Chapter 15: Subsidy Administration Portfolio/Dashboard

Table of Contents

Chapter 15: Subsidy Administration Portfolio/Dashboard 15-1

15.1 Subsidy Administration Portfolio/ Dashboard Page 15-2

15.1.1 Subsidy Administration Sidebar 15-2

15.2 Subsidy Administration Portfolio/ Dashboard Page Tabs 15-3

15.2.1 My Properties 15-3

15.2.2 Open Contract Processing 15-4

15.2.3 Properties with Contract(s) Assigned to CA ID 15-5

15.2.4 Advanced Search 15-6

List of Figures

Figure 15-1. Subsidy Administration Business Function 15-3
Figure 15-2. My Properties page 15-4
Figure 15-3. Open Contract Processing 15-5
Figure 15-4. Properties with Contract(s) Assigned to CA ID 15-6
Figure 15-5. Advanced Search/Property Selection 15-7
Figure 15-6. Single Search results page 15-8
Figure 15-7. Search Results for multiple properties 15-9

15

Subsidy Administration Dashboard

The **Subsidy Administration Portfolio/Dashboard** page is the initial page displayed when you access the *Subsidy Administration* tab in **iREMS**. The **Subsidy Administration Portfolio/Dashboard** page contains a list of all of your assigned properties, along with tabs across the top to allow you to easily generate property lists associated with other areas of focus for working with subsidy information and contract processing. The Advanced Search tab allows you to search **iREMS** for all properties that are in the database.

Once you have accessed the *Subsidy Administration* tab the **Subsidy Administration Portfolio/Dashboard** page displays. You must select a valid property from the list before you can click on the links in the Subsidy Administration Sidebar to access property-specific information for any of your assigned properties.

Objectives:

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

- Navigate the **Subsidy Administration Portfolio/Dashboard** page
- Access focus-related property lists according to tasks, using the tabs
- Use the **Advanced Search** tab to retrieve information on any property in **iREMS**
- Retrieve specific contract information for a property using the sidebar links

15.1 Subsidy Administration Portfolio/ Dashboard Page

The **Subsidy Administration Portfolio/Dashboard** page is populated with the list of your assigned properties, displayed on the *My Properties* tab by default. As the default setting, your portfolio is divided into lists of 10, with navigational buttons at the top of the page that allow you to move forward or backward in the list. You can go through the list in order, or you can jump to the end of the list or the top of the list, using the "first", "previous", "next" or "last" buttons.

> ✍ *Note: The navigational buttons display on pages when more than 10 records exist. If there are 10 or less records, the "first", "previous", "next", or "last" buttons will not display. You can edit the number of records in your display by using the settings link.*

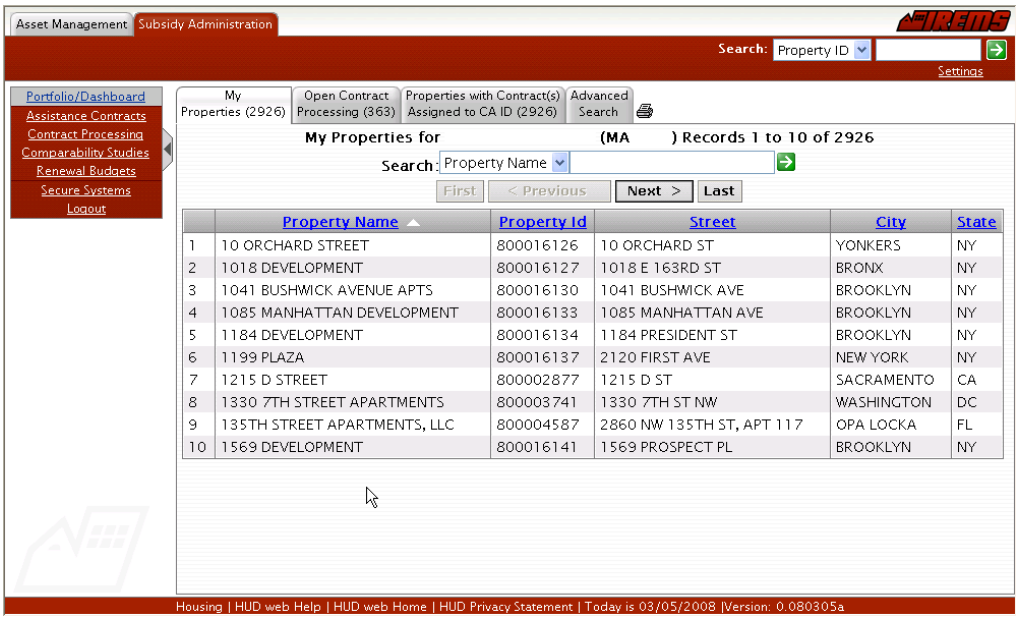
15.1.1 Subsidy Administration Sidebar

The **iREMS** *Subsidy Administration* sidebar displays links to detail pages containing information for a selected property. Detailed information for each of these links can be found in the Contract Processing chapter of this guide.

The Contract Processing chapter contains all the renewal information including; *Contract Processing, Comparability Studies, Renewal Budgets* and the *Funding Process*. For additional information on Contract processing *see chapter 17, Contract Processing.*

The following links display in the **iREMS** Subsidy Administration sidebar:

- Portfolio/Dashboard (default page – displays when accessing the *Subsidy Administration* tab)
- Assistance Contracts
- Contract Processing
- Comparability Studies
- Renewal Budgets



	Property Name	Property Id	Street	City	State
1	10 ORCHARD STREET	800016126	10 ORCHARD ST	YONKERS	NY
2	1018 DEVELOPMENT	800016127	1018 E 163RD ST	BRONX	NY
3	1041 BUSHWICK AVENUE APTS	800016130	1041 BUSHWICK AVE	BROOKLYN	NY
4	1085 MANHATTAN DEVELOPMENT	800016133	1085 MANHATTAN AVE	BROOKLYN	NY
5	1184 DEVELOPMENT	800016134	1184 PRESIDENT ST	BROOKLYN	NY
6	1199 PLAZA	800016137	2120 FIRST AVE	NEW YORK	NY
7	1215 D STREET	800002877	1215 D ST	SACRAMENTO	CA
8	1330 7TH STREET APARTMENTS	800003741	1330 7TH ST NW	WASHINGTON	DC
9	135TH STREET APARTMENTS, LLC	800004587	2860 NW 135TH ST, APT 117	OPA LOCKA	FL
10	1569 DEVELOPMENT	800016141	1569 PROSPECT PL	BROOKLYN	NY

Figure 15-1. Subsidy Administration Business Function

15.2 Subsidy Administration Portfolio/ Dashboard Page Tabs

Across the top of the **Subsidy Administration Portfolio/Dashboard** page are tabs that allow you to organize your properties according to the focus of your work. The tab labels are *My Properties, Open Contract Processing, Properties with Contract(s) Assigned to CA ID* and *Advanced Search*. If you want to access information for open contracts assigned to you, you click on the **Open Contract Processing** tab and a list of your assigned active properties with open contract processing is generated and displayed.

Each tab displays a number in parentheses next to the label. This indicates how many properties in your portfolio meet that specific criteria. For examples, the **My Properties** tab may show that there are 250 properties in your portfolio that have assistance contract information, but the **Open Contract Processing** shows that 20 properties in your portfolio meet the criteria of "open contract processing". By selecting the **Open Contract Processing** tab, you access a list of the 20 properties with open contract processing.

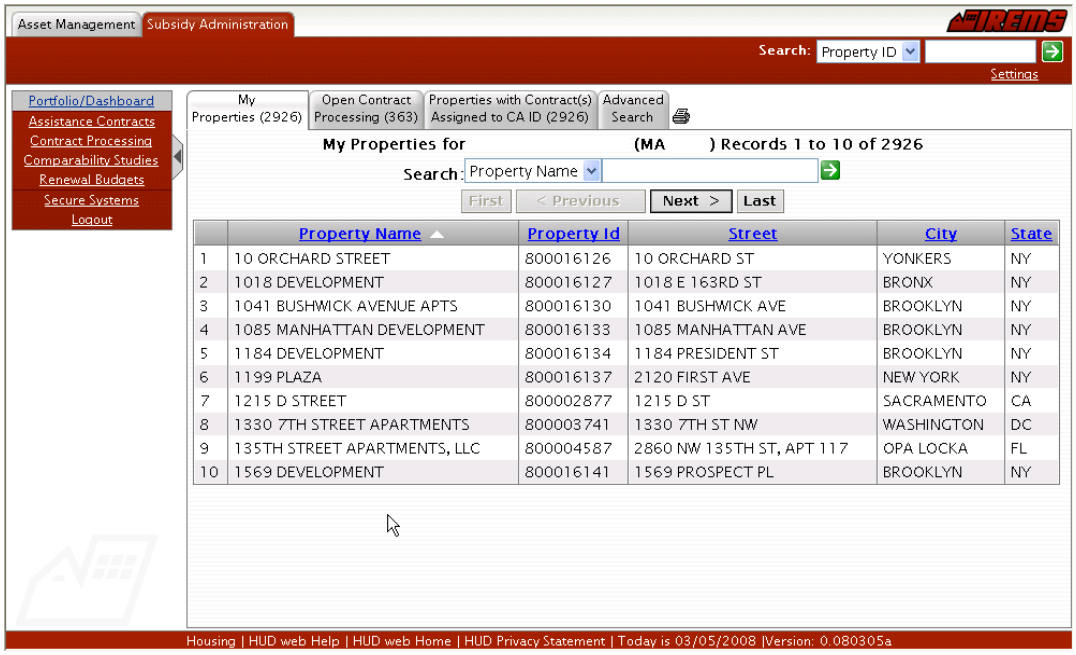
The column headings differ depending on each tab, however, the first column on all pages is *Property Name*. The lists can be sorted in ascending/descending order, either numerically or alphabetically depending on content, by clicking on any of the column headings.

15.2.1 My Properties

The **My Properties** tab default is a list of all active properties in your portfolio with contracts associated. The contracts on these properties can be active or inactive. However, if you used the select/filter option on the **Asset Management Portfolio Dashboard** page, the list displayed on the **My Properties** page will

reflect the roles selected. The tab displays the number of properties meeting this criteria in your portfolio in parentheses. For additional information on selecting roles see *Chapter 3, Asset Management section 3.2.1.1*. The property information is displayed in the following columns: *Property Name, Property ID, Street, City* and *State.* The list can be sorted in ascending/descending order by any of the columns by clicking on the column header.

A property can be selected by highlighting and clicking on the row. Once you select a property, the **Assistance Contract List** page displays. See *Chapter 17, Contract Processing*, for a detailed description of this page.



	Property Name	Property Id	Street	City	State
1	10 ORCHARD STREET	800016126	10 ORCHARD ST	YONKERS	NY
2	1018 DEVELOPMENT	800016127	1018 E 163RD ST	BRONX	NY
3	1041 BUSHWICK AVENUE APTS	800016130	1041 BUSHWICK AVE	BROOKLYN	NY
4	1085 MANHATTAN DEVELOPMENT	800016133	1085 MANHATTAN AVE	BROOKLYN	NY
5	1184 DEVELOPMENT	800016134	1184 PRESIDENT ST	BROOKLYN	NY
6	1199 PLAZA	800016137	2120 FIRST AVE	NEW YORK	NY
7	1215 D STREET	800002877	1215 D ST	SACRAMENTO	CA
8	1330 7TH STREET APARTMENTS	800003741	1330 7TH ST NW	WASHINGTON	DC
9	135TH STREET APARTMENTS, LLC	800004587	2860 NW 135TH ST, APT 117	OPA LOCKA	FL
10	1569 DEVELOPMENT	800016141	1569 PROSPECT PL	BROOKLYN	NY

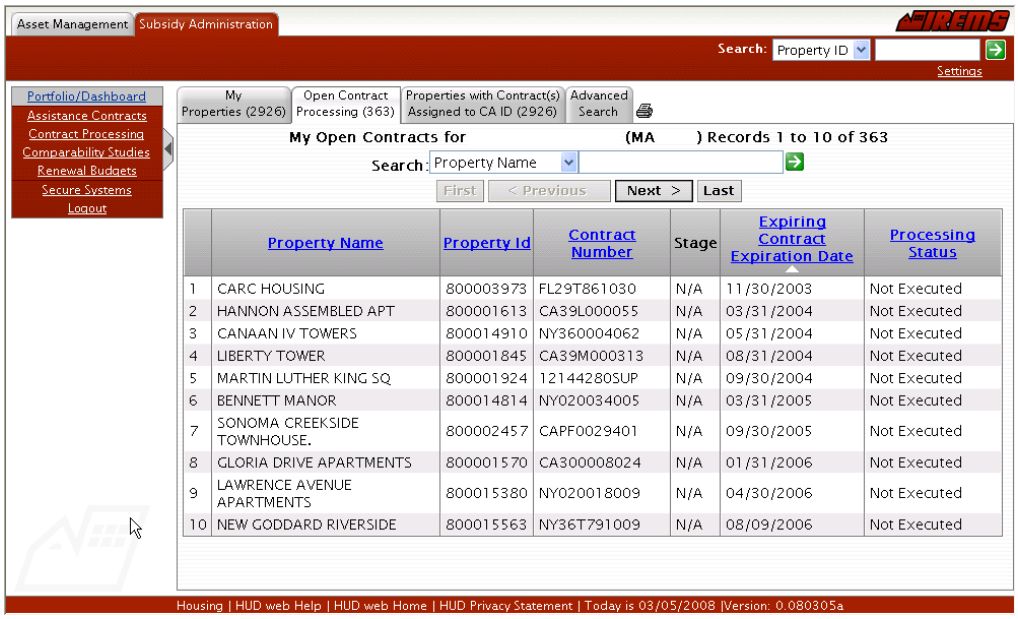
Figure 15-2. My Properties page

15.2.2 Open Contract Processing

The **Open Contract Processing** tab displays a list of all active properties assigned to you with open contract processing. However, if you used the select/filter option on the **Asset Management Portfolio Dashboard** page, the list displayed will reflect the roles selected. The tab displays the number of properties meeting this criteria in your portfolio in parentheses. For additional information on selecting roles see *Chapter 3, Asset Management section 3.2.1.1*.

The property information is displayed in the following columns: *Property Name, Property ID, Contract Number, Stage, Expiring Contract, Expiration Date,* and *Processing Status.* The list can be sorted in ascending/descending order by any of the columns, except for stage, by clicking on the column header.

A property can be selected by highlighting and clicking on the row. Once you select a property, the **Contract Processing List** page displays. See *Chapter 17, Contract Processing*, for a detailed description of this page.



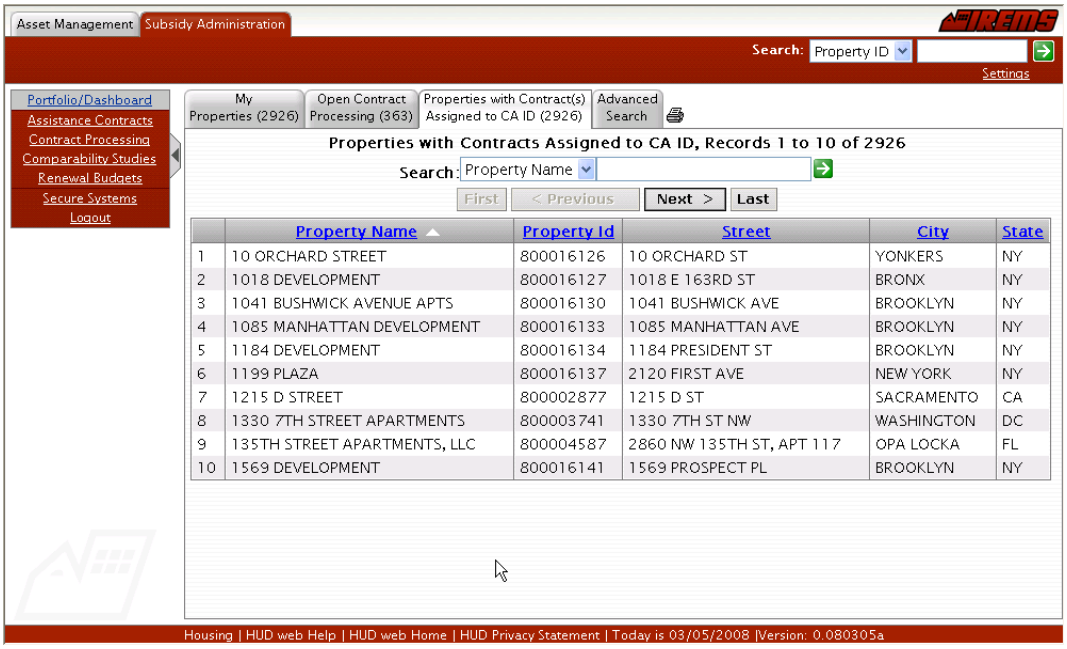
	Property Name	Property Id	Contract Number	Stage	Expiring Contract Expiration Date	Processing Status
1	CARC HOUSING	800003973	FL29T861030	N/A	11/30/2003	Not Executed
2	HANNON ASSEMBLED APT	800001613	CA39L000055	N/A	03/31/2004	Not Executed
3	CANAAN IV TOWERS	800014910	NY360004062	N/A	05/31/2004	Not Executed
4	LIBERTY TOWER	800001845	CA39M000313	N/A	08/31/2004	Not Executed
5	MARTIN LUTHER KING SQ	800001924	12144280SUP	N/A	09/30/2004	Not Executed
6	BENNETT MANOR	800014814	NY020034005	N/A	03/31/2005	Not Executed
7	SONOMA CREEKSIDE TOWNHOUSE.	800002457	CAPF0029401	N/A	09/30/2005	Not Executed
8	GLORIA DRIVE APARTMENTS	800001570	CA300008024	N/A	01/31/2006	Not Executed
9	LAWRENCE AVENUE APARTMENTS	800015380	NY020018009	N/A	04/30/2006	Not Executed
10	NEW GODDARD RIVERSIDE	800015563	NY36T791009	N/A	08/09/2006	Not Executed

Figure 15-3. Open Contract Processing

15.2.3 Properties with Contract(s) Assigned to CA ID

The **Properties Assigned to CA ID** tab displays a list of all active properties in your portfolio that have been assigned to a PBCA for contract processing.

A property can be selected by clicking on the row. Once you click on a property, the **Contract Processing** page displays. See *Chapter 17, Contract Processing*, for a detailed description of this page.



	Property Name	Property Id	Street	City	State
1	10 ORCHARD STREET	800016126	10 ORCHARD ST	YONKERS	NY
2	1018 DEVELOPMENT	800016127	1018 E 163RD ST	BRONX	NY
3	1041 BUSHWICK AVENUE APTS	800016130	1041 BUSHWICK AVE	BROOKLYN	NY
4	1085 MANHATTAN DEVELOPMENT	800016133	1085 MANHATTAN AVE	BROOKLYN	NY
5	1184 DEVELOPMENT	800016134	1184 PRESIDENT ST	BROOKLYN	NY
6	1199 PLAZA	800016137	2120 FIRST AVE	NEW YORK	NY
7	1215 D STREET	800002877	1215 D ST	SACRAMENTO	CA
8	1330 7TH STREET APARTMENTS	800003741	1330 7TH ST NW	WASHINGTON	DC
9	135TH STREET APARTMENTS, LLC	800004587	2860 NW 135TH ST, APT 117	OPA LOCKA	FL
10	1569 DEVELOPMENT	800016141	1569 PROSPECT PL	BROOKLYN	NY

Figure 15-4. Properties with Contract(s) Assigned to CA ID

15.2.4 Advanced Search

The **Advanced Search** tab allows you to search for a single property or a list of properties. Housing, Contract Administrators (CA), DEC, and other users will be able to view and modify information based upon the rights assigned to their user ID. The **Advanced Search** tab displays the **Advanced Search/Property Selection** page, which allows you to retrieve an individual property or a list of properties. You can also retrieve properties with partial search criteria, for example, incomplete numbers or partial property names.

✍ *Note: The* **Advanced Search/Property Selection** *page will be the default page displayed for HUD View Only users when they first access the system.*

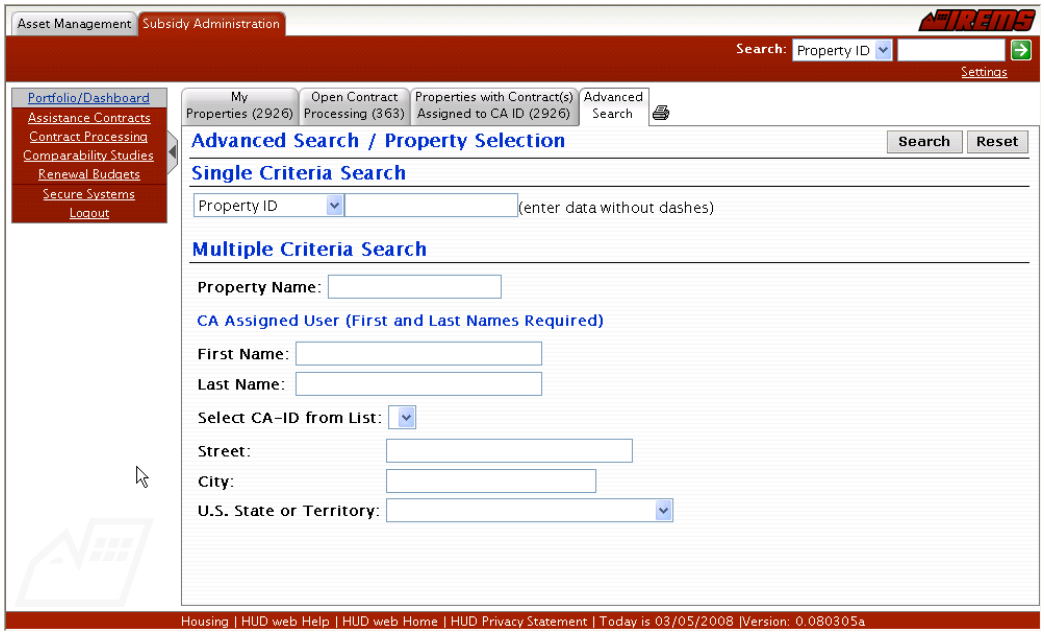


Figure 15-5. Advanced Search/Property Selection

To display a single property:

1. Click on the *Advanced Search* tab, and the **Advanced Search/Property Selection** page displays.
2. Enter the search criteria via the drop-down list in the single criteria search section:
   - *Property ID*
   - *Contract Number*
3. Click on Search and the **Search Results** page displays with the requested property information.

✍ *Note: If you enter selection criteria and it is not found, a "not found" message displays.*

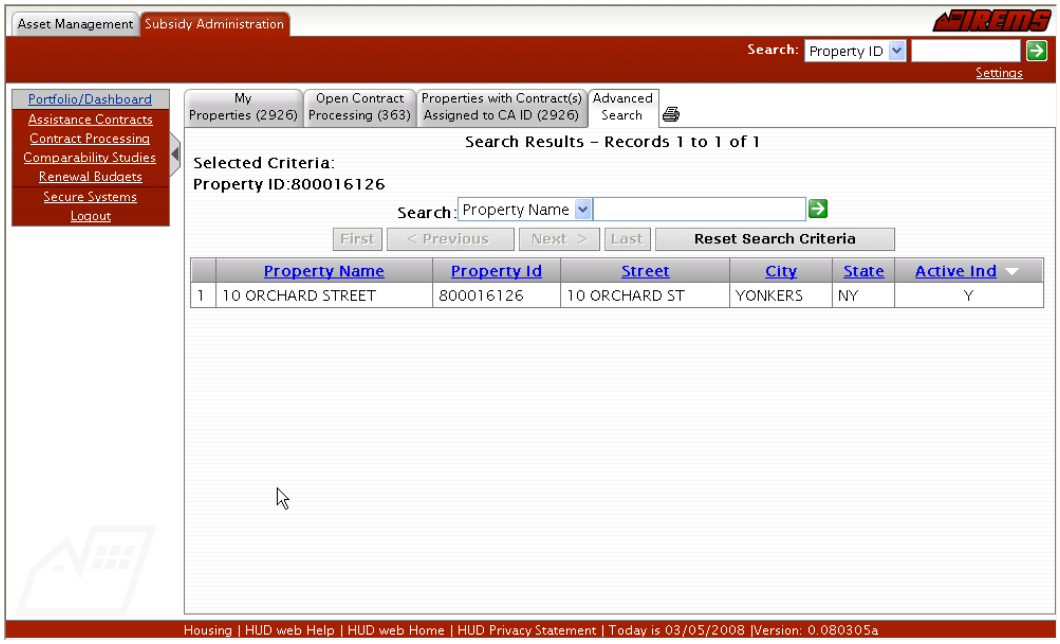


Figure 15-6. Single Search results page

4. Highlight and click on the property to select.

To display a list of properties:

1. Click on the *Advanced Search* tab, and the **Advanced Search/Property Selection** page displays.
2. In the Multiple Search Criteria section following in any of the following search criteria:
   - *Property Name*
   - *First Name*
   - *Last Name*
   - *Servicing Site*
   - *Street*
   - *City*
   - *State*

✍ *Note: You can enter the first few letters of the search criterion in any of the fields to search for a list of properties. For example, entering the letters "Cal", instead of an entire property*

name, retrieves a list of all properties that have a property name starting with "Cal" from the REMS database.

3. Click on Search and the **Search Results** page displays a list of the properties that meet the search criteria.

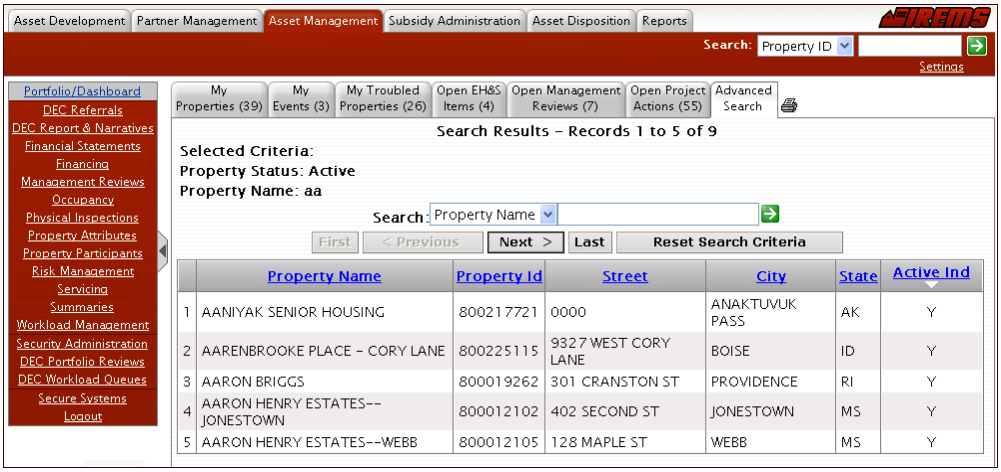


Figure 15-7. Search Results for multiple properties

4. Highlight and click on a property in the list to access the **Assistance Contract List** page for the selected property.