: CA), 'Performed Date' (09/07/2007), 'Report Date' (10/02/2007), 'Date Report Date Entered' (10/02/2007), 'Owner Response Due' (Yes selected), 'Response Due Date' (11/01/2007), 'Response Received Date', 'Closed Date', and 'Overall Rating' (Satisfactory). Buttons for 'Save', 'Reset', and 'Delete' are also present.

Figure 6-7. Management Review Detail page

2. From the **Management Review Detail** page, click on **Related Project Actions** and the **Project Action List** page displays.

Action	Responsible Person	Role	Type of Plan	Start Date	Target Completion Date	Amended Target Date	Closed Date	Related Referral ID
1 Management Review Sent to Owner & Response Due	MAXIE W WALLS	PM	H	08/17/2007	09/18/2007	09/05/2007	09/05/2007	

Figure 6-8. Project Action List page

3. Click on the appropriate link in the Action column of the table. The **Project Action Detail** page displays the following data:
 - *Action Entered Date: system-generated current date*
 - *Current Action: Management Review Sent to Owner & Response Due*
 - *Action Group: Housing Program*
 - *Action Start Date: from the Report Date field on the Management Review Detail page*
 - *Person/Role Responsible for Action: from the Person/Role Responsible for Review field on the Management Review Detail page*
 - *Target Completion Date: from the Date Response Due on the Management Review Detail page*

The screenshot displays the 'Project Action Detail' page with the following fields and values:

- Action Entered Date:** 08/17/2007
- Action Type:** Asset Management Activities
- Current Action:** Management Review Sent to Owner & Response Due
- Action Group:** Housing Program
- Type of Plan:** Housing
- Action Start Date:** 08/17/2007
- Person/Role Responsible for Action:** JOHN W TESTER - Role: PM
- Target Completion Date:** 09/18/2007
- Amended Target Date:** 09/05/2007
- Date Amended:** (empty)
- EC Concurrence:** Yes No
- EC Concurrence Date:** (empty)
- Closed Date:** 09/05/2007
- Reason for Closure:** Completed
- Estimate of Hours Spent on Activity:** 1
- Further Action Required (Another Project Action is Needed):** Yes No
- Comments:** response deemed acceptable; awaiting MTPA submission

Figure 6-9. Project Action Detail page

As long as the Further Action Required indicator on the **Project Actions** page is not set to *Yes*, once you enter and save the closed date on the **Project Actions Detail** page, the response received date and closed date on the **Management Review Detail** page will be set to the same date.

However, if the Further Action Required indicator on the Management Review Sent to Owner & Response Due project action above is set to *Yes*, then only the response received date will be set and a new project action will be created once the closed date is entered and saved. This new project action's reference ID is the same as that of the previous project action. The following data displays:

- *Action Entered Date: system-generated current date*
- *Current Action: Management Review Owner Response Received & HUD Follow-up Required*
- *Action Group: Housing Program*
- *Action Start Date: automatically set to the closed date of the Management Review Sent to Owner & Response Due action.*
- *Person/Role Responsible for Action: from the Person/Role Responsible for Review field on the Management Review Detail page*
- *Target Completion Date: automatically set to the action start date plus thirty days*

When this Management Review Owner Response Received & HUD Follow-up Required project action is closed, the closed date on the **Management Review Detail** page will be set to the same date.

 *Note: For the project action "Management Review Sent to Owner & Response Due," the closed date is a non-editable field that is populated by the system.*