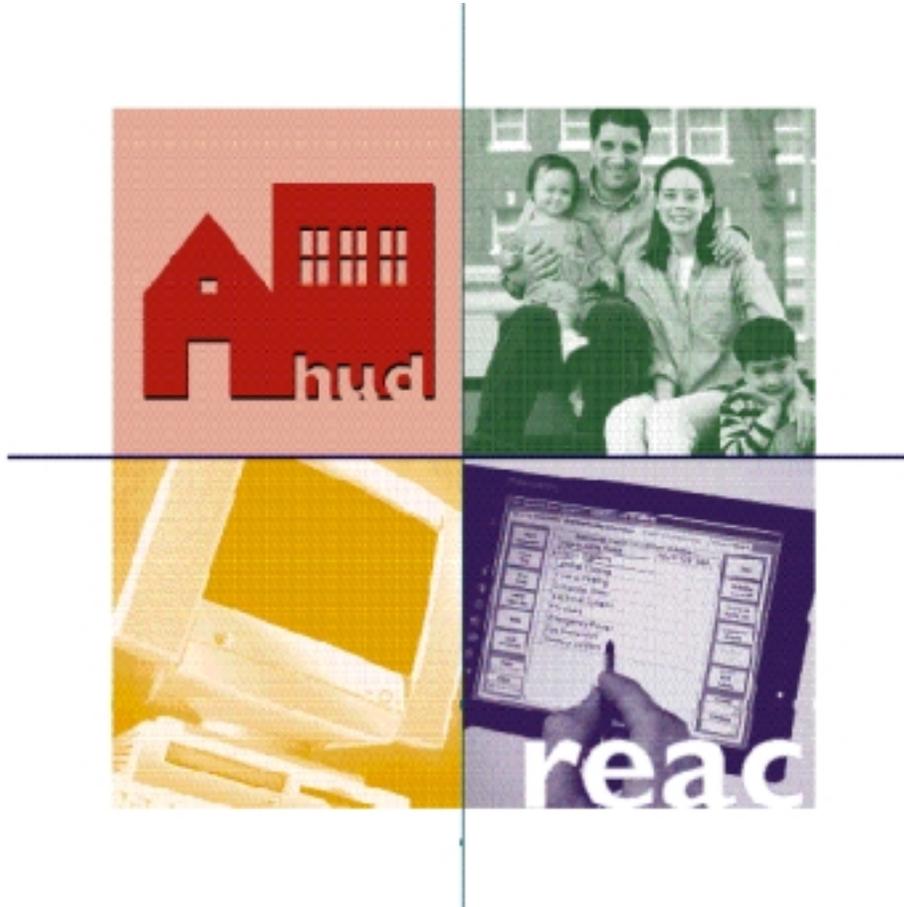


# **Servicing Mortgagee Scheduling Quick Reference Guide Version 1.0 For Independent Inspectors**



## **Physical Assessment Subsystem (PASS) Release 2.6**

U.S. Department of Housing and Urban Development  
Real Estate Assessment Center (REAC)

March 30, 2001

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## Introduction

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The Real Estate Assessment Center (REAC) is a U.S. Department of Housing and Urban Development (HUD) national management center created to centralize and standardize the way HUD monitors and evaluates the physical condition, as well as the financial condition of HUD properties. This includes over 3,000 Public Housing Agencies (PHA) and over 30,000 Federal Housing Administration (FHA) multifamily insured, direct loan, HUD-held, and Section 8 project-based subsidized properties.

The Physical Assessment Subsystem (PASS) is a Web-based subsystem developed by REAC to monitor the physical condition of HUD properties based on on-site physical inspections. One component of PASS is Scheduling where inspection schedules are managed.

### ***Objectives***

The purpose of PASS Servicing Mortgagee Scheduling is to provide Servicing Mortgagees with a tool to effectively manage physical inspection scheduling details.

Servicing Mortgagees have access to property and scheduling information within their own organization. Servicing Mortgagees can search for inspection schedules, based on specified criteria (e.g., city, dates, etc.), and can modify basic property information. As a Servicing Mortgagee, they will select HUD REAC certified inspectors to work for their organization. From those inspectors they can select one or more to be Master Schedulers for their organization. The Master Scheduler is responsible for scheduling the organization's inspections to Independent Inspectors. Not all of the Servicing Mortgagee's properties have to be scheduled by the Master Scheduler. The Servicing Mortgagee can schedule inspections as well.

As an Independent Inspector, you will use Servicing Mortgagee Scheduling to review and update the date and time of inspections scheduled to you.

## Accessing Servicing Mortgagee Scheduling

### Security

PASS Servicing Mortgagee Scheduling is a secure, Web-based system containing sensitive public housing information. A HUD-issued user ID is required to use the system. Authorized users only have access to inspection scheduling information for properties associated with their FHA number.

Authorized users for PASS Servicing Mortgagee Scheduling include:

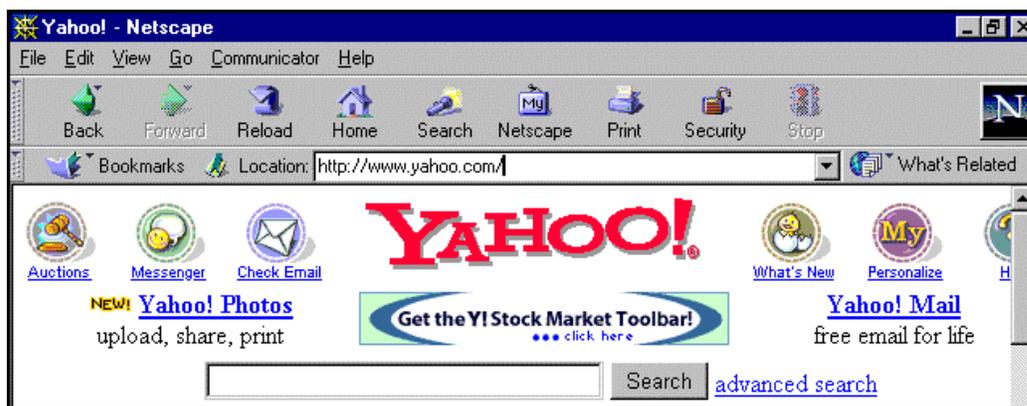
- Servicing Mortgagees
- HUD REAC certified inspectors responsible for scheduling inspections (Master Schedulers), and conducting on-site physical inspections (Independent Inspectors) at HUD properties
- HUD REAC personnel responsible for monitoring HUD properties

### Authorized User Login

To access PASS Servicing Mortgagee Scheduling, Independent Inspectors must log in using their six-character HUD-issued user ID (e.g., M12345).

#### To access PASS Servicing Mortgagee Scheduling:

1. Open the Internet browser (e.g., Netscape). The example shown is the Yahoo main page.



2. Enter the following URL address in the *Location* field:  
**www.hud.gov/offices/reac/index.cfm**



The Real Estate Assessment Center (REAC) home page displays (next page).

**NOTE:** The content of this page is updated on a regular basis, therefore, the appearance may vary.

3. Click on the online systems link under the REAC heading on the left. The **Online Systems** screen displays (next page).

HUD HOME ABOUT HUD Q & A SEARCH / INDEX E-MAIL

## online systems

If you already have a User ID, click on the "Log In" button to proceed directly to Secure Connection. Note that upon log in, the "User Name" field actually requires your user ID.

**LOG IN**

**TOPICS**  
[customers](#)  
[products](#)  
[tools](#)  
[online systems](#)  
[contact us](#)  
[reac home](#)

**WHAT'S NEW**

**SIGNIFICANT REVISIONS!**  
 Industry User Guide for the Financial Assessment Subsystem-Multifamily Housing (FASSUB) [Changes to FASS-MF](#). To [view guide](#) go to Documents and Guidance. Updated February 9, 2001

**IMPORTANT!** Obtaining instructions for getting a UII has just gotten easier!!  
 Retrieve the short version of the [UII Registration Instructions](#). Updated January 24, 2001

**NEW!** Financial Assessment Subsystem - Public Housing Agencies [Top level financial statements](#) are now required to be submitted with the audited financial submission.

[Effective October 30, 2000, Secure Connection Coordinators \(AKA FASSUB Coordinators and or Coordinators\) are Granted Access to Physical Inspection Reports via the Internet. HUD will continue to mail reports until March 31, 2001](#) Updated December 8, 2000

**NEED A USER ID?**  
 Complete [registration instructions](#) are available, or go directly to the appropriate secure connection registration form.

[Multifamily Housing Entity](#)

[Public Housing Agency](#)

**HIGHLIGHTS**

**SINGLE FAMILY APPRAISAL QUALITY SYSTEM ACCESS**  
 All AQA Contractors and Review Appraisers must register for a Secure Systems ID and password to access SASS Online. [Additional information and online registration.](#)

**TENANT INCOME VERIFICATION SYSTEM (TEVS) ACCESS**  
 The former TEVS site to access SS and SSI benefit history and income discrepancy reports for Public Housing Authorities (PHAs) has been transferred to REAC. [TEVS' new location.](#)

If your public housing authority needs technical assistance, please contact the Social Security and Supplemental Security Income Hotline Internet Facility at (202) 708-4932, extensions 3319 or 3321.

**TENANT INCOME DISCREPANCY RESOLUTION**  
 To review and report on Tenant Income Discrepancies, PHAs, owners, and management agents select the "Log In" button located at the top of this page.

**SYSTEM PASSWORDS**  
 Effective April 8, 2000 Secure Systems Passwords must be reset every 21 days. [More password details](#)

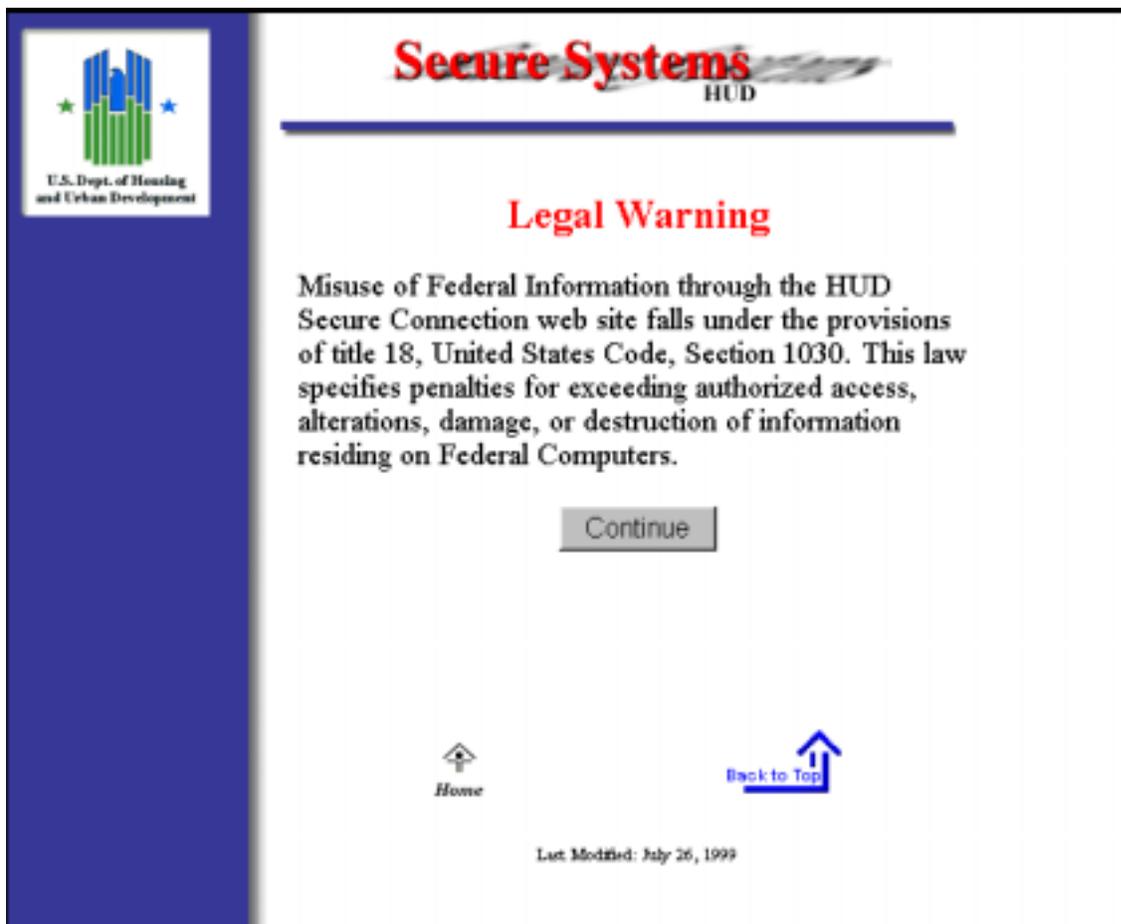
**QUICK TIPS DESK REFERENCE**  
 REAC has prepared handy, one page desk reference sheets with step by step instructions for obtaining user IDs and logging into the secure systems. They are quick, easy and colorful. [Print Quick Tips now.](#)

**SYSTEM SECURITY USER GUIDE FOR PHAs**  
 This guide provides instructional guidelines on how to get a user ID, access Secure Systems, and perform system administration functions.

Last revised: February 9, 2001

- Click on the **Log In** button. The **Username and Password Required** window displays (next page).

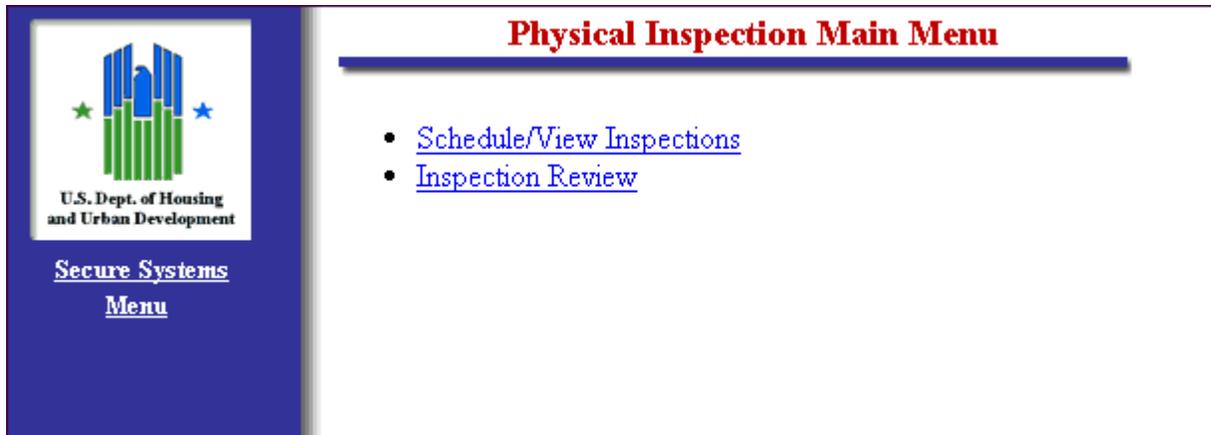
5. Enter your user ID (e.g., M11111) in the *User Name* field. The user ID is case-sensitive; remember to use a capital letter.
6. Tab to the *Password* field and enter your password.
7. Click on the  button. The **Secure Systems Legal Warning** screen displays.



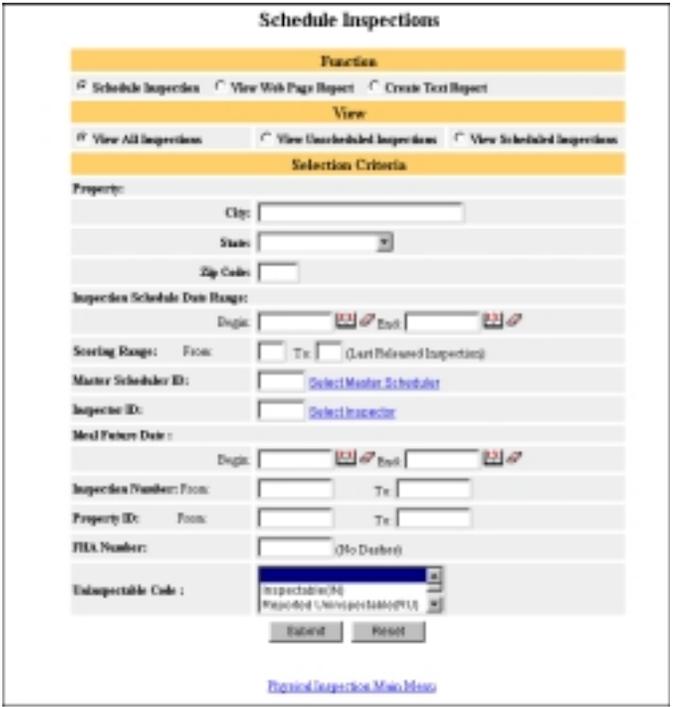
8. Click on the  button. The **Secure Systems** screen displays.



9. Click on the **Physical Assessment Subsystem (PASS)** link. The **Physical Inspection Main Menu** screen displays.



10. Click on the Schedule/View Inspections link to review or modify inspections. One of three screens displays if the Independent Inspector works for more than one Servicing Mortgagee and/or contractor organization, as demonstrated in the following table.

<h2>Independent Inspector</h2>	
<b>If you are the....</b>	<b>Schedule Inspections Query Screen Displays</b>
<p>Independent Inspector for only one Servicing Mortgagee organization the <b>Schedule Inspections</b> query screen displays.</p>	
<b>If you are the....</b>	<b>Servicing Mortgagee Inspection Scheduling Screen Displays</b>
<p>Independent Inspector for more than one Servicing Mortgagee, then the <b>Servicing Mortgagee Inspection Scheduling</b> screen displays.</p> <p>Select the appropriate Servicing Mortgagee from the <i>Servicing Mortgagee</i> drop-down list.</p> <p>Click on the Inspection Scheduling button, and the <b>Schedule Inspections</b> query screen displays.</p>	

<b>Independent Inspector</b>	
<b>If you are the....</b>	<b>Contractor/Servicing Mortgagee Inspection Scheduling Screen Displays</b>
<p>Independent Inspector for a Servicing Mortgagee(s) and Contractor(s), then the <b>Contractor/Servicing Mortgagee Inspection Scheduling</b> screen displays.</p> <p>Select either the Contractor or Servicing Mortgagee organization from the corresponding drop-down list.</p> <p>Click on the Inspection Scheduling button, and the <b>Schedule Inspections</b> query screen displays.</p>	

**NOTE:** Independent Inspectors only have access to those inspections scheduled to them.

## Schedule/View Inspections

### Schedule Inspections Query Screen

The **Schedule Inspections** query screen allows Independent Inspectors to search for specific inspection assignments. Independent Inspectors can request to update inspection schedules or view inspection reports using this screen. Searches can be narrowed in scope by entering specified criteria such as: *City, State, Zip Code, Inspection Schedule Date Range, Scoring Range, Master Scheduler ID, Inspector ID, Ideal Future Inspection Date, Inspection Number(s), Property ID(s), FHA Number, and Uninspectable Code.*

### Schedule Inspections

Function

Schedule Inspection  
  View Web Page Report  
  Create Text Report

View

View All Inspections  
  View Unscheduled Inspections  
  View Scheduled Inspections

Selection Criteria

Property:

City:

State:

Zip Code:

Inspection Schedule Date Range:

Begin:    End:

Scoring Range: From:  To:  (Last Released Inspection)

Master Scheduler ID:  [Select Master Scheduler](#)

Inspector ID:  [Select Inspector](#)

Ideal Future Date :

Begin:    End:

Inspection Number: From:  To:

Property ID: From:  To:

FHA Number:  (No Dashes)

Uninspectable Code :

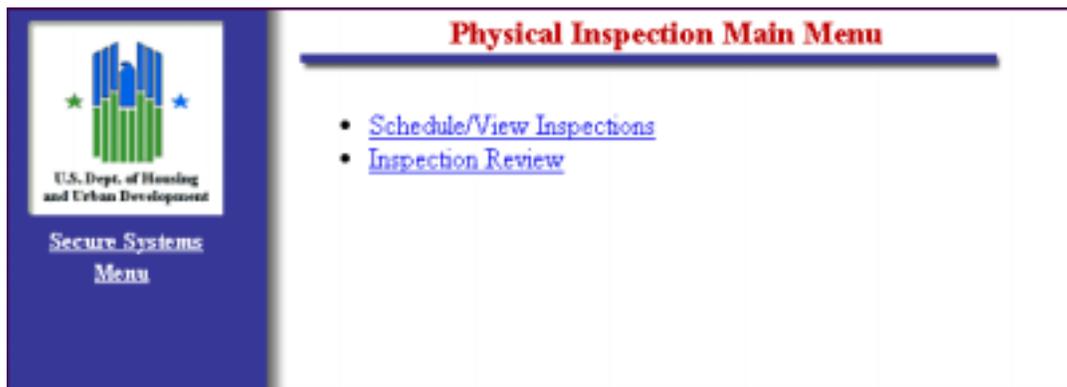
[Physical Inspection Main Menu](#)

SCHEDULE INSPECTIONS SCREEN	
Feature	Description
<p><a href="#">Schedule Inspection</a></p>	<p>This function allows Independent Inspectors to modify their scheduled inspections.</p>
<p><a href="#">View Web Page Report</a></p>	<p>This function allows Users to view <b>Inspection Schedule Reports</b> for scheduled inspections, unscheduled inspections, or both scheduled and unscheduled inspections.</p> <p><i>Independent Inspectors can view only scheduled inspections.</i></p>
<p><a href="#">Create Text Report</a></p>	<p>This function allows downloading and updating of large volume of data (e.g., inspection schedule, inspection property, and inspection participant information) using Microsoft Word. After the data is revised, the data is sent to REAC via the Bulk Upload Process.</p> <p><i>Independent Inspectors do not have access to the Bulk Upload Process, so this function is unnecessary.</i></p>
<p><a href="#">View All Inspections</a></p>	<p>This view option allows Users to view both scheduled and unscheduled inspections.</p> <p><i>Independent Inspectors can view only scheduled inspections.</i></p>
<p><a href="#">View Unscheduled Inspections</a></p>	<p>This view option allows Users to view unscheduled inspections.</p> <p><i>Independent Inspectors do not have access to unscheduled inspections.</i></p>
<p><a href="#">View Scheduled Inspections</a></p>	<p>This view option allows Independent Inspectors to view their scheduled inspections.</p>
<p><a href="#">Select Master Scheduler</a></p>	<p>The <u>Select Master Scheduler</u> link prompts a pop-up window. The pop-up window displays all HUD REAC certified inspectors associated with the Servicing Mortgagee.</p> <p>Selecting a specific <u>Inspector ID</u> link on the pop-up window closes the window and places the inspector ID in the <i>Master Scheduler</i> ID field.</p>
<p><a href="#">Select Inspector</a></p>	<p>The <u>Select Inspector</u> link prompts a pop-up window. The window displays all HUD REAC certified inspectors associated with the Servicing Mortgagee.</p> <p>Selecting a specific <u>Inspector ID</u> link on the pop-up window closes the window and places the inspector ID in the <i>Inspector ID</i> field.</p>

SCHEDULE INSPECTIONS SCREEN	
Feature	Description
	This button initiates the action to locate schedule information based on information entered for the query.
	This button returns all fields to the original information.
<a href="#">Physical Inspection Main Menu</a>	The <a href="#">Physical Inspection Main Menu</a> link returns Independent Inspectors to the <b>Physical Inspection Main Menu</b> screen, where other PASS components can be accessed.

*To access the Schedule/View Inspections or Portfolio query screen:*

Click on the [Schedule/View Inspections](#) link on the **Physical Inspection Main Menu** screen.



The **Schedule Inspections** query screen displays.

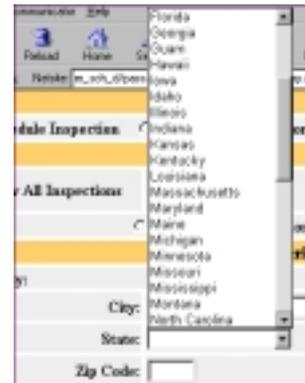
## Query Fields

The query fields in the Function and View sections of the **Schedule Inspections** query screen are required fields. Independent Inspectors must select one option in each section. The system automatically displays as the default, *Schedule Inspection* in the Function section and *View All Inspections* in the View section of the screen.

All the query fields in the Selection Criteria section are optional. To execute a search, Independent Inspectors can enter data in all, some, or leave the fields blank. The more information provided in the query search reduces the number of unnecessary results. For example, if 25 inspections are scheduled to an Independent Inspector, and no specific information about those inspections is specified, the **Inspections Schedule Report** displays all 25 inspections once submitted. However, if an Independent Inspector prefers to view only scheduled inspections for the state of Virginia, they select Virginia in the *State* field and the **Inspections Schedule Report** displays only those scheduled inspections for Virginia.

- The **Function** section determines what Independent Inspectors can do with the inspection information by clicking on the appropriate radio button. Independent Inspectors have three options:
  - *Schedule Inspection* allows Independent Inspectors to enter or modify schedule information on the **Inspections Schedule Report**.
  - *View Web Page Report* allows Independent Inspectors to view or print the **Inspections Schedule Report**.
  - *Create Text Report* allows Independent Inspectors to download an inspection schedule, inspection property, inspection participant and participant role reference information.
- The **View** section allows Users to search for scheduled, unscheduled, or all inspections (scheduled and unscheduled) by clicking on the appropriate radio button.

- The **City** field allows Independent Inspectors to search for inspections by a particular city.
- The **State** field allows Independent Inspectors to search for inspections by states and territories using the drop-down list.



- The **Zip Code** field allows Independent Inspectors to search for inspections by entering the postal zip code.
- The **Inspection Schedule Date Range** allows Independent Inspectors to search for inspection schedules within a range of dates, selecting the *Begin* and *End* dates of the time frame, and by clicking on the calendar  icon.

**To use the calendar box:**

1. Click on the calendar  icon to view the current month in the calendar box. The current date is highlighted.
2. Select a date by:
  - Click on a date (e.g., 20) to select a date in the current month.
  - To move backward or forward by year, click once on the symbols (**|<** or **>|**) per year.
  - To move backward or forward by month, click once on the symbols (**<** or **>**) per month.



- Independent Inspectors can also use the drop-down arrows to select the month and year from the Month and Year menus. The calendar changes when the month and year are selected, then the Independent Inspectors click on a specific date within the month.

Once a date is selected, the calendar box closes or click on the control **X** icon to close the window.

**NOTE:** If a date is only entered in the Begin field, the query results will list all inspection schedule date ranges equal to or greater than the inspection schedule date entered.

If a date is only entered in the End field, the query results will list all inspection schedule date ranges equal to or less than the inspection schedule date entered.

To generate a search for one inspection schedule date, enter the same date in the Begin and End fields.

- The **Scoring Range** field allows Independent Inspectors to search for inspections by score(s) of the last released inspection.

**NOTE:** If a score is only entered in the From field, the query results will list all scores equal to or greater than the score entered.

If a score is only entered in the To field, the query results will list all scores equal to or less than the score entered.

To generate a search for one score, enter the same score in the From and To fields.

- The **Master Scheduler ID** field allows Independent Inspectors to search for inspections using the Master Scheduler's ID number. Enter the Master Scheduler ID number in the field. Independent Inspectors can also click on the [Select Master Scheduler](#) link to view a list of all Inspector ID numbers on the **Inspector List** screen that have been selected to work for the Servicing Mortgagee. Click on an Inspector ID link (e.g., [M00519](#)) to select a Master Scheduler Inspector or leave blank. The **Schedule Inspections** screen redisplay once an *Inspector ID* is selected from the **Inspector List** screen.

Inspector Id	Inspector Name	Home State	Home City
<a href="#">M00519</a>	Lieg Charles	VA	McLean
<a href="#">M00924</a>	Robert Red	VA	Falls Church

**NOTE:** The **Inspector List** screen contains the Inspector ID numbers of both, Master Schedulers and Independent Inspectors selected by the Servicing Mortgagee. There is no special listing that displays *only* Master Scheduler ID or Independent Inspector ID numbers.

- The **Inspector ID** field allows Independent Inspectors to search for inspections by the Inspector's ID number. Enter the Inspector ID number in the field. Independent Inspectors can also click on the [Select Inspector](#) link to view a list of all Inspector ID numbers that have been selected by the Servicing Mortgagee. Click on the [Inspector ID](#) link to select an Inspector ID. The **Schedule Inspections** screen displays once an *Inspector ID* is selected from the **Inspector List** screen.

Inspector List
Sort By: Inspector Id

Prev View: 1 - 2 of 2 Next Select No. of Records to Show: 25 Page No: 1

Inspector Id	Inspector Name	Home State	Home City
<a href="#">M00519</a>	Ling Charles	VA	McLean
<a href="#">M00884</a>	Robert Red	VA	Falls Church

**NOTE:** The Inspector List screen contains the Inspector ID numbers of both Master Schedulers and Independent Inspectors selected by the Servicing Mortgagee. There is no special listing that displays only Master Scheduler ID or Independent Inspector ID numbers.

- The **Ideal Future Inspection Date** allows Independent Inspectors to search for inspection schedules using the ideal future inspection date, selecting the *Begin* and *End* dates of the time frame by clicking on the calendar  icon.

**To use the calendar box:**

- Click on the calendar  icon to view the current month in the calendar box. The current date is highlighted.
- Select a date by:
  - Click on a date (e.g., 20) to select a date in the current month.
  - To move backward or forward by year, click once on the symbols (**|<** or **>|**) per year.
  - To move backward or forward by month, click once on the symbols (**<** or **>**) per month.



- Independent Inspectors can also use the drop-down arrows to select the month and year from the Month and Year menus. The calendar changes when the month and year are selected, then Independent Inspectors click on a specific date within the month.

Once a date is selected the calendar box closes, or click on the control **X** icon to close the window.

**NOTE:** If a date is only entered in the Begin field, the query results will list all ideal future inspection dates equal to or greater than the ideal future inspection date entered.

If a date is only entered in the End field, the query results will list all ideal future inspection dates equal to or less than the ideal future inspection date entered

To generate a search for one ideal future inspection date, enter the same date in the Begin and End fields.

- The **Inspection Number** field allows Independent Inspectors to search for inspections by a specific inspection or for a range of inspections.

**NOTE:** If the inspection number is only entered in the From field, the query results will list all inspection numbers equal to or greater than the inspection number entered.

If the inspection number is only entered in the To field, the query results will list all inspection numbers equal to or less than the inspection number entered.

To generate a search for one inspection number, enter the inspection number in the To and From fields.

- The **Property ID** field allows Independent Inspectors to search for inspections by a specific property ID or a range of property IDs.

**NOTE:** If the Property ID number is only entered in the From field, the query results will list all property ID numbers equal to or greater than the property ID number entered.

If the Property ID number is only entered in the To field, the query results will list all property ID numbers equal to or less than the property ID number entered.

To generate a search for one property ID number, enter the property ID number in the To and From fields.

- The **FHA Number** field allows Independent Inspectors to search for inspections by a specific FHA number.

The **Uninspectable Code** field allows Independent Inspectors to search for inspections by an uninspectable status selected from the drop-down menu.

**The codes are:**

IN – Property is inspectable (default)

RU – Property is being reported as uninspectable  
(inspection can still be scheduled)

**The following codes are only assigned by HUD:**

VI – Property has been verified by HUD as inspectable and  
is being referred back for inspection (inspection can  
be scheduled)

VU – Property has been verified as uninspectable  
(inspection cannot be scheduled)

**NOTE:** Inspections with an Uninspectable code of VU cannot be downloaded to a Data Collection Device (DCD).

Once criteria from the Function, View and Selection Criteria sections are selected, click on the

Submit

button, and one of the following screens or options displays:

- **Inspections Schedule Report** (to schedule/reschedule inspections) via the *Schedule Inspection* function
- **Inspections Schedule Report** (to view scheduled/unscheduled inspections) via the *View Web Page Report* function
- **Text Reports** via the *Create Text Report* function. Remember Independent Inspectors do not use this function.

### Inspections Schedule Report

Once the **Schedule Inspections** query screen is updated and submitted, the **Inspections Schedule Report** (for all inspections, scheduled or unscheduled inspections) displays. The **Inspections Schedule Report** contains basic information on scheduled, unscheduled or both scheduled and unscheduled inspections based on specified criteria for those inspections assigned to the Independent Inspector. The Independent Inspector can *only* update the *Insp. Date* and/or *Local Time* fields.

To ensure the integrity of the data, any modifications to the inspection schedule or property information should be made prior to downloading the inspection.

Inspections Schedule Report												
3 Record(s) Found												
All Inspections												
To schedule an inspection, enter the Inspection Date and the Local Time.												
<input type="button" value="Prev"/>	View: 1 - 12 of 12		<input type="button" value="Next"/>	Select No. of Records to Show: 25		Page No: 1		<input type="button" value="Search Page"/>				
FHA No	Property ID	Property Name	City	State	Insp. No.	Insp. Date	Local Time	Inspector ID	Last Released Insp. Date	Prior Score	Meal Future Date	Uninsp. Code
<a href="#">08437383</a>	<a href="#">3000066666</a>	Skyline	McLean	NY	2000	<input type="text" value="Dec 12 2000"/>	<input type="text" value="02:00 PM"/>	M00884	10/21/1999	79c	10/21/2000	<a href="#">IN</a>
<a href="#">08437444</a>	<a href="#">3000076767</a>	Charles Smith	Falls Church	NY	2002	<input type="text" value="Dec 18 2000"/>	<input type="text" value="11:00 AM"/>	M00884	09/21/1999	67a	10/14/2000	<a href="#">IN</a>
<a href="#">08375383</a>	<a href="#">300806081</a>	Hilltop Apartments	Louisville	KY	2010	<input type="text" value="Dec 15 2000"/>	<input type="text" value="03:00 PM"/>	M00884	10/21/1999	79c	10/21/2000	<a href="#">IN</a>

[Back to Search Page](#)  
[Physical Inspection Main Menu](#)

**NOTE:** Only scheduled inspections appear on the Inspections Schedule Report for Independent Inspectors.

<b>SCHEDULE INSPECTIONS REPORT</b>	
<b>Feature</b>	<b>Description</b>
 <span style="margin: 0 10px;">View: 1 - 25 of 30</span> 	<p>These buttons allow Independent Inspectors to view information on the previous screen or next screen. In this example, there are 25 records on the current screen. To display the remaining 5 records click on the Next button. Once records 26-30 are displayed, click on the Prev button to return to records 1-25.</p>
<span>Select No. of Records to Show:</span> 	<p>Sets the number of records displayed at one time. The system automatically displays 25 records at a time. Records display in increments of 25, 50, 75, 100, 200 or 250 records on a screen.</p>
<span>Page No:</span> 	<p>The list of scheduled inspections can contain more than one page. To view another page, select a different page number from the drop-down list.</p> <p>For example, if viewing page 5 of 10 pages, and the Independent Inspector selects page 8 from the drop-down list, page 8 displays.</p>
	<p>Returns Independent Inspectors to the <b>Schedule Inspections</b> query screen.</p>
<b>FHA No and Property ID links</b>	<p>Both links allow Independent Inspectors to view or update the <b>Property Information</b> screen for a particular property.</p>
	<p>Enter the date of the inspection using this format: MM/DD/YYYY (e.g., 02/23/2001).</p>
	<p>Inspections are scheduled based on the local time between the hours of 7 AM and 3 PM in half-hour increments.</p>

<b>SCHEDULE INSPECTIONS REPORT</b>	
<b>Feature</b>	<b>Description</b>
	<p>Identifies the inspectable status of a property. The code can only be changed from IN to RU. Clicking on an uninspectable code link prompts a pop-up window where the Independent Inspector updates the fields with the information that was provided rendering the property uninspectable.</p> <p><b>Note:</b> If the Uninspectable Code is changed in error, contact the Technical Service Support Center.</p> <p><b>The codes are:</b>                      IN – Property is inspectable (default)                      RU – Property is being reported as uninspectable (inspection can still be scheduled)</p> <p><b>The following codes are only assigned by HUD:</b>                      VI – Property has been verified by HUD as inspectable and is being referred back for inspection (inspection can be scheduled)                      VU – Property has been verified as uninspectable (inspection cannot be scheduled)</p> <p><b>Note:</b> Inspections with an Uninspectable code of VU cannot be downloaded to a Data Collection Device (DCD).</p>
	Button schedules or reschedules the inspection based on the information entered.
	Button returns all fields to the original information.
<a href="#"><u>Back to Search Page</u></a>	<a href="#"><u>Back to Search Page</u></a> link returns the Independent Inspectors to the <b>Schedule Inspections</b> query screen.
<a href="#"><u>Physical Inspection Main Menu</u></a>	<a href="#"><u>Physical Inspection Main Menu</u></a> link returns Independent Inspectors to the <b>Physical Inspection Main Menu</b> screen where other PASS components can be accessed.

**To revise an inspection schedule:**

1. Click on the  radio button in the *Function* section on the **Schedule Inspections** query screen.
2. Click on a view option in the *View* section of the screen. In this example  is selected.

### Schedule Inspections

Function	
<input checked="" type="radio"/> Schedule Inspection	<input type="radio"/> View Web Page Report
<input type="radio"/> Create Text Report	
View	
<input checked="" type="radio"/> View All Inspections	<input type="radio"/> View Unscheduled Inspections
<input type="radio"/> View Scheduled Inspections	
Selection Criteria	
Property:	
City:	<input type="text"/>
State:	<input type="text"/>
Zip Code:	<input type="text"/>
Inspection Schedule Date Range:	
Begin:	<input type="text"/> <input type="text"/>
End:	<input type="text"/> <input type="text"/>
Scoring Range: From:	<input type="text"/> To: <input type="text"/> (Last Released Inspection)
Master Scheduler ID:	<input type="text"/> <a href="#">Select Master Scheduler</a>
Inspector ID:	<input type="text"/> <a href="#">Select Inspector</a>
Ideal Future Date :	
Begin:	<input type="text"/> <input type="text"/>
End:	<input type="text"/> <input type="text"/>
Inspection Number: From:	<input type="text"/> To: <input type="text"/>
Property ID: From:	<input type="text"/> To: <input type="text"/>
FHA Number:	<input type="text"/> (No Dashes)
Uninspectable Code :	<input type="text"/> (Inspectable (I)) (Reported Uninspectable (RU))
<input type="button" value="Submit"/> <input type="button" value="Reset"/>	
<a href="#">Physical Inspection Main Menu</a>	

3. Enter the search criteria in the appropriate fields, or leave these fields blank.

**NOTE:** If all fields are left blank, the search will be larger in scope.

4. Click on the  button. The **Inspections Schedule Report** displays.

### Inspections Schedule Report

3 Record(s) Found  
All Inspections

To schedule an inspection, enter the Inspection Date and the Local Time.

View: 1 - 12 of 12  Select No. of Records to Show:

FHA No	Property ID	Property Name	City	State	Insp. No.	Insp. Date	Local Time	Inspector ID	Last Released Insp. Date	Prior Score	Ideal Future Date	Uninsp. Code
<a href="#">08437383</a>	<a href="#">8000066666</a>	Skyline	McLeas	NY	2000	<input type="text" value="Dec 12 200"/>	<input type="text" value="02:00 PM"/>	M00884	10/21/1999	79c	10/21/2000	<a href="#">IN</a>
<a href="#">08437444</a>	<a href="#">8000076767</a>	Charles Smith	Falls Church	NY	2002	<input type="text" value="Dec 18 200"/>	<input type="text" value="11:00 AM"/>	M00884	09/21/1999	67a	10/14/2000	<a href="#">IN</a>
<a href="#">08375383</a>	<a href="#">800806081</a>	Hilltop Apartments	Louisville	KY	2010	<input type="text" value="Dec 15 200"/>	<input type="text" value="03:00 PM"/>	M00884	10/21/1999	79c	10/21/2000	<a href="#">IN</a>

[Back to Search Page](#)  
[Physical Inspection Main Menu](#)

**NOTE:** The complete table may not display on the screen. Use the scroll bars in the table to view all columns and rows.

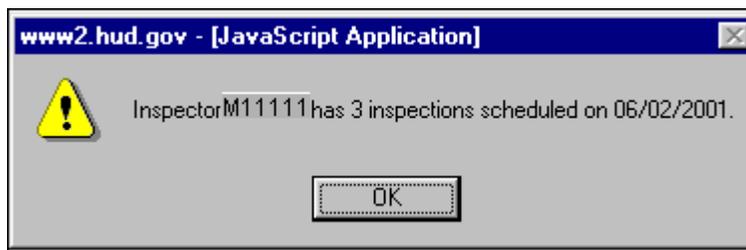
The **Inspection Schedule Report** shows basic information for all inspections that match the specified search criteria.

- When an Independent Inspector modifies an inspection schedule the following **two fields must be updated**:
  - *Insp. Date* (Inspection Date) - The correct format for the *Insp. Date* field is MM/DD/YYYY
  - *Local Time* - The time of the inspection 7 AM – 3 PM in half-hour increments.

5. Click on the  button. The **Inspection Scheduling Results** screen displays confirming the schedule changes (next page).



**NOTE:** If an inspector is scheduled for more than two inspections on the same date, a warning message is displayed to inform of the scheduling conflict. However the database is still updated with the scheduled inspection. The following is an example of this message:



An Independent Inspector must update the **Uninspectable Property Details** screen if a property is determined to be uninspectable.

**To update the Uninspectable Code:**

1. Click on an IN code link in the *Uninspectable Code* column to update.

**Inspections Schedule Report**

3 Item(s) Found  
All Inspections

To reschedule an inspection, enter the Inspection Date and the Local Time.

Prev: 1 - 12 of 12 Next: | Select No. of Records to Show: 25 | Page No: 1 | Search Page

FHA No	Property ID	Property Name	City	State	Insp. No.	Insp. Date	Local Time	Inspector ID	Last Released Insp. Date	Filter Score	Next Future Date	Uninsp. Code
<a href="#">0243720</a>	<a href="#">00006666</a>	Oyster	McLean	NY	2000	Dec 12 2001	02:30 PM	M00004	10/21/1999	7%	10/21/2000	<a href="#">IN</a>
<a href="#">0243244</a>	<a href="#">00002471</a>	Charles Smith	Falls Church	NY	2002	Dec 11 2001	11:30 AM	M00004	09/21/1999	6%	10/14/2000	<a href="#">IN</a>
<a href="#">0071010</a>	<a href="#">00006811</a>	Hobby Apartments	Louisville	KY	2010	Dec 15 2001	02:30 PM	M00004	10/21/1999	7%	10/21/2000	<a href="#">IN</a>

Update | Reset

[Back to Search Page](#)

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The **Uninspectable Property Details** screen displays.

### Uninspectable Property Details

**Inspection No:** 2000    **Property Id:** 800066666  
**Property Name:** Skyline

**Uninspectable Code:**

**Reporter Information**

**First Name:**

**Last Name:**

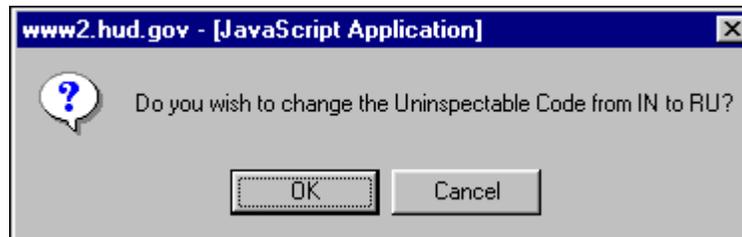
**Telephone Number:**  -  -   
Example: 703-555-1212

**Telephone Extension:**

**Uninspectable Reason Information**

2. Update all the fields (telephone extension is optional).

3. Click on the  button. The following message appears.



4. Click on the  button and the **Inspections Schedule Report** redisplay with the Uninspectable Code updated to RU.

**To View Property Information screen from the Inspections Schedule Report:**

Click on the *FHA No.* or *Property ID* link on the **Inspection Schedules Report** to review and update the **Property Information** screen. The SKYLINE (800066666) property is shown below.

## Skyline

Property Information			
Property ID:	800066666	FHA Number:	08437383
Inspection No.:	2000	Building Count:	<input type="text" value="0"/>
Property Name:	<input type="text" value="SKYLINE"/>		
Property Address:			
Street:	<input type="text" value="1592 Skyline ST NW"/>		
	<input type="text"/>		
City:	<input type="text" value="McLean"/>	State:	<input type="text" value="NY"/>
		Zip:	<input type="text" value="20202"/> - <input type="text" value="0000"/>
Phone:	<input type="text" value="(202) 70849"/> <input type="text"/>	Fax:	<input type="text" value="2027084932"/>
Email:	<input type="text"/>		
Management Agent Information:			
Name:	<input type="text"/>		
Organization:	<input type="text" value="STEVEN MANAGEMENT COMPANY, INC."/>		
Street:	<input type="text"/>		
	<input type="text"/>		
City:	<input type="text" value="Rockville"/>	State:	<input type="text" value="MD"/>
		Zip:	<input type="text" value="20603"/> - <input type="text" value="0424"/>
Phone:	<input type="text" value="(703) 4356787"/> ext- <input type="text" value="467"/>	Fax:	<input type="text"/>
Email:	<input type="text" value="stevenmanagement@erols.com"/>		
<input type="button" value="Update Profile"/>		<input type="button" value="Reset"/>	
<a href="#">Physical Inspection Main Menu</a>			

**Independent Inspectors can edit all fields on this screen to update the property information.**

- a. Click in the appropriate field and enter new or revised data.

- b. Click on the  button to save the property information in the database. A message displays confirming the update.



- c. Click on the [Back to Search Page](#) link to return to the **Schedule Inspections** screen or click on the [Physical Inspection Main Menu](#) link to return to the **Physical Inspection Main Menu** screen.

## View Web Page Report Option

The **View Web Page Report** option allows Independent Inspectors to view or print the **Inspections Schedule Report**. This is a view only screen, and no inspections can be modified. Use the scroll bar to view all the columns, if necessary.

### To view the Web Page Report:

1. Click on the  **View Web Page Report** radio button in the *Function* section of the **Schedule Inspections** query screen.

2. Click on the  **View Scheduled Inspections** radio button in the *View* section.
3. Enter data in the appropriate fields in the *Selection Criteria* section, if necessary.
4. Click on the  button. The **Inspections Schedule Report** displays with the inspection schedules matching the submitted criteria.

### Inspections Schedule Report

3 Record(s) Found  
Scheduled Inspections

FHA No	Property ID	Property Name	City	State	Insp. No.	Insp. Date	Local Time	Inspector ID	Last Released Insp. Date	Prior Score	Ideal Future Date	Uninsp. Code
<a href="#">0843733</a>	<a href="#">800066666</a>	Skyline	McLean	NY	2000	12/28/00	2:00PM	M00384	10/21/1999	79c*	10/21/2000	<a href="#">IN</a>
<a href="#">0843744</a>	<a href="#">800070767</a>	Charles Smith	Falls Church	NY	2002	18/28/00	11:08AM	M00384	09/21/1999	67a*	10/14/2000	<a href="#">IN</a>
<a href="#">08375383</a>	<a href="#">800806881</a>	Hilltop Apartments	Lexington	KY	2010	15/28/00	3:00PM	M00384	10/21/1999	79c*	10/21/2000	<a href="#">IN</a>

[Back to Search Page](#)  
[Physical Inspection Main Menu](#)

**To View Property Information:**

Click on the *FHA No* or *Property ID* links on the **Inspections Schedule Report** to review and update the **Property Information** screen. This example is for the SKYLINE (800066666) property.

### Skyline

**Property Information**

Property ID:	800066666	FHA Number:	08437383
Inspection No.:	2000	Building Count:	<input type="text" value="0"/>
Property Name:	SKYLINE		
<b>Property Address:</b>			
Street:	<input type="text" value="1582 Skyline ST NW"/>		
City:	<input type="text" value="McLean"/>	State:	<input type="text" value="NY"/>
Phone:	<input type="text" value="(703) 70049"/>	Fax:	<input type="text" value="(703) 7004932"/>
Email:	<input type="text"/>		
<b>Management Agent Information:</b>			
Name:	<input type="text"/>		
Organization:	<input type="text" value="STEVEN MANAGEMENT COMPANY, INC."/>		
Street:	<input type="text"/>		
City:	<input type="text" value="Lexington"/>	State:	<input type="text" value="KY"/>
Phone:	<input type="text" value="(703) 4384707"/>	Fax:	<input type="text"/>
Email:	<input type="text" value="stevenmanagement@erols.com"/>		

[Physical Inspection Main Menu](#)

**Independent Inspectors can edit all fields on this screen to update the property information.**

a. Click in the appropriate field and enter new or revised data.

b. Click on the  button to save the property information in the database. A message displays confirming the update (next page).

### Update Profile

The Profile update was successful.

[Back to Search Page](#)  
[Physical Inspection Main Menu](#)

- c. Click on the [Back to Search Page](#) link to return to the **Schedule Inspections** screen or click on the [Physical Inspection Main Menu](#) link to return to the **Physical Inspection Main Menu** screen.

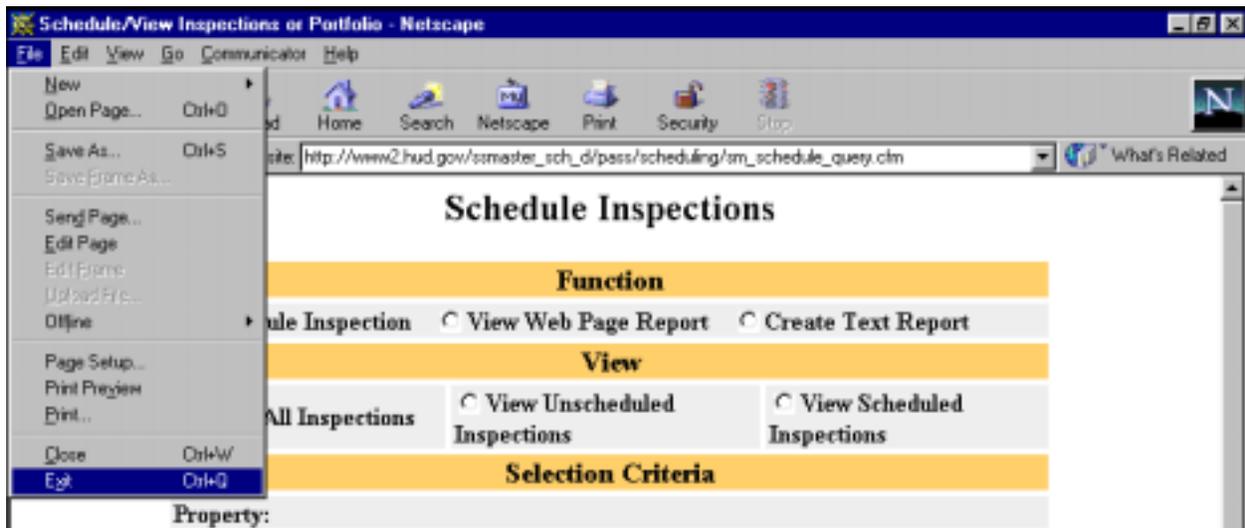
### ***Create Text Report Option***

The **Create Text Report** option allows Users to download and update a large volume of data (inspection schedule, inspection property, and inspection participant information) using Microsoft Word. After the data is revised, the data is sent to REAC via the Bulk Upload Process.

**NOTE:** Independent Inspectors do not have access to the Bulk Upload Process so this is unnecessary.

## Exiting Scheduling

Independent Inspectors can exit Servicing Mortgagee Scheduling at any time. To exit the system, click on the Menu bar of the browser and select *File* and *Close* or *Exit*, or click on the Close control  icon in the right corner of the screen.



## Browser Basics

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### *Software and Hardware Requirements*

The electronic scheduling of physical inspections using PASS Servicing Mortgagee Scheduling software requires computer resources and an Internet browser. The optimum software and hardware resources are recommended for efficiency, although users can operate with the minimum required resources.

#### **Optimum Hardware Resources**

Processor: Pentium I00  
RAM: 16 MB  
Modem: 28.8  
Video card: 256k  
Download file size: 5.8MB  
Installed file size: 10MB

#### **Optimum Software Resources**

Windows 95  
Netscape\* 4.5 or HTML-compliant browser application  
Adobe# Acrobat Reader 4.05

**NOTE:** Users can download Netscape\* 3.5 or higher (32-bit) from the Internet. The procedures to download Netscape\* can be found at <http://home.netscape.com/download>.

#### **Minimum Hardware Resources**

Processor: 486  
RAM: 8 MB  
Modem: 14.4 kb  
Video card: 256k  
Download file size: 5.5MB  
Installed file size: 10MB

#### **Minimum Software Resources**

Windows 3.1  
Netscape\* 3.5 or HTML-compliant browser application  
Adobe# Acrobat Reader 3.0

\*Copyright© Netscape Communications Corporation.

#Copyright© Adobe Systems Incorporated.

All rights reserved. Protected by the copyright laws of the United States and international treaties.

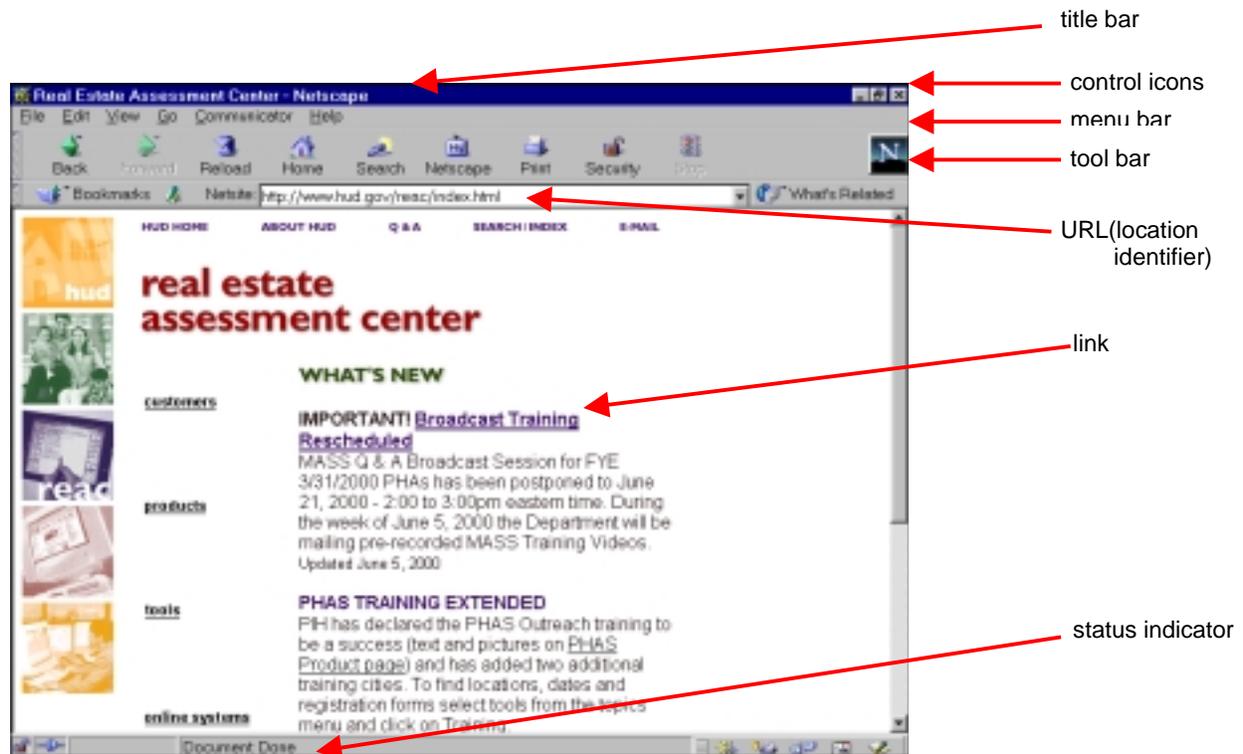
## Internet Basics

The Internet is a worldwide system of computer networks facilitating access to information and people. Using the Internet to access and use HUD's secure systems requires an Internet connection and a computer with a high-speed modem and Netscape 4.5 or an HTML-compliant browser application. A browser allows access to Web pages on the World Wide Web (WWW or the Web). The Web is a universally accepted standard for sharing information in the Internet. The Web consists of information organized into pages stored in computers physically located throughout the world.

**NOTE:** The browser in this example is Netscape. Display may vary according to the browser.

## Web Page

A Web page is a document or application with a unique address on the Web, including links to other pages.



## Title Bar

The title bar at the top of the page displays the title of the document or application of the Web page that is active or currently displayed. When more than one window is open, the title bar of the active window is bold; the other open title bars appear faded.



## Control Icons

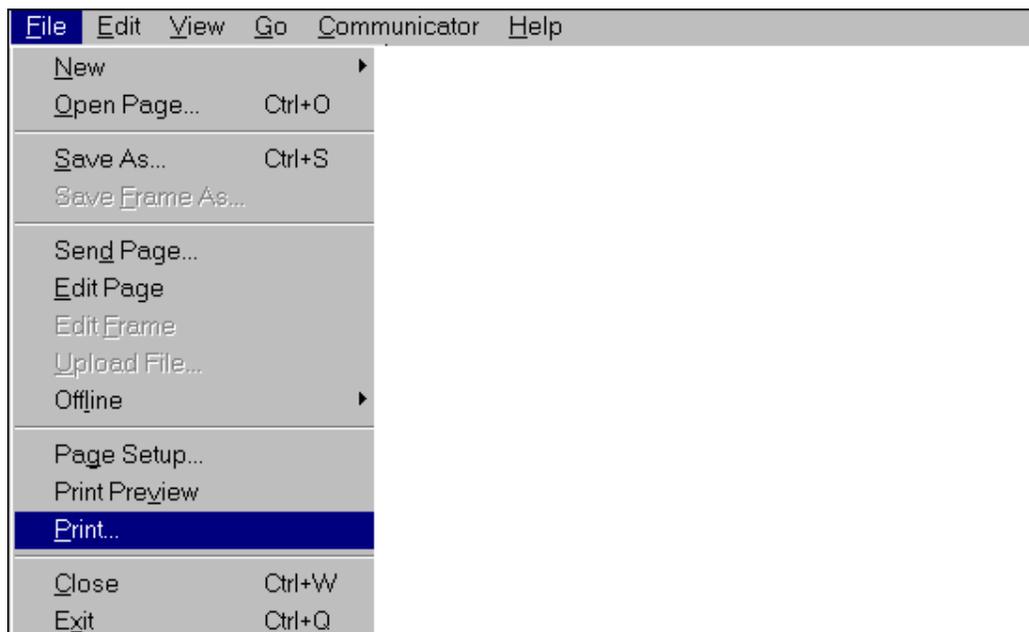
In the right corner of the title bar, there are three control icons. With a mouse click, the Minimize  control icon reduces or minimizes the window to the bottom of the page. To enlarge the window back to full size, click on the appropriately titled box at the bottom of the page. The Minimize/Maximize  control icon reduces the window to a smaller size, allowing the user to view other open windows or the desktop. To enlarge the window back to full size, click on the Minimize/Maximize  control icon again.

The last control icon is the Close  control icon. Clicking on this control icon closes the browser application (and the document or application open within the browser) and returns the user to the desktop.



## Menu Bar

The menu bar provides drop-down menus for browser functions. By placing the cursor over a menu item and clicking on it with a left mouse button, the drop-down menu appears. Highlight the appropriate menu function with the cursor to make a selection.



Available menu functions are text items in bold. Menu functions that are not available appear faded and cannot be activated.

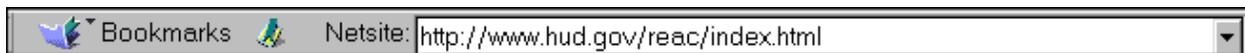
## Tool Bar

The tool bar consists of buttons representing browser functions. Available functions are buttons with bold text and graphics. A tool bar button appears faded if the function is not available.



## Location Identifier

The unique location of the Web document or application is called the Uniform Resource Locator (URL). The URL is used to find a particular Web page among all the computers on the Internet. Enter the desired URL in the *Location* field and press the Enter key.



**NOTE:** The field is labeled “Location” for an Internet site. It is labeled “Netsite” for an intranet (internal/within the organization) site.

## Status

The Netscape browser indicates the status of the action being performed. If the browser is performing an action (for example, searching a database for information): the Netscape logo to the right of the URL address appears to have comets flying across it, the Stop icon on the tool bar is bold and red, and the status indicator line at the bottom of the page (next to the Lock icon) describes the status (for example, “Connect . . . Waiting for reply”). Upon completion of the action, the logo returns to its static state, the Stop tool appears faded, and the status indicator line reads “Document: Done.”



**NOTE:** The lock indicates whether the Web page is secure or not. Some Web pages can be secured or blocked from other Internet users if the page contains sensitive information, such as financial or housing information. If the lock is closed, the page is secure. If the lock is open, it is not a secure Web page.

## Links

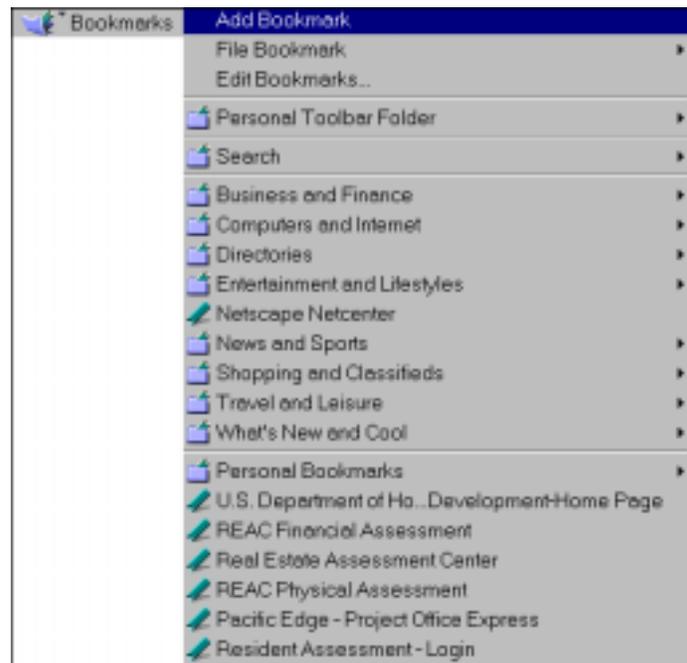
A link provides a method to move quickly from the current page to another Web page. Links are typically underlined, although they do not have to be. Click on a particular link, and it moves you to that particular page. Once the link is accessed, it typically changes color to indicate that you have already accessed the page once before.

## Bookmarks

The Bookmarks function is a browser tool that provides users with quick access to a Web page. Once a Web page's title and location is marked as a bookmark in the browser, you do not have to remember and type in the URL or go through a series of links to access that page.

To bookmark the currently displayed Web page, click on Bookmarks to the left of the *Location* field for the drop-down options. Click on the Add Bookmark option to mark the page. The Web page location is added.

All bookmark(s) appear in list form under the Bookmarks option. Clicking on a bookmark in that list takes the user directly to that page.



## ***REAC Technical Service Support***

The staff in the Physical Inspection Operations area within REAC is available for assistance Monday through Friday from 8:00 A.M. to 5:30 P.M.

### **REAC Technical Service Phone Number**

1-877-406-9220

## ***Technical Assistance Center***

Independent Inspectors can contact the REAC Technical Assistance Center with any questions or problems Monday through Friday 7 a.m. to 8:30 p.m., Eastern Standard Time. The REAC Technical Assistance Center can be contacted by telephone or email.

### **REAC Technical Assistance Center Phone Number**

1-888-245-4860