

# Chapter 13: Summaries

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# 13

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## Summaries

The **Summary** pages provide an overview of information for each property in **iREMS** and also contain the **Consolidated Screen Print** page. The *Summary* and *Summary Narrative* tabs are accessed once you have selected **Summaries** from the sidebar. All information displayed on the summary pages are view only. You would need to access the appropriate **iREMS** page to add, update, or delete information.

The **Summary** page provides an overview of property information (e.g., property address, owner, finances, and physical inspection information), and also displays the person assigned to the property. The **Property Summary Narratives** page displays narratives that were entered on various **iREMS** pages for a property. The last tab is the *Consolidated Screen Print* tab. The **Consolidated Screen Print** page allows you to select several pages from **iREMS** to be printed as one document.

### Objectives:

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

- Verify current user assignments and roles
- View pertinent property data in one location
- Create a consolidated screen print document
- Review summary narratives entered throughout **iREMS** in one location

## 13.1 Property Summary

The **Property Summary** page displays cumulative information about the selected property to give you an overview of the status of the property. You can view a variety of information specific to a property, such as property address and status, building and inspection data from PASS, and annual financial statement information from FASS. All information displayed on this page is view-only; you would need to return to the original screen where the data was entered to update the information.

### Accessing the Summary Page:

To access the **Summary** 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 the *Summaries* link from the **iREMS** sidebar. (See Chapter 3: Portfolio/Dashboard or Chapter 2. Getting Started for detailed information.)

 *The Property Header located at the top of the page, displays the Property ID, Name, Contract/FHA#, Active Status, Watch List, Troubled Status and DEC 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 to make the change.*

To view Summary information:

Select a property and click on Summaries from the sidebar. The **Summary** page displays.

The screenshot displays the 'Summary' page for the property 'BETHLEHEM TOWERS'. The page is divided into several sections:

- Property Summary:** Includes 'Assigned Project Manager' (MONA TISTA).
- Primary Address:** 801 TUPPER ST, SANTA ROSA, CA 95404-5069.
- Geocode Information (Automated):** Lists various codes including County Code (097), County Name (Sonoma), Census Tract (151900), MSA Code (7500), MSA Name (Santa Rosa, CA PMSA), CBSA Code (42220), CBSA Name (Santa Rosa-Petaluma, CA Metropolitan Statist), County Subdivision Code (92940), County Subdivision Name, Congressional District (05), State House District (00), State Senate District (00), Place Based City (Santa Rosa), and Longitude/Latitude (-122.708292 / 38.437001).
- Building & Unit Information:**
  - Building Type Descriptions:  Row,  Townhouse,  Detached,  Semi-Detached,  Walk-up/ Garden,  Mid-Rise,  High-Rise/Elevator.
  - Building Count: 1
  - Initial Occupancy Date: 02/26/1972
  - Unit Type # Total Units table:
 

Unit Type	# Total Units
0	107
1	51
2	1
3	0
4	0
5	0
6	0
7	0
8	0
9	0
<b>Total Units</b>	<b>159</b>
- Client Group Information:** Elderly - Wholly Elderly Housekeeping
- Property Status:** Active Status: Y, Troubled Status: Not Troubled, OPIIS Risk Category: Low, Action Plan Approved: No, DEC Status: NONE, Demo Program Closing Date, OMHAR Mark Down to Market Restructure Date, OAHF Green Flag: No, OAHF Green Retrofit Flag: No.
- Open Root Problem Cause(s):** Table with columns: Entered Date, Underlying Problem.
- Open Mitigation Strategies:** Table with columns: Entered Date, Recommended Mitigation Strategy.

Figure 13-1. Summary page ( display 1 of 3 )

Owner Annual Financial Statements from FASS										
Due Date	TIN	Non-Filer Email Sent	Date Received	Number of Compliance Flags - Assessed	Performance Value/Color	Date FASS Letter Sent	Response Due Date	Referred To	Response Received Date	Closed Date
03/31/2012	Unknown									04/12/2012
Submission Status: Active			Submission Type:			Submission FYE:				
04/30/2011	941723489		03/31/2011	0	57.000 Red	04/06/2011		None		04/04/2011
Submission Status: Active			Submission Type: AUD-A133 (Non-coop)			Submission FYE: 12/31/2010				
04/30/2010	941723489		03/30/2010	0	61.000 Yellow	04/07/2010		None		03/31/2010

Lessee Annual Financial Statement from FASS										
Due Date	TIN	Non-Filer Email Sent	Date Received	Number of Compliance Flags - Assessed	Performance Value/Color	Date FASS Letter Sent	Response Due Date	Referred To	Response Received Date	Closed Date

Released Physical Inspections from PASS						
	Inspection Number	Inspection Date	EH&S Items?	Released Date	Score	
1	336837	11/15/2011	Y	11/23/2011	62. c*	
2	281454	10/14/2009	Y	10/21/2009	87. b*	

On-Site Visits and Physical Inspection History						
Performed Date	Overall Rating	Report Date	Response Due Date	Response Received Date	Closed Date	Type of Reviewer
07/29/1997	Satisfactory	08/12/1997				Mortgagee
08/06/1996	Satisfactory	08/14/1996			09/12/1996	Mortgagee
07/25/1995	Satisfactory	07/31/1995				Mortgagee
10/25/1994	Satisfactory					HUD/Contractor

Management Review						
	Scheduled Date	Performed Date	Report Date	Response Due Date	Closed Date	Overall Rating
1	04/01/2011	04/27/2011	05/11/2011	06/10/2011	06/13/2011	Above Average
2	04/01/2010	04/28/2010	05/14/2010	06/13/2010	06/08/2010	Above Average
3	04/01/2009	04/22/2009	05/01/2009	05/31/2009	06/04/2009	Above Average

Financing								
FHA Number	SOA Group Type	Field Office Status	Active	Business Phase	Under Management	Pipeline	Primary Financing Instrument	In Delinquency or Default
12144808T	201 Non-Amortizing	Terminated - Inactive	N	Terminated	N	N		N
12144808	236(j)(1) 202 Elderly Hsg.	Terminated - Inactive	N	Terminated	N	N	1	N

Contract Rent									
Rent Effective Date	Contract# Project#	Contract Status	Unit Type	#Units	Contract Rent	Utility Allow. Effective Date	Utility Allow.	Gross Rent	FMR
02/01/2013	CA39M000162	Active	0	27	811		0	811	873
			0	48	811		0	811	873
			1	26	926		0	926	1018

Project/Contract Rents							
Rent Effective Date	FHA #	Unit Type	Total TRACS Project # Units	Basic Rent	Market Rent	Utility Allow.	Gross Rent
04/01/2009	12144808	0	48	503	559	0	503
		0	60	482	536	0	482
		1	4	621	721	0	621
		1	48	648	691	0	648

Figure 13-2. Summary page ( display 2 of 3 )

<b>Current Owner</b>					
Name: CLIFFORD MANOR, INC. TIN: 942167919					
Title:		Phone: (408) 724-4193			
Street: 240 CLIFFORD AVE		Fax:			
City: WATSONVILLE		E-Mail: need_email@hud.gov			
U.S. State or Territory:		CA			
Foreign State or Territory:					
Country:		USA			
U.S. Zip Code:		95076 - 0000			
Foreign Postal Code:					
Standardization Status:		Not Standardized			
DUNS #:					
Owner Financial Statement Required:		Yes			
<b>Current Lessee</b>					
Name: Professional Property Management, LLC TIN: 364259240					
Title:		Phone: (815) 397-3755			
Street: 973 Featherstone Road		Fax: (815) 397-3931			
City: Rockford		E-Mail: GerryWalters@ppmll.com			
U.S. State or Territory:		IL			
Foreign State or Territory:					
Country:		USA			
U.S. Zip Code:		61107 -			
Foreign Postal Code:					
Standardization Status:		100% Overall probable correctness			
Lessee Financial Statement Required:		No			
<b>Management Agent</b>					
Name: Willowbrook Housing Partners TIN: 460486338					
Title:		Phone: 619-260-5562			
Street: P.O. Box 880367		Fax: 619-260-5563			
City: San Diego		E-Mail: martha@loganpm.com			
U.S. State or Territory:		CALIFORNIA			
Foreign State or Territory:					
Country:		USA			
U.S. Zip Code:		92116			
Foreign Postal Code:					
Standardization Status:		Not Standardized			
<b>Servicing Mortgagee</b>					
Name: FNMA CAPMARK FINANCE INC					
Street: ATTN GMAC COMMERCIAL MTG CORP					
P O BOX 809					
City: HORSHAM					
State: PA					
Zip Code: 19044					
Lender ID: 9407700001					
<b>Property Disposition</b>					
Date of 21 Day Hearing Letter:					
Date Foreclosure Sale Held:					
Mortgagee in Possession Date:					
<b>Use Restriction / Lock-out</b>					
Effective Date	Reason(s) for Restriction	Use Restriction Status	Date of Recordation	End Date	Quantity of Units Restricted

Figure 13-3. Summary page ( display 3 of 3 )

 Note: All fields in the Property Summary page are view-only.

## 13.2 Summary Narrative

The **Summary Narrative** page displays all *summary narratives* written throughout iREMS in one location. You can read all *summary narratives* written for the management of a specific property. All data displayed on this page is view-only, and you would need to return to the original page where the data was entered to update information.

To view **Summary Narratives** page:

1. From the **Summary** page, click on the *Summary Narrative* tab and the **Summary Narrative** page displays.



Figure 13-4. Summary Narrative page

2. View the information.
3. Click on one of the other *Page* tabs or a *Side-bar* link to change to exit this page..

## 13.3 Consolidated Screen Print

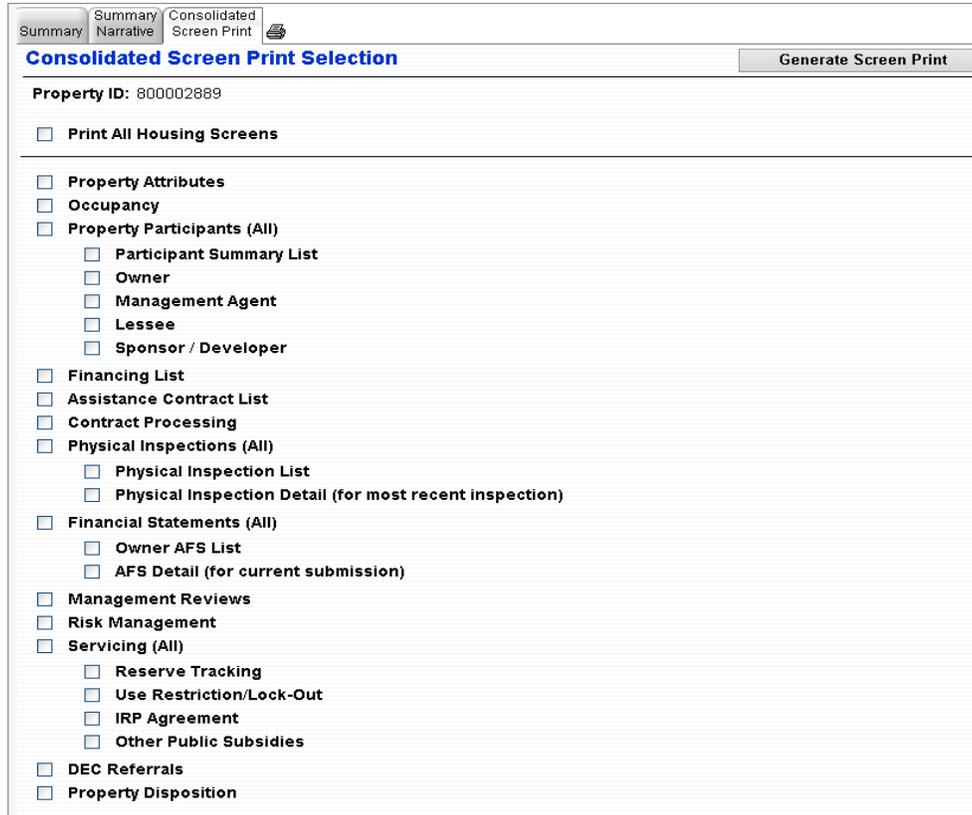
The *Consolidated Screen Print* tab allows you to select multiple Housing pages in **iREMS** for a property and print as a single document. This function simplifies the printing process when consolidated information is needed from several pages in **iREMS**. The **Consolidated Screen Print Selection** page allows the user to select all Housing or specified DEC pages for a property.

Once a *Consolidated Screen Print* document is generated, it displays on the page, formatted for printing. The cover page displays the *Property Name and Property ID, the Referral ID*, and the selection criteria for the document. The pages are separated by page breaks, with the Property Name and Property ID displayed at the top of each page.

 *Note: Only users with at least “view” rights to the pages are allowed to print them. Access level is determined by user ID and role.*

**To generate a Consolidated Screen Print document for “All Housing Screens”:**

1. From the **Summary** page, click on the *Consolidated Screen Print* tab and the **Consolidated Screen Print Selection** page displays.



**Figure 13-5. Consolidated Screen Print page**

2. Click in the checkbox for “*Print All Housing Screens*”.

 *Note: Selecting “Print All Housing Screens” will print most pages in the system for a property. This feature will produce a large document that may take several minutes to complete.*

3. Click on  and the following message displays:



Figure 13-6. Print Time Warning message

4. Click on  and a loading message displays on the **Consolidated Screen Print Selection** page.

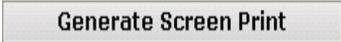
 *Note: Once the requested document is complete, the report displays on the bottom half of the page*

5. Click on the **Print** icon in the browser toolbar to print the report. .
6. Click on  to return to the **Consolidated Screen Print Selection** page.

#### To generate a Consolidated Screen Print document for specific pages:

1. From the **Summary** page, click on the *Consolidated Screen Print* tab and the **Consolidated Screen Print Selection** page displays.

Figure 13-7. Consolidated Screen Print page

2. Click in the checkbox for specific pages you want to generate.
3. Click on .

 *Note: Once the requested document is complete, the report displays on the bottom half of the page.*

**Management Review List**

Management Review 1 to 5 of 5

	Scheduled Date ▼	Performed Date	Report Date	Response Due Date	Closed Date	Overall Rating
1	07/19/2007	07/23/2007	08/07/2007	09/06/2007		Below Average
2	07/19/2006	07/20/2006	08/10/2006	09/09/2006	12/18/2006	Satisfactory
3	07/19/2005	07/28/2005	08/10/2005	09/10/2005	04/14/2006	Satisfactory
4	06/07/2002	06/07/2002	07/07/2002	12/01/2002	05/28/2003	Satisfactory
5	05/03/2001	05/03/2001	06/01/2001	07/01/2001	11/02/2001	Satisfactory

Figure 13-8. Sample Report displayed at bottom of the Consolidated Screen Print page

4. Click on the *Print* icon in the browser toolbar to print the report. .
5. Click on  to return to the **Consolidated Screen Print Selection** page.