



# HA USER MANUAL

*Public and Indian Housing (PIH)  
Real Estate Assessment Center (REAC)  
Inventory Management System (IMS)  
Housing Inventory Module  
Development sub Module*

*U.S. Department of Housing and Urban Development  
(HUD)*

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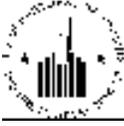


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# **1.0 HOUSING INVENTORY**



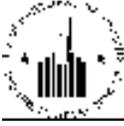
# 1 HOUSING INVENTORY

The **Housing Inventory** sub module allows the user to view PHA data, inventory of buildings and units that the PHA has at its disposal, and allows the user to propose buildings or units for removal. The **Housing Inventory** module includes three sub modules: **Housing Agency** sub module, **Development** sub module and the **Inventory Removals** sub module.

The **Housing Agency** sub module provides various types of data for PHAs. PHAs can use this sub module to enter, update and maintain their information. This sub module also allows the users to create new PHAs.

The **Development** sub module includes information about the inventory of units and buildings that PHAs manage. This sub module allows the users to view the current unit and building inventory, add new inventory items and delete inventory items that are no longer needed. The inventory information is provided at the development level, building level and unit level. Users can group any inventory items in the database based on various For example, units can be grouped by unit tenant status, submission status type, or unit designation.

The **Inventory Removals** sub module allows PHAs to remove certain items from their inventory by proposing those items for demolition/disposition. This sub module allows PHAs to fill the demolition/disposition application Form HUD-52860, submit it with accompanying documentation, review the application and approve it. After the demolition/disposition application is approved, inventory items that are subject to that application no longer are part of the PHA's inventory.



## 1.0 Housing Inventory

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### 1.1 DEVELOPMENT

The **Development** sub module of the **Housing Inventory** module allows users to view, access, and modify the physical inventory data. The physical inventory includes developments, buildings, and units managed by PHAs. The inventory database contains data for all the inventory items from the moment when a building, unit, or land becomes part of the assisted housing stock till the moment when the inventory item is disposed of and is no longer a part of assisted housing stock (removed from inventory).

The **Development** sub module includes eight tabs.

- The **Development** tab allows users to manage development data.
- The **Building** tab allows users to manage building data by development. That is, the **Building** tab displays only buildings associated with the selected development.
- The **Unit** tab allows users to manage unit data by development. That is, the **Unit** tab displays only units associated with the selected development.

These tabs contain addresses, property characteristics, and various other types of data. Using these tabs, the user can add inventory items, edit inventory item information, and view the information about existing inventory items.

- The **Submission** tab allows users to submit any proposed inventory item property changes to be approved by HUD Field Office staff. The HUD approval is mandatory for certain item properties since they may affect PHA funding allocation and thus must be controlled by HUD personnel to avoid misuse.
- The **Approval** tab allows HUD users to approve the proposed inventory item information.
- The **Reports** tab allows the user to run various reports to view inventory unit and tenant data.
- The **Maintain Inventory** tab allows the user to edit various development, building, or unit numbers/re-assign units to different building within the same development, or delete inventory item records, edit unit status effective dates and development regroupings. .

The **CAPFUND B&U Certification** tab allows PHA users to certify their housing inventory for capital funding as of a specific date. After certification, PHAs can view the inventory that they are certified to receive funding for.

#### 1.1.1 Development Tab

The **Development** tab contains the inventory data for developments that are managed by PHAs. A development can be one or more building(s) that form a community and are treated in IMS as one entity. The **Development** tab allows users to view, submit, modify, or delete development data.

##### 1.1.1.1 Profile sub Tab

The **Development** tab (see Figure 1) consists of four sub tabs:

- The **Profile** sub tab provides a summary of a development's program, structure, and inventory.
- The **List** sub tab presents a list of all developments in the selected HA.
- The **Address** sub tab presents the mailing and physical addresses (if available) for a development's management office.
- The **Contact** sub tab presents contact names, telephone numbers, email addresses, and other details for a selected development.



## 1.0 Housing Inventory

The **Profile** sub tab presents a specific development’s vital housing information (program type, construction date, inventory, and so forth).

The following table includes all data presented in the Development Profile Information section and short description of each data category:

Profile Page Data Category	Description
Development Name	The name an HA assigns a development.
Program Type	One of the following program types is displayed: <b>HOPE VI:</b> Any program involving HOPE VI funds <b>Low Income Rental:</b> Regular public housing program <b>Low Income/Fair Market Rent:</b> Mixed Income programs unrelated to HOPE VI <b>Mixed Finance:</b> Mixed Finance programs unrelated to HOPE VI <b>Section 23 Bond Financed:</b> An obsolete program <b>Section 23 Leased:</b> An obsolete program <b>Turnkey III</b> An obsolete Public Housing Homeownership program
Development Method	One of the following development methods is displayed: <b>Acquisition w/out Rehab:</b> The development is purchased and no rehabilitation is necessary. <b>Major Reconstruction of Obsolete Public Housing Projects (MROP):</b> An obsolete development method. <b>New Construction:</b> A new development is built. Most developments fall into this category. <b>New Construction – Conventional:</b> Same as the New Construction method. <b>New Construction – Turnkey:</b> A method where the developer builds the development but “turns the keys over” when it’s ready for the HA. <b>Rehabilitation– Conventional:</b> An old development is rehabilitated for HA use. <b>Rehabilitation– Turnkey:</b> A method where the developer rehabilitates the development and “turns the keys over” when it’s ready for the HA. <b>Note:</b> The obsolete development methods will be removed in a future PIC release.
Structure Type	One of the following structure types is displayed: Elevator Structure Mixed Type Row or Townhouse Style (Sep. Entrances) Semi-Detached



### 1.0 Housing Inventory

Profile Page Data Category	Description
	Single-Family/Detached Walkup/Multifamily Apt (Shared Entrances)
Acquisition/Construction Date (if known)	Either the date the HA acquired the development, or the date construction began on the development.
Date of Full Availability (DOFA)	The DOFA occurs when at least 95% of the units in a development are ready to be occupied (i.e., have certificates of occupancy). The DOFA is especially important for management of a mixed-finance development because it starts the development's initial operating period.
End of Initial Operating Period (EIOP) Date	EIOP is the last day of the first calendar quarter after DOFA provided that 95% of the units are actually occupied (vs. ready to be occupied). If 95% of the units are not occupied, EIOP is automatically established as the last day of the second calendar quarter after DOFA. EIOP marks the point at which the construction period for a development ends and management begins.
Dwelling Structures	Number of structures in the development containing inhabitable units.
Non Dwelling Structures	Number of structures in the development with Non Dwelling units only.
"Scattered Site?"	Yes: Units are located in different parts of the city. (They are separated by more than one street.) No: Units exist in the same city location.
Total Acres	Available acres for development
Total removed acres	Available acres for development after its removed from inventory
Mixed finance except from FASS PH	Projects developed under the use of combination of private financing, public housing and other funds to develop public housing units except from FASS PH.

Many of the following structure types are displayed in other parts of this development sub module. Here are the definitions for each structure type listed.

Structure Type	Description
Elevator Structure	Any high-rise structure requiring an elevator under the Minimum Property Standards or local building codes.
Mixed Type	A development that consists of more than one structure type.



## 1.0 Housing Inventory

Structure Type	Description
Row or Townhouse (Sep. Entrances)	A structure containing three or more living units. Each unit is separated by vertical walls. These building types have their own entrances and interior stairs. <b>Note:</b> Units in this structure type should not have door numbers.
Semi-Detached	A structure containing two living units separated by a common vertical wall.
Single-Family/Detached	A structure consisting of a single-living unit surrounded by permanent, open spaces.
Walkup/Multifamily Apartment (Shared Entrances)	Any multilevel, low-rise structure containing two or more living units. Each unit is separated horizontally (ceiling/floor) and by vertical walls. This category includes row houses where the units share the same physical address and are identified by a door number only.

The **Development Summary Information** section includes an **Approved as of** date. This date refers to the date of the last approved building/unit data submission.

This section also displays the summarized unit counts by the unit designation types, dwelling information, and bedroom count.



## 1.0 Housing Inventory

Reports
Manage Inventory
COMPLETION Certification

Development
Billing
Unit
Submission
Approval

Profile
List
Address
Contact

Select View: Development

Hub: 7-BRD Kansas City Hub

Field Office: 7A7H KANSAS CITY HUB OFFICE

Field Office ILA: ACROSSANTON

Physical Developments: 1405503031 HALLAND VILLAGE

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**Development Profile Information**

Development Name: HALLAND VILLAGE

Program Type: Low Income Rental

Development Method: New Construction - Conventional

Structure Type: Row or Townhouse Style (Sep. Entrances)

Acquisition Construction Date:

DOFA Date Actual: 10/31/1987

RODP Date Actual: 03/31/1989

DOFA Target Date:

RODP Target Date:

Dwelling Structures: 8

Non-Dwelling Structures: 0

Scattered Site?: No

Total Acres: 0.00

Total Reserved Acres: 0.00

Mixed Finance Exempt from FASS ph?: Yes

---

**Development Summary Information**

General Occupancy Dwelling Units	Dwelling Units		Non-Dwelling/Exception Units			Occupancy		Total Unit Count
	Elderly/Disabled Dwelling Units	Total	Merged Units	Non-Dwelling Units	Total	Occupied Units	Vacant Units	
0	0	0	0	0	0	0	0	0

Unit Designation	0 Bedroom	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms	5+ Bedrooms	Total
Elderly/Disabled Units	0	0	0	0	0	0	0
General Occupancy	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Approved as of: 02/15/2009

Figure 1: Development Profile page

### 1.1.1.2 List sub Tab

The **List** sub tab (see Figure 2) displays a summary listing of all the developments associated with the Housing Authority that the user selected on the **Development Profile** page. Users can view all the developments associated with the PHA record, or narrow the report criteria by using the **Status** list. The **Status** list allows users to set the program to display only the developments of the selected status. The **ACC Details** list allows users to view the ACC data for all the developments. To apply the selected search criteria, users must click **Retrieve**.

System retrieves the development list based on the user selection; user can click the **Development Number** link from the list to view more details about that particular development. When the user clicks the **Development Number** link the system navigates to the **Unit List** sub tab of the **Unit** tab.



## 1.0 Housing Inventory

Development Number	Development Name	Total Unit Count	Unit Designation Total			Occupancy Total	
			General Occupancy Dwelling Units	Finely/Disabled Dwelling Units	Non Dwelling/Exception Units	Occupied Units	Vacant Units
<a href="#">X00100001</a>	CHA MERE COURTS	158	158	0	0	0	3
<a href="#">X00100002</a>	RUSLWOOD COURTS	156	156	0	0	0	4
<a href="#">X00100003</a>	SANTA RITA COURTS	97	97	0	0	0	2
<a href="#">X00100004</a>	MLACOWURK COURTS	160	160	0	0	0	8
<a href="#">X00100005</a>	ROBERT T WASHINGTON TRT	216	216	0	0	0	12
<a href="#">X00100007</a>	LAKESIDE APARTMENTS	164	164	0	0	0	0
<a href="#">X00100009</a>	CARTON PLACE	100	100	0	0	0	2
<a href="#">X00100010</a>	DOULDER OWNS	144	144	0	0	0	2

Figure 2: List sub tab

The development listing table of the **List** sub tab displays the following information for each development based on the user selected filter options from the status filter and when the **ACC Details** option is set to **No**. PIC draws the information from the **Development**, **Building**, and **Unit** tabs in this sub module. The program displays the following information:

- The **Development Number** column displays the development number in PIC as a link to the **Unit** tab.
- The **Development Name** column displays the development name.
- The **Total Unit Count** column displays the total number of units in the development.
- The **Unit Designation Total** section displays unit counts by unit designation types.
- The **Occupancy Total** section displays the number of vacant and occupied units within the development.

If the user selects the **Yes** option in the **ACC Details** list, then the program will display the following ACC unit data:

- The **Development Number** column displays the development number in PIC as a link to the **Unit** tab.
- The **Development Name** column displays the development name.
- The **Total Unit Count** column displays the total number of units in the development.
- The **Unit Designation Total** section displays unit counts by unit designation types. The unit counts are broken down by ACC indicator (Y and N).
- The **Occupancy Total** section displays the number of vacant and occupied units within the development. The unit counts are broken down by ACC indicator (Y and N). See Figure 3.



### 1.0 Housing Inventory

<div style="display: flex; justify-content: space-between;"> <span>Reports</span> <span>Maintain Inventory</span> <span>CAP/IND/ISD Certification</span> </div> <div style="display: flex; justify-content: space-between;"> <span>Development</span> <span>Building</span> <span>Unit</span> <span>Subsystem</span> <span>Approved</span> </div>													
Profile			List						Address				Contact
HQ Division:			Public and Indian Housing										
HQ Office:			PO Field Operations										
Hub:			GISNA San Antonio Hub										
Field Office:			61PH SAN ANTONIO HUB OFFICE										
Field Office HA:			1X001 Austin										
Development Status Filter													
Status:			Management										
ACC Details:			Yes										
<input type="button" value="Refresh"/>													
Page No: 1 of 1											Page 1		
Development Number	Development Name	Total Unit Count	Unit Designation Total						Occupancy Total				
			Family Dwelling Units		Elderly Dwelling Units		Non Dwelling/Exception Units		Occupied Units		Vacant Units		
			ACC Indicator		ACC Indicator		ACC Indicator		ACC Indicator		ACC Indicator		
			Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	
<a href="#">1X00100001</a>	CHALMERS COURTS	158	158	0	0	0	0	0	0	0	0	0	
<a href="#">1X00100002</a>	ROSEWOOD COURTS	158	158	0	0	0	0	0	0	0	3	0	
<a href="#">1X00100003</a>	SAN ANTONIO COURTS	97	97	0	0	0	0	0	0	0	2	0	
<a href="#">1X00100004</a>	MEADOWBROOK COURTS	150	150	0	0	0	0	0	0	0	0	0	
<a href="#">1X00100005</a>	DOCKERS I. WASHINGTON TRK.	216	216	0	0	0	0	0	0	0	42	0	
<a href="#">1X00100007</a>	LAKEVIEW APARTMENTS	151	151	0	0	0	0	0	0	0	0	0	

Figure 3: List sub tab with the ACC details

#### 1.1.1.3 Address sub Tab

The **Address** sub tab (see Figure 4) displays the development address. PIC allows users to enter two types of addresses – the physical and the mailing address. The **Select Address Type** list allows users to select the type of address to view. After the user clicks **Select**, the program refreshes the page and displays the actual address entered, if applicable.

<div style="display: flex; justify-content: space-between;"> <span>Reports</span> <span>Maintain Inventory</span> <span>CAP/IND/ISD Certification</span> </div> <div style="display: flex; justify-content: space-between;"> <span>Development</span> <span>Building</span> <span>Unit</span> <span>Subsystem</span> <span>Approved</span> </div>													
Profile			List						Address				Contact
HQ Division:			Public and Indian Housing										
HQ Office:			PO Field Operations										
Hub:			GISNA San Antonio Hub										
Field Office:			61PH SAN ANTONIO HUB OFFICE										
Field Office HA:			1X001 Austin										
Physical Development:			TX001000001 CHALMERS COURTS										
Address Information													
Select Address Type:			Physical <input type="button" value="Select"/>										
Address Line 1:			500										
Address Line 2:													
County Name:			TRAVIS										
City/Township:			MCKENZIE										
State:			TX										
Zip Code:			78767 - 6700										
Additional Address Information													
Additional address information is not available for this address.													

Figure 4: Address sub tab



## 1.0 Housing Inventory

The **Modify Address** link allows users to edit the development address. The program displays the address boxes for the user to modify. The boxes marked with the asterisk (\*) are mandatory.

The screenshot shows the 'Modify Address' form. The 'Address' tab is selected, and the 'Address' section is highlighted in purple. The form contains the following fields:

- HQ Division: Public and Indian Housing
- HO Office: PO Field Operations
- Hub: GISNA San Antonio Hub
- Field Office: 61PH SAN ANTONIO HUB OFFICE
- Field Office: HA: 1X001 Austin
- Physical Development: TX001000001 CHAI MFRS COURTS

**Address Information**

- Address Type: Physical
- Address Line 1: \* (text input)
- Address Line 2: (text input)
- County Name: \* (text input)
- City/Locality: \* (text input)
- State: \* (dropdown menu)
- Zip Code: \* (text input)

\* Designates a required field.

Buttons: Cancel, Save

Figure 5: Modifying Development Address

To save the changes, the user must click **Save**. If the user clicks **Cancel**, then the program will not retain any user modifications.

### 1.1.1.4 Contact sub Tab

The **Contact** sub tab (see Figure 6) displays the information about the development manager. If any issues arise concerning the development, this person would be the point of contact for their resolution. The user can select the contact status using the **Contact Status** list to filter the contacts. The options available are **Active**, **Inactive**, and **All**.

The screenshot shows the 'Contact sub Tab' form. The 'Contact Status' dropdown is set to 'Active'. The 'Add Contact' link is visible in the top right corner. The table below shows the list of contacts:

Contact	Role	Phone Number	Email	Status
<a href="#">CAMPBELL, SARRINA</a>	Resident Manager	(512) 477-7475		Inactive
<a href="#">CAMPBELL, SARRINA</a>	Resident Manager	(512) 477-7475		Active
<a href="#">CAMPBELL, SARRINA</a>	Resident Manager	(512) 477-7475		Active
<a href="#">CHAVEZ LINDA</a>	Resident Manager	(512) 477-7475		Active
<a href="#">SELLERS MOLLE</a>	Resident Manager	(512) 477-7475		Inactive

Figure 6: Contact sub tab



## 1.0 Housing Inventory

The **Contacts List** table displays the contact name, role, phone number, email, and activity status.

### 1.1.2 The Building Tab

The **Building** tab contains the official inventory of buildings for the development selected on the **Profile** page.

Two different pages are accessible via the Building Tab.

- **The Building List** page presents summary information for every building in the selected development. It also enables users with the proper security access role to delete building records from the development. If the building status is **Initial Upload**, any user type can delete it except for Guest user. If the building status is **Initial Approval Completed**, then only HUD/Super user can delete those buildings on condition that they do not have any units associated with them.
- **The Building Detail** page provides information about a specific building. It also enables users to edit building details or add a new building record.

Additional information on how to perform certain actions in this tab can be found in job aids on HUD website. IMS job aids provide users with additional support to help navigate through the PIC sub modules. They are intended as informal, technical guidance to help users successfully complete the activities specified in the job aid. The job aids can be found following the link:

<http://www.hud.gov/offices/pih/systems/pic/ts/>

#### 1.1.2.1 The Building List sub Tab

The **Building List** sub tab (see Figure 7) presents a list of all buildings in the development selected on the **Profile** sub tab of the **Development** tab. It also provides summary data for each of those buildings.

Building No.	Building Entrance No.	Building Name	Building Type	Building Status type	Address Line 1	Floor Count	Unit Count	Construction Date	Delete Building?
<a href="#">001001</a>	1	<a href="#">apfx bax search</a>	Row or Townhouse (Sep. entrances)	Initial Approval Completed	psvph sgfs ghaf 947	1	1	04/31/1941	
<a href="#">001001</a>	2	<a href="#">apfx bax search</a>	Row or Townhouse (Sep. entrances)	Initial Approval Completed	sgfs ghaf 947	1	1	04/31/1941	
<a href="#">001001</a>	4	<a href="#">apfx bax search</a>	Row or Townhouse (Sep. entrances)	Initial Approval Completed	psvph sgfs ghaf 947	1	1	04/31/1941	

Figure 7: Building List sub tab Building tab



## 1.0 Housing Inventory

### 1.1.2.1.1 Searching the Building Information Table

Developments can have hundreds of buildings. PIC provides two different methods for searching for a specific building in the building list: a search by building number and a search by entrance number (see Figure 7). The search filters can be found in the **Building Search** section.

These two search methods can be used independently or together. Type the desired building number in the **Building Number** box or the building entrance number in the **Entrance Number** box. Click the **Search** button. The system will display the data pertaining to the specified building or entrance number.

### 1.1.2.1.2 Information Presented on the Building List Page

The **Building List** sub tab consists of the development identification information, **Building Search** section and the **Building Information** section. The **Building Information** section displays a table containing summarized building information.

The development identification information includes the following:

- HQ Division
- HQ Office
- Hub
- Field Office
- Field Office HA
- Physical Development

The **Building Information** table (see Figure 8) displays several categories of information.

Building Information									
Building No.	Building Entrance No.	Building Name	Building Type	Building Status Type	Address Line 1	Plan Count	Unit Count	Construction Date	Delete Building?
001001	1	High Rise (several)	Row or Townhouse (Sep entrances)	Final Approval Completed	gvlab sq55 stnd 3-17	1	1	03/31/1941	
001001	2	High Rise (several)	Row or Townhouse (Sep entrances)	Final Approval Completed	sq55 stnd 3-17	1	1	03/31/1941	
001001	3	High Rise (several)	Row or Townhouse (Sep entrances)	Final Approval Completed	gvlab sq55 stnd 3-17	1	1	03/31/1941	
001001	4	High Rise (several)	Row or Townhouse (Sep entrances)	Final Approval Completed	sq55 d 3-17	1	1	03/31/1941	

Figure 8: An example of a Building List.

The following table lists and provides descriptions for the **Building Information** table data categories.

Data Category	Description
Building No	The unique identification number for the selected building.
Building Entrance No	The specific entrance number for the selected building record. One building structure can have several entrances. Each entrance number has its own physical address and its own building record.
Building Name	If entries in this category are blank, the HA has not entered a name for the building.



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Data Category	Description
Building Type	<p>One of the following structure types is displayed:</p> <ul style="list-style-type: none"> <li>• Elevator Structure</li> <li>• Walkup/Multifamily Apartment (Shared Entrances)</li> <li>• Non Dwelling Structure</li> <li>• Row or Townhouse (Sep. Entrances)</li> <li>• Semi-Detached (Sep. Entrances)</li> <li>• Single-Family/Detached</li> </ul>
Building Status Type	<p>The status of the building entrance record in PIC. One of the following statuses is displayed:</p> <ul style="list-style-type: none"> <li>• Initial Upload: The building record has been entered but not approved by the Field Office.</li> <li>• Initial Approval Completed: The building record has been approved by the Field Office.</li> <li>• Demo/Dispo – Approved: The building in question has been approved for either demolition or disposition. Source: <b>Demo/Dispo</b> sub module.</li> <li>• Demo/Dispo – Proposed: The building in question has been proposed for either demolition or disposition. Source: <b>Demo/Dispo</b> sub module.</li> <li>• Demo/Dispo Draft: A draft has been created to propose either demolition or disposition for this building. Source: <b>Demo/Dispo</b> sub module.</li> <li>• Removed from Inventory: HUD HQ has completed the HA request to remove this building from the HA’s inventory. Source: <b>Demo/Dispo</b> sub module.</li> <li>• Proposed Removed from Inventory: The HA has submitted a request to HUD HQ to remove this building from its inventory. Source: <b>Demo/Dispo</b> sub module.</li> <li>• Removed without HUD Approval: Buildings removed from the HA’s official inventory without formal approval from a HUD Field Office. This entry may switch to Removed without Formal Approval in the future.</li> </ul>
Address Line 1	<p>The physical address for the selected building entrance. Physical address is an address an emergency services unit (e.g., police or rescue squad) would respond to.</p>
Floor Count	<p>The number of floors accessible via the specified building entrance where units that can be occupied exist.</p>
Unit Count	<p>Number of units accessible via the building entrance. This number includes units of all types.</p>
Construction Date	<p>The date the building entrance finished construction.</p>



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Data Category	Description
Delete Building?	This column displays the check box that allows users to delete selected buildings. In most instances, this column is blank.

The building numbers displayed in the **Building No.** column are links. Each link allows the user to view the details for the particular building in the **Building Detail** sub tab. Click a **Building Number** link to view additional building details for that building.

**Note:** If you click a link for a building record with a Removed From Inventory status, PIC displays the following message: *No buildings were found in this development, please add a building.*

The **Building Information** table displays 50 building entrance records at a time. The total number of records is displayed at the top of the table.

If there are more than 50 buildings in a development, the user may click the **Next** link at the bottom of the table to view the remainder. After clicking the **Next** link, the user can click the **Previous 50 Buildings** link to return to the previous page (see **Error! Reference source not found.****Error! Reference source not found.**).

### **1.2.1.2 The Building Detail sub Tab**

To access the **Building Detail** sub tab (see Figure 9), click a **Building Number** link from the Building Information table.

This page presents the information for every building entrance number associated with the building. It also displays the summary of all the unit data associated with the building entrance number.



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Development Identification

HQ Office: Public and Indian Housing  
HQ Division: PO Field Operations  
Hub: 6HLRK Little Rock Hub  
Field Office: 6FPH LITTLE ROCK HUB OFFICE  
Field Office HA: AR002 North Little Rock Housing Authority  
Physical Development: AR00200001 SILVER CITY COURTS

Building Entrance Identification

Select Building: 001001 - 1 - gvvigh sg63 ghvnd 347  
Building Name: hgfk bgx iveorh  
DOFA Date Actual: 01/31/1942

Building Entrance Address

Address Line 1: gvvigh sg63 ghvnd 347  
City: NORTH LITTLE ROCK  
State: Arkansas  
Address Line 2: (empty)  
County: PULASKI COUNTY  
Zip Code: 72114

Building Entrance Details

Building Type: Row or Townhouse (Sep. entrances)  
Building Status Type: Initial Approval Completed  
A.M.P. Group Number: AR00200001P  
Floor Count: 1  
Total Units Count: 1  
Construction Date: 03/31/1941

Building Entrance Summary

Unit Designation	0 Bedroom	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms	5+ Bedrooms	Total
General Occupancy	0	1	0	0	0	0	1
Elderly/Disabled Units	0	0	0	0	0	0	0
Total	0	1	0	0	0	0	1

Non-Dwelling Unit Count: 0  
Appraised as of: 01/31/2016

Figure 9: Building Detail sub tab

### 1.1.2.1.3 Information Presented on the Building Detail Page

The **Building Detail** page consists of the following sections:

- Development identification information displays the HQ Division, HQ Office, Hub, Field Office, PHA and development name and number.
- **Building Entrance Identification** section allows the user to select the building entrance number (if the building has multiple entrance numbers) to view the details for the selected entrance number.
- **Building Entrance Address** section displays the physical address associated with the entrance number.
- **Building Entrance Details** section displays the building details of the building that is associated with the entrance number selected.
- **Building Entrance Summary** section displays the unit data for the selected building entrance number.

The **Building Entrance Identification** section includes the following building identifiers (see Figure 10):

- The **Select Building** list containing a list of building entrance number for the user to select.
- The **Building Name** box contains the name of the building (if applicable)
- The **DOFA Date Actual** box displays the date in the MM/DD/YYYY format.



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Building Entrance Identification

Subject Ranking: 5200 2  
Building Name: Inglewood  
DIFA Date Acquired: 12/24/2011

[Add Buildings](#)

Figure 10: Building Entrance Identification section of Building Detail page.

Additionally, the user can add new buildings to the selected development by clicking the **Add Buildings** link.

The **Building Entrance Address** (see Figure 11) section displays the following physical entrance address details:

- Address Line 1
- Address Line 2
- City
- County
- State
- Zip Code

The **Building Entrance Details** (see Figure 11) section provides the following structural and status details. Many of these data categories are also presented in the **Building Information** table.

- Building Type
- Building Status Type
- AMP Group Number
- Floor Count
- Total Unit Count (this data category is the same as the Unit Count category on the Building List)
- Construction Date
- Comments (general comments about the building or development)

Building Entrance Address

Address Line 1: 5200 2  
Address Line 2: Inglewood  
City: Inglewood  
County: ET CLAR  
State: WA  
Zip Code: 98001

Building Entrance Details

Building Type: Rent Detached (see address)  
Building Status Type: Initial Approval Completed  
AMP Group Number:  
Floor Count:  
Total Units Count: 1  
Construction Date: 04/28/2008  
Comments:

[Show](#)

Figure 11: Building Details - Building Entrance Address & Details sections

The **Building Entrance Summary** section (see Figure 12) provides the following information about the units accessible via the selected entrance:

- Number of Units by Unit Designation



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- Family Units
- Elderly Units
- Total
- Number of Units by Bedroom Size
  - 0 Bedroom
  - 1 Bedroom
  - 2 Bedrooms
  - 3 Bedrooms
  - 4 Bedrooms
  - 5+ Bedrooms
  - Total

Unit Designation	0 Bedroom	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms	5+ Bedrooms	Total
Family Units	0	0	0	0	0	0	0
Elderly Units	0	1	0	0	0	0	1
Total	0	1	0	0	0	0	1
Non Dwelling Unit Count:	0						
Approved as of:	03/15/2018						

Figure 12: The Building Entrance Summary section of the Building Detail page.

This section also displays the following building entrance information:

- **Non-Dwelling Unit Count:** The number of Non Dwelling units accessible via the building entrance.
- **Approved as of:** The date of the last building data approval for the selected building.

The following building types can be selected in the **Building Type** list:

Building Type	Description
Elevator structure	Any high-rise structure requiring an elevator under the Minimum Property Standards or local building codes. For the Elevator Structure the minimum unit count must be 5.
Multifamily/Walkup Apts (Shared Entrance)	Any multilevel, low-rise structure containing two or more living units. Each unit is separated horizontally (ceiling/floor) and by vertical walls. This category includes row houses where the units share the same physical address and are identified by a door number only. For the Multifamily/Walkup Apts (Shared Entrance) may have more than one entrance, one entrance must have at least two units, and all other entrances must have at least one unit.
Non Dwelling Structure	Non dwelling structure will not have any units associated with the structure since the building will not have any residents. So the total unit count for this building type must equal zero.
Row or Townhouse (Sep. entrances)	A structure containing three or more living units. Each unit is separated by vertical walls. These building types have their own entrances and interior stairs. This type of buildings must have



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	only one entrance / unit. <b>Note:</b> Units in this structure type should not have door numbers.
Semi Detached (Sep. entrances)	A structure containing two living units separated by a common vertical wall. This type of buildings must have only one entrance / unit.
Single Family / Detached	A structure consisting of a single-living unit surrounded by permanent, open spaces. This type of buildings must have only one entrance / unit.

### 1.1.2.1.4 Adding New Buildings

The user can add additional building(s) to the development. To add new buildings, the user should click the **Add Buildings** link.

The **Building Detail** sub tab will be refreshed and all the options will be displayed as editable (see Figure 13). The development which was pre-selected on the **Development** tab will be active. In order to add a new building, the user need to specify the structure type in the **Building Type** list along with **Total Units Count**, **Building Number**, **Building Name** and **Building Entrance Address** information. For more information about these options, please refer to section 1.2.1.2 The Building Detail sub Tab.

The screenshot displays the 'Building Detail' sub-tab of the 'Add Buildings Page'. The page is divided into several sections:

- Development Information:**
  - HQ Division: Public and Indian Housing
  - HQ Office: PO Field Operations
  - Unit: 2HNMK Newark Hub
  - Field Office: 2FPH NEWARK HUB OFFICE
  - Field Office HA: NJ002 Newark HA
  - Physical Development: bornzu dvns bgrx 774244244qm
- Building Entrance Identification:**
  - Building Type: Flexible Structure (dropdown menu)
  - Total Units Count: [input field]
  - Building Number: [input field]
  - Building Name: [input field]
- Building Entrance Address:**
  - Entrance Number: [input field]
  - Address Line 1: [input field]
  - Address Line 2: [input field]
  - City: [input field]
  - County: [input field]
  - State: Alaska (dropdown menu)
  - Zip Code: [input field]
- Additional Information:**
  - Floor Count: [input field]
  - Construction Date: 2010/01/01
  - Comments: [text area]

A 'Save' button is located at the bottom right of the form.

Figure 13: The Add Buildings Page



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### 1.1.3 The Unit Tab

The **Unit** tab (see Figure 14) contains the official inventory of units for the development selected on the **Profile** sub tab. It also provides the functionality to upload large amounts of building and unit data for submission in PIC and to view histories of upload error reports.

**Note:** Uploading data is not the same as submitting data. After you perform an upload, you still need to submit building/unit data via the **Submission** tab.

The **Unit** tab is composed of three sub tabs:

- **The Unit List** sub tab displays a list of all units in a development and enables the user to view specific unit details. It also enables users with the proper security access to add unit records to a development, delete unit records from a development (during the initial upload stage only), or edit specific unit information.
- **The Building/Unit Data Transfer** sub tab enables users to download a file template for a mass submission of building and unit data. It also enables HA users to upload a Comma Separated Values (CSV) or Microsoft® Excel file into PIC.
- **The Upload Error Report** sub tab enables HA users to view any errors that occurred during the report upload process.

The **Unit List** sub tab is the default page for the **Unit** tab.

Unit Number	Submission Status Type	Initial View (Last Time/Name)	Building Number	Crosses Number	Floor Number	Door Number	Units/Units
30-001	Initial Approval Completed	1/1/2010 10:10 AM	001001	1	1	1	1
30-002	Initial Approval Completed	1/1/2010 10:10 AM	001001	1	1	2	2
30-003	Initial Approval Completed	1/1/2010 10:10 AM	001001	1	1	3	3
30-004	Initial Approval Completed	1/1/2010 10:10 AM	001001	1	1	4	4
30-005	Initial Approval Completed	1/1/2010 10:10 AM	001002	1	1	5	5
30-006	Initial Approval Completed	1/1/2010 10:10 AM	001002	1	1	6	6
30-007	Initial Approval Completed	1/1/2010 10:10 AM	001002	1	1	7	7

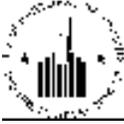
Figure 14: Unit tab and Unit List sub tab

Additional information on how to perform certain actions in this tab can be found in job aids on HUD website. IMS job aids provide users with additional support to help navigate through the PIC sub modules. They are intended as informal, technical guidance to help users successfully complete the activities specified in the job aid. The job aids can be found following the link:

<http://www.hud.gov/offices/pih/systems/pic/ts/>

#### 1.1.3.1 The Unit List sub Tab

Click the **Unit** tab to access the **Unit List** sub tab. The **Unit List** sub tab presents a searchable list of every unit in the development selected on the **Profile** page. The list contains summary details for every



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unit displayed. It also allows users to edit existing unit data, add new unit records, or delete invalid unit records (during the initial upload stage only).

### 1.1.3.1.1 Using the Unit Search Functions

Developments can include hundreds, sometimes thousands of units. While all units in a development can be presented on the **Unit List** sub tab, PIC also supplies the following tools for filtering the list:

- Building Number
- Entrance Number
- Unit Number
- Floor Number
- Door Number
- HOH First Name
- HOH Last Name

In order to use the filter, the user should type the data into the appropriate boxes (**Building Number, Entrance Number, Unit Number, Floor Number, Door Number, First Name, Last Name**) and click the **Search** button (see Figure 15). The user can use any combination of these tools for one search.

Unit Search			
Building Number:	<input type="text"/>	Door Number:	<input type="text"/>
Entrance Number:	<input type="text"/>	First Name:	<input type="text"/>
Unit Number:	<input type="text"/>	Last Name:	<input type="text"/>
Floor Number:	<input type="text"/>		<input type="button" value="Search"/>

Figure 15: Unit Search

### 1.1.3.1.2 Information Presented on the Unit List sub Tab

The **Unit List** sub tab presents a table that lists all the units associated with the development identified in the first tier of the page.

The first tier contains the following development identification information:

- HQ Division
- HQ Office
- Hub
- Field Office
- Field Office HA
- Physical Development

This information is not modifiable. If the user wants to select another development, the user would have to return to the **Profile** sub tab of the **Development** tab and select a different development.

The **Unit Information** section (Figure 16) features a table displaying data for each unit that meets the applied search criteria. If the user does not search for a particular unit or unit type, PIC displays a record for every unit in the development.



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Unit Information							
Units 1 to 10 of 10							<a href="#">Add Units</a>
Page No: 1 of 1							
Unit Number	Submission Status Type	Tenant Name (Last, First Name)	Building Number	Entrance Number	Floor Number	Door Number	Delete Unit?
<a href="#">527721</a>	Initial Approval Completed	ivknfq, v	5201	1	1		
<a href="#">527725</a>	Initial Approval Completed	mlhrizs, z	5201	2	1		
<a href="#">527729</a>	Initial Approval Completed	ilobzg, z	5202	1	1		
<a href="#">527733</a>	Initial Approval Completed	hpmzysxizn-bvmmpxn, v	5202	2	1		

*Figure 16: An example of a Unit List.*

PIC presents the number of unit records just above the table. The table displays 50 records at a time.

PIC displays the units in ascending alphanumeric unit number order. If there are more than 50 units in a development, click the **Next** hyperlink at the bottom of the table to view the following unit records. After clicking the **Next** link, the user can click the **Previous 50 Units** link to return to the previous page.

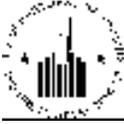
The following table presents and describes the unit list data categories:

Data Category	Description
Unit Number	The unique identifier for a unit. This number is the same as the HA's inventory number for the unit.



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Data Category	Description
Submission Status Type	<p>The status of the unit in PIC. One of the following statuses is displayed:</p> <ul style="list-style-type: none"> <li>• Initial Upload: The unit record has been entered into PIC but not approved by a Field Office.</li> <li>• Initial Approval Completed: The unit record has been approved by the Field Office.</li> <li>• Demo/Dispo – Approved: The building the unit is in has been approved for either demolition or disposition. Source: <b>Inventory Removals</b> sub module.</li> <li>• Demo/Dispo – Proposed: The building the unit is in has been proposed for either demolition or disposition. Source: <b>Inventory Removals</b> sub module.</li> <li>• Demo/Dispo Draft: A draft application has been created to propose either demolition or disposition for the building this unit is in. Source: <b>Inventory Removals</b> sub module.</li> <li>• Removed from Inventory: HUD HQ has completed the HA request to remove this unit from the HA’s inventory. Source: <b>Inventory Removals</b> sub module.</li> <li>• Proposed Removed from Inventory: The HA has submitted a request to HUD HQ to remove this unit from its inventory. Source: <b>Inventory Removals</b> sub module.</li> <li>• Removed without HUD Approval: Units removed from the HA’s official inventory without formal approval from a HUD Field Office. This entry may switch to “Removed without Formal Approval” in the future.</li> <li>• Proposed Unit Information – PHAs proposed for units status/designation changes.</li> <li>• Submit Unit Information – PHA submitted the unit status/designation changes to the field office for approval.</li> <li>• Final Review results submitted – Field office approved the unit status/designation changes and waiting for the archival to take place.</li> </ul>
Tenant Name - Last Name, First Name	<p>If the unit is unoccupied, the column will state VACANT. PIC draws this head of household information from the <b>Form-50058</b> module.</p>
Building Number	<p>The unique identifier for the building containing the selected unit.</p>
Entrance Number	<p>The unique identifier for the building entrance used to access the unit. One building structure can have several entrances. Each entrance number has its own physical address and its own building record.</p>
Floor Number	<p>The floor in the building where the selected unit is located.</p>
Door Number	<p>The unique number for each unit within an elevator structure or walkup/multifamily apartment. Typically, door numbers are optional for row houses, town homes, semidetached, and single-family units.</p>



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Data Category	Description
Delete Unit?	If this functionality is available, the program will display a check box allowing to remove the unit from PIC inventory.

### 1.1.3.1.3 Deleting Units

If a user deletes a unit record, it cannot be retrieved. Only delete a unit record that is an erroneous entry. Make sure the unit has never been part of the official inventory before deciding to erase it permanently.

PIC enables users to perform this deletion only in certain circumstances. Unit records can only be deleted before they are submitted to the Field Office or after that initial upload data is rejected by the Field Office.

If the user is uploading a second set of new unit data after the first set of unit data has received Field Office approval, units can only be deleted from the second set of data.

If none of the above situations apply, the user must submit a formal request to HUD HQ to delete a unit record.

In order to delete a unit, navigate to the **Unit List** page and when the functionality to delete units is available, check boxes are displayed in the **Delete Unit?** column of the **Unit Information** section. Select desired units and click the **Delete** button at the bottom of the table to erase the unit records. Please note that this is a non-reversible action. After you delete a unit, all of the data associated with it is deleted.

### 1.1.3.2 Unit Details Page

The unit number displayed in the **Unit Number** column is a link that allows the user to access additional details about the selected unit.

PIC displays unit details in two sections:

- The **Unit Information** section
- The **Head of Family Details** section



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Unit List	Building/Unit Data Transfer	Upload Error Report	
HQ Division:	Public and Indian Housing		
HQ Office:	PO Field Operations		
Hub:	4HATL Atlanta Hub		
Field Office:	4APH ATLANTA HUB OFFICE		
Field Office HA:	GA069 DUBLIN		
Physical Development:	GA069000100 CLAXTON HOMES		
<b>Unit Information</b>			
Unit Number:	0019B	Building:	019
Entrance Number:	2	Building Entrance Address:	hvnls mlgczo x y53
Door Number:	<input type="text" value="0019B"/>	Floor Number:	<input type="text" value="1"/> *
Bedroom Count:	<input type="text" value="2"/> *	Submission Status Type:	Initial Approval Completed
Unit Designation:	General Occupancy <a href="#">[ Modify ]</a>	Accessible Designation:	Not Applicable <a href="#">[ Modify ]</a>
Unit Tenant Status:	Vacant <a href="#">[ Modify ]</a>		
Effective Date:	01/05/2009		
ACC Unit Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No	ACC Indicator Change Date:	07/31/1962
Cap Fund Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Op Fund Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Head of Family Details</b>			
First Name:	-		
Last Name:	-		
Occupancy Date:	-		
<input type="button" value="Update Unit Details"/>			

Figure 17: Unit Details

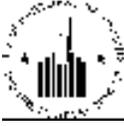
Additional information on how to perform certain actions in this page can be found in job aids on HUD website. IMS job aids provide users with additional support to help navigate through the PIC sub modules. They are intended as informal, technical guidance to help users successfully complete the activities specified in the job aid. The job aids can be found following the link:

<http://www.hud.gov/offices/pih/systems/pic/ts/>

#### 1.1.3.2.1 The Unit Information Section

In addition to the data in the Unit List, the Unit Information section includes the following details:

- Unit Number
- Entrance Number
- Door Number
- Bedroom Count
- Unit Designation
- Unit Tenant Status
- Effective Date
- Building
- Building Entrance Address
- Floor Number
- Submission Status Type
- Accessible Designation
- ACC Indicator Change Date
- Op Fund Indicator



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- ACC Unit Indicator
- Cap Fund Indicator

### **1.1.3.2.2 The Head of Family Details Section**

The **Head of Family Details** section (see Figure 17) displays the following head of household information:

- First Name
- Last Name
- Occupancy Date

### **1.1.3.2.3 The ACC Unit Indicator**

At the start of the public housing process, HUD and a PHA enter into an ACC agreement to establish what units get subsidized and the amount of HUD subsidies that will be provided. The ACC Unit Indicator in PIC is used to identify units included in this contract.

All public housing dwelling units are “ACC Yes” units. That means that these units are subject to the ACC agreement between HUD and a PHA and receive subsidy. However, there are four situations where the ACC status of a unit can be brought into question:

- Permanent Conversions to Non Dwelling Units
- Temporary Conversions to Non Dwelling Units
- Merged Units
- Floating Units in Mixed Finance Developments

### **1.1.3.2.4 Editing Unit Details**

The information in the following controls can be changed:

- Door Number
- Bedroom Count
- Unit Designation
- Floor Number
- Accessible Designation

The user can easily change/add information by typing data into the boxes and clicking the **Update Unit Details** button. However, for **Unit Designation** and **Accessible Designation** options an additional step is required (described below).

After the units are approved by HUD Field Office staff member, PHAs are limited in the changes that they can make to unit characteristics without HUD approval. Changes that potentially affect unit funding are controlled by Field Offices and thus must undergo HUD approval.

So when PHA make changes to unit tenant status, unit designation, or accessibility designation, the program does not make any changes to the existing unit characteristics until a Field Office user approves the proposed changes. So when a PHA user makes changes, the unit details are not updated immediately. Rather, the program saves the changes as proposed and changes the submission status type of the unit that undergoes unit characteristics changes.

So, a PHA user must propose the desired changes and then submit them for Field Office approval. The changes will take effect only upon Field Office approval is granted.



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Unit Information			
Unit Number:	0084	Building:	15
Entrance Number:	1	Building Entrance Address:	gvvigh sg23 z 0433
Door Number:	<input type="text" value="1104A"/>	Floor Number:	<input type="text" value="1"/> *
Bedroom Count:	<input type="text" value="2"/> *	Submission Status Type:	Initial Approval Completed
Unit Designation:	General Occupancy <a href="#">[Modify]</a>	Accessible Designation:	Not Applicable <a href="#">[Modify]</a>
Unit Tenant Status:	Occupied - Assisted Tenant		
Effective Date:	02/09/2007		
ACC Unit Indicator:	Yes	ACC Indicator Change Date:	04/30/1970
Cap Fund Indicator:	Yes	Op Fund Indicator:	Yes
Head of Family Details			
First Name:	z		
Last Name:	nzszt		
Occupancy Date:	02/09/2007		
<input type="button" value="Update Unit Details"/>			

Figure 18: Update Unit Detail

To edit the **Unit Designation** option the user should click the **Modify** link as shown on the screenshot (see Figure 19).



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Unit List		Building/Unit Data Transfer		Upload Error Report	
HQ Division:	Public and Indian Housing				
HQ Office:	PO Field Operations				
Hub:	4HATL Atlanta Hub				
Field Office:	4APH ATLANTA HUB OFFICE				
Field Office HA:	GA069 DUBLIN				
Physical Development:	GA069000100 CLAXTON HOMES				
Unit Information					
Unit Number:	0019B	Building:	019		
Entrance Number:	2	Building Entrance Address:	hvnls mlgczo x y53		
Door Number:	<input type="text" value="0019B"/>	Floor Number:	<input type="text" value="1"/> *		
Bedroom Count:	<input type="text" value="2"/> *	Submission Status Type:	Initial Approval Completed		
Unit Designation:	General Occupancy	[Modify]	Accessible Designation:	Not Applicable [Modify]	
Unit Tenant Status:	Vacant	[Modify]			
Effective Date:	01/05/2009				
ACC Unit Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No		ACC Indicator Change Date:	07/31/1962	
Cap Fund Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No		Op Fund Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Head of Family Details					
First Name:	-				
Last Name:	-				
Occupancy Date:	-				
<input type="button" value="Update Unit Details"/>					

Figure 19: Modify Unit Designation

The following page will be displayed (see Figure 20), the user will have an option to select appropriate designation, reason for change in unit designation, and enter comments.



### 1.0 Housing Inventory

Figure 20: Unit Designation

In the **New Unit Designations** list the user can select the desired designation (see Figure 21)

Figure 21: New Unit Designation

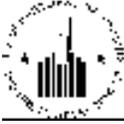
Additionally, the user needs to select the **Reason for change in Unit Designation** from the respective list. There are three available options: **Change In Use, Data Correction, and Other**. Also, if necessary, before proceeding to the final step, the user can enter additional comments.

Click **Propose Change** button propose unit detail change. The change will be effective in the system upon Field Office approval. After proposing changes to unit characteristics, the user must submit them to Field Office for approval using the **Submission** tab.

The **Merged Unit** designation type is not available for PHA users. If PHA users need to change an existing unit designation to merged, they must contact the appropriate Field Office for assistance.

The **Non-Dwelling** unit designation is changed by means of changing unit tenant status type. If a PHA user selects one of the non-dwelling unit tenant statuses, he unit designation will be changed to non-dwelling automatically. Also, if a PHA user needs to change a non-dwelling unit designation to **General Occupancy**, then the PHA user must first change the unit tenant status to any of the vacant statuses (**Vacant, or Vacant HUD Approved**) and the program will change the unit designation to **General Occupancy** automatically.

Additional information on how to edit unit details can be found in job aids on HUD website. IMS job aids provide users with additional support to help navigate through the PIC sub modules. They are intended as informal, technical guidance to help users successfully complete the activities specified in the job aid. The job aids can be found following the link: <http://www.hud.gov/offices/pih/systems/pic/ts/>



## 1.0 Housing Inventory

To edit the **Accessible Designation** option the user should click the **Modify** link as shown on the screenshot (see Figure 19) above. The page that is responsible for editing accessible designations will be displayed (see Figure 22).

The screenshot shows the 'Accessible Designation' form in the IMS system. The form is divided into several sections:

- Unit Information:** Unit Number: 02, Building - Entrance Number: 1-2
- Current Accessible Designation:** Current Accessible Designation: Not Applicable
- New Accessible Designation:** New Accessible Designation: Not Applicable
- Reason for change in Accessible Designation:** Reason for change in Accessible Designation: Change In Use
- Comments:** A text area for entering additional comments.

At the bottom of the form, there is a green message: "The changes will not be effective in the system upon clicking 'Propose Change'. FIA must submit all the accessible designation changes for IUD approval. The changes will be effective in the system upon approval by field office." and two buttons: "Propose Change" and "Cancel".

Figure 22: Accessible Designation

The user can assign a new designation to the unit by selecting the appropriate option in the **New Accessible Designation** list and selecting one of the following:

- Hearing/Visual Impairment
- Not Applicable
- Standard
- UFAS barrier free accessible

Additionally, the user needs to select the **Reason for change in Accessible Designation** from the respective list. There are three available choices: **Change In Use, Data Correction, and Other**. Also, if necessary, before proceeding to the final step, the user can enter additional comments.

Click **Propose Change** button propose unit detail change. The change will be effective in the system upon Field Office approval. After proposing changes to unit characteristics, the user must submit them to Field Office for approval using the **Submission** tab.

To edit **Unit Tenant Status** the user should click on **Modify** link as shown on the screenshot (see Figure 19) above. The page that is responsible for editing Accessible Designations will be displayed (see Figure 23).

**Note:** Users cannot edit the unit tenant status of the units occupied by assisted tenants or are in the merged unit designation.



## 1.0 Housing Inventory

Figure 23: Unit Tenant Status

As shown on the screenshot (see Figure 23), the user will be presented with an option with select unit tenant status and a subcategory.

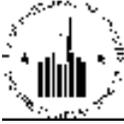
This type of user doesn't require submitting information for the HUD approval first as all changes will be effective in the system immediately.

Below you can see a list of available designations and available subcategories:

- Occupied
  - Employee
  - Non-assisted Tenant
  - Police Officer
  - Unauthorized
- Vacant HUD Approved
  - Casualty Loss
  - Court Litigation
  - Market Conditions
  - Natural Disaster
  - Undergoing Modernization
- Non-Dwelling
  - Administrative uses
  - MTW Neighborhood Services
  - Resident Amenities
  - Special Use: Anti Drug/Crime
  - Special Use: Other Resident Activities
  - Special Use: Self Sufficiency Activities
  - Unauthorized

In both cases before proceeding to the final step, the user needs to:

- 1) Enter the **New Status Effective Date** into the respective box.



## 1.0 Housing Inventory

- 2) Select the **Reason for change in Accessible Designation** from the respective list. There are two available choices: **Change In Use** and **Other**.
- 3) If necessary, enter comments into the **Comments** box.

Click **Propose Change** button propose unit detail change. The change will be effective in the system upon Field Office approval. After proposing changes to unit characteristics, the user must submit them to Field Office for approval using the **Submission** tab.

### 1.1.4 The Building/Unit Data Transfer sub Tab

Click the **Building/Unit Data Transfer** sub tab in the **Unit** tab to access the Building/Unit Data Transfer page.

Situations may arise when you need to submit large amounts of data. Examples include:

- Adding a new 50-unit building.
- Editing 20 units or more.

The **Building/Unit Data Transfer** page (see Figure 24) provides a venue to upload this information into the PIC database and prepare it for submission to the Field Office in one bulk transaction.

Reports	Maintain Inventory	CAPFUND B&U Certification		
Development	Building	Unit	Submission	Approval
Unit List		Building/Unit Data Transfer		Upload Error Report
Hub:	7HKNC Kansas City Hub			
Field Office:	7APH KANSAS CITY HUB OFFICE			
Field Office HA:	IA001 CORNING			
<b>Template Download</b>				
Select Template Type:	- Template type -	Select		
<b>Upload Building and Unit data</b>				
Select File Type to Upload:	- Select upload file type -	Select		

Figure 24: Building/Unit Data Transfers

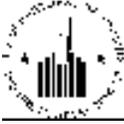
The upload can be performed using an Excel file or a CSV file. These are the only acceptable formats for the data transfer in PIC.

This page enables you to:

- Download a preformatted Excel spreadsheet, which you can use to enter the data.
- Download directions for preparing a text file submission.
- Upload the spreadsheet or a text file into PIC for Field Office approval.

#### 1.1.4.1 Uploading Microsoft Excel Spreadsheet

To download a Microsoft Excel template, select Excel from the **Select Template Type** list in the **Template Download** section. Click **Save**, when prompted by the message and save in the desired location on your computer.



## 1.0 Housing Inventory

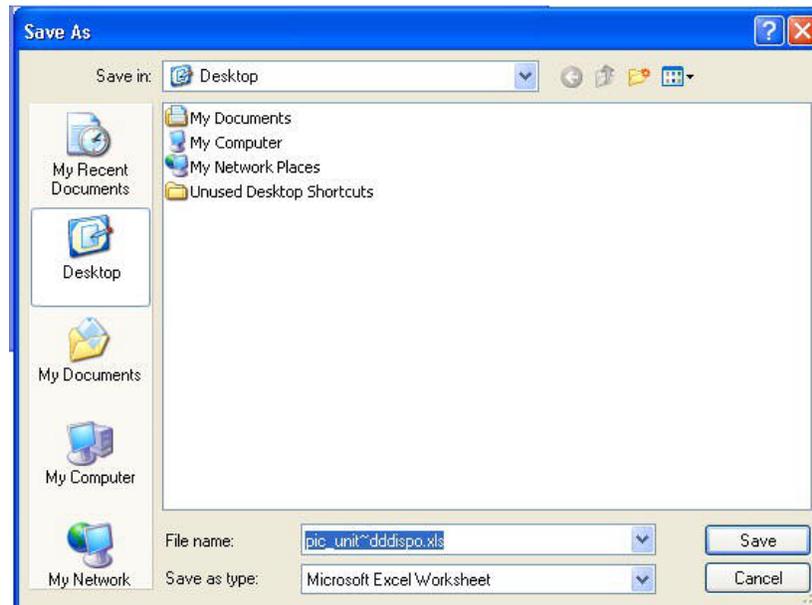


Figure 25: The Save As dialog box.

The template contains a macro which needs to be executed upon entering the data. To execute the macro when the spreadsheet is open, click **Tools** and then click the **Format Columns for Upload** menu option. Close the file after the data is entered completely.

To upload a completed spreadsheet into PIC for Field Office review, select the **Excel** option in the **Select File Type to Upload** list in the **Upload Building and Unit Data** section. Click the **Browse** button and navigate to the file's location. Click the **Upload** button to upload the file in PIC. The file is saved to the system's server where it undergoes a validation process to ensure the form was properly completed.

### 1.1.4.2 The Text File Method

The user can generate a CSV file using a third-party vendor software. However, it is the user's responsibility to make sure this software-generated text file is in the correct format when submitted for Field Office approval.

The **Building/Unit Data Transfer** page enables users to download instructions for verifying the text file format. Select the **Pipe Delimited CSV File** option in the **Select Template Type** list in the **template Download** section. Save file to the local drive when prompted by the message.

To upload the text file into PIC for Field Office review, select the **Pipe Delimited CSV File** option in the **Select File Type to Upload** list in the **Upload Building and Unit Data** section. Click the **Browse** button and navigate to the file's location. Click the **Upload** button to upload the file in PIC. The file is saved to the system's server where it undergoes a validation process to ensure the form was properly completed.



## 1.0 Housing Inventory

### 1.1.5 The Upload Error Report sub Tab

Click the **Upload Error Report** sub tab on the **Unit** tab to access the **Upload Error Report** page.

Many errors can occur during the submission process because it relies heavily on data entry. An Upload Error Report records the results of a submission and displays any errors found during the upload verification.

This information allows users to go back and fix the errors so the next submission can be approved with more speed. It also enables users to view the error records by error type, submitter, or historical file.

#### 1.1.5.1 Information Presented on the Upload Error Report Page

This page contains first tier section, a **Search** section, and an **Upload Errors** table.

Unit List	Building/Unit Data Transfer	Upload Error Report				
HQ Division:	Public and Indian Housing					
HQ Office:	PO Field Operations					
Hub:	3HPL Philadelphia Hub					
Field Office:	3APH PHILADELPHIA HUB OFFICE					
Field Office HA:	PA002 Philadelphia HA					
<b>Search</b>						
Error Type:	Invalid Tier 1: Accessible Unit Designation code					
User ID:	<input type="text"/>					
Sheet Type:	All Sheet Type					
File Name :	hudfinal1219-12/20/2001 4:02:21 PM					
<input type="button" value="Retrieve"/>						
<b>Upload Errors</b>						
Records 1 to 7 of 7						
Date	Submitted By	Status	Worksheet	Exception	Row	Field
12/20/2001	rtwillia	Completed - File successfully processed.	bldg	The Development Number is invalid or it does not belong to this HA.	9629	1
12/20/2001	rtwillia	Completed - File successfully processed.	unit	The Development Number is invalid or it does not belong to this HA.	16377	2
12/20/2001	rtwillia	Completed - File successfully processed.	unit	The Development Number is invalid or it does not belong to this HA.	16378	2
12/20/2001	rtwillia	Completed - File successfully processed.	unit	The Development Number is invalid or it does not belong to this HA.	16379	2

Figure 26: Upload Error Report page

The first-tier section contains all identifier information for the HA that has received the submissions:

- HQ Division
- HQ Office
- Hub
- Field Office
- Field Office HA

The **Search** section contains tools to filter the results included in the **Upload Errors** table.



## 1.0 Housing Inventory

The table displays all error messages occurred in the submission in question by default. To search for a particular error, select the desired option from the **Error Type** list and click the **Retrieve** button to display the records containing only the error specified.

The user can also narrow the search result by specifying the ID of the user that reported the error in the **User ID** box. This option allows searching for the error reported by a particular user.

The table includes errors for both buildings and units by default. However, the user can select to search for building or unit errors only by selecting the appropriate option in the **Sheet Type** list.

The table also displays results from the most recent submission by default. To search for a specific report submission, use the **File Name** list to select the desired file name from the list of building/unit data files submitted by the selected HA.

The user can use any combination of these tools for one search. Simply enter the data into the appropriate controls before clicking the **Retrieve** button.

If the search returns no matches, PIC displays the following message: *No upload errors were found.*

The **Upload Error** section (see Figure 27) contains a table displaying details about the errors found in the specified file upload. The default display for the table is the most recent submission.

Upload Errors						
Records 1 to 25 of 734						
Date	Submitted By	Status	Worksheet	Exception	Row	Field
03/19/2013	xxxxxx	Completed - File successfully processed.	tblg	Uploads to spreadsheet building information cannot be replaced. The same building already	1	0
03/19/2013	xxxxxx	Completed - File successfully processed.	tblg	Uploads to spreadsheet building information cannot be replaced. There must be correct records	2	0

Figure 27: An Upload Errors table on the Upload Error Report page.

The table presents the following data categories for each report selected:

Data Category	Description
Date	The date the HA submitted the file.
Submitted By	Name of person who submitted the file.
Status	The status of the file submission.
Worksheet	The worksheet where the error occurred: Building Unit
Exception	The actual error that occurred (if available).
Row	The row on the spreadsheet where the error occurred.
Field	The field on the Job Aid explaining how to enter the errant data correctly.



## 1.0 Housing Inventory

If no errors occurred, PIC displays the following message in the **Upload Errors** section: *No upload errors were found.* This means that the building and unit data is ready for submission.

### 1.1.6 Submission Tab

The **Submission** tab of the **Development** sub module enables users with proper security access role to submit unit information relevant to a development for the Field Office review. PHA users must submit unit detail changes to Field Office for approval using the **Submission** tab.

Additional information on how to perform certain actions in this tab can be found in job aids on HUD website. IMS job aids provide users with additional support to help navigate through the PIC sub modules. They are intended as informal, technical guidance to help users successfully complete the activities specified in the job aid. The job aids can be found following the link:  
<http://www.hud.gov/offices/pih/systems/pic/ts/>

#### 1.1.6.1 Submit Unit Information sub Tab

To submit the unit information for a desired development, user must navigate to the **Profile** page of the **Development** tab to select the development. The user can use the following first tier options to enter appropriate data: **Hub**, **Field Office**, **Field Office HA**, and the **Physical Development** lists (see Figure 28).

Development Profile Information	
Development Name:	WLSIGAIL
Program Type:	Low Income Rental
Development Method:	New Construction - Conventional
Structure Type:	Row or Townhouse Style (5sq. Footnotes)
Registration Construction Date:	
DOFA Date Actual:	17/31/1967
EHF Date Actual:	05/01/1968
DOFA Target Date:	
EHF Target Date:	
Dwelling Structures:	10
Non-Dwelling Structures:	2
Scattered Site?	No
Total Acres:	0.00

Figure 28: The Profile Page of the Development Sub module

Once the development is selected, the user can navigate to the **Submission** tab to submit unit and other information relevant to a development.

When user selects the **Submission** tab of the **Development** sub module, the **Submit Unit Information** sub tab is displayed (see Figure 28). In this page, user can submit unit information to be approved by a member of Field Office.



## 1.0 Housing Inventory

Reports Maintain Inventory CAPFUND B&U Certification

Development Building Unit Submission Approval

Submit Unit Information Submit Unit Status Changes

IN020 Mishawaka Housing Authority

Enter Comments and Submit Unit Information

Submission Comments

SBMT

All changes are subject to approval by Field Office personnel.

Submit Data For Approval Save

MTCS Data Transfer

All applicable tenant certification records have been extracted from the old MTCS system and transferred to the new Form 50058 Module in PIC.

Status History

Date	Status	Author
03/27/2008	Approved	vmrivsgzp mlhivsxgfs
03/27/2008	Submitted	vmrivsgzp mlhivsxgfs

Figure 29: The Submit Unit Information page of the Development sub module.

In the **Submit Unit Information** sub tab, any comments relevant to the submission of the unit information must be entered in the **Submission Comments** section of the **Submit Unit Information** sub tab. A default text **SBMT** is displayed in this box. When user clicks the **Submit Data For Approval** button, a message is displayed to the user saying **Unit data for this HA has been submitted for Approval** (See Figure 29). The following details are displayed in form of a table in the **Status History** section of the page:

- **Date:** The date unit information was submitted to the Field Office
- **Status:** The status of the submitted unit information. A list of all the possible statuses are displayed below:
  - **Submitted:** The unit information is submitted and is pending for approval/rejection by the Field Office personnel.
  - **Approved:** The unit information is approved by the Field Office personnel.
  - **Rejected:** The unit information is rejected by the Field Office personnel.
  - **RMI Approved:** The units which are RMI approved as part of Demo-Dispo application.
- **Author:** The name of the personnel who submitted the unit information.



## 1.0 Housing Inventory

Reports    Maintain Inventory    CAPFUND B&U Certification

Development    Building    Unit    **Submission**    Approval

**Submit Unit Information**    Submit Unit Status Changes

IN020 Mishawaka Housing Authority

Unit data for this HA has been submitted for approval.

**MTCS Data Transfer**

All applicable tenant certification records have been extracted from the old MTCS system and transferred to the new Form 50058 Module in PIC.

**Status History**

Date	Status	Author
07/21/2010	Submitted	HPIC20 X HPIC20
03/27/2008	Approved	vmrivsgzp mlhivsxgfs
03/27/2008	Submitted	vmrivsgzp mlhivsxgfs
08/27/2001	Approved	givyfs g hmroox
08/14/2001	Approved	givyfs g hmroox
08/03/2001	Submitted	mbisgzp ivmgiztnfzy
05/31/2001	Rejected	ovzsxm q mzomzxh
02/27/2001	Submitted	mvvoolx wmfol

Figure 30: The Submit Unit Information page after unit data has been submitted

Once user clicks the **Submit Data For Approval** button, a message is displayed under **MTCS Data Transfer** section: **All applicable tenant certification records have been extracted from the old MTCS system and transferred to the new Form 50058 Module in PIC.** This is obsolete and will not be available from Release 7.1 in September 2010 onwards (see Figure 30).

The **Status History** table displays the list of users who have submitted the unit information changes. The Super User can select any of these records and generate a report by clicking the **Generate Report** button at the bottom of the page. The **Development Approval Status Report** is displayed upon clicking this button (see Figure 31).



## 1.0 Housing Inventory



# Development Approval Status Report

[Download in Excel](#) [Print](#)

---

HQ Division: **Public and Indian Housing**  
HQ Office: **PO Field Operations**  
Hub: **3HPIT Pittsburgh Hub**  
Field Office: **3EPH PITTSBURGH HUB OFFICE**  
Field Office HA: **PA001 Pittsburgh HA**

---

Records 1 - 25 of 44 ([View All](#)) << Prev page 1 2 Next Page >>

#	Development Number	Status	Approver Name	Approver Action Date	Comments
1	PA001000001	Approved	roz wzhz	08-14-2009	
2	PA001000002	Approved	roz wzhz	08-14-2009	
3	PA001000004	Approved	roz wzhz	08-14-2009	
4	PA001000005	Approved	roz wzhz	08-14-2009	
5	PA001000007	Approved	roz wzhz	08-14-2009	
6	PA001000008	Approved	roz wzhz	08-14-2009	
7	PA001000009	Approved	roz wzhz	08-14-2009	
8	PA001000010	Approved	roz wzhz	08-14-2009	
9	PA001000011	Approved	roz wzhz	08-14-2009	

Figure 31: The Development Approval Status report

This report displays the approval details for a development. The approver name and the date this development was approved are displayed as columns in the report. Any comments entered by the personnel are displayed in the **Comments** column of the report.



1.0 Housing Inventory

1.1.6.2 Submit Unit Status Changes sub Tab

The status of a unit in a development can be modified in the **Unit List** sub tab of the **Unit** tab in the **Development** sub module (see Figure 32).

Unit Number:	136	Building:	B_0083								
Entrance Number:	2	Building Entrance Address:	vizfjh ivhrviw 0113								
Door Number:	<input type="text" value="1334"/>	Floor Number:	<input type="text" value="1"/> *								
Bedroom Count:	<input type="text" value="0"/> *	Submission Status Type:	Initial Approval Completed								
Unit Designation:	General Occupancy <a href="#">[Modify]</a>	Accessible Designation:	Not Applicable <a href="#">[Modify]</a>								
Unit Tenant Status:	Occupied - Police Officer <a href="#">[Modify]</a>										
Effective Date:	07/26/2010										
ACC Unit Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No	ACC Indicator Change Date:	10/01/1970								
Cap Fund Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Op Fund Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No								
<b>Head of Family Details</b>											
First Name:	-										
Last Name:	-										
Occupancy Date:	-										
<input type="button" value="Update Unit Details"/>											
<b>Unit Status/Designations Change History</b>											
Change Type	Old Unit Characteristics	New Unit Characteristics	Effective Date	Request Status	Request Date	Requesting User	Requester Comments	Review Date	Review User	Reviewer Comments	Edit
Unit Status/Reason Change	Vacant	Occupied - Police Officer	07/26/2010	Modified by HUD user	07/26/2010	HPIC20	Comment1	2010-07-26 11:17:34.557	HPIC20		

Figure 32: The Unit tab of the Development sub module

Once the user modifies the status, changes can be submitted by clicking the **Submit Data For Approval** button (see Figure 29).

Upon selecting the **Submit Unit Status Changes** tab of the **Development** sub module, a message is displayed to the user that inventory data for the PHA has been submitted for HUD Approval (see Figure 33).

Once a user submits the unit data for a PHA for Field Office approval, the program locks the PHA inventory to prevent any changes. The PHA inventory will be unlocked only after Field Office grants the approval, or rejects the proposal.



## 1.0 Housing Inventory

Reports	Maintain Inventory	CAPFUND B&U Certification		
Development	Building	Unit	Submission	Approval
Submit Unit Information		Submit Unit Status Changes		
HQ Division:	Public and Indian Housing			
HQ Office:	PO Field Operations			
Hub:	5HCLV Cleveland Hub			
Field Office:	5HPH INDIANAPOLIS PROGRAM CENTER			
Field Office HA:	IN021 Terre Haute Housing Authority			
<b>Unit Information Changes Ready for Submission:</b>				
Read Only. The inventory data for this PHA has been submitted for HUD approval.				
No records available for submission.				

Figure 33: The Submit Unit Status Changes page of Development sub module

### 1.1.7 Approval Tab

Once the unit data has been submitted by the PHA users, the Field Office personnel can review and approve or reject the unit data using the **Approval** tab of the **Development** sub module. PHA users cannot perform any actions using the **Approval** tab.

#### 1.1.7.1 HA Approval sub Tab

Reports	Maintain Inventory	CAPFUND B&U Certification										
Development	Building	Unit	Submission	Approval								
HA Approval		Approve Unit Status Changes										
<b>ABOUT CORNING</b>												
Review Comments and Approve Unit Information												
Unit data for this HA has been submitted for approval. (Approval for Unit Tenant Status Changes)												
Page No. 1 of 1				Page 1								
		Building Structure Count			Unit Count							
Development Number	Development Name	Total Building Structure Count	Ltylestor Structure Count	Row Town House Structure Count	Semi Detached Structure Count	Single Family Detached Structure Count	Walkup Multifamily Structure Count	Non Dwelling Structure Count	Total Units	Vacant Units	Employee Units	ACC Units
IA001000001	WHS1054TH	12	0	10	0	0	0	2	55	7	0	52
IA001000010	Test	0	0	0	0	0	0	0	0	0	0	0
IA001124456	Test	0	0	0	0	0	0	0	0	0	0	0
Page No. 1 of 1				Page 1								
<b>Submission Comments</b>												
SDMT												
<b>Field Rejection Comments</b>												

Figure 34: The HA Approval page of the Development sub module

The details of a development are displayed in the **HA Approval** sub tab of the **Approval** tab (see Figure 34). The name of the housing authority is displayed at the top of the **HA Approval** sub tab. Any comments made by the Field Office personnel are displayed in the **Review Comments and Approve Unit Information** section. The **HA Approval** sub tab also displays the development details and facilitates approval and rejection of the development units.



## 1.0 Housing Inventory

### 1.1.7.2 Approve Unit Status Changes sub Tab

The **Approve Unit Status Changes** sub tab of the **Approval** tab allows users with sufficient access privileges to approve unit status changes for a HA. The **Approve Unit Status Changes** page displays a message that the inventory data has been submitted for HUD Approval (see Figure 35). PHA users cannot perform any changes on this sub tab.

Development		Building		Unit		Submodule		Approval	
Development		Building		Unit		Submodule		Approval	
HUD Approval		Approve Unit Status Changes							
Hub:		THRC Kansas City Hub							
Field Office:		TAPH KANSAS CITY HUB OFFICE							
Field Office IIA:		IAG01 CORNING							
Unit Status Changes Submitted for Review:									
Review Options: Unit Level Review - <input type="button" value="Select"/>									
#	Dev Num	Unit Num	Change Type	Old Value	New Value	Effective Date	Request Date	Requesting User	Requester Comments
1	00001000001	000002	Unit Designation	Mixed Elderly and Disabled Not HUD Officially Designated	Officially Disabled	08/31/2010	8/31/2010 2:33:22 PM	MCC300	User MCC300 has changed the Unit Designation from MED to ODE
2	00001000001	000004	Unit Designation	Mixed Elderly and Disabled Not HUD Officially Designated	Officially Elderly	08/31/2010	8/31/2010 2:33:22 PM	MCC300	User MCC300 has changed the Unit Designation from MED to ODE
3	00001000001	000005	Unit Designation	Officially Mixed Elderly and Disabled	Mixed Elderly and Disabled Not HUD Officially Designated	08/31/2010	8/31/2010 2:33:22 PM	MCC300	User MCC300 has changed the Unit Designation from ODE to MED
4	00001000001	11	Unit Accessible Designation Change	Not Applicable	Hearing/Visual Impairment	08/31/2010	8/31/2010 2:33:22 PM	MCC300	User MCC300 has changed the Unit Designation from NA to HVIMP
5	00001000001	12	Unit Designation	General Occupancy	Mixed Elderly and Disabled Not HUD Officially Designated	08/31/2010	8/31/2010 2:33:22 PM	MCC300	User MCC300 has changed the Unit Designation from GA to MED

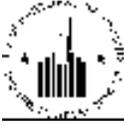
Figure 35: The Approve Unit Status Changes page of the Approval tab

### 1.1.8 Reports Tab

The **Reports** tab of the **Development** sub module (see Figure 36) allows the user to run various reports to view the building data, unit data, vacancy / occupancy data, etc. When users run the reports, they can further organize the report data for more convenient presentation.

Reports		Maintain Inventory		Landing Unit Certification					
Development		Building		Unit		Submodule		Approval	
Building Reports		Unit Reports		RANS Report		Unit/Dev Report		Geo-Coded Addresses	
Select View:		Development							
Hub:		THRC Kansas City Hub <input type="button" value="Select"/>							
Field Office:		TAPH KANSAS CITY HUB OFFICE <input type="button" value="Select"/>							
Field Office IIA:		IAG01 CORNING <input type="button" value="Select"/>							
Development Code		Development Name							
<input type="checkbox"/>	00001000001	WESTCOTE							
<input type="checkbox"/>	00001000002	TAP							
<input type="checkbox"/>	00001000003	TAP							
<input type="checkbox"/>	00001000004	TAP							
<input type="checkbox"/> Select/Deselect All									
Building Status:		Inventory <input type="button" value="Select"/>							
Select Report Type:		<input type="radio"/> Summary <input type="radio"/> Summary by Development <input checked="" type="radio"/> Detailed							
<input type="button" value="Generate Report"/>									

Figure 36: The Building Reports sub tab of the Reports tab



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## 1.0 Housing Inventory

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### **1.1.8.1 Building Reports sub Tab**

The **Building Reports** sub tab allows users to run building inventory reports (see Figure 36). Building reports present a range of up-to-date building data for any development (or group of developments) in an HA. Users can run three types of building reports that display various building data: the number of buildings and units for selected development(s), as well as more detailed building and unit data. Users can run building reports based on the building statuses.

PIC draws the data for these reports from the Building Detail and Unit Detail pages in the **Development** sub module and the **Demo/Dispo** sub module.

To run a report, user must select the appropriate Hub in the **Hub** list and click **Select**. Then, the user must select the appropriate Field Office in the **Field Office** list and then click **Select**. If there is only one Field Office associated with a Hub, then the user must select the appropriate PHA in the **Field Office HA** list and then click **Select**.

The program displays the list of developments that are associated with the selected PHA. User must select the desired development(s) by clicking the check boxes for the development records in the **Development Code** column. The program also displays the **Select / Deselect All** button to select all the developments, or to clear the selected check boxes.

Then, the user must select the desired building status option in the **Building Status** list. The report count will only include the buildings associated with the selected building status within the selected development(s). Using the **Building Status** list, the user can get counts for buildings and units that are part of the current inventory, buildings participating in the demo / dispo process or removal from inventory process.

To run the report, the user must click the **Generate Report** button. The report will be displayed in a separate browser window.

#### **1.1.8.1.1 Building Summary Report**

The Building Summary report (see Figure 37) displays the summarized building and unit counts grouped by building types. The report includes only the buildings that have the same status that the user selected in the **Building Status** list when running the report.



## 1.0 Housing Inventory

Building Summary Report			
As of 6/21/2010			
Hub	: SHCHI Chicago Hub		
FieldOffice	: SAPH CHICAGO HUB OFFICE		
Field Office HA	: IL001 E. St. Louis Housing Authority		
Developments Selected	: IL001000001, IL001000002, IL001000003, IL001000004, IL001000005		
Search Criteria			
Status	: In Inventory		
Building Type	No.of Bldgs.	No.of Units Reported in Bldg.	No.of Units Uploaded
Elevator Structure	2	222	222
Mixed Type	0	0	0
Non Dwelling Structure	8	0	0
Row or Townhouse (Sep. entrances)	145	953	953
Semi Detached (Sep. entrances)	48	94	94
Single Family/Detached	19	19	19
Multifamily/Walkup Apts (Shared Entrance)	0	0	0
<b>Total for All Selected Developments</b>	<b>222</b>	<b>1288</b>	<b>1288</b>

Figure 37: Building Summary Report

The Building Summary report displays the report date, the Hub, Field Office, and PHA selected. Then, the report displays the development(s) associated with the PHA and selected for the report. In the **Search Criteria** section, the report displays the option that the user selected in the **Building Status** list when running the report.

The report data presents the number of buildings and units within the selected developments. The **No. of Bldgs.** column displays the total number of buildings of each building type. The **No. of Units Reported in Bldg.** column displays the total number of units associated with the buildings included in the report. **The No. of Units Uploaded column displays**

The report also presents the **Total for All Selected Developments** section that summarizes the counts for all the building types.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

### 1.1.8.1.2 Building Summary by Development Report

The Building Summary by Development report (see Figure 38) displays the summarized building and unit counts grouped by development and building types. The report includes only the buildings that have the same status that the user selected in the **Building Status** list when running the report.



## 1.0 Housing Inventory

### Building Summary By Development Report

As of 6/21/2010

**Hub** : SHCHI Chicago Hub  
**Field Office** : SAPH CHICAGO HUB OFFICE  
**Field Office HA** : IL001 E. St. Louis Housing Authority  
**Developments Selected** : IL001000001, IL001000002, IL001000003, IL001000004, IL001000005

**Search Criteria**

**Status** : In Inventory

Select Page Set : 1-2 ▾

**Development : IL001000001**

Bldg. Type	Ent. No.	No. of Units Reported in Bldg.	No. of Units Uploaded
Elevator Structure	0	0	0
Mixed Type	0	0	0
Non Dwelling Structure	1	0	0
Row or Townhouse (Sep. entrances)	30	240	240
Semi Detached (Sep. entrances)	0	0	0
Single Family/Detached	0	0	0
Multifamily/Walkup Apts (Shared Entrance)	0	0	0
<b>Total for IL001000001</b>	<b>31</b>	<b>240</b>	<b>240</b>

**Development : IL001000002**

Bldg. Type	Ent. No.	No. of Units Reported in Bldg.	No. of Units Uploaded
Elevator Structure	0	0	0
Mixed Type	0	0	0
Non Dwelling Structure	2	0	0
Row or Townhouse (Sep. entrances)	39	314	314
Semi Detached (Sep. entrances)	0	0	0
Single Family/Detached	0	0	0
Multifamily/Walkup Apts (Shared Entrance)	0	0	0
<b>Total for IL001000002</b>	<b>41</b>	<b>314</b>	<b>314</b>

Figure 38: Building Summary by Development Report

The Building Summary by Development report displays the report date, the Hub, Field Office, and PHA selected. Then, the report displays the development(s) associated with the PHA and selected for the report. In the **Search Criteria** section, the report displays the option that the user selected in the **Building Status** list when running the report.

The report data presents the number of buildings and units within the selected developments grouped by building type for every individual development. The **Ent. No.** column displays the total number of entrances for buildings of each building type associated with each development. The **No. of Units Reported in Bldg.** column displays the total number of units associated with the buildings included in the report. The **No. of Units Uploaded** column displays the number of units that PHA submitted using the **Development** sub module.

The report also presents the **Total for [development number]** section that summarizes the counts for all the building types.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.



## 1.0 Housing Inventory

### 1.1.8.1.3 Building Detail Report

The Building Detail report (see Figure 39) displays the detailed building data for all the buildings associated with the selected development.

The Building Summary by Development report displays the report date, the Hub, Field Office, and PHA selected. Then, the report displays the development(s) associated with the PHA and selected for the report. In the **Search Criteria** section, the report displays the option that the user selected in the **Building Status** list when running the report.

The screenshot shows the 'Building Detail Report' interface. At the top, it says 'As of 6/21/2010'. Below that, there are fields for 'Hub' (WUHD Chicago Hub), 'Field Office' (SAPH CHICAGO HUB OFFICE), 'Field Office HA' (0100 N. St. Louis Housing Authority), and 'Development Selected' (I.001000000). The 'Search Criteria' section shows 'Status' set to 'Inventory'. A 'Select Page Set' dropdown is set to '1'. The main table has the following data:

Bldg. No.	Ent. No.	Loc.	Status	Bldg. Type	Const. Date	Floor Count	No. Of Units Reported In Bldg.	No. of Units Uploaded
0800	1	1452, hth, sp, gher	Initial Approval Completed	Non-Dwelling Structure		1	0	0
0801	1	over houses 2452, park map/merged	Initial Approval Completed	Theater Structure	12/30/1957	11	25	25
0802	1	over houses 2452, park map/merged	Initial Approval Completed	Elevator Structure	07/07/1957	11	50	50
0803	1	over houses 1452, park map/merged	Initial Approval Completed	Theater Structure	12/30/1957	11	25	25
0804	1	over houses 0452, park map/merged	Initial Approval Completed	Elevator Structure	07/07/1957	11	54	54

Page No: 1  
Showing 1 to 5 of 5 records

Figure 39: Building Detail Report

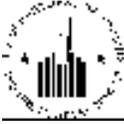
The report data displays all building records providing the following details: number of entrances in the building, location of the building (address), building status, building type, the construction date (the date when the construction of the building was finished), floor count, the number of units reported and number of units uploaded.

Users can sort the report in ascending or descending order by clicking the up or down arrow in any report column.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

### 1.1.8.2 Unit Reports sub Tab

The **Unit Reports** sub tab (see Figure 40) allows users to run unit inventory reports for all buildings within individual developments. Unit reports present a range of up-to-date unit data for any development (or group of developments) in an HA. Users can run five types of unit reports that display various unit



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## 1.0 Housing Inventory

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data: unit details from the **Unit** tab, ACC, occupied and vacant unit counts grouped by unit designation, bedroom count, or development number, unit status changes, and current unit tenant statuses for every unit. Every report also has additional report criteria.

PIC draws the data for these reports from the Building Detail and Unit Detail pages in the **Development** sub module and the **Demo/Dispo** sub module.

To run a report, user must select the appropriate Hub in the **Hub** list and click **Select**. Then, the user must select the appropriate Field Office in the **Field Office** list and then click **Select**. If there is only one Field Office associated with a Hub, then the user must select the appropriate PHA in the **Field Office HA** list and then click **Select**.

Then the user must select the report in the **Report Type** list. Depending on the option selected in the **Report Type** list, the program allows the user to run the following reports: the Unit Detail report, Unit Summary report, Unit Status Changes report, and Unit Status Summary report.

The program displays the list of developments that are associated with the selected PHA. User must select the desired development(s) by clicking the check boxes for the development records in the **Development Code** column. The program also displays the **Select / Deselect All** button to select all the developments, or to clear the selected check boxes.

Depending on the report type, the user will have to edit various additional report criteria. For the **Detailed** option of the **Report Type** list, the user will have to select whether the report will display the occupancy data. To display the occupancy data, the user must select the **Occupancy** check box. If the user clears the **Occupancy** check box, then the program will not include the occupancy information in the report. Also the user must select the desired option in the **Unit Status** list. The units will be included (or excluded) based on the user's selection. The **Unit Detail Complete** list allows the user to set the report to include only units with all the details, units with incomplete details or both types of units. The **ACC Indicator** list allows the user to set the report to include only units with ACC indicator "Yes", units with ACC indicator "No" or both types of units.

The **Summary** and **Summary by Development** option of the **Report Type** list, requires the user to edit the same report criteria as for the **Detailed** option except for the **ACC Indicator** list. The **ACC Indicator** list will be inactive.

The **Status Changes Detailed** and **Status Changes Summary** option of the **Report Type** list requires the user to select the report period using the **Start Date** and **End Date** boxes. The dates must be entered in the MM/DD/YYYY format.

To run the report, the user must click the **Generate Report** button. The report will be displayed in a separate browser window.



## 1.0 Housing Inventory

The screenshot displays the 'Unit Reports' sub-tab interface. At the top, there are navigation tabs: 'Reports', 'Maintain Inventory', and 'LAPPHD (S20) in Motion'. Below these are sub-tabs: 'Development', 'Building', 'Unit', 'Submission', and 'Approval'. The 'Unit Reports' sub-tab is active, showing a navigation bar with 'Building Reports', 'Unit Reports', 'RANS Report', 'Var./Dec. Report', and 'Gen. Unid. Addresses'. The main content area includes a 'Select View:' dropdown set to 'Development'. Below this are search filters: 'Hub:' (7-RNC Kansas City Hub), 'Field Office:' (7ATH KANSAS CITY HUB OFFICE), 'Field Office ILA:' (A001 CORNING), and 'Report Type:' (Detailed). A table lists development codes and names:

Development Code	Development Name
<input type="checkbox"/> 2402100001	WESTGATE
<input type="checkbox"/> 2402100011	---
<input type="checkbox"/> 2402122486	test
<input checked="" type="checkbox"/> Select/De-select all	

Below the table are filters for 'Occupancy' (checked), 'Unit Status' (Inventory), 'Unit Detail Complete' (All), and 'ACC Indicator' (All). A 'Generate Report' button is located at the bottom right.

Figure 40: Unit Reports sub Tab

### 1.1.8.2.1 Unit Detail Report

The Unit Detail report (see Figure 41) displays the detailed data for every unit that matched the report criteria.

The Unit Detail report displays the report date, the Hub, Field Office, and PHA selected. In the **Search Criteria** section, the report displays the option that the user selected in the **Unit Status** list when running the report. The report also displays the **Details Complete**, **ACC Indicator** selections as well as the **Occupancy** option (if selected).

The report lists all the units that match the report criteria. Based on whether the user selected or cleared the **Occupancy** check box when running the report, the program will display the following data:

If the user selected the **Occupancy** option (see Figure 41), the report will display the following information: the building number, entrance number and the unit number, unit designation, unit status type, bedroom count, SSN of the head of household that lives in this unit, his/her first name and last name, date when the head of household started living in the unit (occupancy date), unit tenant status, accessibility designation, whether the unit details are complete and the ACC indicator.



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Unit Detail Report													
As of 6/21/2010													
Hub		: SHCHI Chicago Hub											
FieldOffice		: SAPH CHICAGO HUB OFFICE											
Field Office HA		: IL003 Peoria Housing Authority											
Search Criteria													
Status		: In Inventory											
Details Complete		: ALL											
ACC Indicator Selected		: ALL											
Occupancy		: Selected											
Bldg No.	Ent. No.	Unit No.	Unit Designation	Unit Status Type	Bdrm Cnt	SSN	First Name	Last Name	Occ. Date	Unit Tenant Status Code	Accessible Designation	Dtls Comp.	ACC Unit
H037	1	600037	General Occupancy	Proposed for Removed from Inventory	3					Vacant - Vacant	Not Applicable	Yes	Yes
H016	1	600016	General Occupancy	Initial Approval Completed	3					Vacant - Vacant	Not Applicable	Yes	Yes
H007	1	600007	General Occupancy	Initial Approval Completed	3	429982285	vxroz	hylxq	09/01/2001	Occupied - Assisted Tenant	Not Applicable	Yes	Yes
H004	1	600004	General Occupancy	Initial Approval Completed	3					Vacant - Vacant	Not Applicable	Yes	Yes

Showing 1 to 4 of 4

Figure 41: Unit Detail Report

If the user cleared the **Occupancy** check box, the report would not include the data about the tenant that lives in the unit.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

1.1.8.2.2 Unit Summary by Development Report

The Unit Summary by Development report (see Figure 42) displays the unit counts by development, bedroom count, and sorted by unit designation types. The first tier of the report displays the information about the selected Hub, Field Office, PHA, and development(s). The second tier of the report (**Search Criteria** area) displays the selected searching options.

The unit counts are presented per development and unit designation. Within the unit designation, the unit counts are broken down by number of bedrooms in a unit, occupancy, vacancy, and ACC indicator. The **Total** section displays the total unit counts not broken down by bedroom count.

For every unit designation in every selected development, the table displays the following columns:

- The **Bedroom Size** column indicates the number of bedrooms.
- The **Unit Count** column displays the number of units within every bedroom number category including the total number of units in the **Total** section.



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- The **ACC Unit Count** column displays the number of ACC units broken down by bedroom count as well as the total number of ACC units. ACC units are considered to be units that have ACC indicator set to “Y”.
- The **Occupied** unit column displays the number of units that are occupied broken down by bedroom count.
- The **Vacant** unit column displays the number of units that are vacant broken down by bedroom count.

**Unit Summary Report**  
As of 7/20/2010

Hub: CH2V Cleveland Hub  
Field Office: MULTIHANAPUR PROGRAM CENTER  
Field Office ES: IN02 Veterans Housing Authority  
Development Selected: IN02001001

Search Criteria:  
Status: ALL  
Details Complete: ALL

Development: IN02001001

Unit Designation: General Occupancy

Bed Room Size	Unit Count	ACC Unit Count	Occupied Units	Vacant Units
0	0	0	0	0
1	26	26	15	0
2	76	76	67	9
3	21	21	8	8
4	0	0	0	0
5	0	0	0	0
<b>Total : General Occupancy</b>	<b>03</b>	<b>03</b>	<b>77</b>	<b>6</b>

Unit Designation: Mixed Elderly and Disabled Not HUD Officially Designated

Bed Room Size	Unit Count	ACC Unit Count	Occupied Units	Vacant Units
0	0	0	0	0
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
<b>Total : Mixed Elderly and Disabled Not HUD Officially Designated</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Figure 42: Unit Summary by Development Report

For merged unit designation the report only displays the **Bedroom Size**, **Unit Count**, and the **ACC Unit Count** columns.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

### 1.1.8.2.3 Unit Summary Report

The Unit Summary report (see Figure 43) displays the unit counts for every unit designation sorted by bedroom count in all the developments selected for the report.

The first tier of the report displays the information about the selected Hub, Field Office, PHA, and development(s). The second tier of the report (**Search Criteria** area) displays the selected searching options.

The unit counts are presented per development and unit designation. Within the unit designation, the unit counts are broken down by number of bedrooms in a unit, occupancy, vacancy, and ACC indicator. The **Total** section displays the total unit counts not broken down by bedroom count.



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For every unit designation in every selected development, the table displays the following columns:

- The **Bedroom Size** column indicates the number of bedrooms.
- The **Unit Count** column displays the number of units within every bedroom number category including the total number of units in the **Total** section.
- The **ACC Unit Count** column displays the number of ACC units broken down by bedroom count as well as the total number of ACC units. ACC units are considered to be units that have ACC indicator set to “Y”.
- The **Occupied** unit column displays the number of units that are occupied broken down by bedroom count.
- The **Vacant** unit column displays the number of units that are vacant broken down by bedroom count.

**Unit Summary Report**  
As of 7/20/2010

Field:  ALL  
Field Office:  SEPH INDIANAPOLIS PROGRAM CENTER  
Field Office IDA:  INDIANAPOLIS Housing Authority  
Development Selected:  IN002001001

Search Criteria: \_\_\_\_\_  
Status:  ALL  
Details Complete:  ALL

Unit Designation: General Occupancy	Bed Room Size	Unit Count	ACC Unit Count	Occupied Units	Vacant Units
	0	0	0	0	0
	1	26	26	15	0
	2	76	76	57	0
	3	11	11	8	3
	4	0	0	0	0
	5	0	0	0	0
<b>Total: General Occupancy</b>		<b>113</b>	<b>113</b>	<b>77</b>	<b>36</b>

Unit Designation: Mixed Family and Disabled (Not HUD Officially Designated)	Bed Room Size	Unit Count	ACC Unit Count	Occupied Units	Vacant Units
	0	0	0	0	0
	1	0	0	0	0
	2	0	0	0	0
	3	0	0	0	0
	4	0	0	0	0
	5	0	0	0	0
<b>Total: Mixed Family and Disabled (Not HUD Officially Designated)</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

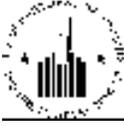
Figure 43: Unit Summary Report

For merged unit designation the report only displays the **Bedroom Size**, **Unit Count**, and the **ACC Unit Count** columns.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

### 1.1.8.2.4 Status Changes Detailed Report

The Unit Status Changes Detailed report (see Figure 44) displays all the transaction records for unit tenant status changes, unit designation changes, and the accessibility indicator changes.



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Users can run the report for a specific date range and any number of selected developments. The first tier of the report displays the selected date range and allows the user to select a development to display the transactions.

The transactions records include the following information:

- The number of the records in the ascending order.
- The **Dev.No.** column specifies the development associated with the transaction. The user can click the column heading to sort the report data by development number.
- The **Building No.** column identifies the building associated with the unit. The user can click the column heading to sort the report data by building number.
- The **Building Entrance No.** column displays the building entrance number associated with the unit. The user can click the column heading to sort the report data by building entrance number.
- The **Unit No.** column displays the unit number. The user can click the column heading to sort the report data by unit number.
- The **Field Type** column displays the unit property that was changed. The report displays data for the following unit properties: unit designation, unit tenant status, and the accessibility indicator. The user can click the column heading to sort the report data by field type.
- The **Old Value** column displays the original unit property. The user can click the column heading to sort the report data by the old value.
- The **New Value** column displays the modified unit property. The user can click the column heading to sort the report data by the new value.
- The **Effective Date** column displays the date on which the change takes effect. The unit designation and the accessibility indicator changes take effect immediately upon approval and the when changing unit tenant status the user is required to indicate the effective date. The user can click the column heading to sort the report data by the effective dates.
- The **Comments** column displays the text that users enter in the **Comments** box.
- The **User** column displays the name of the user that performed a change. The user can click the column heading to sort the report data by user names.
- The **Update Date** column displays the date when the transaction was performed or proposed. The user can click the column heading to sort the report data by the update dates.



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 <div style="text-align: right;">  <a href="#">Download in Excel</a>   <a href="#">Print</a> </div> <h3 style="text-align: center;">Units Status Changes Report</h3>											
Report Start Date:		05/20/2009									
Report End Date:		07/20/2010									
Development Number:		IL001000001									
Records 1 - 25 of 36 <a href="#">(View All)</a>											<a href="#">&lt;&lt; Prev page</a> <a href="#">1</a> <a href="#">2</a> <a href="#">Next Page &gt;&gt;</a>
#	Dev. No.	Building No.	Building Entrance No.	Unit No.	Field Type	Old Value	New Value	Effective Date	Comments	User	Update Date
1	IL001000001	0134	6	013406	Unit Status/Reason Change	Vacant	Assisted Tenant	08/05/2009	User MP8591 has changed the Unit Status from VACLUP to OCCAT	SHERROD, VERONICA	09/04/2009
2	IL001000001	0134	4	013404	Unit Status/Reason Change	Vacant	Assisted Tenant	06/01/2009	User MP8591 has changed the Unit Status from VACLUP to OCCAT	SHERROD, VERONICA	06/05/2009
3	IL001000001	0133	5	013305	Unit Status/Reason Change	Vacant	Assisted Tenant	09/12/2009	User MP8591 has changed the Unit Status from VACLUP to OCCAT	SHERROD, VERONICA	10/09/2009
4	IL001000001	0133	5	013305	Unit Status/Reason Change	Assisted Tenant	Vacant	06/01/2009	User sp_oleffdt has changed the Unit Status from OCCAT to VACLUP	sp_oleffdt	06/05/2009
5	IL001000001	0133	3	013303	Unit Status/Reason Change	Vacant	Assisted Tenant	10/01/2009	User MP8591 has changed the Unit Status from VACLUP to OCCAT	SHERROD, VERONICA	10/06/2009
6	IL001000001	0130	6	013007	Unit Status/Reason Change	Vacant	Assisted Tenant	08/27/2009	User MP8591 has changed the Unit Status from VACLUP to OCCAT	SHERROD, VERONICA	09/04/2009
7	IL001000001	0130	6	013007	Unit Status/Reason Change	Assisted Tenant	Vacant	06/10/2009	User MP8591 has changed the Unit Status from OCCAT to VACLUP	SHERROD, VERONICA	07/13/2009
8	IL001000001	0130	4	013005	Unit Status/Reason Change	Assisted Tenant	Vacant	09/09/2009	User MP8591 has changed the Unit Status from OCCAT to VACLUP	SHERROD, VERONICA	09/11/2009

Figure 44: Unit Status Changes Detailed Report

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

#### 1.1.8.2.5 Unit Status Changes Summary Report

The Unit Status Changes Summary report (see Figure 45) displays the summarized unit counts distributed by unit tenant statuses. To run the report, the user must select the Hub, Field Office, PHA, the **Status Changes Summary** option in the **Report Type** list.

The program will refresh the page and allow the user to select the developments to run the report. The user can select one or more development(s) in the list of developments (to select or clear all developments, the user can click the **Select/Deselect All** check box). Then, the user must select the desired date range. The date range can be selected doing the **Start Date** and **End Date** boxes. The dates must be entered in the MM/DD/YYYY format.

Then, the user can run the report by clicking the **Generate Report** button.



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Date	Dev/Opener	Count by Assnld Tenant	Count by Non-Assnld Tenant Over-Docmnt	Count by Refoldn Officer	Count by Employee	Count IID Approved - Data Dupo Approval	Count IID Approved - County Cost	Count IID Approved - Comm Utliprve	Taxml	Count IID Approved - Mutual Conditions	Count IID Approved - Undermap Moderniztn	Count IID Approved - Special Disaster	Occupied Indicator	Yes	No	Count by Special Dis - SCS Sufficiency Approval	Count by Special Dis - Other	Count by Special Dis - Other	Count by Administration	Count by Neighborhood	Count by Residnt	Count by Residnt
07/2010	1400001201	01	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
08/2010	1400001201	79	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
09/2010	1400001201	79	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
10/2010	1400001201	77	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
11/2010	1400001201	77	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
12/2010	1400001201	79	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
01/2011	1400001201	77	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
02/2011	1400001201	81	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
03/2011	1400001201	81	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
04/2011	1400001201	81	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
05/2011	1400001201	81	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
06/2011	1400001201	81	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00
07/2011	1400001201	81	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00	00

Figure 45: Unit Status Changes Summary Report

The first tier of the report displays the selected start and end dates of the report, as well as the development number(s) selected. The user can also set the report to display the unit counts at the first or the last day of the month. The report displays the dates for every month within the selected report range, the development number and the counts for every unit tenant status as of the date in the **Date** column.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

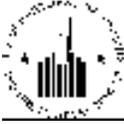
1.1.8.3 RASS Report sub Tab

The **RASS Report** sub tab (see Figure 46) allows users to run the RASS report. The RASS report provides occupied units data for RASS (Resident Assessment sub system) use. RASS team uses the information provided by this report to send the survey mailers.

To run the report, the user must select the appropriate Hub, Field Office and PHA. The program refreshes the page and displays the list of developments associated with the selected PHA. The user must select the desired development(s) to include in the report. Then, the user must select the desired option in the **Occupied Indicator** list. The available options are the **Yes**, **No**, and **All**. If the user selects the **Yes** option, then the report will only include the occupied units. If the user selects the **No** option, then the report will only include the vacant units. If the user selects the **All** option, then the report will include both the occupied and the vacant units.

The user must also select the report date range using the **Last Update Date From** and **To** boxes. The report will only include the resident information with the update dates within the update date range. The dates must be entered in the MM/DD/YYYY format.

To run the report, the user must click the **Generate Report** button.



## 1.0 Housing Inventory

The screenshot shows the RASS Report sub tab interface. It includes a navigation menu with tabs for Reports, Building Inventory, and CAPLIND UNIT Certification. The RASS Report tab is selected. Below the navigation, there are filters for Development View, Hub, Field Office, and Field Office HA. A table displays development codes and names. At the bottom, there are filters for Occupied Indicator and Last Update Date.

Development Code	Development Name
00000000	00000000
00000000	00000000
00000000	00000000

Figure 46: RASS Report sub tab

### 1.1.8.3.1 RASS Report

The RASS Report (see Figure 47) displays the public housing resident information for REAC RASS sub system.

The first tier of the report displays the Hub, Field Office and PHA information. The second tier of the report displays the search criteria and the total number of records that matched the search criteria. The **Select Page Set** list allows the user to browse the report data by pages more efficiently.

The report provides the following data:

- The **Dev. No.** column displays the development number in PIC. The user can click the column name to sort the report data by the development numbers in the ascending or descending order.
- The **Bldg/Ent/Unit** column displays the building, entrance and unit numbers accordingly. The user can click the column name to sort the report data by the building/entrance/unit numbers in the ascending or descending order.
- The report also includes the **Physical Address** and the **Mailing Address** graphs. Within the address graphs the user can sort the report data by city or state in the ascending or descending order.
- The **Occ. Ind.** Column displays the occupancy indicator. It allows the user to see whether the unit is occupied or vacant when the user selects the **All** option. The user can click the column name to sort the report data by the occupancy indicator in the ascending or descending order.
- The **Last Update Date** column displays the date when the last record update was made for the tenant in the unit. The user can click the column name to sort the report data by the last update date in the ascending or descending order.



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**RASS Report**

Hub: **SHCLV Cleveland Hub**  
Field Office: **SIPPI INDIANAPOLIS PROGRAM CENTER**  
Field Office PHA: **IN002 Virmanex Housing Authority**

Display Indicator: **All**  
Update Date From: **12/30/2009**  
Update Date To: **7/22/2010**  
Developments: **ALL**

Total No. Of Records: **83**  
Update Date To: **7/22/2010**

Select Page No: **1-9**

Dev. No.	E.D.S./R.I./P.H.A.	Physical Address				Mailing Address				Date Inl.	Last Update Date
		Address	City	State	Zip Code	Address	City	State	Zip Code		
ND02001001	10/20/201	10201/201 mandy 342	INDIANAPOLIS	IN	46291					Y	07/21/2010
ND02001001	10/20/201	10203/203 mandy 142	INDIANAPOLIS	IN	46291					Y	07/21/2010
ND02001001	11/20/202	11202/202 mandy 242	INDIANAPOLIS	IN	46291					Y	07/21/2010
ND02001001	11/20/204	11204/204 mandy 042	INDIANAPOLIS	IN	46291					Y	07/21/2010
ND02001001	12/20/205	12205/205 mandy 842	INDIANAPOLIS	IN	46291					Y	07/21/2010
ND02001001	12/20/207	12207/207 mandy 742	INDIANAPOLIS	IN	46291					Y	07/21/2010
ND02001001	12/20/206	12206/206 mandy 842	INDIANAPOLIS	IN	46291					Y	07/21/2010

Figure 47: RASS Report

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

**1.1.8.4 Vac/Occ Report sub Tab**

The **Vac/Occ Report** sub tab (see Figure 48) allows the user to run Vacancy report and the Occupancy report. The Vacancy report lists all the vacant units in the selected development(s) with the total number of vacant units. The Occupancy report lists all the occupied units within the selected development(s) providing the total number of occupied units.

To run the Vacancy and Occupancy reports, the user must select the Hub, Field Office and the PHA. Then, the program will refresh the page and display the list of developments associated with the selected PHA. The user can include one development in the report, more than one or all developments. To select include a development in the report, the user must select the check box. To exclude a development from the report, the user must clear the check box. The user can also select or clear all the check boxes by using the **Select / Deselect All** check box.

Then, the user must select the report type, i.e. the **Vacancy** or **Occupancy** option in the **Select Report Type** area. The **Occupancy** option is selected by default. To run the report, click the **Generate Report** button.



### 1.0 Housing Inventory

Figure 48: Vac/Occ Report sub tab

#### 1.1.8.4.1 Vacancy Report

The Vacancy Report (see Figure 49) lists the vacant units associated with the selected development(s). The first tier of the report displays the Hub, the Field Office, the PHA, and the report type. The **Development Code** list allows the user to select the development number from the developments included in the report. To select the development, the user must select the appropriate option and then click the **Select** button.

The **Total Records** area displays the total number of records included in the report. The **Page Set** list allows users to navigate the report pages should the report contain more than one page.

Bldg Num	Bldg Ent	Unit No	Vacant Days
0101		1	0000001
0121		10	001161
0121		7	001158
0125		4	001124
0127		2	001112
2154		1	021247
2155		2	021244
2155		2	021243
2165		1	021225
2173		2	021213

Figure 49: Vacancy report

The **Bldg Num** column displays the building numbers associated with the vacant unit numbers within the selected development. The **Bldg Ent** column displays the building entrance numbers associated with the vacant unit numbers within the associated buildings. The **Unit No** column displays the number of the vacant unit. The **Vacant Days** column displays the number of days passed since the unit was vacated.



## 1.0 Housing Inventory

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

### 1.1.8.4.2 Occupancy Report

The Vacancy Report (see Figure 49) lists the vacant units associated with the selected development(s). The first tier of the report displays the Hub, the Field Office, the PHA, and the report type. The **Development Code** list allows the user to select the development number from the developments included in the report. To select the development, the user must select the appropriate option and then click the **Select** button.

The **Total Records** area displays the total number of records included in the report. The **Page Set** list allows users to navigate the report pages should the report contain more than one page.

Vacancy Occupancy Report											
Hub:	4IEMIA Miami Hub										
Field Office:	4DPH MIAMI HUB OFFICE										
Field Office PHA:	FL002 ST. PETERSBURG										
Report Type:	Occupancy				Total Records:		3				
Development Code:	F 00200001 <input type="button" value="Select"/>				Page Set:		1 - 1		<input type="button" value="Excel"/>		
Unit Num	Bldg Num	Unit No	SSN Head	First Name	Last Name	Occupancy Date	Bedroom Count	Monthly Rent	Household Size		
2		1	2305419	256527054	hrood	razzi	03/01/2002	0	217	1	
2		1	2305425	257142226	wozni	ozni	10/01/2002	0	254	1	
2		1	2305000	451801121	mbozni	bozni	05/12/2001	1	105	1	
1											

Figure 50: Occupancy Report

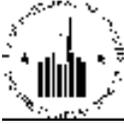
The **Bldg Num** column displays the building numbers associated with the vacant unit numbers within the selected development. The **Bldg Ent** column displays the building entrance numbers associated with the vacant unit numbers within the associated buildings. The **Unit No** column displays the number of the vacant unit. The **SSN Head, First Name, Last Name** column display the corresponding information about the head of household that lives in the unit. The **Occupancy Date** column displays the date when the unit was occupied by the current head of household. The **Bedroom Count** column displays the number of bedrooms in the unit. The **Household Size** column displays the number of people (members of household) that live in the unit.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

### 1.1.8.5 Geo Coded Addresses sub Tab

The **Geo Coded Addresses** sub tab (see Figure 51) allows users to view the data received from GSC (Geo Coding service Center).

To run the Geo Coded Addresses reports, the user must select the Hub, Field Office and the PHA. Then, the program will refresh the page and display the list of developments associated with the selected PHA. The user can include one development in the report, more than one or all developments. To select include a development in the report, the user must select the check box. To exclude a development from the



## 1.0 Housing Inventory

report, the user must clear the check box. The user can also select or clear all the check boxes by using the **Select / Deselect All** check box.

The **No of Rows to Display** list allows users to select the number of rows to be displayed per page which affects the number of pages in the report. The **Sort Report Data by** list and the **Order by** list allow the user to determine the way the program presents the report data.

To run the report, the user must click the **Generate Report** button.

Development Code	Development Name
<input type="checkbox"/> 140000001	WYNTHORP
<input type="checkbox"/> 140000002	Test
<input type="checkbox"/> 140000003	Test

Figure 51: Geo Coded Addresses sub tab

### 1.1.8.6 Geo Coded Addresses Report

The Geo Coded Addresses report (see Figure 52) displays the data received by IMS from GSC. This data is used in IMS to allow users to run Form 50058 reports by such entities as Locality or Congressional District.

The report displays the following data:

- The **Development No** column displays the development number.
- The **Building No** column displays the building number.
- The **Building Entrance No** column displays the building entrance number.
- The **Address** column displays the building entrance address.
- The **City** column displays the building entrance city name.
- The **State** column displays the building entrance state.
- The **Zip Code** column displays the building entrance zip code.
- The **Locality Code** column displays the building entrance locality code.
- The **Census Tract** column displays the census tract code.
- The **Block Code** displays the building entrance block code.
- The **Congressional District Code** column displays the congressional district code associated with the building entrance number.
- The **Geo Match Code (or Equivalent English)** column displays the result of the geo coding matching. For example, if the zip code of the address is not found, the column will display Z.



## 1.0 Housing Inventory

 <span style="float: right;">  <a href="#">Download in Excel</a>  <a href="#">Print</a> </span> <h3 style="text-align: center;">Geo Coded Addresses Report</h3>												
HQ Division:		Public and Indian Housing										
HQ Office:		PO Field Operations										
Hub:		4HMA Miami Hub										
Field Office:		4DPH MIAMI HUB OFFICE										
Field Office HA:		FL002 ST. PETERSBURG										
<b>Legend for Geo Match Code</b>												
[Blank]: Match Successful			Z: Zip Code Not Found			B: Insufficient Address Info			S: Street Name Not Found In Zip Code			
H: House/Box Range Not Found On Street			A: Apt Range Not Found			M: Multiple Matches Found			N: Geo-Coding Incomplete			
C: Critical Error			E: External Match			X: Geo-Coding Error						
Records 101 - 150 of 343 <a href="#">(View All)</a>											<a href="#">&lt;&lt; Prev page</a> <a href="#">1</a> <a href="#">2</a> <a href="#">3</a> <a href="#">4</a> <a href="#">5</a> <a href="#">6</a> <a href="#">7</a> <a href="#">Next Page &gt;&gt;</a>	
#	▲ Development No.	Building No.	Building Entrance No.	Address	City	State	Zip Code	Locality Code	Census Tract	Block Code	Congressional District Code	Geo Match Code (or Equivalent English)
101	FL002000003	40	1	sgflh gvvigh wi12 4133	tifyhivgk .gh	FL	33712	9999	020900	1		
102	FL002000003	40	2	sgflh gvvigh wi12 2133	tifyhivgk .gh	FL	33712	9999	020900	1		
103	FL002000003	41	1	sgflh gvvigh wi12 4233	tifyhivgk .gh	FL	33712	9999	020900	1		
104	FL002000003	41	2	sgflh gvvigh wi12 2233	tifyhivgk .gh	FL	33712	9999	020900	1		
105	FL002000003	42	1	sgflh gvvigh wi12 4433	tifyivgk .gh	FL	33712	9999	020900	1		
106	FL002000003	42	2	sgflh gvvigh wi12 2433	tifyhivgk .gh	FL	33712	9999	020900	1		
107	FL002000003	42	3	sgflh gvvigh wi12 0433	tifyhivgk .gh	FL	33712	9999	020900	1		
108	FL002000003	43	1	sgflh vfmvez mlwtmzo 4012	tifyhivgk .gh	FL	33712	9999	020900	1		

Figure 52: Geo Coded Addresses Report

### 1.1.9 Maintain Inventory

The **Maintain Inventory** tab allows users to view the development, building, and unit information (see Figure 53). PHA users have the read-only access to this tab.



## 1.0 Housing Inventory

Development Number	Development Name	Total Building Structure Count	Total Unit Count
1402520201	HILL AND WILCOX	8	20

Figure 53: Maintain Inventory tab

The **Maintain Inventory** tab contains six sub tabs:

- **Development Inventory** sub tab allows users to modify development inventory for the selected PHA.
- **Building Inventory** sub tab allows users to modify building inventory for the selected PHA
- **Unit Inventory** sub tab allows users to modify unit inventory for the selected PHA
- **Development Regrouping** sub tab allows users to move the buildings from one development to another.
- **Reports** sub tab allows users to run the National Report.
- **Terminate Development** sub tab allows users to terminate developments when there are existing buildings and units associated with it.

The mentioned above sub tabs are described in detail below.

### 1.1.9.1 Development Inventory sub Tab

The **Development Inventory** sub tab lists the details of the developments present for a selected PHA. This page allows users to view and edit development data. Users can also remove development from the inventory database if all the conditions pertaining to the removal are met. However, if any buildings or units assigned to the selected development are in the demo / dispo process, the user will not be able to edit any of the development data.

The development inventory listed in the page is reflected by the user selected options from the **Select View**, **HQ Division**, **Hub**, **Field Office** and **Field Office HA** lists.

#### 1.1.9.1.1 Searching for a Development

The user can specify the number of the development in the **Development Number** box, and the name of the development in the **Development Name** box and click the **Search** button. The system will display the inventory information for that particular development number.



## 1.0 Housing Inventory

### 1.1.9.2 Building Inventory sub Tab

The **Building Inventory** sub tab lists the details of the buildings associated with a specific development that the user can select in the **Physical Development** list (see Figure 54).

The building inventory information listed in the page is determined by the options selected by the user from the **Select View**, **HQ Division**, **Hub**, **Field Office**, **Filed Office HA**, and **Physical Development** lists.

Mid section of the page allows user to search within the development by entering the building or entrance number in the **Building Number** box and the **Building Entrance Number** box, and then clicking **Search** button (see Figure 54).

The screenshot shows the 'Building Inventory' sub-tab interface. At the top, there are navigation tabs: Reports, Main Inventory, and PARTIAL UNIT. Below these are sub-tabs: Development Inv, Building Inv (selected), Unit Inv, Dev Regrouping, Reports, and Terminate Dev. The 'Select View' dropdown is set to 'Development'. The 'Hub' dropdown is set to '7-RMC Kansas City Hub'. The 'Field Office' dropdown is set to '7ATH KANSAS CITY HUB OFFICE'. The 'Field Office HA' dropdown is set to 'ACR STANTON'. The 'Physical Development' dropdown is set to '140550001 HALLAND VILLAGE'. Below these filters is a 'Building Inventory Search' section with input fields for 'Building Number' and 'Entrance Number', and a 'Search' button. Below the search section is a 'Building Inventory Information' section with a note: 'It is possible to delete a building/ building entrance only if there are no units within that building/building entrance. Additionally, the building/ building entrance and none of its units can be in Demo/Dispo process to modify or delete the building/ building entrance.' Below this is a table showing 'Buildings 1 to 15 of 15' and 'Page No: 1 of 1'. The table has columns: Building No., Building Entrance No., Building Name, Building Status type, Unit Count, Edit Building?, and Delete Building?. The table contains four rows of data. The 'Edit Building?' column for the last row is highlighted with a red box.

Building No.	Building Entrance No.	Building Name	Building Status type	Unit Count	Edit Building?	Delete Building?
1	1		Initial Approval Completed	1	<a href="#">Edit</a>	
1	2		Initial Approval Completed	1	<a href="#">Edit</a>	
10	1	www.village	Initial Approval	0	<a href="#">Edit</a>	
2	1		Initial Approval Completed	1	<a href="#">Edit</a>	

Figure 54: Building Inventory List Page

#### 1.1.9.2.1 Editing Building Information

The user can change the information about any particular building. If the user clicks the **Edit** link in the **Edit Building?** column. The **Edit Building and Entrance Number** section is displayed (see Figure 55). The user can change the number in the **Building Number** and **Building Entrance Number** boxes, and provide comments explaining the change in the **Comments** box. All three options are required and have to be filled by the user. When finished entering data, click **Save**. The changes made will be effective immediately.



## 1.0 Housing Inventory

Reports   **Maintain Inventory**   CAPFUND B&U Certification

Development   Building   Unit   Submission   Approval

**Development Inv   Building Inv   Unit Inv   Dev Regrouping   Reports   Terminate Dev**

HQ Office:                      Public and Indian Housing  
HQ Division:                    PO Field Operations  
Hub:                                6HSNA San Antonio Hub  
Field Office:                    6JPH SAN ANTONIO HUB OFFICE  
Field Office HA:                TX001 Austin  
Physical Development:        TX001000001 CHALMERS COURTS

**Edit Building and Entrance Number**

Current Building Number:                      0101  
Current Entrance Number:                      1  
Building Number:                                 \*  
Building Entrance Number:                       \*  
Comments:                                          \*

\* Designates a required field

Save   Cancel

Figure 55: Edit Building and Entrance number page

### 1.1.9.3 Unit Inventory sub Tab

The **Unit Inventory** sub tab lists the details of the units for a specific development selected in the **Physical Development** list (see Figure 56). This page also enables users to view the information for other developments in the HAs permitted by user security access role.

The unit inventory information listed in the page is determined by the user selected options from the **Select View, HQ Division, Hub, Field Office, Field Office HA, and Physical Development** lists.



## 1.0 Housing Inventory

Unit Number	Building Number	Entrance Number	Unit Status Type	Tenant Name (Last, First Name)
0406A	5	1	Initial Approval Completed	deboy, dfr
0406B	5	2	Initial Approval Completed	white, gailin
0406C	5	3	Initial Approval Completed	imrods, emany
0406D	5	4	Initial Approval Completed	imrods, we

Figure 56: Unit Inventory sub tab

### 1.1.9.3.1 Unit Inventory Search

The program can display all unit records associated with the development, or users can run a search and display only unit(s) that matched the search criteria. Users can search the inventory by **Unit Number**, **Building Number**, **Entrance Number**, **First Name** or **Last Name** of the tenant inhabiting the unit. The **Unit Inventory Search** section of the **Unit Inventory** sub tab provides these options. After entering the data, the user should click **Search** button to run the search (see Figure 57).

Unit Number:  First Name:   
Building Number:  Last Name:   
Entrance Number:

Figure 57: Unit Inventory Search

### 1.1.9.4 Development Regrouping sub Tab

The **Development Regrouping** sub tab allows users to move buildings from one development to another. The **Proposal List** section lists the information regarding the development regrouping proposals. In order to perform the regrouping, the user needs to create a proposal by clicking the **Create Proposal** link on the **Development Regrouping** sub tab (see Figure 58). Proposals can be filtered based on the proposal status (see Figure 59).



1.0 Housing Inventory

Reports		Maintain Inventory		CAPFUND B&U Certification	
Development	Building	Unit	Submission	Approval	
Development Inv	Building Inv	Unit Inv	Dev Regrouping	Reports	Terminate Dev

Select View:

HQ Office: Public and Indian Housing

HQ Division:

Hub:

Field Office:

Field Office HA:

**Proposal List**

Proposal Status:  [Create a Proposal](#)

Proposals 1 to 7 of 7  
Page No: 1 of 1

Proposal Number	Proposal Status	Submission Date	Submission Quarter Date	Approval/Rejection Date	Effective Date	Edit/Delete
<a href="#">000000010</a>	Approved/Effective FYB	05/27/2008	12/31/2008	07/10/2008	03/19/2009	
<a href="#">000000014</a>	Approved/Effective FYB	05/28/2008	12/31/2008	07/10/2008	03/19/2009	
<a href="#">000000289</a>	Effective	02/10/2009	03/31/2009	02/18/2009	03/19/2009	
<a href="#">000000290</a>	Effective	02/10/2009	03/31/2009	02/18/2009	03/19/2009	
<a href="#">000000298</a>	Submitted	11/18/2009	12/31/2009			
<a href="#">000000671</a>	Draft					<a href="#">Edit Delete</a>
<a href="#">000000674</a>	Draft					<a href="#">Edit Delete</a>

Proposals 1 to 7 of 7  
Page No: 1 of 1

Figure 58: Development Regrouping sub tab

A particular proposal can be retrieved based on current status. The options in the **Proposal Status** list include **All**, **Approved/Effective FYB**, **Draft**, **Effective**, **Rejected**, and **Submitted**.

Proposal Status:	<input type="text" value="ALL"/> <ul style="list-style-type: none"> <li>ALL</li> <li>Approved/Effective FYB</li> <li>Draft</li> <li>Effective</li> <li>Rejected</li> <li>Submitted</li> </ul>
------------------	---

Figure 59: Options in the Proposal Status list



## 1.0 Housing Inventory

### 1.1.9.4.1 Editing a Proposal

Users can modify existing proposal by clicking the **Edit** link in the **Edit / Delete** column in the **Proposal List** section corresponding to the desired proposal number. When a user clicks on the link, the system opens a new page where the user can edit the information and can submit it.

Figure 60: Edit Proposal section

### 1.1.9.4.2 Deleting a Proposal

The application allows the user to delete an existing proposal by clicking on the **Delete** link in the **Edit / Delete** column in the **Proposal List** section corresponding to the desired proposal number. When the user clicks on the link, the system displays the following warning message: "The proposal will be deleted. Do you want to continue?" prompting the user to click the **Ok** or **Cancel** button.

Figure 61: System displaying warning message

### 1.1.9.4.3 Creating a Proposal

To create a proposal, the user must click the **Create Proposal** link in the **Development Regrouping** sub tab. The system displays the following warning message: "A Proposal will be created. Do you want to continue?" if the user clicks the **Ok** button, the systems will display a new page where user can create a proposal. If the user clicks **Cancel**, the proposal will not be created.

Figure 62: System displaying a warning message when the user attempts to create a proposal



### 1.0 Housing Inventory

The new page displays the **Available Developments**, **Proposed Developments** lists, and **Available Buildings** and **Proposed Buildings** boxes, and the **Save** and **Cancel** button.

Figure 63: Creating a proposal

When a user selects one development from the **Available Developments** list, the program refreshes the page and displays the buildings associated with the selected development in the **Available Buildings** box.

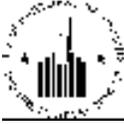
When a user selects the desired buildings from the **Available Buildings** box and clicks the  button, the system displays the selected building in the **Proposed Buildings** box. The user must save the proposal before submitting it. To save the proposal, the user must click **Save**. To submit the proposal, the user must click **Submit**. Once the proposal is submitted, the system displays the following message: "The proposal has been submitted successfully". To complete creating and submitting the proposal, the user must click the **Done** button. When user clicks **Done**, the system refreshes the page and displays the **Dev Regrouping** sub tab. The nightly batch will run every night and regroup the submitted proposals.

Figure 64: Proposal submitted successfully

#### 1.1.9.5 Reports sub Tab

The **Reports** sub tab allows user to retrieve the PHA Configuration Change Request Report on a National level only, but results can be narrowed down by the status of the development regrouping proposals using the **Proposal Status** list (see Figure 65). In order to retrieve the report, the user should select the desired **Proposal Status**, **Number of rows to display**, and click the **Generate Report** button. A report will be displayed in the separate screen.

Figure 65: Reports tab



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### 1.1.9.6 Terminate Development sub Tab

The **Terminate Development** sub tab for a PHA user displays a list of developments (see Figure 66). Since the PHA user has no data editing privileges in the **Maintain Inventory** tab, the **Terminate Development** sub tab allows a read-only access.

Development Number	Development Name	Total Building Structure Count	Total Unit Count
R02700001	CLAYTON HEIGHTS	25	186
R02700002	BRIDGEMILL COURT	44	160
R02700003	FALL OAKS	30	114
R02700004	NORTH HIGHLANDS	25	185
R00000	WARM VILLAGES	0	0

Figure 66: Terminate Development

### 1.1.10 CAPFUND B&U Certification Tab

The **CAPFUND B&U Certification** tab (see Figure 67) allows PHA users to verify the capital funding data and submit the capital funding certification.

The data certification process proceeds as follows:

1. PHA reviews the data for inaccuracies.
2. PHA corrects any data inaccuracies which it is able to correct.
3. PHA certifies all of the developments that have accurate data.
4. PHA provides Help ticket number which reports the data inaccuracy for correction by HUD and marks the developments for which it cannot correct inaccurate PIC data as “rejected.”

Once all of the PHA’s developments have been either marked “certified” or “rejected,” the PHA submits the certification.



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Figure 67: CAPFUND B&U Certification tab

The Capital Fund Data Certification pages (the Capital Fund Building and Unit Data Certification tab page and the Development Details page) in PIC display the state of a PHA's inventory as of the reporting date established by the Office of Public and Indian Housing (PIH). PIH normally sets the reporting date at September 30 of the previous Federal Fiscal Year (e.g. 9/30/2009).

To certify developments, the user must select the check boxes for every development and either click **Certify** or **Reject**. To reject a development, the user must have a PIC Help desk ticket number. To enter a PIC Help desk ticket number, the user must click the development number and enter the PIC Help desk ticket number on the development details page. Then, the user may enter comments and click **Save** to save the updates. The user can also click the **Reset Development Status** button to clear the status selection.

After completing all the development certifications, the user must click **Submit** to complete the Capital Fund Certification process.

Development Number	Development Status	MOA	PIC Ticket No.	Certification Status
<a href="#">U-3001008</a>	Management	03/01/1954		<input type="checkbox"/>
<a href="#">U-3001009</a>	Management	03/01/1954		<input type="checkbox"/>
<a href="#">U-3001010</a>	Management	04/01/1962		<input type="checkbox"/>
<a href="#">U-3001011</a>	Management	05/06/1970		<input type="checkbox"/>
<a href="#">U-3001013</a>	Management	08/31/1971		<input type="checkbox"/>
<a href="#">U-3001016</a>	Management	03/31/1974		<input type="checkbox"/>
<a href="#">U-3001017</a>	Terminated	02/01/1979		<input type="checkbox"/>
<a href="#">U-3001018</a>	Management	05/01/1975		<input type="checkbox"/>
<a href="#">U-3001020</a>	Management	06/17/1976		<input type="checkbox"/>
<a href="#">U-3001022</a>	Management	07/07/1977		<input type="checkbox"/>
<a href="#">U-3001025</a>	Management	04/30/1980		<input type="checkbox"/>
<a href="#">U-3001024</a>	Management	05/31/1978		<input type="checkbox"/>

Figure 68: CAPFUND B&U Certification tab



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The Data Certification pages display data that is stored elsewhere in PIC (usually accessible from the **Development** or **Inventory Removals** sub modules of the **Housing Inventory** module. Therefore, PHAs cannot correct erroneous information on the Capital Fund Data Certification pages themselves. Thus, PHAs must navigate to the location where PIC stores the source information that the Capital Fund Data Certification pages display in order to make corrections to erroneous data. Certain changes must undergo HUD Field Office review and approval process for the changes to take effect.

Once data is changed or corrected in PIC outside of the Capital Fund Data Certification pages, there will be a one day lag from the time the correction is finalized before the Capital Fund Data Certification pages display the corrected data. Users have to be assigned the appropriate access rights to access the Capital Fund Data Certification pages.

### 1.1.10.1 Development List sub Tab

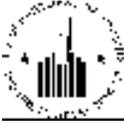
The **Development List** sub tab allows users to select a PHA and view the list of developments associated with this PHA (see Figure 69).

When a user selects a PHA, the **Search** section of the page allows the user to select the certification fiscal year and click **Select** to select development data for that certification year. If the PHA has a long list of developments, then the user can enter a development number in the **Development Number** box and click **Search**. The program will only display the development number that was indicated in the **Development Number** box.

Development Number	Development Status	DOFA	PIC Ticket No.	Certification Status
<a href="#">IL050000010</a>	Management	05/27/1971		Certified
<a href="#">IL050000021</a>	Management	02/28/1978		Certified
<a href="#">IL050000022</a>	Management	11/01/1968		Certified
<a href="#">IL050000041</a>	Management	02/09/1976		Certified

Figure 69: Development List sub tab

First, a PHA should check whether the list of developments is complete and accurate. If a PHA has added a new development that has reached Date of Full Availability (DOFA) prior to the CAPFUND Certification date, and the development is not displayed in the list, the user must navigate to the Development Profile page for the missing development and validate that the **DOFA Date Actual** data element has the correct DOFA date listed. If it does not, the PHA can work with the local PIH Field Office staff to correct or approve the DOFA date (DOFA dates are not effective until approved by appropriate Field Office staff). If a development reaches DOFA after the date the CAPFUND



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Certification is due, it should not be displayed in the list of developments (if it does, then the DOFA date is wrong because the system does not include the developments with DOFA dates after the CAPFUND Certification must be submitted since they do not qualify for the certification). If the list includes a development that reached DOFA after the reporting date, follow the same course of action to correct the DOFA date. The PIC system lists DOFA dates in the **Development** sub module under the **Housing Inventory** module on the **Development** tab.

In addition to checking DOFA dates, PHAs must also check removal from inventory (RMI) status. Units that have been removed from inventory (have RMI action/closing dates) that are more than 11 years prior to the reporting date will not be considered for Replacement Housing Factor funding in the Capital Fund formula, therefore any developments that were entirely removed more than 11 years prior to the reporting date will not display on the list of developments. If a development that was entirely removed more than 11 years prior to the reporting date is listed, the PHA must work with appropriate Field Office staff to enter or correct the RMI action/closing dates to properly mark all of the units in the development as removed. If the RMI action/closing date is within the 11 year timeframe but is inaccurate, this also potentially affects the Capital Fund formula and needs to be corrected. The PIC system lists RMI action/closing dates in the **Inventory Removals** sub module of the **Housing Inventory** module.

### 1.1.10.1.1 Development Details Page

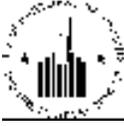
The Development Details page of the **Development List** sub tab displays the detailed data for the selected development drawn from the **Development** tab of the **Development** sub module (see Figure 70). To access this page, the user must click any development number on the **Development List** sub tab. The development numbers are displayed as links and allow users to access development details.

Development List		Building List		Unit List		RMI Units	
Info:	SHCI V Cleveland Hub						
Field Office:	SHPH INDIANAPOLIS PROGRAM CENTER						
Field Office IIC:	IN03 Fort Wayne Housing Authority						
Physical Development:	IN0302001 Ingress mlszgy						
Development Details (2010)							
Unit Count						Standing Unit	Removed Unit
Standing Units	Removed Units	Non-ACC Units	Non-Dwelling Units	Liderly Units	Family Units	Redeem Count	Redeem Count
196	0	0	2	0	194	196	0
PIC Help Ticket No.:				TIQ Comments:			
Comments:							
<small>A PHA is required to enter a valid PIC Help Ticket Number if it is requesting certification for a subdevelopment. You cannot to separate multiple PIC Tickets.</small>							
						Reset	Save

Figure 70: Development Details page

The Development details page displays the unit counts for the development, PIC Help desk ticket number (if applicable), and comment from PHA users and Field Office users.

The Development Details page contains the essential data related to the development that HUD uses to calculate the Capital Fund formula:



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**Standing units** – standing units are the number of units in the development as of the reporting date that have not been removed from the inventory of the development.

**Removed units**– removed units are units in the development that have an approved action date/closing date for the removal that is on or before the reporting date.

**Non ACC Units** – non-ACC units are units that are not included under the public housing annual contributions contract between HUD and the PHA. Usually these units are market rate or non public housing units in mixed finance developments. (Note that demolished/disposed units are still ACC units even though they are no longer in the inventory – they retain the status that they had when they were removed from the inventory.) Units that are marked as non-ACC units, will not be included in the Capital Fund formula.

**Non-Dwelling Units** non- dwelling units include both merged units and non-dwelling buildings in the development. Non-dwelling units will not be included in the Capital Fund formula.

**Elderly Units** is the number of units designated with the unit designation of elderly unit in the Development sub module. (This column will not be displayed after 2011.)

**Family Units** is the number of units designated with the unit designation of family unit in the Development sub module. (This column will not be displayed after 2011.)

**Standing Unit Bedroom Count** is the total number of bedrooms in the standing units.

**Removed Unit Bedroom Count** is the total number of bedrooms that were in the removed units prior to their removal.

*An error in any of the above data elements will affect the calculation of the Capital Fund formula.*

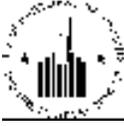
There are three navigation links that take the user to different PIC pages for the development that display the source data used to display the data on the Development Details page to facilitate further investigation of the source data. The **Building List**, **Unit List**, and **RMI Units** sub tabs allow users to view the respective information. The navigation links are located on the dark blue navigation bar underneath the tabs at the top of the page.

To save the development details, the user must click **Save**.

### **1.1.10.1.2 Correcting Incorrect Development Data**

If the data displayed on the Development Details page for a development is incorrect, a PHA must take steps to correct the inaccurate data prior to certifying to the accuracy of the data for that development on the Capital Fund Building and Unit Data Certification tab. In this instance, a PHA would follow the normal procedures for changing the source data in PIC. Some corrections will require coordination with Field Office staff to ensure that any corrections that require Field Office approval prior to taking effect are approved prior to certifying to the accuracy of the data. Some corrections require Field Office staff to make the corrections on a PHA's behalf (particularly corrections relating to development level data such as DOFA dates). Any changes in source data will be reflected in the PIC Data Certification pages the day after they are finalized. Once the data is correct, a PHA can then mark the development as certified on the Capital Fund Building and Unit Data Certification tab.

In rare instances, PHAs may encounter errors that cannot be corrected by either the PHA or Field Office staff because of the way the PIC system operates. In those instances, PHAs are to submit a request to the Real Estate Assessment Center Technical Assistance Center (TAC) Help desk. In such instances, PHA staff can either send an email describing the issue (include staff member name, phone number, housing authority number and field office name where applicable) to REAC\_TAC@hud.gov or call TAC at 1-



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888-245-4860 between 7:00 am and 8:30 pm EST on business days. TAC will assign a ticket number to track the issue to resolution. (The ticket number will be a number preceded by either “IM” or “PIC”.) If the issue is resolved sufficiently before the deadline for certifying, the PHA should take the necessary steps to correct the remaining inaccurate data and certify that the data for the development is accurate.

If the issue is not resolved prior to the deadline for certification or there is insufficient time to make the correction after the issue is resolved before the certification deadline, the affected PHA must reject certification for the development. In order to reject a certification for a development, a PHA must provide certain data on the Development Details page for the development.

In this situation, TAC will assign a PIC help ticket number to the PHA. Note that the PIC help ticket number may be different from the normal TAC help ticket number. It may use the following format: the characters “PIC” (instead of “IM”) followed by five numbers (e.g. PIC12345). The PHA must enter the PIC help ticket number into the space provided on the Development Details web page. If the ticket begins “IM” instead of “PIC”, replace the “IM” with “PIC” when it is entered. The PHA must also provide a comment in the space provided that indicates what data element(s) is/are wrong, what the correct data is and why it cannot correct the data through the normal procedure.

After entering the PIC help ticket number, the user must save the changes by clicking **Save**. Multiple numbers can be entered if separated by commas.

### ***1.1.10.2 Building List sub Tab***

The **Building List** sub tab (see Figure 71) displays the building and entrance information associated with the selected development. The data on this sub tab is read-only. However, it is accessible for editing in the **Building** tab of the **Development** sub module granted the user has sufficient editing privileges.

The **Building Information** section of the page lists all the building numbers and building entrance numbers providing the following information:

- Building name
- Building type
- Building status
- Building address
- Floor count
- Unit count



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Development List		Building List		Unit List		RMI Units	
Hub:	SBCIV Cleveland Hub						
Field Office:	SBCIV INDIANAPOLIS PROGRAM CENTER						
Field Office IIA:	IN03 First Wayne Housing Authority						
Physical Development:	IN0300001 Ingress mlsrwy						
<b>Building Information</b>							
Buildings 1 to 50 of 98							
Bldg. No.	Entrance No.	Bldg. Name	Building Type	Building Status	Address Line 1	Floor Count	Unit Count
1	1		Elevator Structure	Initial Approval Completed	gress mlsrwy 1322	5	100
10	1		Row or Townhouse (Sep. entrances)	Initial Approval Completed	gress mlsrwy 8041	1	1
10	2		Row or Townhouse (Sep. entrances)	Initial Approval Completed	gress mlsrwy 8041	1	1
10	3		Row or Townhouse (Sep. entrances)	Initial Approval Completed	gress mlsrwy 4941	1	1
10	4		Row or Townhouse (Sep. entrances)	Initial Approval Completed	gress mlsrwy 2941	1	1
10	5		Row or Townhouse (Sep. entrances)	Initial Approval Completed	gress mlsrwy 0941	1	1
10	6		Row or Townhouse (Sep. entrances)	Initial Approval Completed	gress mlsrwy 8941	1	1
11	1		Row or Townhouse (Sep. entrances)	Initial Approval Completed	gress mlsrwy 6141	1	1
11	2		Row or Townhouse (Sep. entrances)	Initial Approval Completed	gress mlsrwy 4041	1	1
11	3		Row or Townhouse (Sep. entrances)	Initial Approval Completed	gress mlsrwy 2041	1	1

Figure 71: Building List sub tab

The **Download in Excel** button allows the user to download the entire building data in form of an Excel spreadsheet. If the list of buildings cannot fit on one page, the program will display the **Next** and **Prev** links in the bottom for the user to be able to navigate to the desired building.

### 1.1.10.3 Unit List sub Tab

The **Unit List** sub tab (see Figure 72) displays the unit data associated with a selected building and building entrance number. The **Unit Information** section displays the following details:

- Unit Number
- Building number
- Entrance number
- Floor number
- Door number
- ACC Unit indicator
- Bedroom count
- Unit designation
- Submission status type

All these details are essential for proper Capital Fund certification calculations, so they must be checked for accuracy.



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Development List		Building List			Unit List		RMI Units	
Hub:	SHCLV Cleveland Hub							
Field Office:	SDPH INDIANAPOLIS PROGRAM CENTER							
Field Office IIA:	IN003 Fort Wayne Housing Authority							
Physical Development:	IN003050001 Inptstrck mlsrky							
<b>Unit Information</b>								
Units 1 to 50 of 196								
Unit Number	Building Number	Entrance Number	Floor Number	Door Number	ACC Unit Indicator	Bedroom Count	Unit Designation	Submission Status Type
1	1	1	1	101	Y	1	General Occupancy	Initial Approved Completed
1	R_0001	1	1	1	Y	1	General Occupancy	Initial Approved Completed
10	3	2	1	2	Y	4	General Occupancy	Initial Approved Completed
10	1	1	1	124	Y	1	General Occupancy	Initial Approved Completed
100	1	1	5	526	Y	1	General Occupancy	Initial Approved Completed
11	1	1	1	125	Y	1	General Occupancy	Initial Approved Completed
11	3	3	1	3	Y	4	General Occupancy	Initial Approved Completed
12	3	4	1	4	Y	3	General Occupancy	Initial Approved Completed
12	1	1	1	126	Y	1	General Occupancy	Initial Approved Completed

Figure 72: Unit List sub tab

The **Download in Excel** button allows the user to download the entire unit data in form of an Excel spreadsheet. If the list of buildings cannot fit on one page, the program will display the **Next** and **Prev** links in the bottom for the user to be able to navigate to the desired unit.

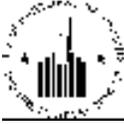
#### 1.1.10.4 RMI Units sub tab

The **RMI Units** sub tab (see Figure 73) displays the approved RMI applications associated with the selected development. The RMI Units section displays the list of RMI application providing the following details:

- Application number
- Application type
- Application status
- Action dates
- RMI Unit Count

The first column allows the user to expand and RMI application record to display the full list of action dates for applications where units were removed on different dates. To expand an RMI application, click the + ('plus') sign. In the **Action Dates** column, the dates are displayed as links. If a user clicks any of the dates, the program will display the RMI Units Report.

Development List		Building List			Unit List		RMI Units	
Hub:	SHCLV Cleveland Hub							
Field Office:	SDPH CLEVELAND HUD OFFICE							
Field Office IIA:	OH002 Youngstown MHA							
Physical Development:	OH002000100 hmls vprzghyd							
<b>RMI Units (2010)</b>								
Application Number	Application Type	Application Status	Action Dates	RMI Unit Count				
004000344	General/Disposition	HO Approved	<a href="#">07/07/2007 - 07/07/2007</a>	50				
			<a href="#">07/07/2007</a>	90				
RECH00710	Disposition	HO Approved	<a href="#">07/07/2007 - 07/07/2007</a>	10				



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Figure 73: RMI Units sub tab

### 1.1.10.4.1 RMI Units Report

#	Building No.	Building Entrance No.	Unit No.
1	IBS23	BE1	IBSUN111
2	IBS23	BE1	IBSUN112
3	IBS23	BE1	IBSUN113
4	IBS23	BE1	IBSUN114
5	IBS23	BE1	IBSUN115
6	IBS24	BE1	IBSUN116
7	IBS24	BE1	IBSUN117
8	IBS24	BE1	IBSUN118
9	IBS24	BE1	IBSUN119
10	IBS24	BE1	IBSUN120
11	IBS25	BE1	IBSUN121
12	IBS25	BE1	IBSUN122
13	IBS25	BE1	IBSUN123
14	IBS25	BE1	IBSUN124
15	IBS25	BE1	IBSUN125
16	IBS26	BE1	IBSUN126

Figure 74: RMI Units Report

The RMI Unit Report lists all the units removed from inventory under the selected RMI application and within the selected action dates. The report provides the following data:

- Building number
- Building entrance number
- Unit number

The user can download the report data in the Excel format or print the report by clicking the respective buttons. Users can find the **Download in Excel** and **Print** buttons in the report header.