Chapter 3: Asset Management Portfolio/Dashboard

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3

Asset Management Portfolio/Dashboard

The **Asset Management Portfolio/Dashboard** page is the initial page displayed when you log into **iREMS**. The **Asset Management 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 an area of focus, such as management reviews or open project actions The **Advanced Search** tab accesses the **Advanced Search** page, which allows you to search **iREMS** for all properties that are in the database.

When you log in to **iREMS,** your **Asset Management Portfolio/Dashboard** page displays. Once you select a property from your portfolio, the **Property Attributes** page for that specific property displays. From this page you can click on the links in the *Asset Management* sidebar to access property-specific information for any of your assigned properties.

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

Objectives:

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

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

3.1 Asset Management Portfolio/Dashboard

The **Asset Management Portfolio/Dashboard** page is populated with the list of your assigned properties, displayed on the **My Properties** page by default (see section 3.2). For easy navigation, each list on each page is divided into lists of 10 properties, with navigational buttons above the lists 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.*

3.1.1 iREMS Asset Management Sidebar

The **iREMS** Asset Management sidebar displays links to detail pages containing information for a selected property. Detailed information for each of these links can be found in separate chapters in this guide corresponding with each link. The following links display in the **iREMS** Asset Management sidebar:

- *Portfolio/dashboard* (default page – displays at log-in)
- *Financial Statements*
- *Financing*
- *Management Review*
- *Occupancy*
- *Physical Inspections*
- *Property Attributes*
- *Property Participants*
- *Risk Management*
- *Servicing*
- *Summaries*
- *Workload Management*
- *Downloads*

✍ *Note: You must select a property in the list by clicking on it to view the information associated with each link in the sidebar. A warning message displays if no property is selected.*

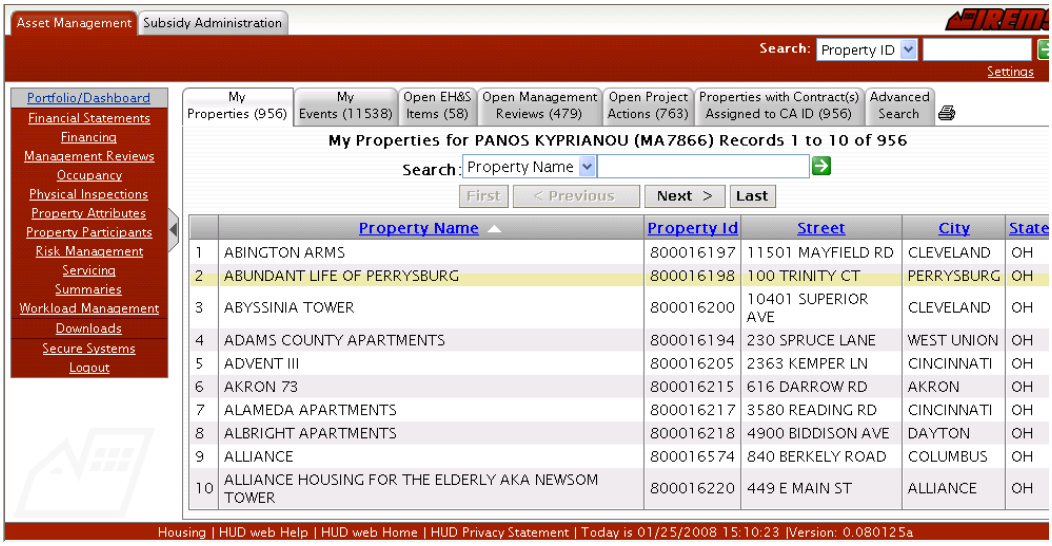


Figure 3-1. Asset Management Portfolio/Dashboard page

3.2 Asset Management Portfolio/Dashboard Page Tabs

Across the top of the **Asset Management Portfolio/Dashboard** page are tabs that allow you to organize your properties according to the focus of your work. For instance, if you want to access property information for any properties with EH&S issues, you click on the **EH&S Items** tab and a list of your assigned properties meeting that criteria is generated and displayed.

The heading on each page displays the following information: the current user's name and the number of records returned for each area of focus, i.e., the number of properties in your portfolio, or the number of properties in your portfolio with open project actions.

Each tab displays a number in parentheses next to the label. This indicates how many properties in your portfolio meet that specific criteria. For example, the **My Properties** tab may show that there are 250 properties in your portfolio, but the **My Troubled Properties** shows that 85 properties in your portfolio meet the criteria of "troubled". By selecting the **My Troubled Properties** tab, you access a list of the 85 troubled properties. These numbers are static and will not change within your session, with the exception of the **My Events** tab. If you delete an event from the **My Events** list page, the number on the tab will change immediately. If you make a change to any other list page, you will not see the change until after you have logged out of the browser, opened a new browser and logged back into iREMS.

The property list on each of these tabs is displayed in groups of 10, with the same navigational buttons (see section 3.1). The column headings differ depending on each tab, however, the first column on all screens 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. The following tabs display across the top of the **Portfolio/Dashboard** page: *My Properties, My Events, My Troubled Properties, Open EH & S Items, Open Management Reviews, Open Project Actions,* and *Advanced Search.*

3.2.1 My Properties

The **My Properties** tab displays the **My Properties** page that contains a list of all active properties assigned to you, regardless of your role. To select or filter the roles of the properties that display, see section **Error! Reference source not found.**. The tab displays the number of properties in your portfolio in parentheses.

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 clicking on the row. Once you click on a property, the **Property Attributes** page displays. See *Chapter 9, Property Attributes*, for a detailed description of this page.

Once you have selected a property, you can access detailed information related to a task by clicking on the desired link in the sidebar. For instance, if you need to view information concerning the financing for a property, you would first select the property, and then click on the *Financing* link.

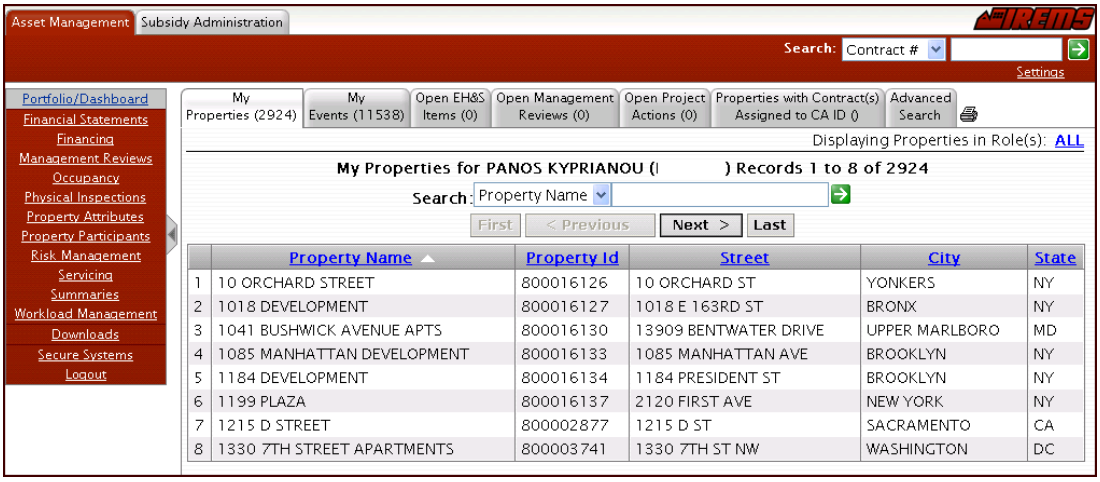


Figure 3-2. My Properties page

3.2.1.1 Change Display Roles

The **My Properties** page default displays all properties assigned to your user id regardless of your role on each property. The *Displaying Properties in Roles* link lists the roles displayed or shows *ALL* if all roles are displayed. You can change this view and narrow down the display by selecting the link. Once you click on the link, the **Change Display Roles** page displays. The selection of roles on this page will only be those roles currently assigned to your user ID.

Once you have made changes to the role selection on the **My Properties** tab, the filtered list of properties will also be used to determine which properties display on the **Subsidy Administration My Properties** page, the **Subsidy Administration Open Contracts** page, and the **Asset Disposition My Properties** page.

To change the role display:

1. From the **My Properties** page, click on the *Displaying Properties in Roles* link

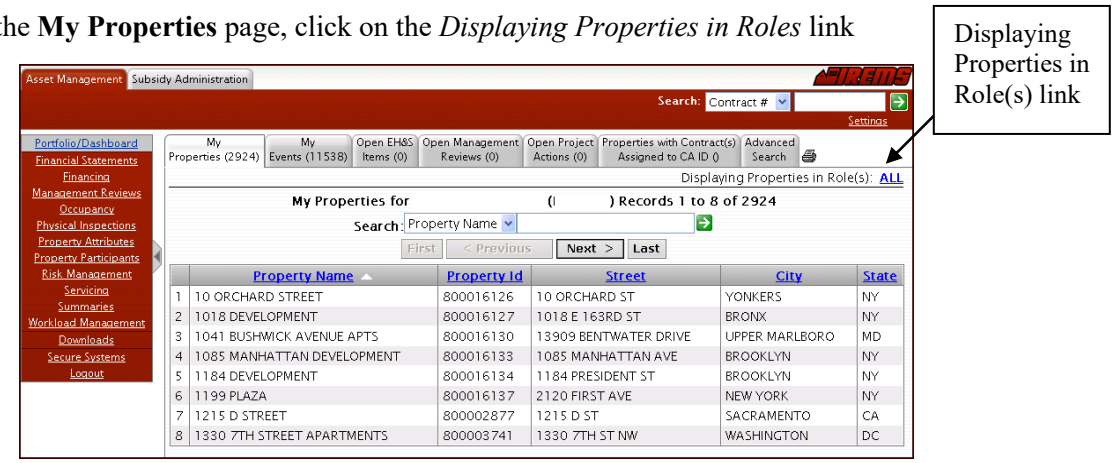


Figure 3-3. My Properties page

2. The **Change Display Roles** page displays.

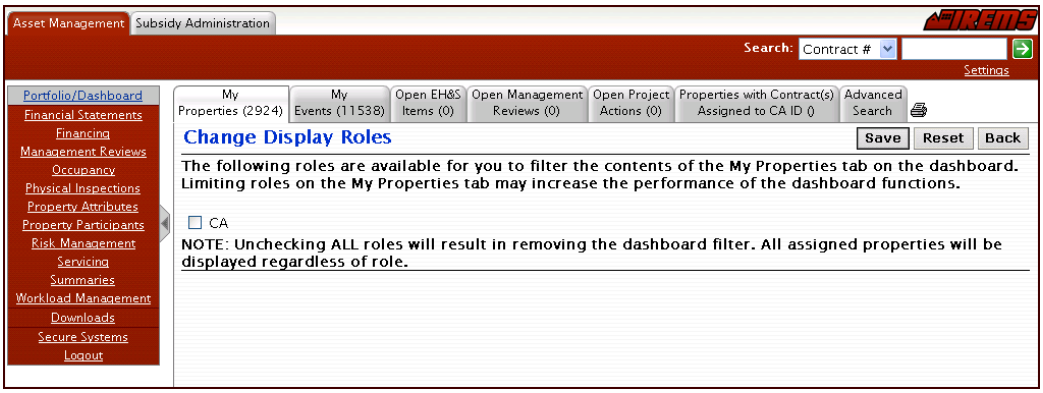


Figure 3-4. Change Display Roles page

3. Click in the check boxes for the roles you want to display.
4. Click on Save and the **My Properties** page displays with only the properties assigned with the selected role.

Alternative Option

Click on Reset to delete the displayed values.

OR

Click on Back to return to the My Properties page without saving the changes.

3.2.2 My Events

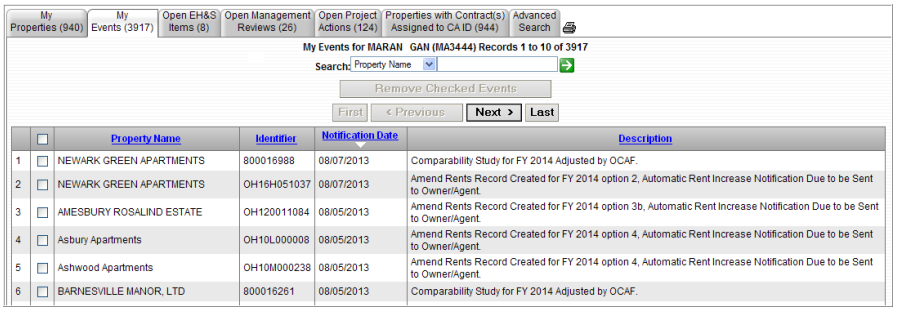
The **My Events** page displays a list of all events for active properties assigned to you. The tab displays the number of events in your portfolio in parentheses. The event information is displayed in the following columns: *Property Name, Identifier, Notification Date,* and *Description*. The list can be sorted in ascending/descending order by any of the columns by clicking on the column header. A checkbox displays in a column at the beginning of each row. You can remove events from your My Events list by selecting this checkbox (see below).

The **My Events** page provides users with automated notification of critical changes to the projects to which they are assigned. These notifications are triggered by changes to the database and are based on specific rules determined by the Office of Multifamily Housing and the Departmental Enforcement Center. The initial rules provide notifications for changes to properties and loans that are designated as important for users to efficiently work their current caseloads.

The life cycle of an event is determined by the rule associated with the event. A notification of a specific event is only received once and remains in the event list until removed by the user or automatically removed when the rule that trigged the event is no longer applicable. The life cycle of events may vary, as each rule has its own set of criteria. When new information is entered into the HEREMS database, **iREMS** looks at the new information, checks it against the current rules and, if a match is found, creates an event. The event is then distributed to all user roles that are designated for notification based on the rule guidelines. Events remain in your event listing until you mark them for removal or until the event is no longer true.

✍ *Note: The **My Events** tab is displayed only to users' assigned role that can receive events.*

✍ *Note: Description column gives the user an overview of the Event specified. Additional information has been added that allows more customized notifications.*



		Property Name	Identifier	Notification Date	Description
1	☐	NEWARK GREEN APARTMENTS	800016988	08/07/2013	Comparability Study for FY 2014 Adjusted by OCAF.
2	☐	NEWARK GREEN APARTMENTS	OH16H051037	08/07/2013	Amend Rents Record Created for FY 2014 option 2, Automatic Rent Increase Notification Due to be Sent to Owner/Agent.
3	☐	AMESBURY ROSALIND ESTATE	OH120011084	08/05/2013	Amend Rents Record Created for FY 2014 option 3b, Automatic Rent Increase Notification Due to be Sent to Owner/Agent.
4	☐	Asbury Apartments	OH10L000008	08/05/2013	Amend Rents Record Created for FY 2014 option 4, Automatic Rent Increase Notification Due to be Sent to Owner/Agent.
5	☐	Ashwood Apartments	OH10M000238	08/05/2013	Amend Rents Record Created for FY 2014 option 4, Automatic Rent Increase Notification Due to be Sent to Owner/Agent.
6	☐	BARNESVILLE MANOR, LTD	800016261	08/05/2013	Comparability Study for FY 2014 Adjusted by OCAF.

Figure 3-5. My Events page

3.2.2.1 Event Notification Rules

The rules for creation of events are described in the following chart. The chart lists the *Rule Name*, *Organization*, *Rule Description*, *Contact Roles* and *Notification Removal*.

Rule Name	Org	Rule Description	Contact Roles	Notification Removal
AFS Overdue Submission - Referred to DEC	MFH	Notify the assigned PM and CA when a new "AFS Overdue: DEC Review Required" project activity is created.	PM, CA EAN, FAN	The notification will no longer be displayed when the PM closes the project action. Otherwise, the user can choose to remove the notification from display at any time.
AFS Overdue Submission - APPS 2530 flag created	APPS	Notify the assigned PM when a non-filer participant flag is entered into APPS. The notification reads: "AFS Overdue Submission – Email Sent to Owner - APPS 2530 Flag Created."	PM	The notification will be inactivated when the non-filer participant flag is deleted. The user can also choose to remove the notification from display at any time.
AFS Submission Received - Good	MFH	Notify the assigned PM and CA when a new "AFS Submission (Good) Received by FASS & No Response Due" project activity is created.	PM, CA EAN, FAN	The user can choose to remove the notification from display at any time.
AFS Submission Received - not assessed - missing critical data	MFH	Notify the assigned PM and CA when a new "Critical Data, Required for AFS Assessment, Missing" project activity is created.	PM, CA EAN, FAN	The notification will no longer be displayed when the PM closes the project action. Otherwise, the user can choose to remove the notification from display at any time.
AFS Submission Received - referred to Housing (compliance)	MFH	Notify the assigned PM and CA when a new "AFS Letter Sent to Owner & Response Due" project activity is created.	PM, CA EAN, FAN	The notification will no longer be displayed when the PM closes the project action. Otherwise, the user can choose to remove the notification from display at any time.
AFS Submission Received - referred to Housing (performance)	MFH	Notify the assigned PM and CA when a new "AFS Evaluation Financial/Physical Risk" project activity is created.	PM, CA EAN, FAN	The notification will no longer be displayed when the PM closes the project action. Otherwise, the user can choose to remove the notification from display at any time.
Amend Rents Record Created	MFH	Notify the assigned PM or PBCA that an automatic amend rent record for option 5b has been created.	PM, CA	Notification can be removed from display at any time.
Amend Rents Record Created, Automatic Rent Increase Notification Due	MFH	Notify the assigned PM or PBCA that an automatic amend rent record for option 1a or 1b has been created.	PM, CA	Notification can be removed from display at any time.

Rule Name	Org	Rule Description	Contact Roles	Notification Removal
Amend Rents Record Created, Automatic Rent Increase Notification Due to be Sent to Owner/Agent	MFH	Notify the assigned PM or PBCA that an automatic amend rent record for option 2, 3a, 3b, 4, 5a, has been created	PM, CA	Notification can be removed from display at any time.
Amend Rents Record Created, Comp Study Due – New Rents must be set to Comparable	MFH	Notify the assigned PM or PBCA that an automatic amend rent record for option 1a/1b, 2 has been created but a comparability study is due.	PM, CA	Notification can be removed from display at any time.
Cost Cut Off Date	DAP	Cost Cut Off Date to enter and/or verify the date the Owner assumed financial responsibility.	PM	The user can choose to remove the notification from display at any time. If the cost cut off date is updated by DAP, the old event notification will no longer be displayed. However, a new event will be created.
Current Management Agent Certification Expires	MFH	Notify the assigned PM when the Current Management Agent's Certification Expires.	PM	The user can choose to remove the notification from their display at any time.
DEC Referral Assigned to DEC Analyst/ Attorney	DEC	For those properties that are currently referred to the DEC, notify the assigned analyst and/or attorney when someone is assigned to a DEC referral.	EAN, FAN, ESA	The notification will no longer be displayed when the user is unassigned from the DEC referral. Otherwise, the user can choose to remove the notification from display at any time.
Loan Status Detail Change	DEC	For those properties that are currently referred to the DEC, notify the assigned analyst and/or attorney when the loan status detail changes.	EAN, FAN, ESA	The notification will no longer be displayed when the DEC referral is closed. Otherwise, the user can choose to remove the notification from display at any time.
MDDR Project Action	MFH	Notify the assigned PM when MDDR inserts a default or delinquency project action in iREMS	PM	The user can choose to remove the notification from display at any time.
NIST Certification Due	MFH	Semi-yearly NIST certification is currently due	Certification Region Administrator	The user can choose to remove the notification from their display at any time.

Rule Name	Org	Rule Description	Contact Roles	Notification Removal
NIST Cert 1 week late	MFH	Semi-yearly NIST certification is currently 1 week late	Certification Region Administrator	The user can choose to remove the notification from their display at any time.
NIST Cert 2 weeks late	MFH	Semi-yearly NIST certification is currently 2 weeks late	Certification Region Administrator	The user can choose to remove the notification from their display at any time.
NIST Cert 3 weeks late	MFH	Semi-yearly NIST certification is currently 3 weeks late	Certification Region Administrator	The user can choose to remove the notification from their display at any time.
OPIIS Risk Category has Changed	MFH DEC	Notify user when the overall OPIIS category has changed.	PM EAN, FAN, ESA	Only notify DEC if an open DEC referral exists.
Physical Inspection Released	MFH	Notify the assigned PM and CA when released physical inspections are received into REMS.	PM, CA	The user can choose to remove the notification from their display at any time.
Property Referred to OMHAR	DEC	For those properties that are currently referred to the DEC, notify the assigned analyst and/or attorney when OMHAR receives a property referral from a Housing field office.	EAN, FAN, ESA	The notification will no longer be displayed when the DEC referral is closed. Otherwise, the user can choose to remove the notification from display at any time.
Renewal Record Created	MFH	Notify the assigned PM or PBCA that an automatic renewal record was created for an expiring contract.	PM, CA	Notification can be removed from display at any time.
Rent Comp Study Expiring	MFH	Rent comp study expiring in 9 months. Sent 4 years and 3 months after appraiser's signature.	PM, CA	The user can choose to remove the notification from their display at any time.
Source System Loan Status Change	DEC	For those properties that are currently referred to the DEC, notify the assigned analyst and/or attorney when the source system status of the loan changes.	EAN, FAN, ESA	The notification will no longer be displayed when the DEC referral is closed. Otherwise, the user can choose to remove the notification from display at any time.

Rule Name	Org	Rule Description	Contact Roles	Notification Removal
Your loan\capital advance status has been terminated	MFH	Notify PM and BPM when an existing loan switches from active to inactive. This applies to all loans from: DAP, MARS, PAS, FHASL, and LAS/NLS.	PM, BPM	The user can choose to remove the notification from their display at any time.

✍ *Note: When you select a row in the My Events table, you access to the related Property Name/Address tab for a property based event, or the Financing Detail tab for financing instrument based events.*

To remove an event from the list

1. On the *My Events* tab page, click on the checkbox next to the property name and event you wish to remove. The Remove Checked Events button becomes active.

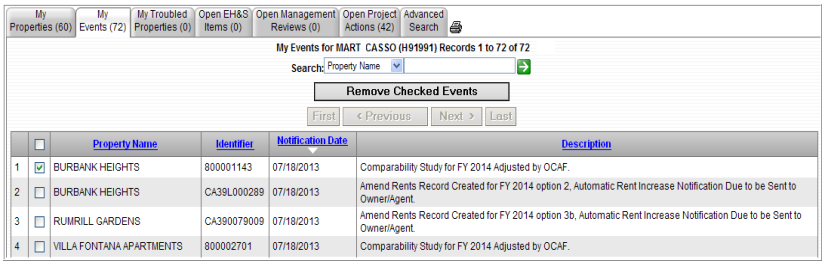
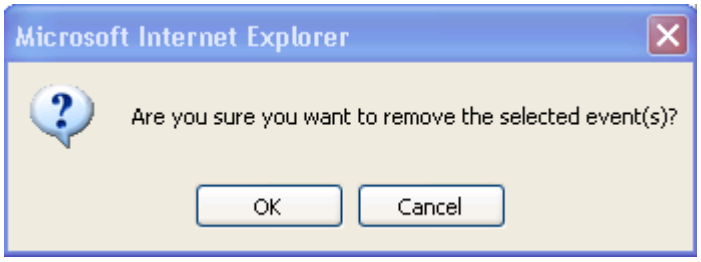


Figure 3-6. My Events page

2. Click on Remove Checked Events. The following message displays asking you to verify that you want to remove the selected event(s).



3. Click on OK to remove the selected event. The **My Events** page displays with the event removed from the list.

Alternative option

Click on Cancel to return to the **My Events** page without removing the event.

> ✍ *Note: You can remove multiple events at one time by clicking on as many checkboxes as needed. To remove all events at one time, click on the checkbox at top of the column.*

3.2.3 Open EH&S

The **Open EH & S Items** page displays a list of all active properties with open EH & S items assigned to you. The page displays the number of properties meeting this criteria in your portfolio in parentheses. The property information is displayed in the following columns: *Property Name, Property ID, Inspection ID*, and *Inspection Date*. 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 clicking on the row. Once you click on a property, the related **EH&S Items Detail** page displays, on the *Physical Inspection* link in the Asset Management sidebar. See *Chapter 8, Physical Inspection*, for a detailed description of this page.

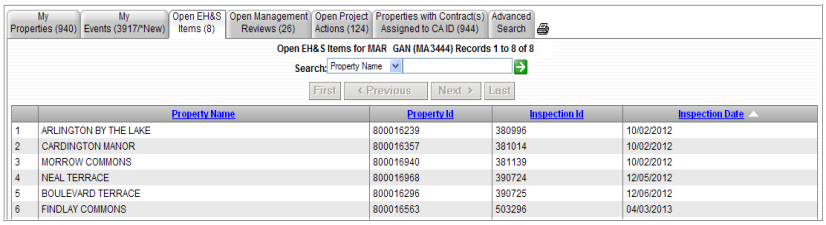


Figure 3-5. Open EH&S Items page

3.2.4 Open Management Reviews

The **Open Management Reviews** page displays a list of all active properties with open management reviews assigned to you. The page displays the number of properties in your portfolio that meet this criteria in parentheses. The property information is displayed in the following columns: *Property Name, Property ID, Scheduled Date, Performed Date,* and *Response Due Date*. 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 clicking on the row. Once you click on a property, the related **Management Review Detail** page displays, under the Management Review link in the Asset Management sidebar. See *Chapter 6, Management Review*, for a detailed description of this page.

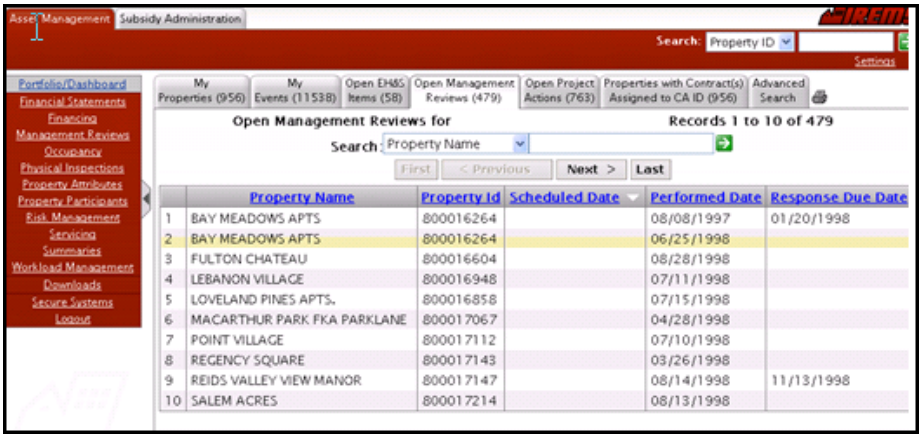


Figure 3-6. Open Management Reviews page

3.2.5 Open Project Actions

The **Open Project Actions** page displays a list of all active properties with open project actions assigned to you. The page displays the number of properties with open project actions in your portfolio in parentheses. The property information is displayed in the following columns: *Property Name, Property ID, Action, Start Date,* and *Current Target Completion Date*. The list can be sorted in ascending/descending order by any of the columns by clicking on the column header.

> ✍ *Note: The Current Target Completion Date column displays the most current target completion date, whether that date is the original target completion date, or an amended target date.*

A property can be selected by clicking on the row. Once you click on a property, the related **Project Action Detail** page displays, under the *Workload Management* link in the Asset Management sidebar. See *Chapter 14, Workload Management*, for a detailed description of this page.

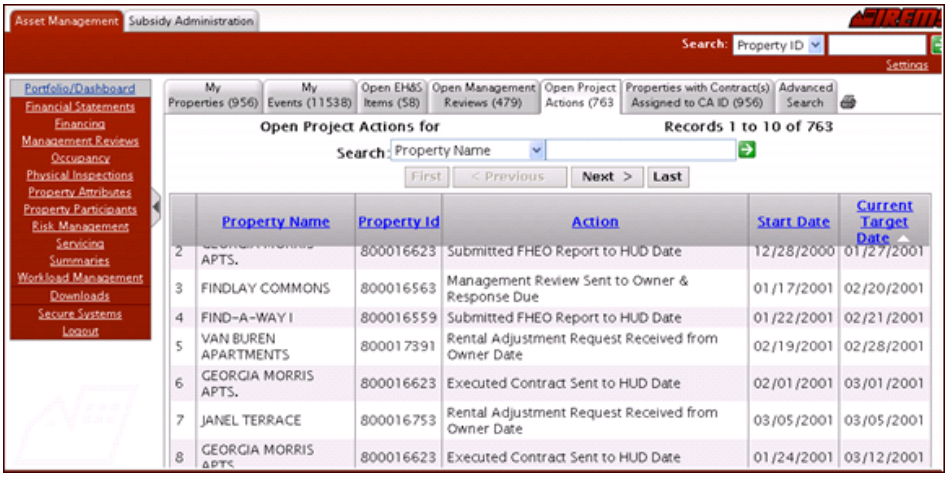
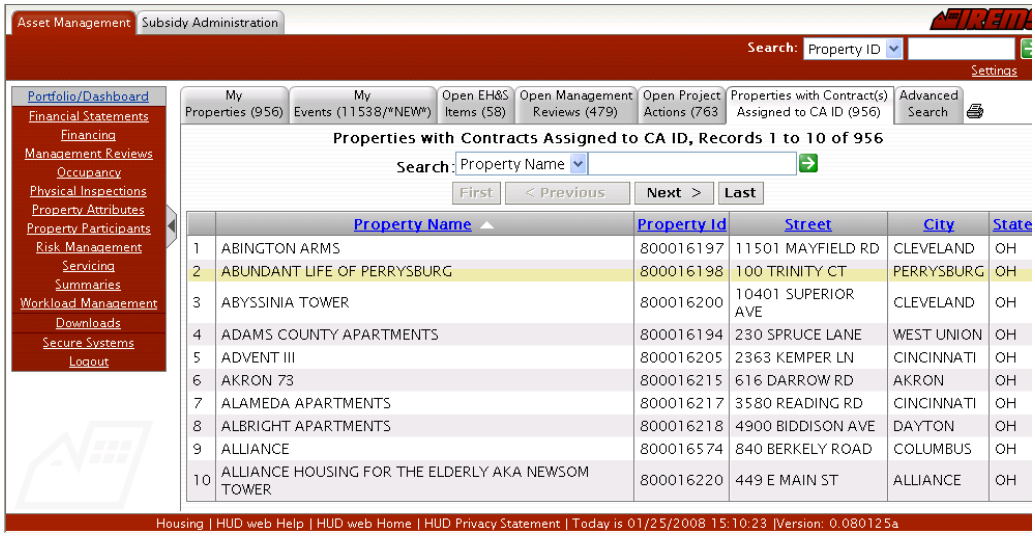


Figure 3-7. Open Project Actions page

3.2.6 Properties with Contracts Assigned to CA ID

The **Properties with Contracts Assigned to CA ID** page displays a list of all properties with contracts assigned to the PBCA organization. This list includes those assigned to the current user ID as well as those not assigned.



	Property Name	Property Id	Street	City	State
1	ABINGTON ARMS	800016197	11501 MAYFIELD RD	CLEVELAND	OH
2	ABUNDANT LIFE OF PERRYSBURG	800016198	100 TRINITY CT	PERRYSBURG	OH
3	ABYSSINIA TOWER	800016200	10401 SUPERIOR AVE	CLEVELAND	OH
4	ADAMS COUNTY APARTMENTS	800016194	230 SPRUCE LANE	WEST UNION	OH
5	ADVENT III	800016205	2363 KEMPER LN	CINCINNATI	OH
6	AKRON 73	800016215	616 DARROW RD	AKRON	OH
7	ALAMEDA APARTMENTS	800016217	3580 READING RD	CINCINNATI	OH
8	ALBRIGHT APARTMENTS	800016218	4900 BIDDISON AVE	DAYTON	OH
9	ALLIANCE	800016574	840 BERKELY ROAD	COLUMBUS	OH
10	ALLIANCE HOUSING FOR THE ELDERLY AKA NEWSOM TOWER	800016220	449 E MAIN ST	ALLIANCE	OH

Figure 3-8. Properties with Contract Assigned to CA ID

3.2.7 Advanced Search

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

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

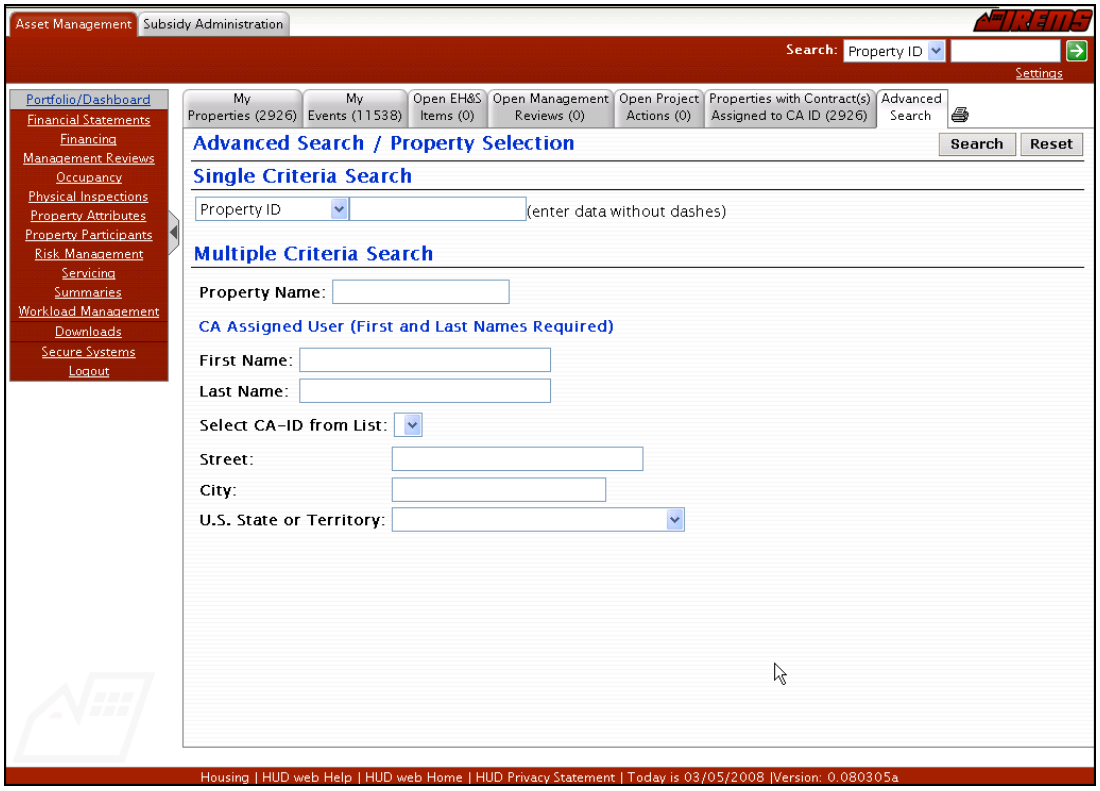


Figure 3-9. Advanced Search page

To display a single property:

1. Click on the **Advanced Search** page, and the **Advanced Search/Property Selection** page displays.
2. In the *Single Criteria Search* section, click on the drop-down arrow and select one of the following: *Property ID, Contract Number*, or *FHA Number*.
3. Enter the corresponding data in the text field, i.e., if you have selected Property ID in the drop-down list, you need to enter the numerical property ID.
4. Click on "submit" and the **Search Results** page displays with the requested property in the list.
5. Click on the property in the list to access the **Property Attributes** page for the selected property. See *Chapter 9: Property Attributes* for detailed information about this page.

Alternative Option

Click on Reset to return the page to blank fields.

To display a list of properties using partial criteria

1. Click on the **Advanced Search** tab, and the **Advanced Search/Property Selection** page

displays.

2. In the *Single Criteria Search* section, click on the drop-down arrow and select one of the following: *Contract Number* or *FHA Number*.
3. Enter the corresponding data in the text field, i.e., if you have selected *FHA Number* in the drop-down list, you need to enter the partial FHA number.
4. Click on Submit and the **Search Results** page displays a list of the properties that meet the search criteria on the Advanced Search page.
5. Click on a property in the list to access the **Property Attributes** page for the selected property. See *Chapter 9: Property Attributes* for detailed information about this page.

> ✍ *Note: If you enter selection criteria and it is not found, or you are restricted from the information, a "not found or you do not have rights to view" message displays.*

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 Criteria Search* section, Enter any of the following search criteria:
   - *Property Name*
   - *CA Assigned User First Name*
   - *CA Assigned User Last Name*
   - *Select CA-ID from List*
   - *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 **iREMS** database.*
>
> ✍ *Note: The Contract and FHA Number fields also allow you to search for a list of properties. For example, entering a partial contract number, such as "VA", retrieves a list of all properties that have a contract number starting with "VA" from the **iREMS** database.*

3. Click on Submit and the **Search Results** page displays a list of the properties that meet the search criteria on the Advanced Search page.
4. Click on a property in the list to access the **Property Attributes** page for the selected property. See *Chapter 9: Property Attributes* for detailed information about this page.