Chapter 13: Summaries

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Summaries

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

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

Objectives:

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

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

13.1 Property Summary

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

Accessing the Summary Page:

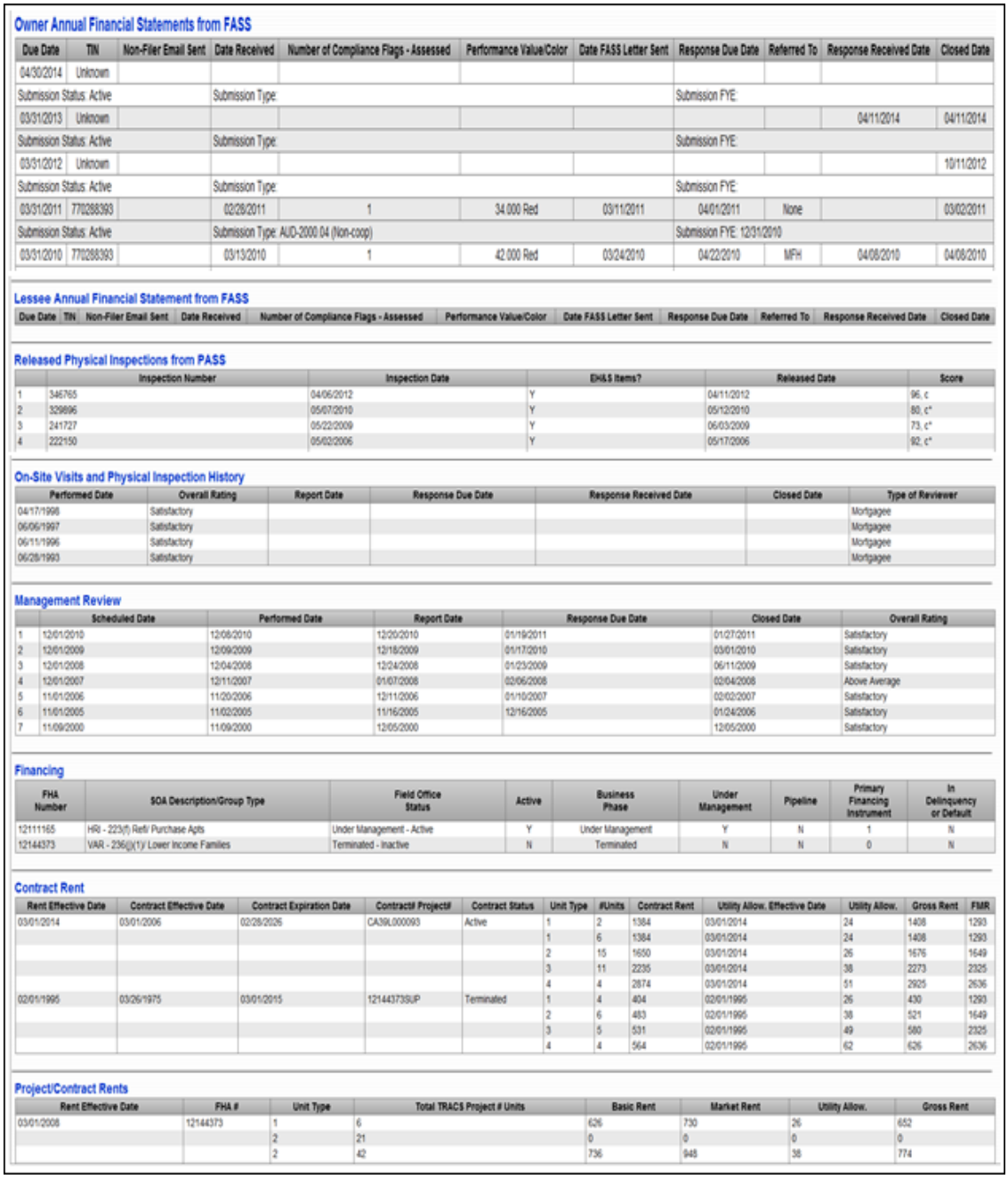
To access the **Summary** page you must first select a specific property. Once you have selected a property, the **Property Attributes** page displays. From the **Property Attributes** page you can select the *Summaries* link from the ***iREMS*** sidebar. (See Chapter 3: Portfolio/Dashboard or Chapter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

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

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



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



Owner Annual Financial Statements from FASS

Due Date	TIN	Non-Filer Email Sent	Date Received	Number of Compliance Flags - Assessed	Performance Value/Color	Date FASS Letter Sent	Response Due Date	Referred To	Response Received Date	Closed Date
04/30/2014	Unknown									
Submission Status: Active			Submission Type:				Submission FYE:			
03/31/2013	Unknown								04/11/2014	04/11/2014
Submission Status: Active			Submission Type:				Submission FYE:			
03/31/2012	Unknown									10/11/2012
Submission Status: Active			Submission Type:				Submission FYE:			
03/31/2011	770288393		02/26/2011	1	34.000 Red	03/11/2011	04/01/2011	None		03/02/2011
Submission Status: Active			Submission Type: AUD-2000.04 (Non-coop)				Submission FYE: 12/31/2010			
03/31/2010	770288393		03/13/2010	1	42.000 Red	03/24/2010	04/22/2010	MFH	04/08/2010	04/08/2010

Lessee Annual Financial Statement from FASS

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

Released Physical Inspections from PASS

	Inspection Number	Inspection Date	EH&S Items?	Released Date	Score
1	346765	04/06/2012	Y	04/11/2012	96, c
2	329896	05/07/2010	Y	05/12/2010	80, c*
3	241727	05/22/2009	Y	06/03/2009	73, c*
4	222150	05/02/2006	Y	05/17/2006	92, c*

On-Site Visits and Physical Inspection History

Performed Date	Overall Rating	Report Date	Response Due Date	Response Received Date	Closed Date	Type of Reviewer
04/17/1998	Satisfactory					Mortgagee
06/06/1997	Satisfactory					Mortgagee
06/11/1996	Satisfactory					Mortgagee
06/28/1993	Satisfactory					Mortgagee

Management Review

	Scheduled Date	Performed Date	Report Date	Response Due Date	Closed Date	Overall Rating
1	12/01/2010	12/09/2010	12/20/2010	01/19/2011	01/27/2011	Satisfactory
2	12/01/2009	12/09/2009	12/18/2009	01/17/2010	03/01/2010	Satisfactory
3	12/01/2008	12/04/2008	12/24/2008	01/23/2009	06/11/2009	Satisfactory
4	12/01/2007	12/11/2007	01/07/2008	02/06/2008	02/04/2008	Above Average
5	11/01/2006	11/20/2006	12/11/2006	01/10/2007	02/02/2007	Satisfactory
6	11/01/2005	11/02/2005	11/16/2005	12/16/2005	01/24/2006	Satisfactory
7	11/09/2000	11/09/2000	12/05/2000		12/05/2000	Satisfactory

Financing

FHA Number	SOA Description/Group Type	Field Office Status	Active	Business Phase	Under Management	Pipeline	Primary Financing Instrument	In Delinquency or Default
12111165	HRI - 223(f) Refi/ Purchase Apts	Under Management - Active	Y	Under Management	Y	N	1	N
12144373	VAR - 236(j)(1)/ Lower Income Families	Terminated - Inactive	N	Terminated	N	N	0	N

Contract Rent

Rent Effective Date	Contract Effective Date	Contract Expiration Date	Contract# Project#	Contract Status	Unit Type	#Units	Contract Rent	Utility Allow. Effective Date	Utility Allow.	Gross Rent	FMR
03/01/2014	03/01/2006	02/28/2026	CA39L000093	Active	1	2	1384	03/01/2014	24	1408	1293
					1	6	1384	03/01/2014	24	1408	1293
					2	15	1650	03/01/2014	26	1676	1649
					3	11	2235	03/01/2014	38	2273	2325
					4	4	2874	03/01/2014	51	2925	2636
02/01/1995	03/26/1975	03/01/2015	12144373SUP	Terminated	1	4	404	02/01/1995	26	430	1293
					2	6	483	02/01/1995	38	521	1649
					3	5	531	02/01/1995	49	580	2325
					4	4	564	02/01/1995	62	626	2636

Project/Contract Rents

Rent Effective Date	FHA #	Unit Type	Total TRACS Project # Units	Basic Rent	Market Rent	Utility Allow.	Gross Rent
03/01/2008	12144373	1	6	626	730	26	652
		2	21	0	0	0	0
		2	42	736	948	38	774

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

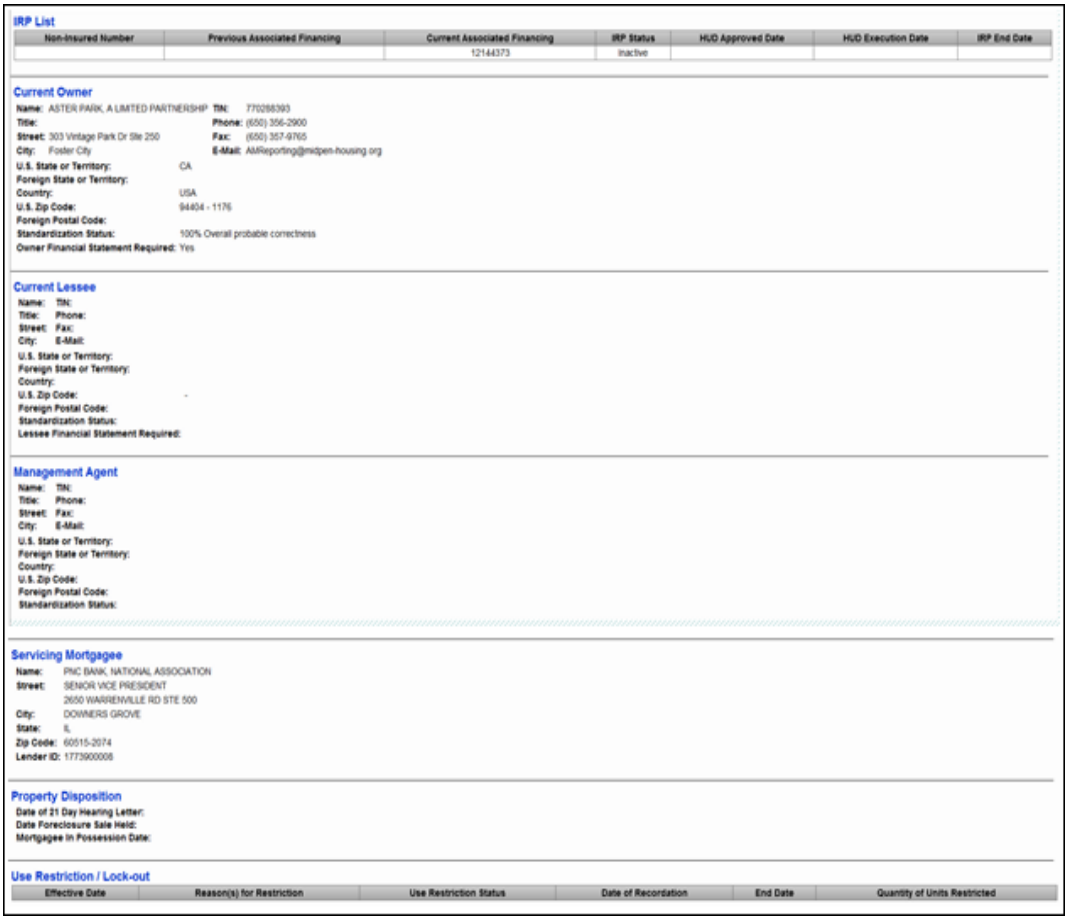


Figure 13-3. Summary page (display 3 of 3)

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

13.2 Summary Narrative

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

To view Summary Narratives page:

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

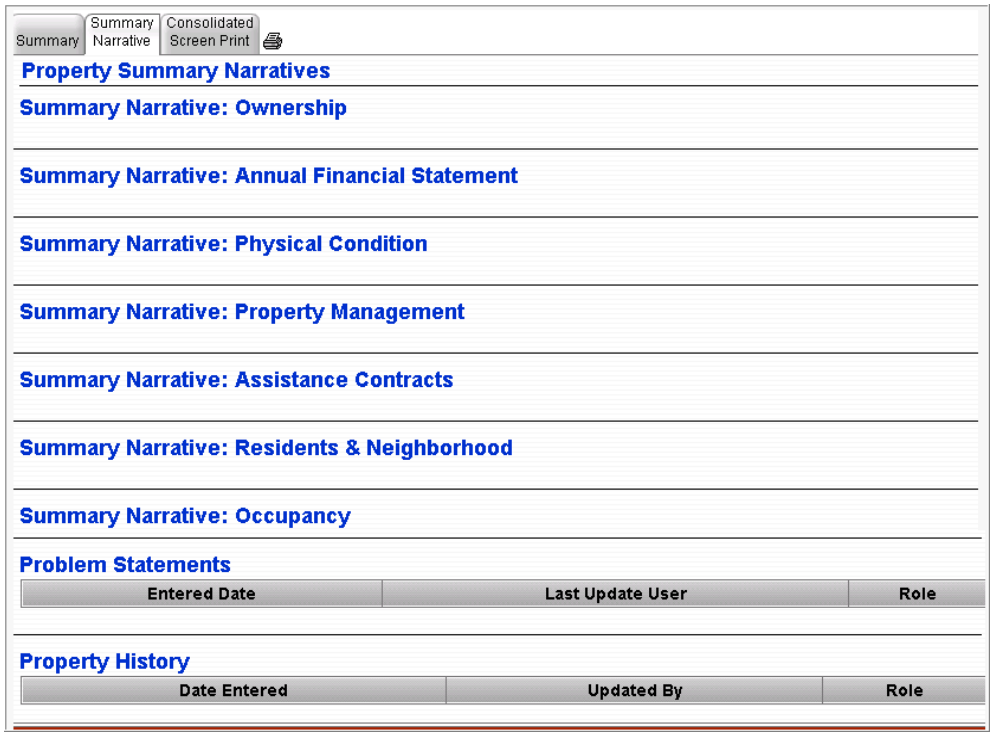


Figure 13-4. Summary Narrative page

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

13.3 Consolidated Screen Print

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

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

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

To generate a Consolidated Screen Print document for "All Housing Screens":

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

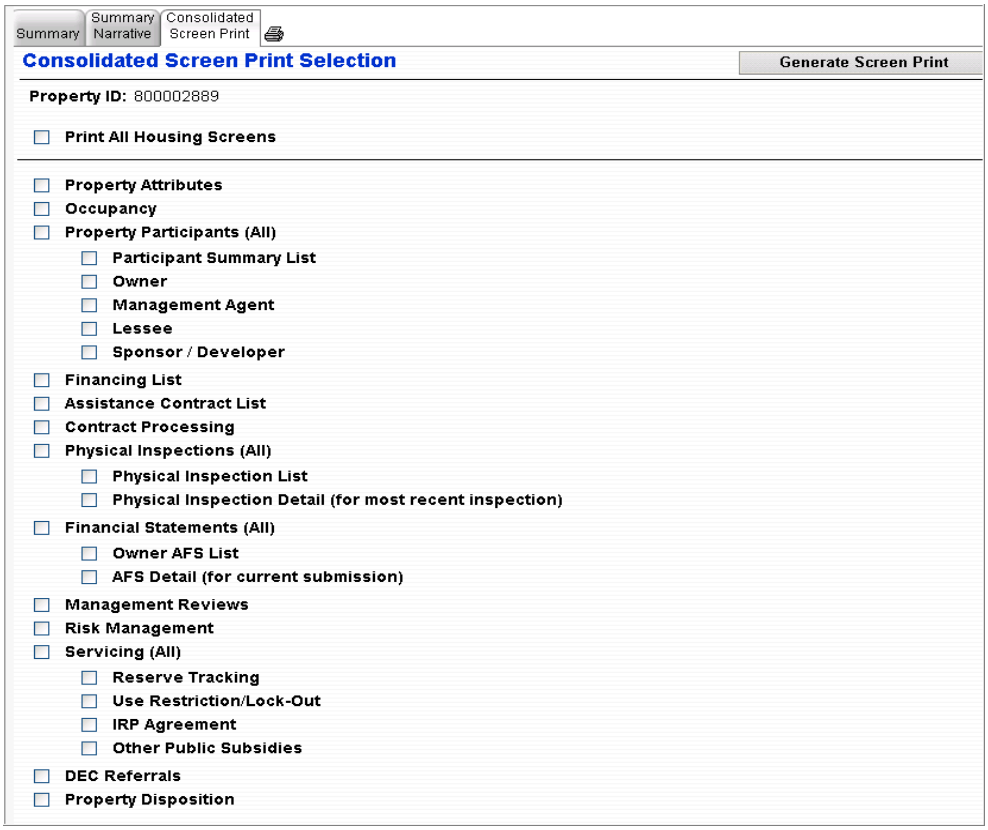


Figure 13-5. Consolidated Screen Print page

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

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

3. Click on Generate Screen Print and the following message displays:

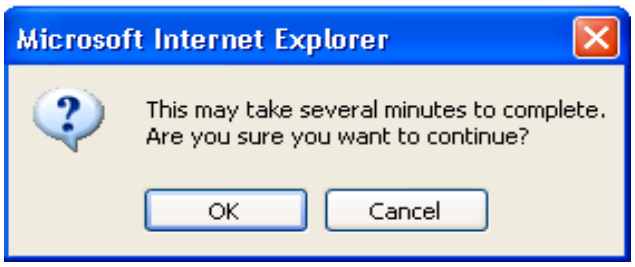


Figure 13-6. Print Time Warning message

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

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

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

To generate a Consolidated Screen Print document for specific pages:

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

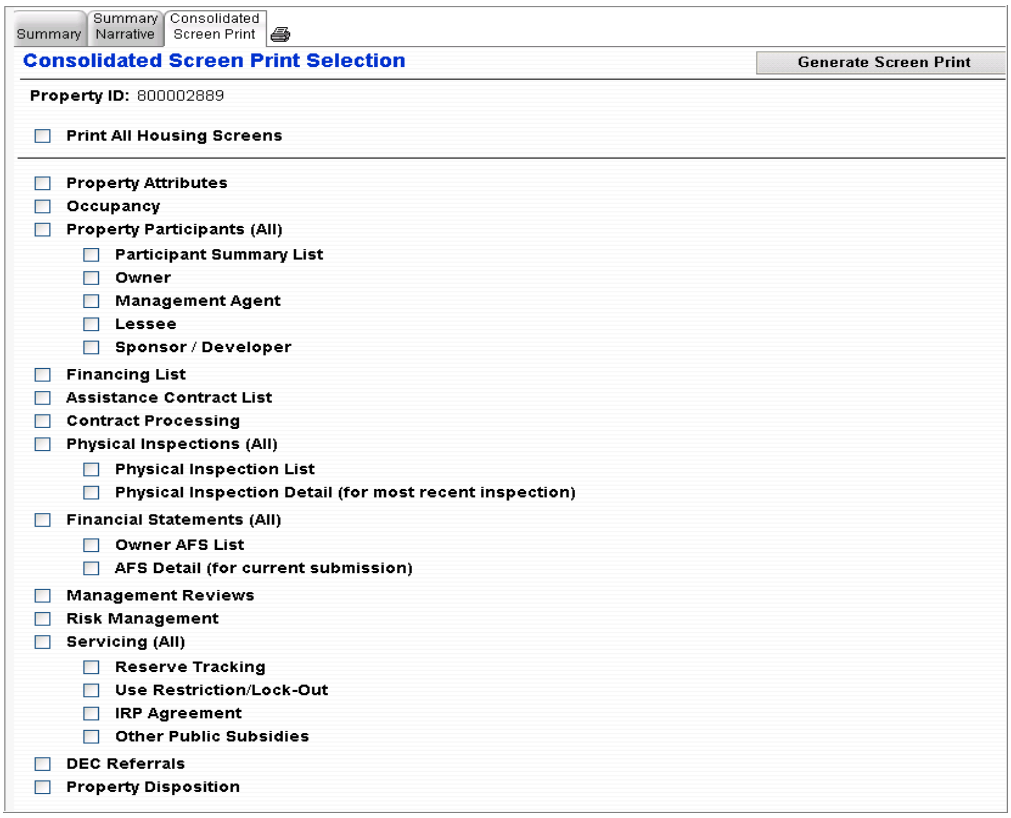


Figure 13-7. Consolidated Screen Print page

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

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

Management Review List

Management Review 1 to 5 of 5

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

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

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