

Job Aid for Excluding Units from the Delinquency Report

In order to exclude a unit from the “50058 Required” column in the monthly Delinquency Report, the unit must be given a special designation indicating why it will not be reported using Form 50058. Some reasons may be entered by HA users and some are reserved for entry by HUD users. The chart below details the various options.

Exclusion Reasons			
Action Category	Pull-Down Selection Options	By HUD User	By HA User
"Exception" button	Conversion Unit*	X	
	Merged Unit*	X	
	Non-dwelling Unit Used for Anti-Drug Activities*	X	
	Non-dwelling Unit Used for Economic Self Sufficiency Services*	X	
	Non-dwelling Unit Used for Other Purposes*	X	
	Occupied by Non-Assisted Employee	X	
	Occupied by Non-Assisted person Providing Tenant or Neighborhood-Oriented Services	X	
"Vacant or Otherwise Occupied" button	Occupied by Over-Income Family	X	X
	Occupied by Police Officer	X	X
	Vacant- Undergoing Modernization	X	X
	Vacant as a result of Court Litigation	X	X
	Vacant by Law	X	X
	Vacant due to Casualty Loss	X	X
	Vacant due to Make-Ready or Leaseup Time	X	X
	Vacant due to Market Conditions	X	X
	Vacant due to Natural Disaster	X	X
	Vacant due to RMC Funding	X	X
Notes: * Unit designation "not applicable" when Unit Status = Exception and Exception reason = Conversion unit, Merged unit, Non-dwelling unit used for anti_drug activities, non-dwelling unit used for economic self sufficiency services, or non-dwelling unit used for other purposes			

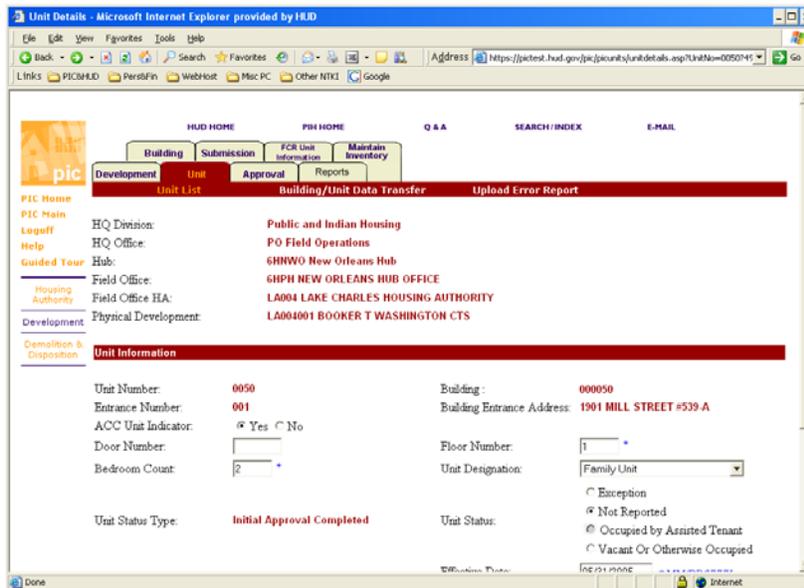
The general procedure is as follows:

1. Go into PIC Development and select the PHA (HUD user) and the Development.
2. Select a unit in the Unit tab.
3. Click "Exception" (HUD user) or "Vacant or otherwise occupied" (HA or HUD user) in Unit Status on the right.

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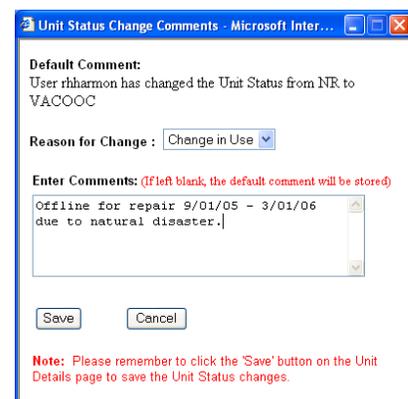
4. A pop-up box will ask for a comment: explain the change, then click "Save".
5. The pop-up box will close and you will then be able to pull down the "Exception" (HUD user) or "Vacant or otherwise occupied" list (whichever "Action Category" you started with) to pick one of the exclusion reasons shown in the pull-down list.
6. Click "Save" and the unit status will change to whatever exclusion reason you selected. (You may also be required to change the Unit Designation to "not applicable" in some instances.

Here are some examples to demonstrate the details.

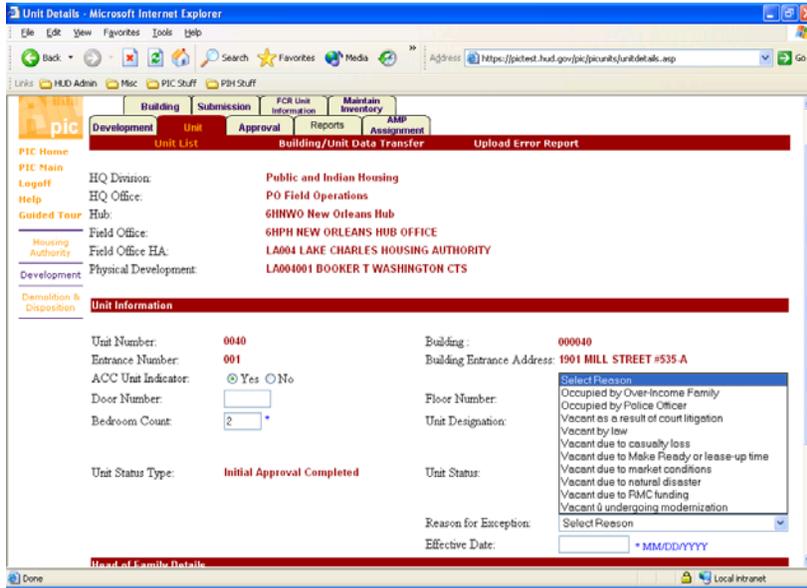


HA or HUD User excluding a unit that is "Vacant or Otherwise Occupied".

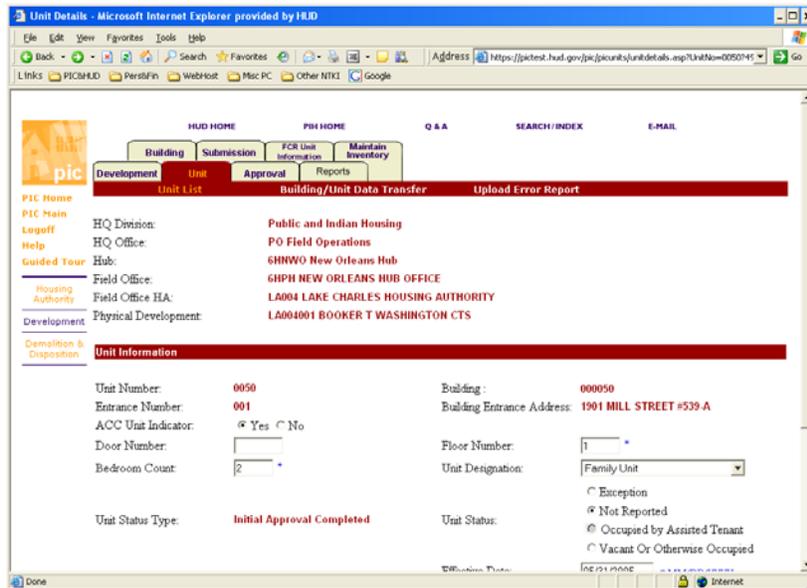
Click the "Vacant or Otherwise Occupied" radio button. A comment box opens up. Provide a comment to justify the exception or reference a file document that contains the justification. Click "Save" and the comment box closes.



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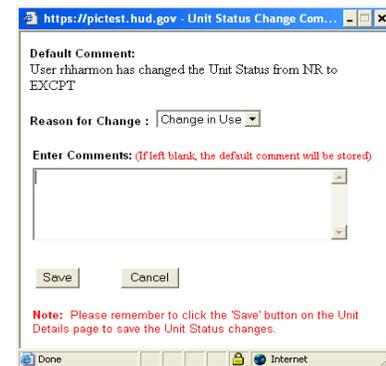


Click the triangle at the right edge of the “Reason for Exception” data field to open the pull-down list of exclusion reasons. Click a reason and the pull-down list closes. Enter the effective start date of the exclusion reason and click “Save”. The comment box closes.

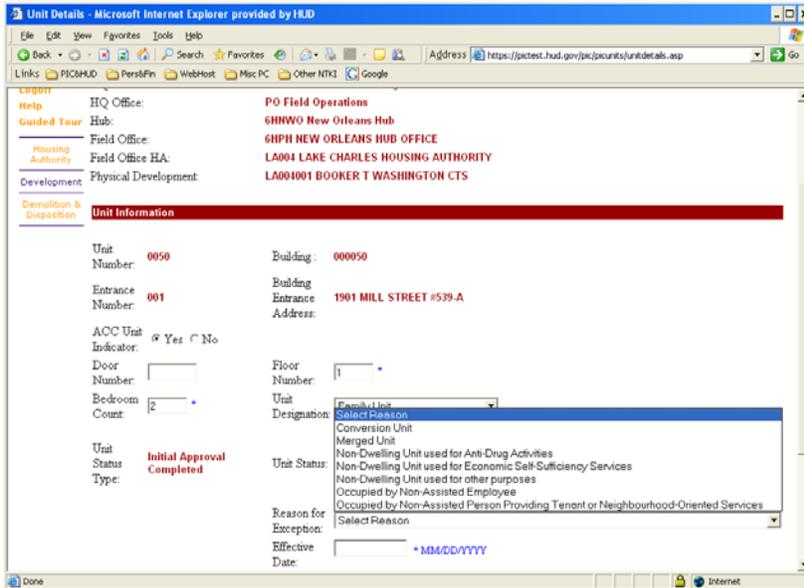


HUD User excluding a unit that is an “Exception”

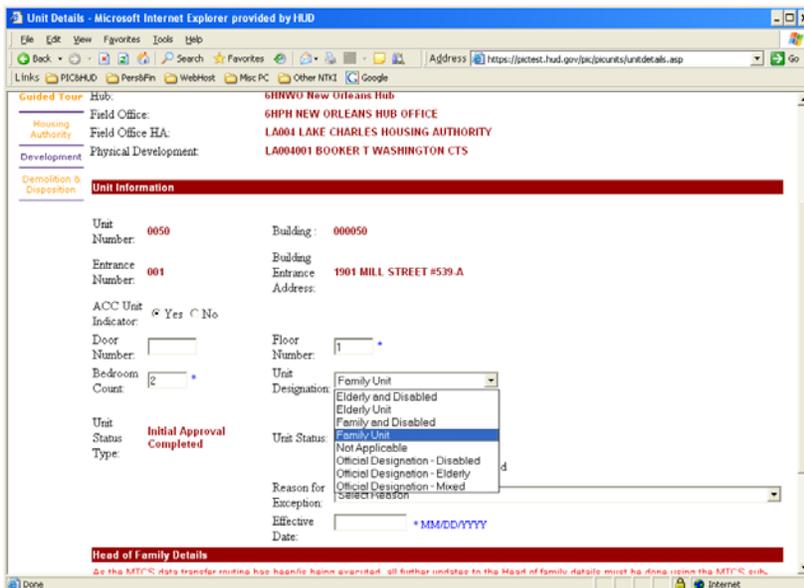
Click the “Exception” radio button. A comment box opens up. Provide a comment to justify the exception or reference a file document that contains the justification. Click “Save” and the comment box closes.



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Click the triangle at the right edge of the “Reason for Exception” data field to open the pull-down list of exclusion reasons. Click a reason and the pull-down list closes. Enter the effective start date of the exclusion reason and click “Save”. The comment box closes.



The system may ask you to change the “Unit Designation” to “Not Applicable”. To do so, click the “Designation” pull-down list and choose “Not applicable”. Click “Save” to complete it.