Public Housing Portal

Public Housing Agency User Guide for
HUD-50075 PHA Annual Plan CY 2025

U.S. Department of Housing and Urban Development

Office of Public and Indian Housing

Financial Management Division

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Public Housing Portal

The Public Housing Portal (portal) is an online platform for Public Housing Authorities (PHAs) and the Office of Public and Indian Housing (PIH). It allows PHAs to complete and submit Operating Fund (OpFund) required forms. This guide provides PHAs the steps to create complete and submit the online version of the PHA Annual Plan (form HUD-50075). It is important to note the terms Development, Project, and Asset Management Project (AMP) are used interchangeably within the Portal. The Inventory Management System/PIH Information Center (IMS/PIC) continues to consider projects as developments.

Public Housing Authority Plans

The PHA Plan is a comprehensive guide to Public Housing Agency (PHA) policies, programs, operations, and strategies for meeting local housing needs and goals. There are two parts to the PHA Plan:

- **5-Year Plan** – required to be completed and submitted by each PHA to HUD every fifth (5th) PHA fiscal year.
- **Annual Plan** – required to be completed and submitted by each PHA to HUD every year.

This guide focuses on the Annual Plans which must be completed by all PHAs. For guidance on how to complete the Annual PHA Plan, review the following:

- [Notice PIH-2015-18](#) Availability of New and Revised Public Housing Agency (PHA) Five-Year and Annual Plan Templates and Other Forms that provides clarification on the categories of PHAs and the corresponding 5-Year PHA Plan submission requirements.

- Forms HUD-50075-ST, HUD-50075-HP, HUD-50075-SM, HUD-50075-HCV Annual PHA Plans (for all PHAs) provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low-income, very low-income, and extremely low-income families.

- PHA Certifications of Compliance with PHA Plans and Related Regulations (HUD-50077-CRT-SM, HUD-50077-ST-HCV-HP), Civil Rights Certification (HUD-50077-CR), Certification by State or Local Office of PHA Consistency with the Consolidated Plan (HUD-50077-SL) are the standard certifications PHAs submit indicating their compliance with PHA Plan, Civil Rights Certification, and related regulations.

Requesting Access to the Portal

PHA staff must request access to the Portal through their local Web Access Security Subsystem (WASS) security coordinator.

User Roles

WASS security coordinators must assign the users only one user role. WASS security coordinators must assign users the appropriate user role. The PHA user roles are described below:

| User Role	Description
OPD	**This user role is for the PHA's Executive Director only.** This user can create, edit, upload supporting documents, and manually or electronically sign or submit certifications, plans, forms, and other types of submissions.
OPE	This user can create, edit, and upload supporting documents for the submission. This user cannot sign or submit certifications, plans, forms, and other types of submissions.
OPI	This user can only read completed submissions. This user cannot create, edit, upload supporting documents, sign or submit certifications, plans, forms, and other types of submissions.
OPL	**This user role is for the PHA's Board Chair only.** This user can create, edit, manually or electronically sign required Board certifications, and upload supporting documents. This user cannot sign or submit plans, forms, or other types of submissions.
OPM	**This user role is for the Local Authorizing Official only.** This user can manually upload or electronically sign the required HUD-50077-SL certification. This user cannot sign or submit plans, forms, or other types of submissions.

WASS security coordinator can find a user guide to assign user roles from this web page: https://www.hud.gov/program_offices/public_indian_housing/programs/ph/am/webportal.

Navigating to Portal through Secure Systems

Using the Google Chrome web browser only, go to the portal through the Secure Systems URL: https://hudapps.hud.gov/HUD_Systems/ , log in, and click the **Public housing Portal (PIH Operating Fund)** hyperlink.

The system displays the portal home page as shown below.
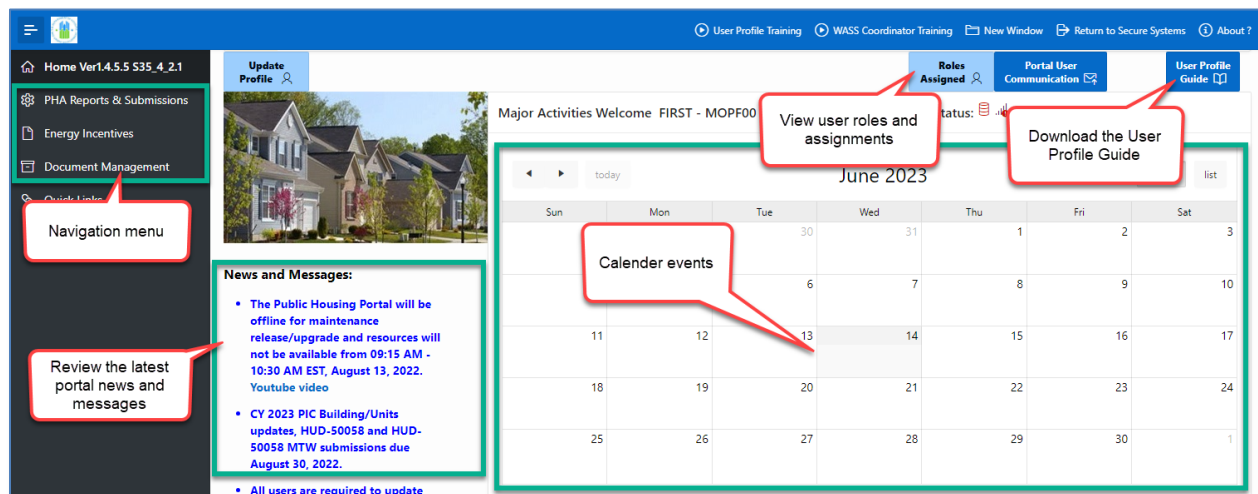
From the home page, PHA users can review upcoming portal submission dates, events, read the latest Portal News and Messages, download the User Profile Guide, update their User Profiles, and navigate to many of the portal's modules.

 IMPORTANT:

Please use the Google Chrome browser to access the portal.

User Profile

The portal requires all users to have a user profile. Users cannot navigate the portal or access portal resources until they create their user profiles. If the user has not created a User Profile,

the home page will display the following message: User profile is missing, please update user profile to continue.
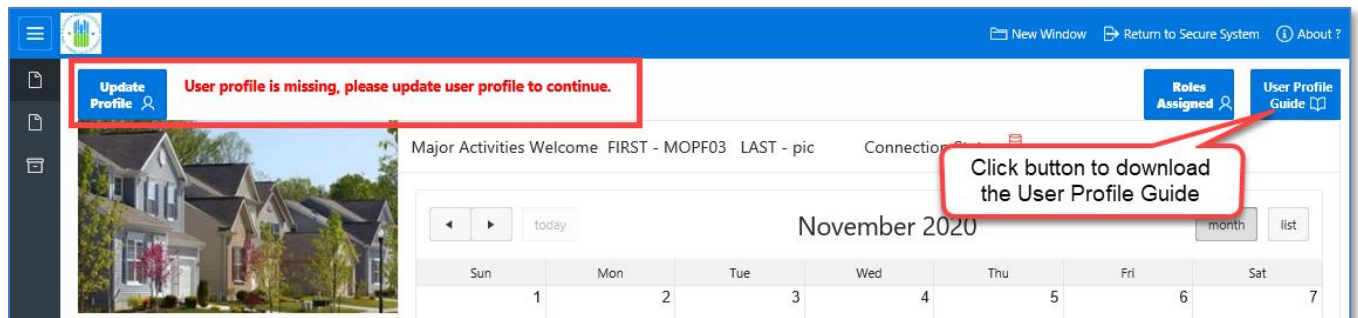
Consult the User Profile user guide to complete your User Profile. <u>The **User Profile Guide** is available to download at the portal Home page</u>.

Missing PHA Assignment Warning

1. Click **PHA Reports & Submissions** in the left side navigation menu.

If the system displays the **Missing PHA Assignment** warning in the upper right corner of the PHA Reports & Submissions page, the PHA user must contact their WASS security coordinator to correct their user role for the portal.
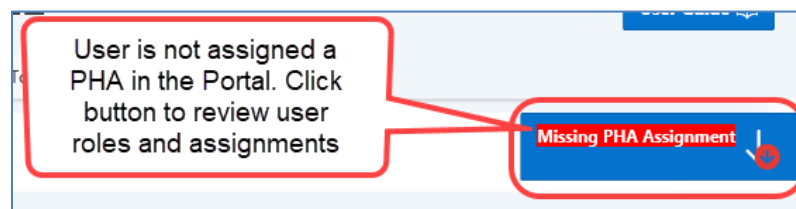
2. Click the **Missing PHA Assignment** button to review assignments of PHAs to user roles. The pop-up window displays the user's Portal roles and associated PHAs.
3. Contact your WASS security coordinator if you need to update your user role and/or PHA assignment(s).

The PHA assignment pop-up window is divided into two (2) areas:

Area 1: Displays Portal role(s) assigned to the user that has associated PHA(s).

Area 2: Displays Portal role(s) assigned to the user that do not have associated PHA(s).

The user should contact the PHA's WASS security coordinator to assign a PHA.

Note: Changes to the user's roles and assignments may take up to two (2) business days. Until then, the user will not be able to access the portal.
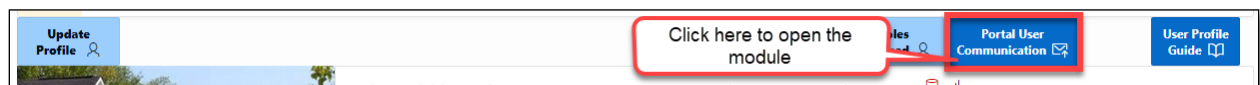
News and Messages

The portal provides users with the current News and Messages related to the Portal and OpFund Grant processing. The News and Messages feed can be found on the home page:
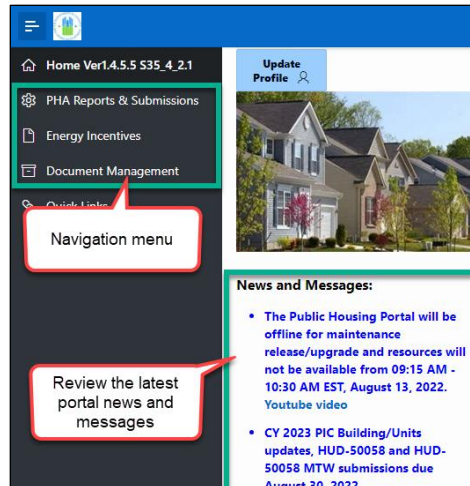
Communication Module

The portal provides a communication module that allows users to view historical listserv and email communications containing PIH guidance and instructions. This includes viewing the type of correspondence, date of correspondence, as well as the subject, and the content. The user can sort through different reports ranging from previous years' reports to sub-reports within the current calendar year.

To open this module, select the **Portal User Communication** button in the upper right corner of the portal home page.

The **View/Download Portal User Communications** page displays the following:

There are actions the user can make within this module to suit their needs.
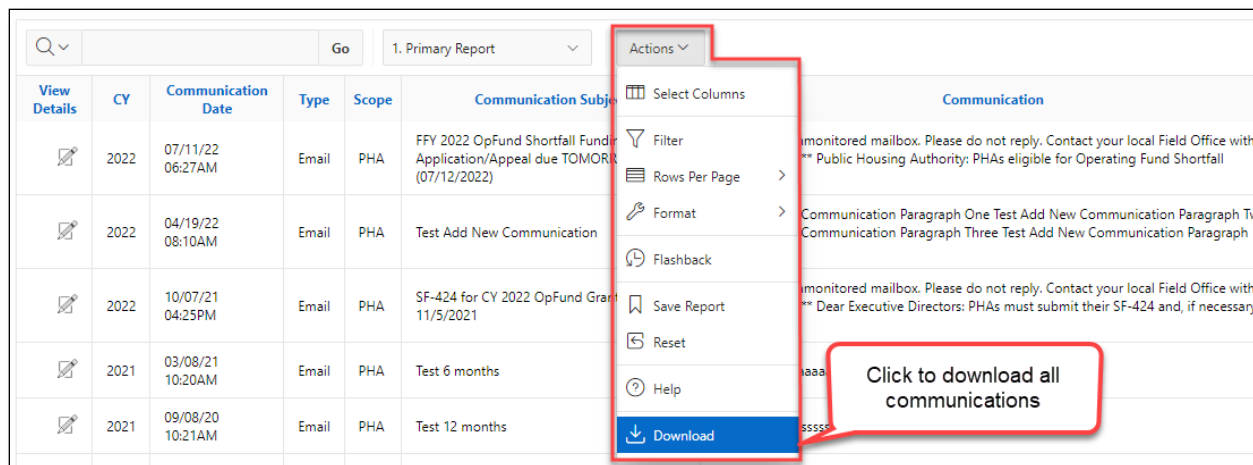
Click the **Actions** drop-down menu to perform the following:

- Filter the full list of portal user communications by Column and Expression.
- Download the full list of portal user communications.
- Aggregate, group, and display the data in the chart format.

This module may help users to search, filter, sort and quickly locate correspondences from a PHA with a specific piece of information (e.g., correspondence regarding SR-FRB for a specific PHA).
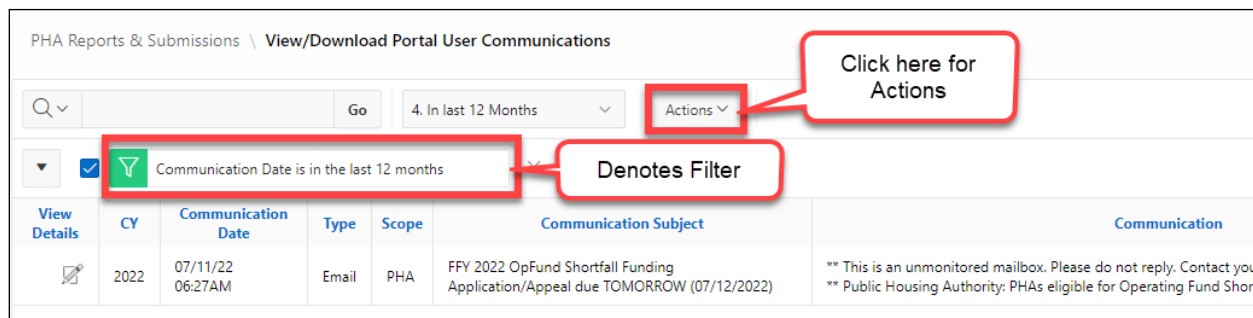
Users can view details from each correspondence and content from the email or download the email and file attachments, as necessary.

Note: *See below details of the communication sent and you may download communication document and any associated file attachments.*

Communication

Notice PIH 2021-14. PHAs that implement waivers and alternative requirements may submit forms HUD-50058 or HUD-50058 MTW no later than 90 calendar days from the effective date.

PHAs that implement waivers and alternative requirements

PHAs that implement waivers and alternative requirements consistent with Notice PIH 2021-14 may submit actions recorded on lines 2a and 2b in the form HUD-50058 or HUD-50058 MTW no later than 90 calendar days from the effective date. PHAs may only submit 90 calendar days from the effective date for transactions impacted by the waivers and alternative requirements. Such instances may be waivers and alternative requirements related to reexaminations and inspections. Although PIH provides PHAs that implement waivers and alternative requirements up to 90 days to submit their forms, PIH encourages PHAs that have the operational capacity to do so to continue submitting HUD-50058 forms within the normal 60-day

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Click here to view & download the message

|	File Name	File Description	Last Update User	Last Update	Attach Id	File Id
Download	2nd Reminder for timely HUD-50058 and HUD-50058 MTW submissions_20210827_PHA.pdf	Email PDF File format	LIANG ZHOU	09/14/21 04:16PM	16089	35090
Download	2nd Reminder for timely HUD-50058 and HUD-50058 MTW submissions_20210827_PHA.msg	Email File Outlook Format	LIANG ZHOU	09/14/21 04:15PM	16089	35089

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Session Time-Out

Due to HUD-issued security requirements, if a user is inactive for ten (10) continuous minutes, the portal displays a pop-up message asking the user if the session needs to be extended or not. If the user doesn't extend the session the system will end the session in five (5) minutes after the pop-up message is displayed.
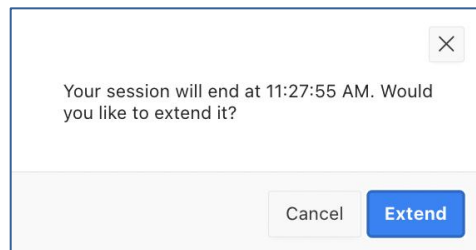
The user can continue extending the inactive session up to five (5) times (sixty (60) minutes). The portal terminates the user's session after sixty (60) minutes. The system starts persistently displaying the following warning message five (5) minutes before the end of the session:
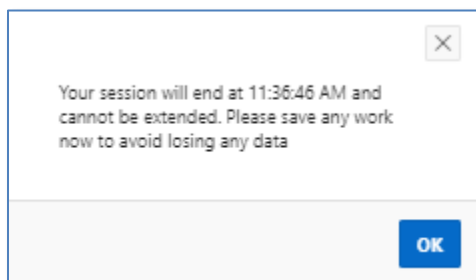

Click the **OK** button and use the remaining five (5) minutes to save any updates to forms. Once the session is terminated, the portal displays the following warning message:
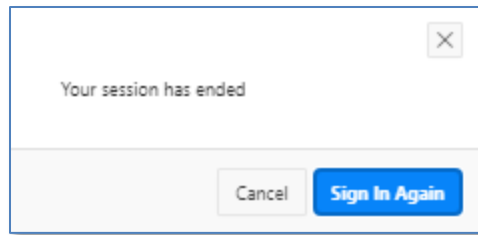
Click the **Sign In Again** button to return to the Secure Systems log-in page or click the **Cancel** button to close the pop-up window.

System Maintenance and Software Updates

Users may be locked out of the portal during system maintenance and software updates. Users are notified when the system is offline with a warning message displayed on the home page as shown below.
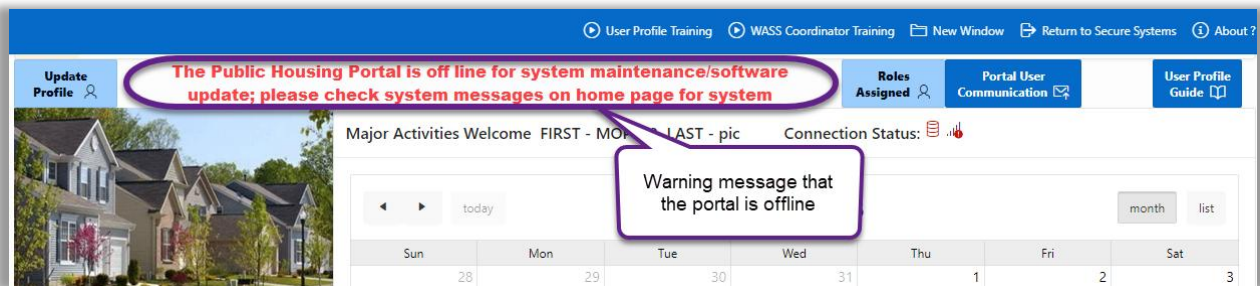
The portal will be available once the system maintenance or software updates are completed.

Navigation Shortcuts and Tips

The image below provides basic top navigation shortcuts located near the top of the portal.
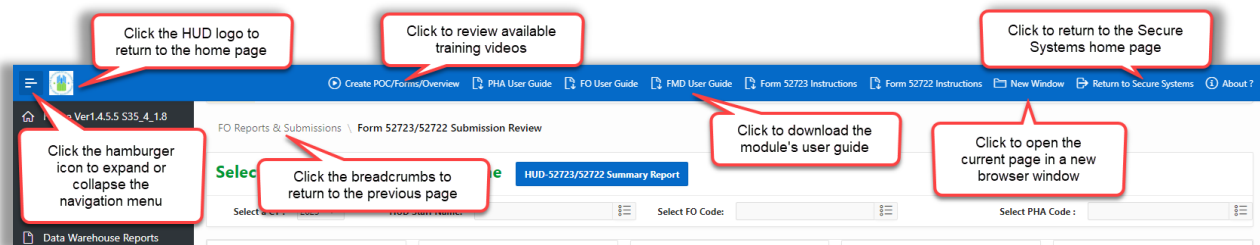
Users can click on the HUD logo to return to the portal's home page or click the **Return to Secure Systems** shortcut to return to Secure Systems. The portal provides breadcrumbs which are hyperlinks, indicating user's location on the website and helping to navigate the user to the previous web page. The shortcut **New Window** opens the current page in a new web browser

window. Clicking the **PHA User Guide (Annual)** button downloads this **PHA Annual User Guide for HUD-50075.**

Below is the list of icons the user may encounter while using the portal. These icons provide users with additional functions that include downloading, filtering the reports and tables, and reviewing the definitions of data elements.

Icon	Description
☰	Click this icon to expand the navigation menu
✕	Click this icon to minimize the navigation menu
⬇ Download	Click this icon to download the displayed data in CSV/Excel format
↗↙	Click this icon to expand or maximize the tables
↙↗	Click this icon to minimize the tables
⊘	Click this icon to read the definition of the data element
🔍⌄	Click this icon before the search bar to select a column heading to filter tables
Actions ⌄	Click this button to reveal additional features to manipulate reports and tables, such as download the report or filter the data
📄 PHA User Guide (Annual)	Click this button to view and download the PHA Annual user guide
▶ PHA Training Video (Annual)	Click this button to open the module's training video (videos include options to select subtitles/closed captions and auto-translate to over fifty languages including Spanish)
📄 Form 50075-ST Instructions	**Click this button to download the Annual Plan** Form 50075 **instructions. These instructions d**etail **how** the Annual Plan needs to be completed
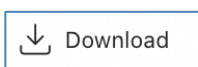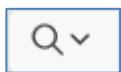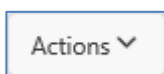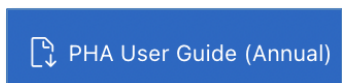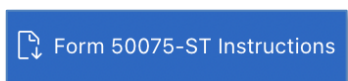
Navigating to the HUD-50075 Module

Follow these steps from any page in the Portal to find the PHA Annual Plans Submission module. All PHA Annual Plans are done at a PHA level, not a development or AMP level.
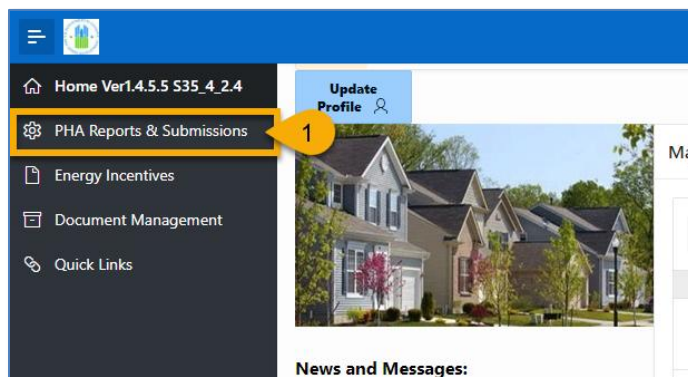
1. On the Portal home page, click **PHA Reports & Submissions** in the left side navigation menu.
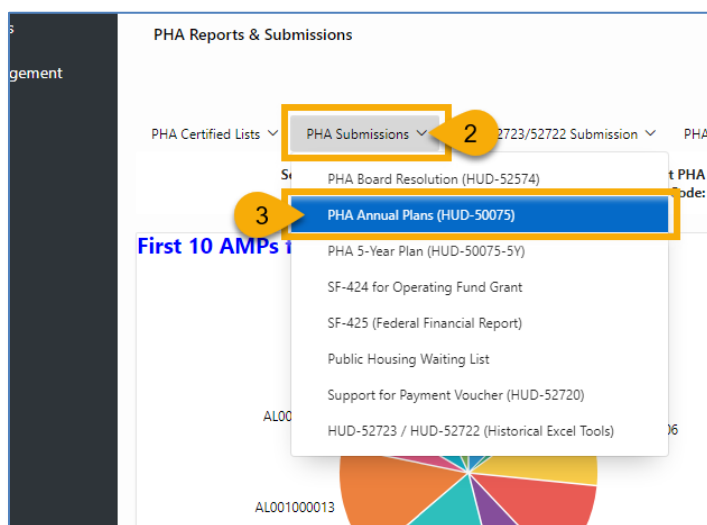
2. Click the **PHA Submissions** drop-down menu.
3. Select **PHA Annual Plans (HUD-50075)**.

Creating New and Revised HUD-50075 Annual Plan Submissions

1. **Select PHA Fiscal Year Beginning (FYB):** Select the appropriate calendar year.
2. **Select PHA Code:** Select the appropriate PHA.
3. Click the **Generate Annual Plan** button.

A pop-up window appears with one or more options of the PHA Plan types to select from.
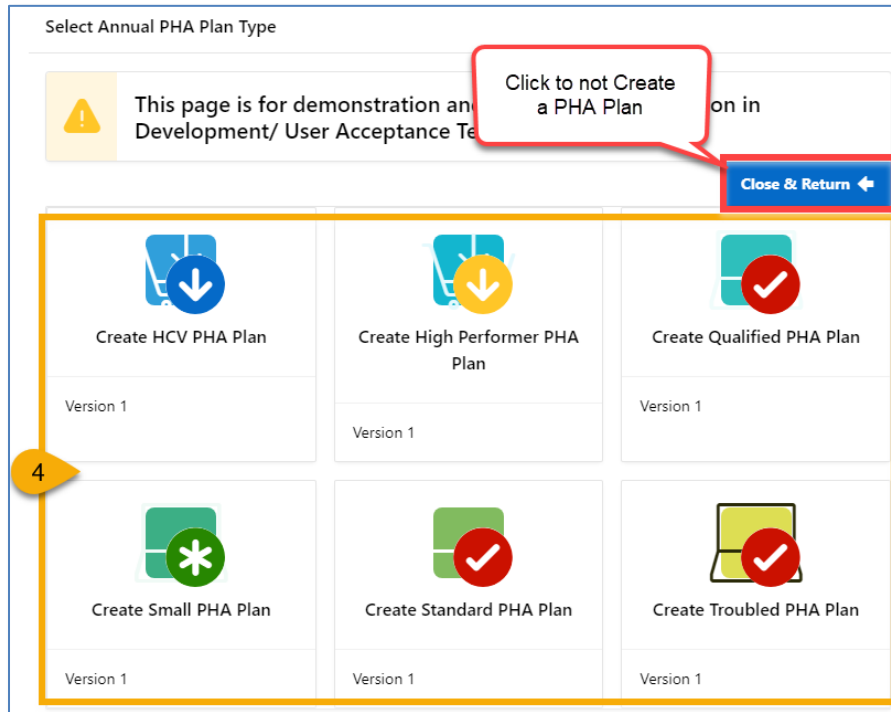
4. Select an appropriate PHA Plan (if more than one option is provided.)

Notes:

1. The system will display only Annual Plan type based on PHA type, PHAS and/or SEMAP designation statuses and PHAS and/or SEMAP scores (whichever is applicable.) For example, for Troubled PHA, the system will display only Create Troubled PHA Plan, while for HCV Only PHA the system will display Create HCV PHA Plan and Create High Performer PHA Plan if this HCV PHA meets the definition of the High Performer under SEMAP score.
2. In some applicable cases, the system will provide more than one annual plan option for PHA to select from, where a PHA needs to select the most appropriate plan type based on Notice PIH-2015-18.

Standard PHA

PHAs who have selected this annual plan are completing the HUD-50075-ST standard template. PHAs will also need to complete the certification forms HUD-50077-SL and HUD-50077-ST-HCV-HP.

To **qualify as a Standard PHA**, the PHA must meet the following requirements:

- Owns or manages 250 or more public housing units and any number of vouchers where the total combined units exceed 550.
- Designated as a Standard Performer (see 24CFR 902.11(b)) in the most recent Public Housing Assessment System (PHAS) or Section Eight Management Assessment Program (SEMAP) assessments if administering both programs. Otherwise, PHAS if only administering public housing or SEMAP if only administering Housing Choice Vouchers.
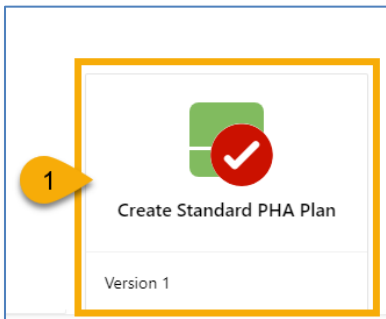
1. Select the **Create Standard PHA Plan** to begin the submission process.

Once the **Create Standard PHA Plan** is clicked, the user must continue with Step 2 in order to have the plan record created and saved in **Created** status. If the user stops here, the changes will not be saved, and the plan record will not be created.

2. Click **Create Annual Plan** to formally create a submission.

The Annual PHA Plan (HUD-50075) has been created.

Completing HUD-50075-ST

Follow the steps below to complete the Annual PHA Plan submission process.

A. **Return to PHA Selection:** Click this button to return to the Annual PHA Selection.

B. **HUD-50077-SL:** Click this button to create the HUD-50077-SL certificate. If there is an existing form created for the same year and same version in the 5-Year Plan submission, the system will automatically identify such form and associate it with the current Annual Plan submission record. By default, this form is set to be manually signed, but it also provides an option for an electronic signature submission. To manually sign the HUD-50077-SL certificate, the PHA User or PHA Execute Director will have to enter the required details including the information on how the PHA Plan is consistent with its Consolidate Plan, print the certificate, get the signature from the appropriate State or Local Official, and upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certificate. The State or Local Official can upload the manually signed form but cannot submit it. To electronically sign the HUD-50077-SL certificate the State or Local Official must log into the Public Housing Portal using the proper credentials, provide the details and electronically certify/submit the form.

C. **HUD-50077-ST-HCV-HP:** Click this button to create the HUD-50077-ST-HCV-HP certificate. This is the PHA Certifications of Compliance with the PHA Plans and Related Regulations (Standard, Troubled, HCV-Only, and High Performer PHAs). By default, this form is set to be manually signed, but it does have an option for an electronic signature submission. To manually sign the HUD-50077-ST-HCV-HP certificate, the PHA User or PHA Execute Director will have to enter the required details, print the certificate, get the signature from both: the PHA ED and the Board Chairman, then upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certified form. To electronically sign the HUD-50077-ST-HCV-HP certificate PHA Executive Director and the Board Chairman must log into the Public Housing Portal using the proper credentials, provide the details and certify/submit the form.

D. **View/Print HUD-50075-ST:** Click this button to review the HUD-50075-ST in printed format.

E. **Status Log:** Click this button to review the status changes for the current submission of the Annual PHA Plan.

F. **Apply Changes:** Click this button to save any changes to the HUD-50075-ST form.

G. **Delete HUD-50075:** Click this button to delete the HUD-50075-ST form.

H. **Validate:** Click this button to validate the HUD-50075-ST form prior to submission and to identify any missing plan elements required for submission.

I. **Submit:** Click this button to submit the HUD-50075-ST form to the Field Office (this button is available only for PHA Executive Directors.)

J. **View Email Log**: Click this button to review the current and previous email correspondence from FO to PHA related to the current and previous submissions.

K. **View File Attachment:** Click this button to review all file attachments associated with the HUD-50075-ST including current submission attachments and any previous submission attachments for the current submission period.

Navigate to Section A. PHA Information.

1. **How the public can access this PHA Plan**: Enter the PHA Plan Locations indication how the public can access this Annual PHA Plan.

Click the **Show Details** button to expand the **PHA Type Details** below the **A. PHA Information** box.

2. **PHA Consortia**: Check this box to see if the PHA is participating in a consortia and submitting a joint PHA plan. The PHA must add itself to the consortia.

Note: Go to the Adding PHA Consortia section to follow the steps to complete the PHA Consortia.

Navigate to Section B. Plan Elements.

Respond to **B.1 Revision of Existing PHA Plan Elements.**

3. Select **Y** (Yes) or **N** (No) for each element. If a PHA selects **Y** (Yes) for any of the elements, then it must describe the revisions for this revised element so Field Office can review it. For all **N** (No) choices, additional information is not required.

4. Click the pencil ( ) icon to describe the revisions for each revised element.

5. **(a) Have the following PHA Plan elements been revised by the PHA** Ensure the appropriate element is selected.

6. Ensure the selection of **Y** (Yes) is correct. Otherwise change it to **N** (No) and proceed to Step 9.

7. **(b) If the PHA answered yes for any element, describe the revisions for each revised element(s)**: Enter the information that describes the revision for the revised element (text only.)

8. **(c) The PHA must submit its Deconcentration Policy for Field Office review**: This text box is <u>only</u> available for the **Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions** revised element. Provide the details in the text box and upload the Deconcentration Policy using the **Add/Delete/View Plan Elements Attachment**.

9. Click **Update & Close** to save the entered data.

10. Click the **Add/Delete/View Plan Elements Attachment** button to upload documentation related to the revisions of the PHA Plan elements, including the **Deconcentration policy and other policies that govern eligibility, selection, and admissions**.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.2 New Activities**.

11. Select **Y** (Yes) or **N** (No) for each activity. If a PHA selects **Y** (Yes) for any of the activities, then it must describe each new activity for the Field Office review. For all **N** (No) choices, additional information is not required.

12. Click the pencil (✏️) icon to describe the new activity.

13. **(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?** Ensure the appropriate element is selected.

14. Ensure the selection of **Y** (Yes) is correct. Otherwise change it to **N** (No) and proceed to Step 16.

15. **(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project-based units and general locations, and describe how project basing would be consistent with the PHA Plan**: Enter the information that describes the planned new activity (text only.)

16. Click **Update & Close** to save the entered data.

17. Click the **Add/Delete/View Plan New Activities Attachment** button to upload documentation related to the new activity.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.3 Progress Report**.

18. **Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year and Annual Plan**. Enter the information that provides a description of the PHA's progress towards meeting its Mission and Goals (text only.)

19. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

20. Once saved, click the **Add/Delete/View Progress Report Attachment** button to upload related documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.4 Capital Improvements**.

21. **Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved**: Enter the information related to the most recently HUD-approved 5-Year Action Plan in EPIC and the date it was approved (text only.)

22. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

23. Once saved, click the **Add/Delete/View Capital Improvements Attachment** button to upload documentation related to capital improvements.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.5 Most Recent Fiscal Year Audit**.

24. **(a) Were there any findings in the most recent FY Audit?** Select **Y** (Yes) or **N** (No).
25. **(b) If yes, please describe**: If Y (Yes) is selected for (a), then enter a description of the audit findings in the most recent FY Audit (text only.)

26. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

27. Once saved, click the **Add/Delete/View Audit Attachment** button to upload related documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Navigate to Section C. Other Document and/or Certification Requirements.

Respond to **C.1 Resident Advisory Board (RAB) Comments**.

28. **(a) Did the RAB(s) have comments to the PHA Plan**: Select **Y** (Yes) or **N** (No).

29. **(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations**: If Y (Yes) is selected for (a), then submit the narrative with recommendations and attach comments.

30. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

31. Once saved, click the **Add/Delete/View RAB Comments Attachment** button to upload documentation.

Note: Go to the <u>Uploading Attachments</u> section to follow the steps to complete the attachment process.

Respond to **C.2 Certification by State or Local Officials.**

32. Click the **HUD-50077-SL** button to complete the certification. Follow Completing Supplemental Form HUD-50077-SL (Authorizing Official) section to complete the supplemental certification.

Respond to **C.3 Civil Rights Certification/Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.**

33. Click the **HUD-50077-ST-HCV-HP** button to complete the certification. Follow Completing Supplemental Form HUD-50077-ST-HCV-HP (Board Chair) and Completing Supplemental Form HUD-50077-ST-HCV-HP (Executive Director) section to complete the supplemental certification.

Respond to **C.4 Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.**

34. **(a) Did the public challenge any elements of the Plan?** Select **Y** (Yes) or **N** (No).
35. **If yes, include Challenged Elements.** If Y (Yes) is selected for (a), then submit the Challenged Elements details using the text box and/or attaching the description of Annual Plan challenged elements.

36. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

37. Once saved, click the **Add/Delete/View Challenged Elements Attachment** button to upload Challenged Elements documentation.

   Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **C.5 Troubled PHA.**

38. **(a) Does the PHA have any current Memorandum of Agreement, Performance Improvement Plan, or Recovery Plan in place?** Select **N/A**.

39. Click **Apply Changes** to save the entry.

Annual PHA plan (HUD-50075) is updated.

The annual PHA plan is updated.

Navigate to Section D. Affirmatively Furthering Fair Housing (AFFH)

D.1 Affirmatively Furthering Fair Housing (AFFH).

Provide a statement of the PHA's strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.

40. **+ Add Fair Housing Goal**

No data found.

Respond to **D.1 Affirmatively Furthering Fair Housing (AFFH).**

40. Click **+ Add Fair Housing Goal** to add fair housing goals.

Describe fair housing strategies and actions to achieve the goal

⚠ This page is for demonstration and testing only (Application in Development/ User Acceptance Testing (UAT) phases).

* Fair Housing Goal: [41]

* Description of Strategies and Actions: [42]

Cancel   [43] Create & Close

41. **Fair Housing Goal**: Describe the fair housing goal.
42. **Description of Strategies and Actions**: Describe the fair housing strategies and actions to achieve the goal.
43. Click the **Create & Close** button to complete the goal.

Scroll down to add additional supporting documents.

44. Click **Add/Delete/View Additional Supporting Document** button to add any other additional documents to this Annual Plan.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Troubled PHA

PHAs who have selected this annual plan are completing the HUD-50075-ST standard template.

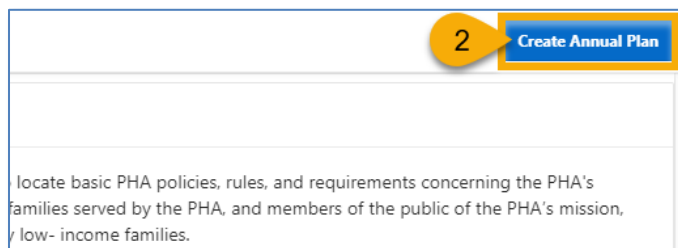PHAs will also need to complete the certification forms HUD-50077-SL and HUD-50077-ST-HCV-HP.

The designation of the PHA as Troubled is based on the following criteria:

- Any PHA that is designated Troubled (see 24 CFR 902.11(d) and 902.75) or at risk of being designated as troubled (see 24 CFR 902.11(c)) on the most recent PHAS or SEMAP assessments if administering both programs. Otherwise, PHAS if only administering public housing or SEMAP if only administering Housing Choice Vouchers.
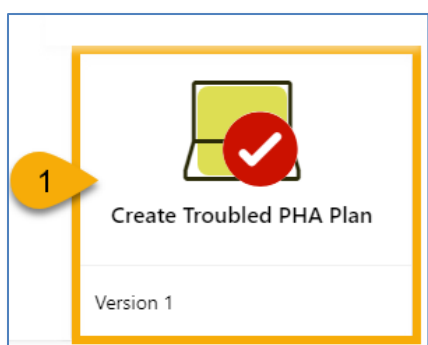
1. Select the **Create Troubled PHA Plan** to begin the submission process.

Once the **Create Troubled PHA Plan** is clicked, the user must continue with Step 2 in order to have the plan record created and saved **Created** status. If the user stops here, the changes will not be saved, and the plan record will not be created.

2. Click **Create Annual Plan** to formally create a submission.

The Annual PHA Plan (HUD-50075) has been created.

Completing HUD-50075-ST

Follow the steps below to complete the created Annual PHA Plan submission process.

A. **Return to PHA Selection:** Click this button to return to the Annual PHA Selection.

B. **HUD-50077-SL:** Click this button to create the HUD-50077-SL certificate. If there is an existing form created for the same year and same version in the 5-Year Plan submission, the system will automatically identify such form and associate it with the current Annual Plan submission record. By default, this form is set to be manually signed, but also provides an option for an electronic signature submission yet. To manually sign the HUD-50077-SL certificate, the PHA User or PHA Execute Director will have to enter the required details including the information on how the PHA Plan is consistent with its Consolidate Plan, print the certificate, get the signature from the appropriate state or local official, and upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certificate. The State or Local Official can upload the manually signed form but cannot submit it. To electronically sign the HUD-50077-SL certificate the State or Local Official must log into the Public Housing Portal using the proper credentials, provide the details and electronically certify/submit the form.

C. **HUD-50077-ST-HCV-HP:** Click this button to create the HUD-50077-ST-HCV-HP certificate. This is the PHA Certifications of Compliance with the PHA Plans and Related Regulations (Standard, Troubled, HCV-Only, and High Performer PHAs). By default, this form is set to be manually signed, but it does have an option for an electronic signature submission. To manually sign the HUD-50077-ST-HCV-HP certificate, the PHA User or PHA Execute Director will have to enter the required details, print the certificate, get the signature from both: the PHA ED and the Board Chairman, then upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certified form. To electronically sign the HUD-50077-ST-HCV-HP certificate PHA Executive Director and the Board Chairman must log into the Public Housing Portal using the proper credentials, provide the details and certify/submit the form.

D. **View/Print HUD-50075-ST:** Click this button to review the HUD-50075-ST in printed format.

E. **Status Log:** Click this button to review the status changes for the current submission of the Annual PHA Plan.

F. **Apply Changes:** Click this button to save any changes to the HUD-50075-ST form.

G. **Delete HUD-50075:** Click this button to delete the HUD-50075-ST form.

H. **Validate:** Click this button to validate the HUD-50075-ST form prior to submission and to identify any missing plan elements required for submission.

I. **Submit:** Click this button to submit the HUD-50075-ST form to the Field Office (this button is available only for PHA Executive Directors.)

J. **View Email Log**: Click this button to review the current and previous email correspondence from FO to PHA related to the current and previous submissions.

K. **View File Attachment:** Click this button to review all file attachments associated with the HUD-50075-ST including current submission attachments and any previous submission attachments for the current period.

Navigate to section A. PHA Information.

1. **How the public can access this PHA Plan**: Enter PHA Plan Locations indicating how the public can access this Annual PHA Plan.

Click the **Show Details** button to expand the **PHA Type Details** below the **A. PHA Information** box.

2. **PHA Consortia**: Check this box, if the PHA is participating in a consortia and submitting a joint PHA plan. The PHA must add itself to the consortia.

Note: Go to the Adding PHA Consortia section to follow the steps to complete the PHA Consortia.

Navigate to section B. Plan Elements.

Respond to **B.1 Revision of Existing PHA Plan Elements:**

3. Select **Y** (Yes) or **N** (No) for each element. If a PHA selects **Y** (Yes) for any of the elements, then it must describe the revisions for this revised element so Field Office can review it. For all **N** (No) choices, additional information is not required.

4. Click the pencil (🖊) icon to describe the revisions for each revised element.

5. **(a) Have the following PHA Plan elements been revised by the PHA?** Ensure the appropriate element is selected.

6. Ensure the selection of **Y** (Yes) is correct. Otherwise change it to **N** (No) and continue to Step 9.

7. **(b) If the PHA answered yes for any element, describe the revisions for each revised element(s)**: Enter the information that describes the revision for the revised element (text only).

8. **(c) The PHA must submit its Deconcentration Policy for Field Office review**: This text box is <u>only</u> available for the **Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions** revised element. Provide the details in the text box and upload the Deconcentration Policy using the **Add/Delete/View Plan Elements Attachment**.

9. Click **Update & Close** to save the entered data.

10. Click the **Add/Delete/View Plan Elements Attachment** button to upload documentation related to the revisions of the PHA Plan elements, including the **Deconcentration policy and other policies that govern eligibility, selection, and admissions**.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.2 New Activities**.

11. Select **Y** (Yes) or **N** (No) for each activity. If a PHA selects Y (Yes) for any of the activities, then it must describe each new activity for the Field Office review. For all N (No) choices, additional information is not required.

12. Click the pencil ( ) icon to describe the new activity.

13. **(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?** Ensure the appropriate element is selected.

14. Ensure the selection of **Y** (Yes) is correct. Otherwise change it to **N** (No) and proceed to Step 16.

15. **(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project-based units and general locations, and describe how project basing would be consistent with the PHA Plan**: Enter in information that describes the planned new activity (text only.)

16. Click **Update & Close** to save the entered data.

17. Click the **Add/Delete/View Plan New Activities Attachment** button to upload documentation related to the new activity.
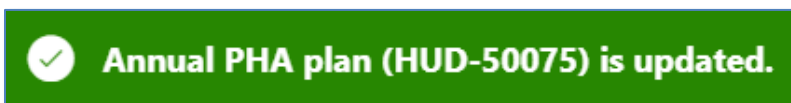
Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.3 Progress Report.**

18. **Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year and Annual Plan.** Enter the information that provides a description of the PHA's progress towards meeting its Mission and Goals (text only.)

19. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

20. Once saved, click the **Add/Delete/View Progress Report Attachment** button to upload related documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.4 Capital Improvements.**

21. **Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved**: Enter the information related to the most recently HUD-approved 5-Year Action Plan in EPIC and the date that it was approved (text only.)

22. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

23. Once saved, click the **Add/Delete/View Capital Improvements Attachment** button to upload documentation related to capital improvements.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.5 Most Recent Fiscal Year Audit.**

24. **(a) Were there any findings in the most recent FY Audit?** Select **Y** (Yes) or **N** (No).
25. **If yes, please describe**: If Y (Yes) is selected for (a), then enter a description of the audit findings in the most recent FY Audit (text only.)

26. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

27. Once saved, click the **Add/Delete/View Audit Attachment** button to upload related documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Navigate to Section C. Other Document and/or Certification Requirements.

Respond to **C.1 Resident Advisory Board (RAB) Comments**.

28. **(a) Did the RAB(s) have comments to the PHA Plan**: Select **Y** (Yes) or **N** (No.)
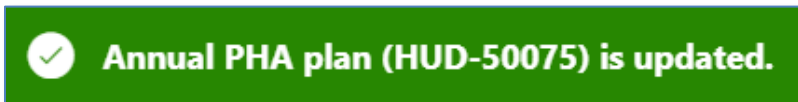
29. **(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations**: If Y (Yes) is selected for (a) , then submit the narrative with recommendations and attach comments.

30. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

31. Once saved, click the **Add/Delete/View RAB Comments Attachment** button to upload documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **C.2 Certification by State or Local Officials.**

32. Click the **HUD-50077-SL** button to complete the certification. Follow [Completing Supplemental Form HUD-50077-SL (Authorizing Official)](#) section to complete the supplemental certification.

Respond to **C.3 Civil Rights Certification/Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.**

33. Click the **HUD-50077-ST-HCV-HP** button to complete the certification. Follow [Completing Supplemental Form HUD-50077-ST-HCV-HP (Board Chair)](#) and [Completing Supplemental Form HUD-50077-ST-HCV-HP (Executive Director)](#) section to complete the supplemental certification.

Respond to **C.4 Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.**

34. **(a) Did the public challenge any elements of the Plan?** Select **Y** (Yes) or **N** (No).
35. **If yes, include Challenged Elements.** If Y (Yes) is selected for (a), then submit the Challenged Elements details using the text box and/or attaching the description of Annual Plan challenged elements.

36. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

37. Once saved, click the **Add/Delete/View Challenged Elements Attachment** button to upload Challenged Elements documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **C.5 Troubled PHA.**

38. **(a) Does the PHA have any current Memorandum of Agreement, Performance Improvement Plan, or Recovery Plan in place?** Select **Y** (Yes) or **N** (No.)

39. **If yes, please describe:** Provide the description of the Memorandum of Agreement, Performance Improvement Plan, or Recovery Plan in place.

40. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

41. Once saved, click the **Add/Delete/View MOA/Improvement/Recovery Plan** button to upload related documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Navigate to Section D. Affirmatively Furthering Fair Housing (AFFH)

Respond to **D.1 Affirmatively Furthering Fair Housing (AFFH).**

42. Click **+ Add Fair Housing Goal** to add fair housing goals.

43. **Fair Housing Goal**: Describe the fair housing goal.
44. **Description of Strategies and Actions**: Describe the fair housing strategies and actions to achieve the goal.
45. **Click** the **Create & Close** button to complete the goal.

Scroll down to add additional supporting documents.

46. Click **Add/Delete/View Supporting Documents** to add attachments.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

High-Performer PHA

PHAs who have selected this annual plan are completing the HUD-50075-HP template. PHAs will also need to complete the certification forms HUD-50077-SL and HUD-50077-ST-HCV-HP.

To qualify as a High-Performer PHA, the PHA must meet the following requirements:

- Owns or manages any number of public housing units and any number of vouchers where the total combined units exceed 550.
- Designated as a high performer (see 24 CFR 902.11(a)) on both, the most recent PHAS and SEMAP assessments if administering both programs. Otherwise, PHAS if only administering public housing or SEMAP if only administering Housing Choice Vouchers.
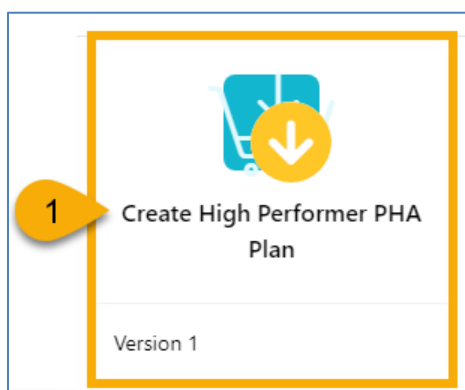

1. Select the **Create High Performer PHA Plan** to begin the submission process.

Once the **Create High Performer PHA Plan** is clicked, the user must continue with Step 2 in order to have the plan record created and saved in **Created** status. If the user stops here, the changes will not be saved, and the plan record will not be created.
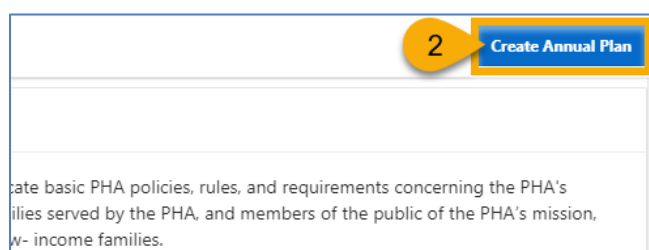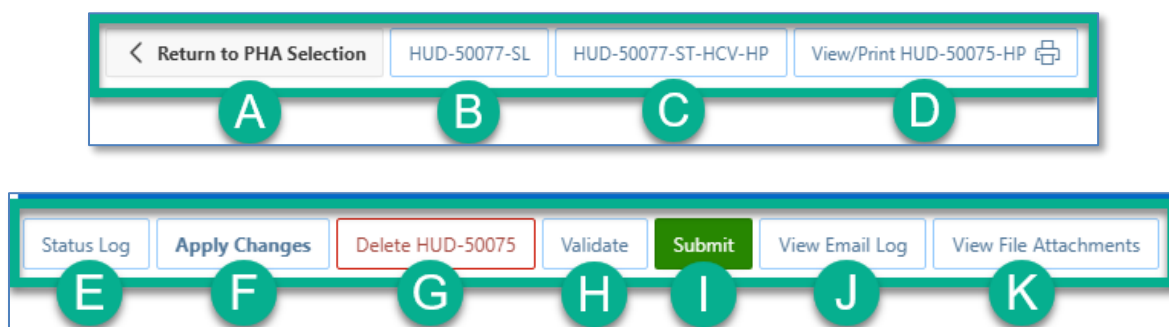

2. Click **Create Annual Plan** to formally create a submission.
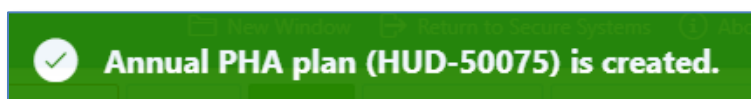
The Annual PHA Plan (HUD-50075) has been created.

Completing HUD-50075-HP

Follow the steps below to complete the Annual PHA Plan submission process.

A. **Return to PHA Selection:** Click this button to return to the Annual PHA Selection.

B. **HUD-50077-SL:** Click this button to create the HUD-50077-SL certificate. If there is an existing form created for the same year and same version in the 5-Year Plan submission, the system will automatically identify such forms and associate it with the current Annual Plan submission record. By default, this form is set to be manually signed, but also provides an option for an electronic signature submission yet. To manually sign the HUD-50077-SL certificate, the PHA User or PHA Execute Director will have to enter the required details including the information on how the PHA Plan is consistent with its Consolidate Plan, print the certificate, get the signature from the appropriate state or local official, and upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certificate. The State or Local Official can upload the manually signed form but cannot submit it. To electronically sign the HUD-50077-SL certificate the State or Local Official must log into the Public Housing Portal using the proper credentials, provide the details and electronically certify/submit the form.

C. **HUD-50077-ST-HCV-HP:** Click this button to create the HUD-50077-ST-HCV-HP certificate. This is the PHA Certifications of Compliance with the PHA Plans and Related Regulations (Standard, Troubled, HCV-Only, and High Performer PHAs). By default, this form is set to be manually signed, but it does have an option for an electronic signature submission. To manually sign the HUD-50077-ST-HCV-HP certificate, the PHA User or PHA Execute Director will have to enter the required details, print the certificate, get the signature from both: the PHA ED and the Board Chairman, then upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certified form. To electronically sign the HUD-50077-ST-HCV-HP certificate PHA Executive Director and the Board Chairman must log into the Public Housing Portal using the proper credentials, provide the details and certify/submit the form.

D. **View/Print HUD-50075-HP:** Click this button to review the HUD-50075-HP in printed format.

E. **Status Log:** Click this button to review the status changes for the current submission of the Annual PHA Plan.

F. **Apply Changes:** Click this button to save any changes to the HUD-50075-HP form.

G. **Delete HUD-50075:** Click this button to delete the HUD-50075-HP form.

H. **Validate:** Click this button to validate the HUD-50075-HP form prior to submission and to identify any missing plan elements required for submission.

I. **Submit:** Click this button to submit the HUD-50075-HP form to the Field Office (this button is available only for PHA Executive Directors.)

J. **View Email Log**: Click this button to review the current and previous email correspondence from FO to PHA related to the current and previous submissions.

K. **View File Attachment:** Click this button to review all file attachments associated with the HUD-50075-HP including current submission attachments and any previous submission attachments for the current submission period.

Navigate to Section A. PHA Information.

1. **How the public can access this PHA Plan**: Enter the PHA Plan Locations indication how the public can access this PHA Plan associated with the Annual PHA Plan.

Click the **Show Details** button to expand the **PHA Type Details** below the **A. PHA Information** box.

2. **PHA Consortia:** Check this box, if the PHA is participating in a consortia and submitting a joint PHA plan. The PHA must add itself to the consortia.

Note: Go to the Adding PHA Consortia section to follow the steps to complete the PHA Consortia.

Navigate to section B. Plan Elements.

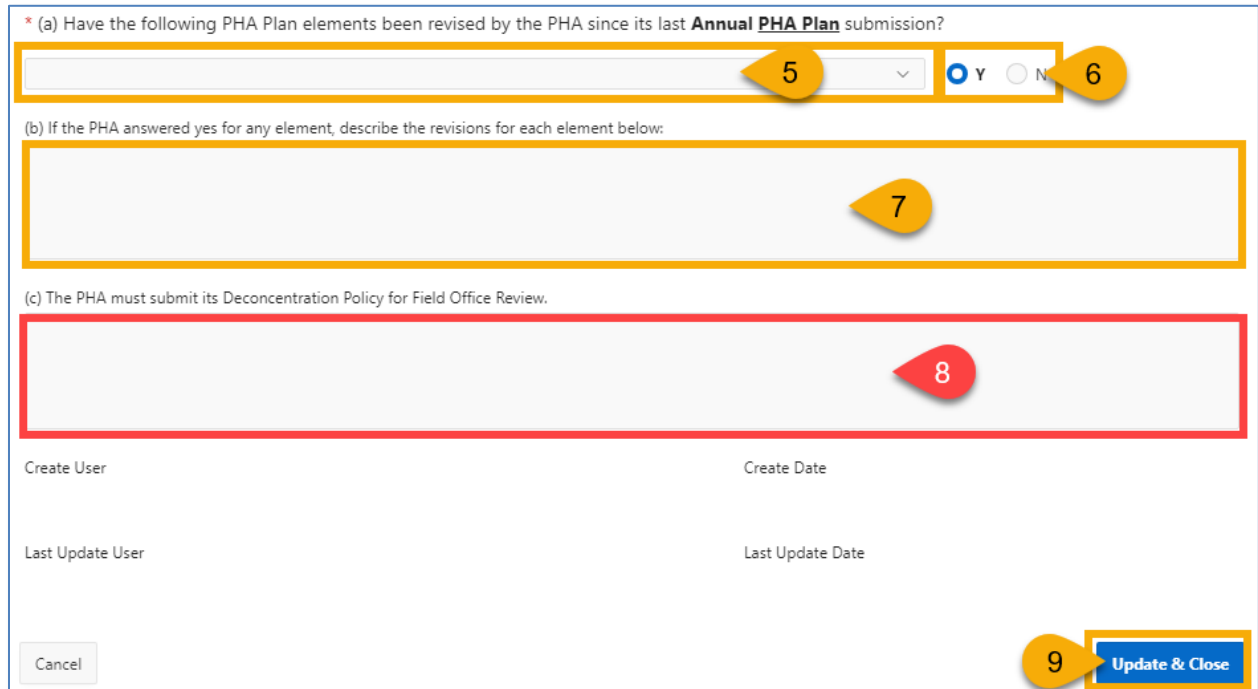Respond to **B.1 Revision of Existing PHA Plan Elements.**

3. Select **Y** (Yes) or **N** (No) for each element. If a PHA selects **Y** (Yes) for any of the elements, then it must describe the revisions for this revised element so Field Office can review it. For all **N** (No) choices, additional information is not required.

4. Click the pencil (✏) icon to describe the revisions for each revised element.

5. **(a) Have the following PHA Plan elements been revised by the PHA since its last Annual PHA Plan submission?** Ensure the appropriate element is selected.

6. Ensure the selection of **Y** (Yes) is correct. Otherwise change it to **N** (No) and proceed to Step 9.

7. **(b) If the PHA answered yes for any element, describe the revisions for each element below**: Enter in information that describes the revision for the revised element (text only.)

8. **(c) The PHA must submit its Deconcentration Policy for Field Office Review**: This text box is <u>only</u> available for the **Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions** revised element. Provide the details in the text box and upload the Deconcentration Policy using the **Add/Delete/View Plan Elements Attachment**.

9. Click **Update & Close** to save the entered data.

10. Click the **Add/Delete/View Plan Elements Attachment** button to upload documentation related to the revisions of the PHA Plan elements, including the **Deconcentration policy and other policies that govern eligibility, selection, and admissions**.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.2 New Activities**.

11. Select **Y** (Yes) or **N** (No) for each activity. If a PHA selects **Y** (Yes) for any of the activities, then it must describe each new activity for the Field Office review. For all **N** (No) choices, additional information is not required.

12. Click the pencil ( ) icon to describe the new activity.

13. **(a) Does the PHA intend to undertake any new activities related to the following in the 'HA's current Fiscal Year?** Ensure the appropriate element is selected.

14. Ensure the selection of **Y** (Yes) is correct. Otherwise change it to **N** (No) and proceed to Step 16.

15. **(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/ disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project-based units and general locations, and describe how project basing would be consistent with the PHA Plan**: Enter the information that describes the planned new activity (text only.)

16. Click **Update & Close** to save the entered data.

17. Click the **Add/Delete/View Plan New Activities Attachment** button to upload documentation related to the new the new activity.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.3 Progress Report.**

18. **Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year Plan**. Enter the information that provides a description of the PHA's progress towards meeting its Mission and Goals (text only.)

19. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

20. Once saved, click the **Add/Delete/View Progress Report Attachment** button to upload related documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.4 Capital Improvements.**

21. **Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved**: Enter the information related to the most recently HUD-approved 5-Year Action Plan in EPIC and the date it was approved (text only.)

22. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

23. Once saved, click the **Add/Delete/View Capital Improvements Attachment** button to upload documentation related to capital improvements.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.5 Most Recent Fiscal Year Audit.**

24. **(a) Were there any findings in the most recent FY Audit?** Select **Y** (Yes) or **N** (No.)
25. **If yes, please describe**: If Y (Yes) is selected for (a), then enter a description of the audit findings in the most recent FY Audit (text only.)

26. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

27. Once saved, click the **Add/Delete/View Audit Attachment** button to upload related documentation.

Note: Go to the <u>Uploading Attachments</u> section to follow the steps to complete the attachment process.

Navigate to Section C. Other Document and/or Certification Requirements.

Respond to **C.1 Resident Advisory Board (RAB) Comments**.

28. **(a) Did the RAB(s) have comments to the PHA Plan:** Select **Y** (Yes) or **N** (No.)
29. **(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations**: If Y (Yes) is selected for (a), then submit the narrative with recommendations and attach comments.

30. **Click Apply Changes** to save the entry.

The annual PHA plan is updated.

31. **Once** saved, click the **Add/Delete/View RAB Comments Attachment** button to upload documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **C.2 Certification by State or Local Officials.**

32. Click the **HUD-50077-SL** button to complete the certification. Follow [Completing Supplemental Form HUD-50077-SL (Authorizing Official)](#) section to complete the supplemental certification.

Respond to **C.3 Civil Rights Certification/Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.**

33. Click the **HUD-50077-ST-HCV-HP** button to complete the certification. Follow [Completing Supplemental Form HUD-50077-ST-HCV-HP (Board Chair)](#) and [Completing Supplemental Form HUD-50077-ST-HCV-HP (Executive Director)](#) section to complete the supplemental certification.

Respond to **C.4 Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.**

34. **(a) Did the public challenge any elements of the Plan?** Select **Y** (Yes) or **N** (No).
35. **If yes, include Challenged Elements.** If Y (Yes) is selected for (a), then submit the Challenged Elements details using the text box and/or attaching the description of Annual Plan challenged elements.

36. Click **Apply Changes** to save the entry.

37. Once saved, click the **Add/Delete/View Challenged Elements Attachment** button to upload documentation.

Note: Go to the <u>Uploading Attachments</u> section to follow the steps to complete the attachment process.

Navigate to Section D. Affirmatively Furthering Fair Housing (AFFH)

Respond to **D.1 Affirmatively Furthering Fair Housing:**

38. Click **+ Add Fair Housing Goal** to add fair housing goals.

39. Fair **Housing Goal**: Describe the fair housing goal.
40. Description **of Strategies and Actions**: Describe the fair housing strategies and actions to achieve the goal.
41. Click the **Create & Close** button to complete the goal.

Scroll down to add additional supporting documents.

42. Click **Add/Delete/View Supporting Documents** button to add any other additional documents to this Annual Plan.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Small PHA

PHAs who have selected this annual plan are completing the HUD-50075-SM, template. PHAs will also need to complete the certification forms HUD-50077-SL and HUD-50077-CRT-SM.

To qualify as a Small PHA the PHA must meet the following requirements (see 24 CFR 902.13(a)):

- Owns or manages between 1 and 249 public housing units and any number of vouchers where the total combined units exceed 550.
- Not designated as a troubled PHA in the most recent PHAS or SEMAP assessment, nor at risk of being designated as troubled.
- Small PHAs may also be High Performer PHAs if they meet the definition of High Performer above. Small PHAs that choose to submit Annual PHA Plans as High Performers must submit streamlined Annual PHA Plans using the 50075-HP template.
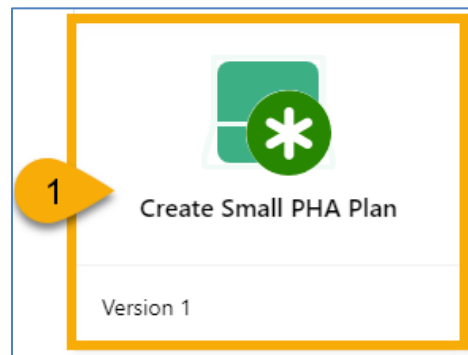
1. Select the **Create Small PHA Plan** to begin the submission process.

Once the **Create Small PHA Plan** is clicked, the user must continue with Step 2 in order to have the plan record created and saved in **Created** status. If the user stops here, the changes will not be saved, and the plan record will not be created.

2. **Are you submitting a 5-Year PHA Plan along with the Annual PHA Plan for this year?**: Select **Y** (Yes) or **N** (No.)

   Note:
   1. If the PHA user needs to change the answer for Step 2 above, the user can either delete the current submission or Create a Version 2 of the PHA Annual Plan after Version 1 is Accepted.
   2. If the PHA user selected Y for submitting the 5-Year Plan, then follow the Completing the HUD-50075-SM (Plan Elements Submitted with 5-Year PHA Plan)
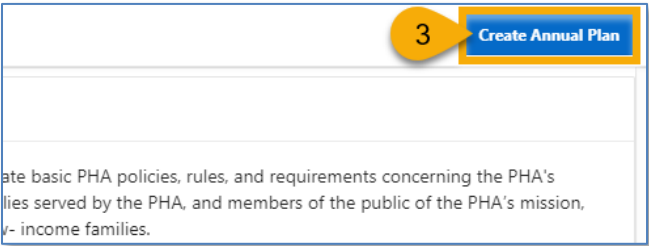
3. Click **Create Annual Plan** to formally create a submission.

The Annual PHA Plan (HUD-50075) has been created.

Completing HUD-50075-SM (Plan Elements Submitted with 5-Year PHA Plan)

Follow the steps below to complete the created Annual PHA Plan submission process to submitted status.

A. **Return to PHA Selection:** Click this button to return to the Annual PHA Selection.

B. **HUD-50077-SL:** Click this button to create the HUD-50077-SL certificate. If there is an existing form created for the same year and same version in the 5-Year Plan submission, the system will automatically identify such form and associate it with the current Annual Plan submission record. By default, this form is set to be manually signed, but it also provides an option for an electronic signature submission yet. To manually sign the HUD-50077-SL certificate, the PHA User or PHA Execute Director will have to enter the required details including the information on how the PHA Plan is consistent with its Consolidate Plan, print the certificate, get the signature from the appropriate state or local official, and upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the c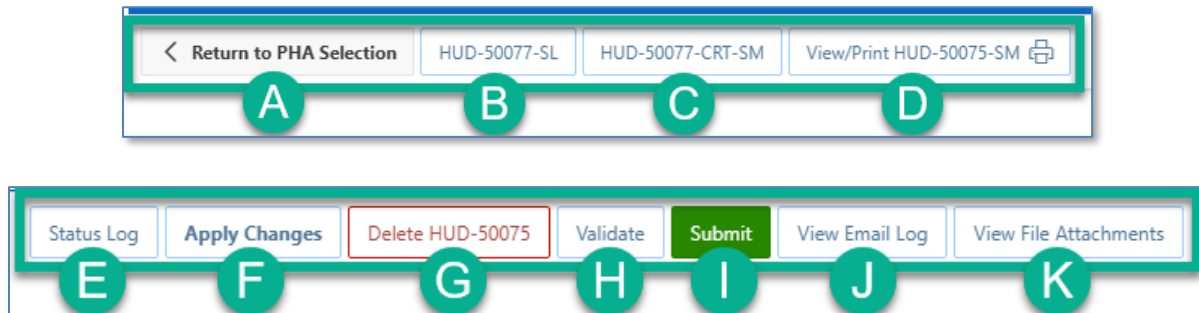ertificate. The State or Local Official can upload the manually signed form but cannot submit it. To electronically sign the HUD-50077-SL certificate the State or Local Official must log into the Public Housing Portal using the proper credentials, provide the details and electronically certify/submit the form.

C. **HUD-50077-CRT-SM:** Click this button to create the HUD-50077-CRT-SM certificate. This is the PHA Certifications of Compliance with PHA Plan and Related Regulations (Small PHAs.) By default, this form is set to be manually signed, but it does have an option for an electronic signature submission. To manually sign the HUD-50077-CRT-SM certificate, the PHA User or PHA Execute Director will have to enter the required details, print the certificate, get the signature from both: the PHA ED and the Board Chairman, then upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certified form. To electronically sign the HUD-50077-CRT-SM certificate PHA Executive Director and the Board Chairman must log into the Public Housing Portal using the proper credentials, provide the details and certify/submit the form.

D. **View/Print HUD-50075-SM:** Click this button to review the HUD-50075-SM in printed format.

E. **Status Log:** Click this button to review the status changes for the current submission of the Annual PHA Plan.

F. **Apply Changes:** Click this button to save any changes to the HUD-50075-SM form.

G. **Delete HUD-50075:** Click this button to delete the HUD-50075-SM form.

H. **Validate:** Click this button to validate the HUD-50075-SM form prior to submission and to identify any missing plan elements required for submission.

I. **Submit:** Click this button to submit the HUD-50075-SM form to the Field Office (this button is available only for PHA Executive Directors.)

J. **View Email Log:** Click this button to review the current and previous and current email FO correspondence from FO to PHA related to the current and previous submissions.

K. **View File Attachment:** Click this button to review all file attachments associated with the HUD-50075-SM including current submission attachments and any previous submission attachments for the current submission period.

Navigate to Section A. PHA Information.

1. **How the public can access this PHA Plan**: Enter the PHA Plan Locations indication how the public can access this PHA Plan associated with the Annual PHA plan.

Click the **Show Details** button to expand the **PHA Type Details** below the **A. PHA Information** box.

2. **PHA Consortia**: Check this box, if the PHA is participating in a consortia and submitting a joint PHA plan. The PHA must add itself to the consortia.

Note: Go to the Adding PHA Consortia section to follow the steps to complete the PHA Consortia.

Navigate to Section B. Plan Elements with 5-Year PHA Plans.

Respond to **B.1 Revision of Existing PHA Plan Elements**:

3. Select **Y** (Yes) or **N** (No) for each element. If a PHA selects the element **Y** (Yes) for any of the elements, then it must describe the revisions for this revised element so Field Office can review it. For all N (No) choices, additional information is not required.

4. Click the pencil (✎) icon to describe the revisions for each revised element.

5. **(a) Have the following PHA Plan elements been revised by the PHA since its last Five-Year PHA Plan submission?** Ensure the appropriate element is selected.

6. Ensure the selection of **Y** (Yes) is correct. Otherwise change it to **N** (No) and proceed to Step 9.

7. **(b) If the PHA answered yes for any element, describe the revisions for each element(s)**: Enter the information that describes the revision for the revised element (text only.)

8. **(c) The PHA must submit its Deconcentration Policy for Field Office Review**: This text box is only available for the **Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions** revised element. Provide the details in the text box and upload the Deconcentration Policy using the **Add/Delete/View Plan Elements Attachment.**

9. Click **Update & Close** to save the entered data.

10. Click the **Add/Delete/View Plan Elements Attachment** button to upload policy related to Deconcentration policy and other policies that govern eligibility, selection, and admissions.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.2 New Activities**.

11. Select **Y** (Yes) or **N** (No) for each activity. If a PHA selects **Y** (Yes) for any of the activities, then it must describe each new activity for the Field Office review. For all **N** (No) choices, additional information is not required.

12. Click the pencil ( ) icon to describe new activity.

13. **(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?** Ensure the appropriate activity is selected.

14. Ensure the selection of **Y** (Yes) is correct. Otherwise change it to **N** (No) and proceed to Step 16.

15. **(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project-based units and general locations, and describe how project basing would be consistent with the PHA Plan**: Enter the information that describes the planned new activity (text only.)

16. Click **Update & Close** to save the entered data.

17. Click the **Add/Delete/View Plan New Activities Attachment** button to upload documentation related to the new activity.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.3 Progress Report. Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year Plan**.

18. Enter the information that provides a description of the PHA's progress towards meeting its Mission and Goals (text only.)

19. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

20. Once saved, click the **Add/Delete/View Progress Report Attachment** button to upload related documentation.

Note: Go to the <u>Uploading Attachments</u> section to follow the steps to complete the attachment process.

Respond to **B.4 Capital Improvements. Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved**:

21. Enter the information related to the most recently HUD-approved 5-Year Action Plan in EPIC and the date that it was approved (text only.).

22. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

23. Once saved, click the **Add/Delete/View Capital Improvements Attachment** button to upload documentation related to capital improvements.

Note: Go to the <u>Uploading Attachments</u> section to follow the steps to complete the attachment process.

Respond to **B.5 Most Recent Fiscal Year Audit.**

24. **(a) Were there any findings in the most recent FY Audit?** Select **Y** (Yes) or **N** (No).

25. **If yes, please describe**: If Y (Yes) is selected for (a), then enter a description of the audit findings in the most recent FY Audit (text only.)

26. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

27. Once saved, click the **Add/Delete/View Audit Attachment** to upload related documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Navigate to Section C. Other Document and/or Certification Requirements for Annual Plan Submissions.

Respond to **C.1 Resident Advisory Board (RAB) Comments**.

28. **(a) Did the RAB(s) have comments to the PHA Plan:** Select **Y** (Yes) or **N** (No.)

29. **(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations**: If Y (Yes) is selected for (a), then submit the narrative with recommendations and attach comments.

30. **Click Apply Changes** to save the entry.

The annual PHA plan is updated.

31. Once saved, click the **Add/Delete/View RAB Comments Attachment** button to upload documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

C.2 Certification by State or Local Officials.
Form HUD-50077-SL, *Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan*, must be submitted by the PHA as electronic attachment to the PHA Plan. 32 HUD-50077-SL

Respond to **C.2 Certification by State or Local Officials.**

32. Click the **HUD-50077-SL** button to complete the certification. Follow Completing Supplemental Form HUD-50077-SL (Authorizing Official) section to complete the supplemental certification.

C.3 Civil Rights Certification/Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.
Form HUD-50077-CRT-SM, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed*, must be submitted by the PHA as an electronic attachment to the PHA Plan. 33 HUD-50077-CRT-SM

Respond to **C.3 Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.**

33. Click the **HUD-50077-CTR-SM** button to complete the certification. Follow Completing Supplemental Form HUD-50077-CRT-SM (Board Chair) or Completing Supplemental Form HUD-50077-CRT-SM (Executive Director) section to complete the supplemental certification.

C.4 Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.
* (a) Did the public challenge any elements of the Plan? ● Y ○ N 34 Click to upload documentation Add/Delete/View Challenged Elements Attachment 0
If yes, include Challenged Elements.
Enter text here as needed. 35
26 of 3900
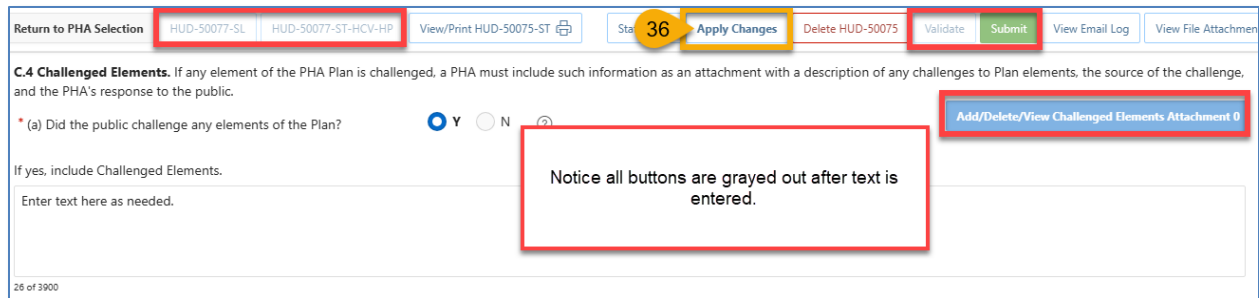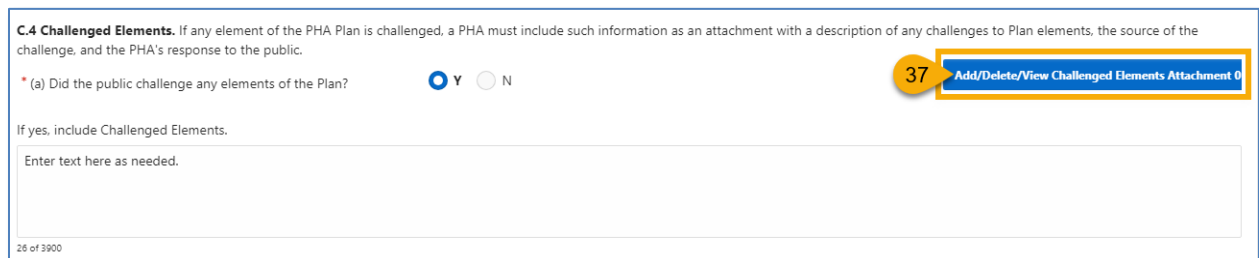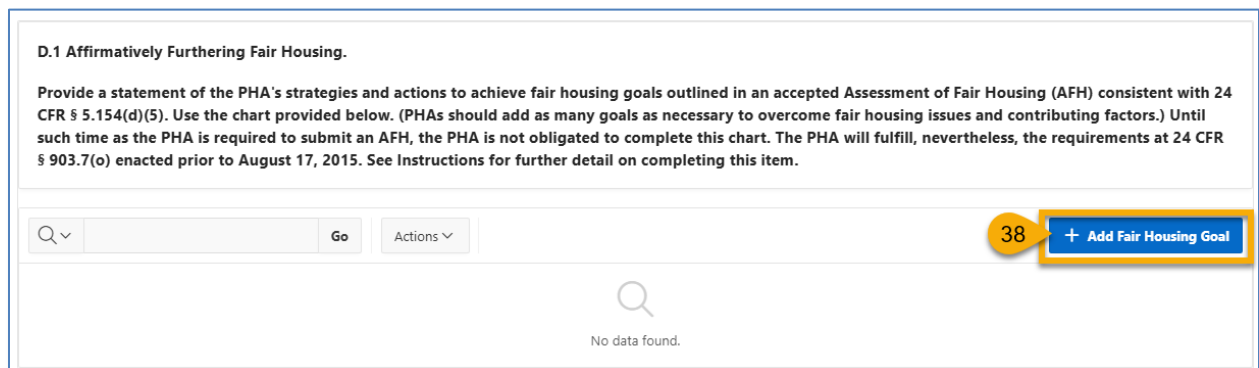
Respond to **C.4 Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.**

34. **(a) Did the public challenge any elements of the Plan?** Select **Y** (Yes) or **N** (No.)

35. **If yes, include Challenged Elements.** If Y (Yes) is selected for (a), then submit the Challenged Elements details using the text box and/or attaching the description of Annual Plan challenged elements.

Notice all buttons are grayed out after text is entered.

36. Click **Apply Changes** to save the entry.

✓ **Annual PHA plan (HUD-50075) is updated.**

The annual PHA plan is updated.

37. Once saved, click the **Add/Delete/View Challenged Elements Attachment** button to upload Challenged Elements documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Navigate to Section D. Affirmatively Furthering Fair Housing

D.1 Affirmatively Furthering Fair Housing.

Provide a statement of the PHA's strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.

Respond to **D.1 Affirmatively Furthering Fair Housing:**

38. Click **+ Add Fair Housing Goal** to add fair housing goals.

39. **Fair Housing Goal**: Describe the fair housing goal.

40. **Description of Strategies and Actions**: Describe the fair housing strategies and actions to achieve the goal.

41. Click the **Create & Close** button to complete the goal.
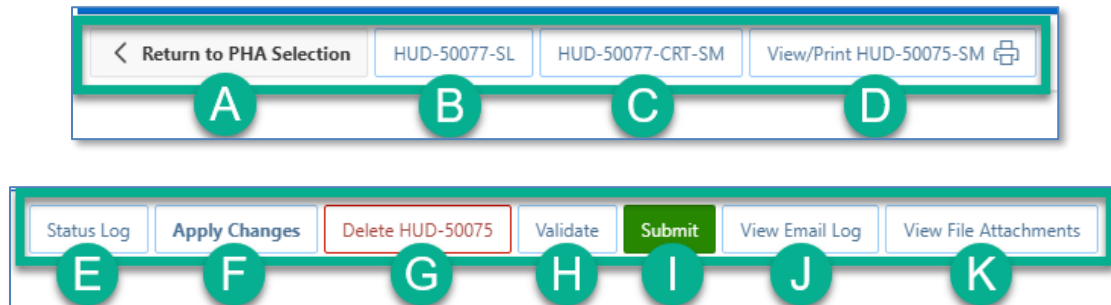

Scroll down to add additional supporting documents.

42. Click **Add/Delete/View Supporting Documents** button to add any other additional documents to this Annual Plan.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Completing HUD-50075-SM (Plan Elements Submitted Years 1-4)

Follow the steps below to complete the created PHA Plan submission process to submitted status.

A. **Return to PHA Selection:** Click this button to return to the Annual PHA Selection.

B. **HUD-50077-SL:** Click this button to create the HUD-50077-SL certificate. If there is an existing form created for the same year and same version in the 5-Year Plan submission, the system will automatically identify such form and associate it with the current Annual Plan submission record. By default, this form is set to be manually signed, but it also provides an option for an electronic signature submission yet. To manually sign the HUD-50077-SL certificate, the PHA User or PHA Execute Director will have to enter the required details including the information on how the PHA Plan is consistent with its Consolidate Plan, print the certificate, get the signature from the appropriate state or local official, and upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certificate. The State or Local Official can upload the manually signed form but cannot submit it. To electronically sign the HUD-50077-SL certificate the State or Local Official must log into the Public Housing Portal using the proper credentials, provide the details and electronically certify/submit the form.

C. **HUD-50077-CRT-SM:** Click this button to create the HUD-50077-CRT-SM certificate. This is the PHA Certifications of Compliance with PHA Plan and Related Regulations (Small PHAs.) By default, this form is set to be manually signed, but it does have an option for an electronic signature submission. To manually sign the HUD-50077-CRT-SM certificate, the PHA User or PHA Execute Director will have to enter the required details, print the certificate, get the signature from both: the PHA ED and the Board Chairman, then upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certified form. To electronically sign the HUD-50077-CRT-SM certificate PHA Executive Director and the Board Chairman must log into the Public Housing Portal using the proper credentials, provide the details and certify/submit the form.

D. **View/Print HUD-50075-SM:** Click this button to review the HUD-50075-SM in printed format.

E. **Status Log:** Click this button to review the status changes for the current submission of the Annual PHA Plan.

F. **Apply Changes:** Click this button to save any changes to the HUD-50075-SM form.

G. **Delete HUD-50075:** Click this button to delete the HUD-50075-SM form.

H. **Validate:** Click this button to validate the HUD-50075-SM form prior to submission and to identify any missing plan elements required for submission.

I. **Submit:** Click this button to submit the HUD-50075-SM form to the Field Office (this button is available only for PHA Executive Directors.)

J. **View Email Log:** Click this button to review the current and previous and current email FO correspondence from FO to PHA related to the current and previous submissions.

K. **View File Attachment:** Click this button to review all file attachments associated with the HUD-50075-SM including current submission attachments and any previous submission attachments for the current submission period.

Navigate to Section A. PHA Information.

1. **How the public can access this PHA Plan**: Enter the PHA Plan Locations indication how the public can access this Annual PHA Plan.

Click the **Show Details** button to expand the **PHA Type Details** below the **A. PHA Information** box.

2. **PHA Consortia**: Check this box, if the PHA is participating in a consortia and submitting a joint PHA plan. The PHA must add itself to the consortia.

   Note: Go to the [Adding PHA Consortia](#) section to follow the steps to complete the PHA Consortia.

Navigate to Section B. Plan Elements Submitted All Other Years (Years 1-4)).

Respond to **B.1 New Activities.**

3. Select **Y** (Yes) or **N** (No) for each activity. If a PHA selects **Y** (Yes) for any of the activities, then it must describe each new activity for the Field Office review. For all **N** (No) choices, additional information is not required.

4. Click the pencil (✏) icon to describe new activity.

5. **(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?** Ensure the appropriate activity is selected.

6. Ensure the selection of **Y** (Yes) is correct. Otherwise change it to **N** (No) then proceed to Step 9.

7. **(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process.:** Enter in text that describes the planned activities for the new activity.

8. **(c) If using Project-Based Vouchers, provide the projected number of project-based units, general locations, and describe how project-basing would be consistent with the PHA Plan.:** This text box is <u>only</u> available for element, Project Based Vouchers. Enter information that describes the projected number of project-based units and general locations.

9. Click **Update & Close** to save the entered data.

10. **Click** the **Add/Delete/View Years 1-4 Activities Attachment** button to upload Deconcentration Policy and any additional documentation for any other new activity.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.2 Capital Improvements.**

11. **Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved**: Enter information including a reference to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved.

12. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

* B.2 Capital Improvements. Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved.

13. Once saved, click the **Add/Delete/View Years 1-4 Capital Improvements Attachment** button to upload documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Navigate to Section C. Other Document and/or Certification Requirements fir Annual Plan Submissions.

Respond to **C.1 Resident Advisory Board (RAB) Comments**.

14. **(a) Did the RAB(s) have comments to the PHA Plan:** Select **Y** (Yes) or **N** (No.)
15. **(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations**: If Y (Yes) is selected for (a) , then submit the narrative with recommendations and attach comments.

16. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

17. Once saved, click the **Add/Delete/View RAB Comments Attachment** button to upload documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **C.2 Certification by State or Local Officials.**

18. Click the **HUD-50077-SL** button to complete the certification. Follow Completing Supplemental Form HUD-50077-SL (Authorizing Official) section to complete the supplemental certification.

Respond to **C.3 Civil Rights Certification/Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.**

19. Click the **HUD-50077-CRT-SM** button to complete the certification. Follow Completing Supplemental Form HUD-50077-CRT-SM (Board Chair) and Completing Supplemental Form HUD-50077-CRT-SM (Executive Director) section to complete the supplemental certification.

Respond to **C.4 Challenged Elements**. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.

20. **(a) Did the public challenge any elements of the Plan?** Select **Y** (Yes) or **N** (No).

21. **If yes, include Challenged Elements.** If Y (Yes) is selected for (a), then submit the Challenged Elements details using the text box and/or attaching the description of Annual Plan challenged elements.

22. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

23. Once saved, click the **Add/Delete/View Challenged Elements Attachment** button to upload Challenged Elements documentation.

Note: Go to the <u>Uploading Attachments</u> section to follow the steps to complete the attachment process.

Navigate to Section D. Affirmatively Furthering Fair Housing (AFFH)

Respond to **D.1 Affirmatively Furthering Fair Housing:**

24. Click **+ Add Fair Housing Goal** to add fair housing goals.

25. **Fair Housing Goal**: Describe the fair housing goal.
26. **Description of Strategies and Actions**: Describe the fair housing strategies and actions to achieve the goal.
27. Click the **Create & Close** button to complete the goal.

Scroll down to add additional supporting documents.

28. Click **Add/Delete/View Supporting Documents** to add any other additional documents to this Annual Plan.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Housing Choice Voucher (HCV) Only PHA

PHAs who have selected this annual plan are completing the HUD-50075-HCV template. PHAs will also need to complete the certification forms HUD-50077-SL and HUD-50077-ST-HCV-HP.

To qualify as a Housing Choice Voucher (HCV)-Only PHA, the PHA must meet the following requirements (see 24 CFR 903.11(a)(3)):

- Administers more than 550 units in HCVs and does not own or manage public housing units.
- Not designated as troubled in its most recent SEMAP assessment.
- HCV-Only PHAs may also be High Performer PHAs if they meet the definition of High Performer under SEMAP above. HCV-Only PHAs that choose to submit Annual PHA Plans as High Performers must submit streamlined Annual PHA Plans using the 50075-HP template.
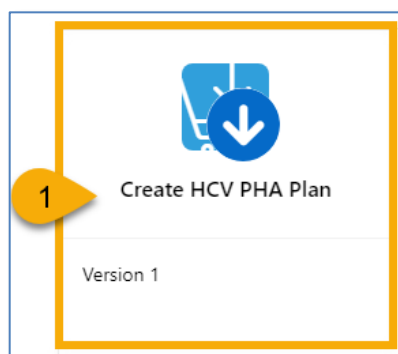
1. Select the **Create HCV PHA Plan** to begin the submission process.

Once the **Create HCV PHA Plan** is clicked, the user must continue with Step 2 in order to have the plan record created and saved in **Created** status. If the user stops here, the changes will not be saved, and the plan record will not be created.
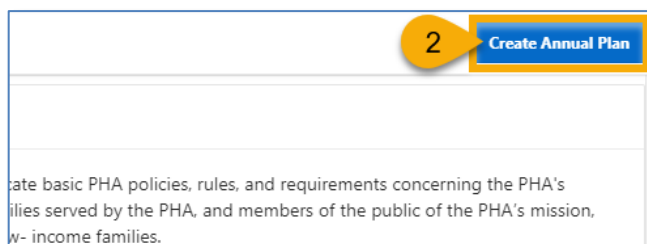
2. Click **Create Annual Plan** to formally create a submission.

The Annual PHA Plan (HUD-50075) has been created.

Completing HUD-50075-HCV

Follow the steps below to complete the created Annual PHA Plan submission process to submitted status.

A. **Return to PHA Selection:** Click this button to return to the Annual PHA Selection.

B. **HUD-50077-SL:** Click this button to create the HUD-50077-SL certificate. If there is an existing form created for the same year and same version in the 5-Year Plan submission, the system will automatically identify such form and associate it with the current Annual Plan submission record. By default, this form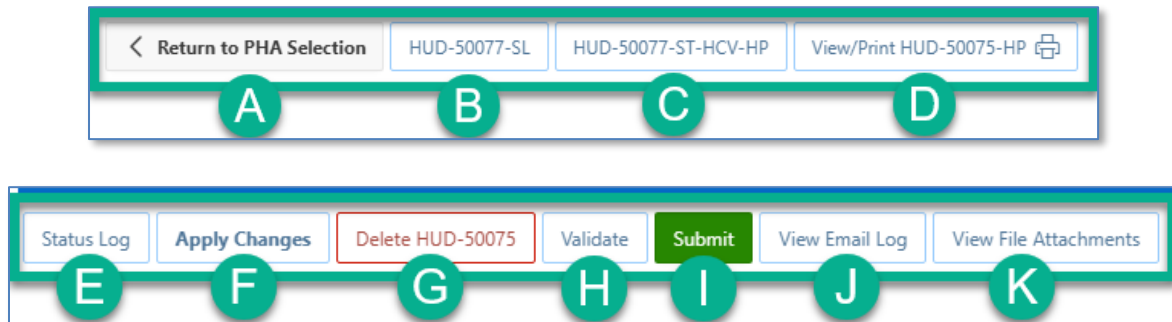 is set to be manually signed, but it also provides an option for an electronic signature submission yet. To manually sign the HUD-50077-SL certificate, the PHA User or PHA Execute Director will have to enter the required details including the information on how the PHA Plan is consistent with its Consolidate Plan, print the certificate, get the signature from the appropriate state or local official, and upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certificate. The State or Local Official can upload the manually signed form but cannot submit it. To electronically sign the HUD-50077-SL certificate the State or Local Official must log into the Public Housing Portal using the proper credentials, provide the details and electronically certify/submit the form.

C. **HUD-50077-ST-HCV-HP:** Click this button to create the HUD-50077-ST-HCV-HP certificate. This is the PHA Certifications of Compliance with the PHA Plans and Related Regulations (Standard, Troubled, HCV-Only, and High Performer PHAs). By default, this form is set to be manually signed, but it does have an option for an electronic signature submission. To manually sign the HUD-50077-ST-HCV-HP certificate, the PHA User or PHA Execute Director will have to enter the required details, print the certificate, get the signature from both: the PHA ED and the Board Chairman, then upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certified form. To electronically sign the HUD-50077-ST-HCV-HP certificate PHA Executive Director and the Board Chairman must log into the Public Housing Portal using the proper credentials, provide the details and certify/submit the form.

D. **View/Print HUD-50075-HCV:** Click this button to review the HUD-50075-HCV in printed format.

E. **Status Log:** Click this button to review the status changes for the current submission of the Annual PHA Plan.

F. **Apply Changes:** Click this button to save any changes to the HUD-50075-HCV form.

G. **Delete HUD-50075:** Click this button to delete the HUD-50075-HCV form.

H. **Validate:** Click this button to validate the HUD-50075-HCV form prior to submission and to identify any missing plan elements required for submission.

I. **Submit:** Click this button to submit the HUD-50075-HCV form to the Field Office (this button is available only for PHA Executive Directors.)

J. **View Email Log**: Click this button to review the current and previous email correspondence from FO to PHA related to the current and previous submissions.

K. **View File Attachment:** Click this button to review all file attachments associated with the HUD-50075-HCV including current submission attachments and any previous submission attachments for the current submission period.

Navigate to Section A. PHA Information.

1. **How the public can access this PHA Plan**: Enter the PHA Plan Locations indication how the public can access this Annual PHA Plan.

Click the **Show Details** button to expand the **PHA Type Details** below the **A. PHA Information** box.

2. **PHA Consortia**: Check this box, if the PHA is participating in a consortia and submitting a joint PHA plan. The PHA must add itself to the consortia.

Note: Go to the Adding PHA Consortia section to follow the steps to complete the PHA Consortia.

Navigate to Section B. Plan Elements.

Respond to **B.1 Revision of Existing PHA Plan Elements.**

3. Select **Y** (Yes) or **N** (No) for each element. If a PHA selects **Y** (Yes) for any of the elements, then it must describe the revisions for this revised element so Field Office can review it. For all **N** (No) choices, additional information is not required.

4. Click the pencil (✏) icon to describe the revisions for each revised element.

5. **(a) Have the following PHA plan elements been revised by the PHA since its last Annual Plan submission**: Ensure the appropriate element is selected.

6. Ensure the selection of **Y** (Yes) is correct. Otherwise change it to **N** (No) and proceed to Step 8.

7. **(b) If the PHA answered yes for any element, describe the revisions for each revised element(s)**: Enter the information that describes the revision for the revised element (text only.)

8. Click **Update & Close** to save the entered data.

9. Click the **Add/Delete/View Plan Elements Attachment** button to upload documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.2 New Activities**.

10. Select **Y** (Yes) or **N** (No) for new activity. If a PHA selects **Y** (Yes) for the new activity, then it must describe each new activity for the Field Office review. For all **N** (No) choices, additional information is not required. Click the pencil (✏) icon to describe the new activity.

11. **(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?** Ensure the appropriate activity is selected.

12. Ensure the selection of **Y** (Yes) is correct. Otherwise change it to **N** (No) and proceed to Step 14.

13. **(b) If Project-Based Voucher (PBV) activities are planned for the current Fiscal Year, provide the projected number of project-based units and general locations, and describe how project basing would be consistent with the PHA Plan**: Enter the information that describes the planned new activity (text only.)

14. Click **Update & Close** to save the entered data.

15. Click the **Add/Delete/View Plan New Activities Attachment** button to upload documentation related to the new activity.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.3 Progress Report.**

16. **Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year and Annual Plan**. Enter the information that provides a description of the PHA's progress towards meeting its Mission and Goals (text only.)

17. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

18. Once saved, click the **Add/Delete/View Progress Report Attachment** button to upload related documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **B.5 Most Recent Fiscal Year Audit.**

19. **(a) Were there any findings in the most recent FY Audit?** Select **Y** (Yes), **N** (No), or **N/A**.
20. **If yes, please describe**: If (Yes) is selected for (a), then enter a description of the audit findings in the most recent FY Audit (text only.)

21. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

22. Once saved, click the **Add/Delete/View Audit Attachment** button to upload documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Navigate to Section C. Other Document and/or Certification Requirements.

Respond to **C.1 Resident Advisory Board (RAB) Comments**.

23. **(a) Did the RAB(s) have comments to the PHA Plan:** Select **Y** (Yes) or **N** (No.).
24. **(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations**: If Y (Yes) is selected for (a), then submit the narrative with recommendations and attach comments.

25. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

C.1 Resident Advisory Board (RAB) Comments.

26. Once saved, click the **Add/Delete/View RAB Comments Attachment** button to upload documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Respond to **C.2 Certification by State or Local Officials.**

27. Click the **HUD-50077-SL** button to complete the certification. Follow Completing Supplemental Form HUD-50077-SL (Authorizing Official) section to complete the supplemental certification.

Respond to **C.3 Civil Rights Certification/Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.**

28. Click the **HUD-50077-ST-HCV-HP** button to complete the certification. Follow Completing Supplemental Form HUD-50077-ST-HCV-HP (Board Chair) or Completing Supplemental Form HUD-50077-ST-HCV-HP (Executive Director) section to complete the supplemental certification.

Respond to **C.4 Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.**

29. **(a) Did the public challenge any elements of the Plan?** Select **Y** (Yes) or **N** (No).
30. **If yes, include Challenged Elements.** If Y (Yes) is selected for (a), then submit the Challenged Elements details using the text box and/or attaching the description of Annual Plan challenged elements.

31. Click **Apply Changes** to save the entry.

The annual PHA plan is updated.

32. Once saved, click the **Add/Delete/View Challenged Elements Attachment** button to upload Challenged Elements documentation.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Navigate to Section D. Affirmatively Furthering Fair Housing (AFFH).

D.1 Affirmatively Furthering Fair Housing (AFFH).

Provide a statement of the PHA's strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.

| Q ⌄ | | Go | Actions ⌄ | | 33 | + Add Fair Housing Goal |

No data found.

Respond to **D.1 Affirmatively Furthering Fair Housing (AFFH).**

33. Click **+ Add Fair Housing Goal** to add fair housing goals.

Describe fair housing strategies and actions to achieve the goal

⚠ This page is for demonstration and testing only (Application in Development/ User Acceptance Testing (UAT) phases).

* Fair Housing Goal: [34]

* Description of Strategies and Actions: [35]

Cancel [36] Create & Close

34. **Fair Housing Goal**: Describe the fair housing goal.
35. **Description of Strategies and Actions**: Describe the fair housing strategies and actions to achieve the goal.
36. Click the **Create & Close** button to complete the goal.

Scroll down to add additional supporting documents.

37. Click **Add/Delete/View Supporting Documents** to add any other additional documents to this Annual Plan.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Qualified PHA

The Qualified PHAs do not need to complete the HUD-50075-HCV, HUD-50075-HP, HUD-50075-SM, or HUD-50075-ST templates. Instead, the Qualified PHA need to complete the HUD-50077-CR and HUD-50077-SL forms only. Note the HUD-50077-SL is completed once every 5 PHA Fiscal Years along with the HUD-50075-5Y Plan.

To qualify as a Qualified PHA, the PHA must meet the following requirements:

- Owns or manages 550 or fewer public housing dwelling units and/or housing choice vouchers combined.
- Not designated as a Troubled PHA in the most recent PHAS assessment and/or does not have a failing score under SEMAP during the prior 12 months.
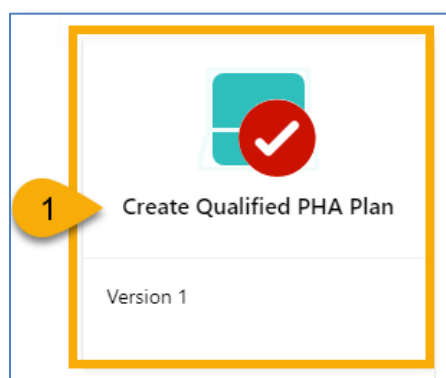

1. Select the **Create Qualified PHA Plan** to begin the submission process.

Once the **Create Qualified PHA Plan** is clicked, the user must continue with Step 2 in order to have the plan record created and saved in **Created** status. If the user stops here, the changes will not be saved, and the plan record will not be created.
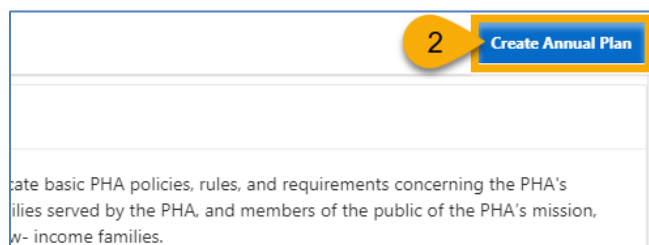
2. Click **Create Annual Plan** to formally create a submission.
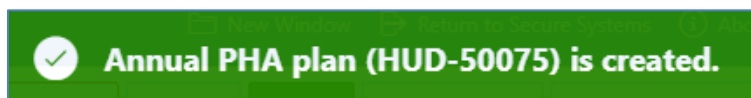
The Annual PHA Plan (HUD-50075) has been created.

Completing HUD-50077-CR

Follow the steps below to complete the created PHA Plan submission process.

A. **Return to PHA Selection:** Click this button to return to the Annual PHA Selection.

B. **HUD-50077-CR:** Click this button to create the HUD-50077-CR certificate. This is the Civils Rights Certification (Qualified PHAs). By default, this form is set to be manually signed, but it does have an option for an electronic signature submission. To manually sign the HUD-50077-CR certificate, the PHA User or PHA Execute Director will have to enter the required details, print the certificate, get the signature from both: the PHA ED and the Board Chairman, then upload the signed/certified version of the form. Once uploaded, only PHA ED can submit the certified form. To electronically sign the HUD-50077-CR certificate PHA Executive Director and the Board Chairman must log into the Public Housing Portal using the proper credentials, provide the details and certify/submit the form.

Note: Go to the Completing Supplemental Form HUD-50077-CR (Board Chair) or Completing Supplemental Form HUD-50077-CR (Executive Director) section to follow the steps to complete the attachment process.

C. **Status Log:** Click this button to review the status changes for the current submission of the Annual PHA Plan.

D. **Delete HUD-50075:** Click this button to delete the HUD-50075 form.

E. **Validate:** Click this button to validate the HUD-50075 form prior to submission and to identify any missing plan elements required for submission.

F. **Submit:** Click this button to submit the HUD-50075 form to the Field Office (this button is available only for PHA Executive Directors.)

G. **View Email Log**: Click this button to review the current and previous email correspondence from FO to PHA related to the current and previous submissions.

H. **View File Attachments:** Click this button to review all file attachments associated with the HUD-50075 including current submission attachments and any previous submission attachments for the current submission period.

Click the **Show Details** button to expand the **PHA Type Details** below the **A. PHA Information box**.

Scroll down to add additional supporting documents.

1. Click **Add/Delete/View Supporting Documents** button to add attachments.

Note: Go to the Uploading Attachments section to follow the steps to complete the attachment process.

Completing Certification Submissions

Completing Supplemental Form HUD-50077-SL

Creating/Deleting Supplemental Form HUD-50077-SL (PHA or ED User)

Certification by State or Local U. S Department of Housing and Urban Development Official of PHA Plans Consistency with the Consolidated Plan or State Consolidated Plan (All PHAs). **The PHA Staff or Executive Director must Create the form first before the Local Authorizing Official can sign and complete the form.**

To complete the HUD-50077-SL, follow the subsections below.

> **Note:**
> 1. The Executive Director must Create the submission before the Local Authorizing Official can complete their signature. Once the form is created by the PHA or Executive Director, the State or Local Official who has OPM user role, can log into PIH Operating Fund portal, and electronically sign and submit HUD-50077-SL form. Likewise, the form can be printed, manually signed by the Local Official (wet signature) and then the signed HUD-50077-SL form can be attached to the Annual Plan.
> 2. Additionally, if a user submits a HUD-50077-SL certificate through the Annual PHA Plan module before the same submission in the 5-Year PHA Plan module, the HUD-50077-SL will be carried over to the 5-Year Plan. And vice versa, if you submitted a HUD-50077-SL through the 5-Year PHA Plan module, then that same signed HUD-50077-SL form will be carried over to the Annual Plan.. The portal will default to the last submitted signed form.

PHA or ED user must add required information and create the HUD-50071-SL form:

1. Click the **HUD-50077-SL** button to review the HUD-50077-SL certificate.

2. **Local Jurisdiction Name**: Enter the local jurisdiction name associated with the PHA Annual plan.

3. **Provide a description of how the PHA Plan's contents are consistent with the Consolidated Plan or State Consolidated Plan**: Enter description details here.

4. **Electronic Signature**: Select **True**.
5. **Name of Authorized Official**: Enter the name of the authorized official for HUD-50077-SL.
6. **Title**: Enter the title of the authorized official.
7. **Email of State or Local Official:** Enter email address of the State or Local Official.

8. **Click** the **Create** button.

The system creates the HUD-50071-SL form.

PHA or ED user can log in and delete the created or electronically signed/submitted form certificate if the Annual Plan is not submitted yet. The State or Local Official cannot delete the form.

Submitting the HUD-50077-SL with Electronic Signature (Local Authorizing Official)

HUD requires PHAs to submit HUD-50077-SL with the Authorized Official's signature. To electronically sign the **Certification by State or Local Official of PHA Plans Consistency with the Consolidated Plan or State Consolidated Plan**, or HUD-50077-SL, follow the directions below.

> **Note: The Executive Director must Create the submission before the Local Authorizing Official can complete their signature.**

Open the created HUD-50077-SL form, the system displays the menu buttons at the top of the screen.

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's Annual Plan submission.
B. **View/Print HUD-50077-SL:** Click this button to review the HUD-50077-SL in printed form.
C. **Apply Changes:** Click this button to save any changes to the HUD-50077-SL form.
D. **Sign Document:** Click this button to sign and submit the HUD-50077-SL submission.

The State or Local Official needs to review the form, **update if needed**, and electronically sign the form:

1. **Local Jurisdiction Name**: Review/update the local jurisdiction name associated with the PHA Annual plan.
2. **Provide a description of how the PHA Plan's contents are consistent with the Consolidated Plan or State Consolidated Plan**: Review/update description details here.

3. **Electronic Signature**: Select **True**.
4. **Name of Authorized Official**: Enter the name of the Authorized Official for HUD-50077-SL.
5. **Title**: Enter the title of the authorized official.
6. **Email of State or Local Official:** Enter the Authorizing Official's email address.
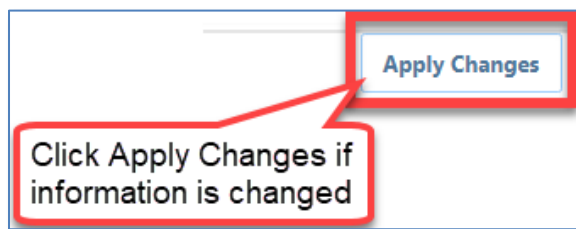
Click **"Apply Changes"** to save any updates if information was changed.

7. Click the **Sign Document** button to submit the HUD-50077-SL.

8. **Signature Text**: Type your name in the field.
9. Click the **Sign Document** button to electronically sign the form.

10. Click the **OK** button to agree to the certifications.

11. The form has been electronically signed and submitted. Click the **OK** button to continue the process.

The certification has been signed.

12. Click the **Return to PHA Annual Plan** button to return to the PHA Annual Plan submission.

Submitting the HUD-50077-SL with Wet Signature (Local Authorizing Official & ED User)

HUD requires PHAs to submit HUD-50077-SL with the Authorized Official's signature. To manually sign the form, the form must be completed, printed, Authorized Official must manually sign the form, then scan and upload the signed form to portal. Once the signed form is uploaded, ED user can submit the form.

Note: The Executive Director must Create the submission before the Local Authorizing Official can complete their signature.
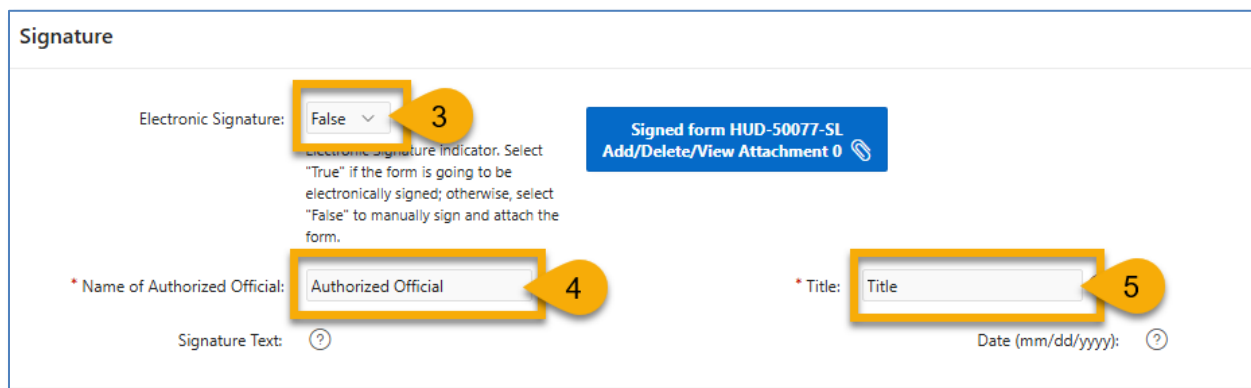
To manually sign the **Certification by State or Local Official of PHA Plans Consistency with the Consolidated Plan or State Consolidated Plan**, or HUD-50077-SL, PHA/ED or State or Local Official must follow the directions below.

Open the created HUD-50077-SL form, the system displays the menu buttons at the top of the screen.

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's Annual Plan submission.
B. **View/Print HUD-50077-SL:** Click this button to review the HUD-50077-SL in printed format.
C. **Apply Changes:** Click this button to save any changes to the HUD-50077-SL form.

The **State or Local Official** needs to review the form, update if needed, and electronically sign the form:

1. **Local Jurisdiction Name**: Review/update the local jurisdiction name associated with the Annual PHA plan.
2. **Provide a description of how the PHA Plan's contents are consistent with the Consolidated Plan or State Consolidated Plan**: Review/update description details here.

3. **Electronic Signature**: Set to **False**.
4. **Name of Authorized Official**: Enter the name of the authorized official for HUD-50077-SL.
5. **Title**: Enter the title of the authorized official.
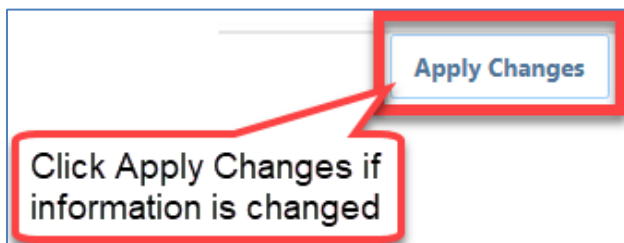
Click **"Apply Changes"** to save the updates if needed.

6. Click the **View/Print HUD-50077-SL** button to generate and download the form for printing and obtaining a signature.

7. Select the **Destination** you want to print to.
8. Click the **More settings** option.
9. Select **Headers and Footers** checkbox.
10. Click the **Print** button to print the form.
11. The State or Local Official must manually sign and date the form.

Before uploading the form, the **PHA/ED** must ensure HUD-50077-SL Form ID number in the scanned and signed attachment matches the HUD-50077-SL ID in the portal (see image below).

Once the form is scanned, **PHA/ED or State or Local Official** must continue with the following steps:

12. Click the **Signed form HUD-50077-SL Add/Delete/View Attachment** button.

A. **Document Type**: Select the appropriate document type.
B. **Document View**: This field is defaulted to **PHA and HUD View** and cannot be changed for PHA users. The **PHA and HUD View** option makes the attachment viewable by both PHA and HUD users.
C. **Comment**: Enter comments related to the document.
D. **File browse**: Either **Drag and Drop** the file or click the **Choose File** button to search and select the file.
E. Click the **Upload File** button.

The file appears in a list at the bottom of the pop-up window.

Click the **Download** hyperlink to open and download the file. Click the trash can icon (🗑) to delete the file.

F. Click the **Close & Return** button when the uploading process is finished.
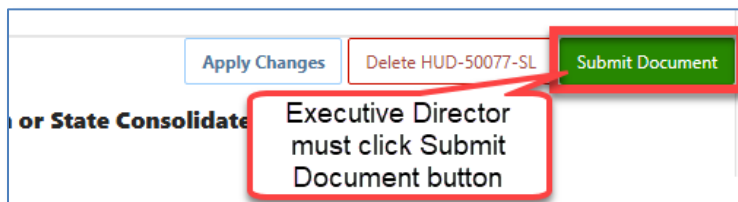
Executive Director Screenshot: Once the form is uploaded, the **Executive Director user** must open and submit the form.

Certification by State or Local Official of PHA Plans Consistency with the Consolidated Plan or State Consolidated Plan *(All PHAs)*

CY: 2025 ⓘ

PHA Code/Name: AL007 - Housing Authority of the City of Dothan ⓘ

HUD-50077-SL ID: 6577 ⓘ

Status: Submitted ⓘ

Form: HUD-50077-SL ⓘ

Annual PHA Plan ID: 1521

Version: 1 ⓘ

The certification has been submitted.
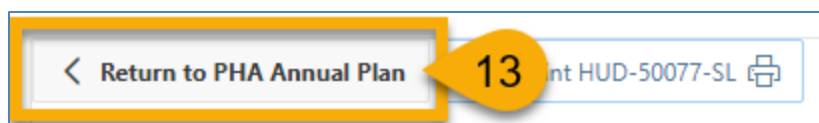
13. Click the **Return to PHA Annual Plan** button to return to the PHA annual submission.

Completing Supplemental Form HUD-50077-ST-HCV-HP

Creating Supplemental Form HUD-50077-ST-HCV-HP (PHA, ED or Board Chair)

HUD requires PHAs to submit HUD-50077-ST-HCV-HP **PHA Certifications of Compliance with the PHA Plans and Related Regulations (Standard, Troubled, HCV-Only, and High Performer PHAs)** with the Board Chair's and Executive Director's signatures. To create the HUD-50077-ST-HCV-HP, PHA, ED and the Board Chair must follow the steps below.

> Note: It is preferable that Executive Director and Board Chair electronically sign the HUD-50077-ST-HCV-HP by following the steps outlined in Submitting the HUD-50077-ST-HCV-HP with Electronic Signature (Board Chair) and Submitting the HUD-50077-ST-HCV-HP with Electronically Signature (Executive Director). If for some reason a Wet Signature is desired, please follow directions for Submitting the HUD-50077-CRT-SM with Wet Signature (Board Chair) and for Submitting the HUD-50077-ST-HCV-HP with Wet Signature (Executive Director).

1. Click the **HUD-50077-ST-HCV-HP** button to begin the process to submit the HUD-50077-ST-HCV-HP certificate.

2. Scroll down and check the **5-Year PHA Plan for Fiscal Year 20_-20_** if this form is submitted for the 5-Yeah PHA Plan.

Scroll down further to the Signature section.

3. **Electronic Signature:** Ensure the dropdown is marked **True** or **False** depending on the submission you wish to complete.
4. **Name of Board Chairman:** Enter in your first and last name.
5. **Email of Board Chairman:** Enter in the official email used. This field only appears if signing the submission electronically.

6. Click the **Create** button.

Submitting the HUD-50077-ST-HCV-HP with Electronic Signature (Board Chair)
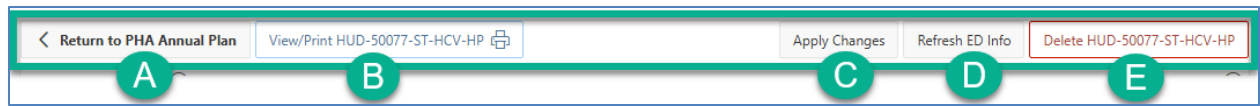
HUD requires PHAs to submit **HUD-50077-ST-HCV-HP PHA Certifications of Compliance with the PHA Plans and Related Regulations (Standard, Troubled, HCV-Only, and High Performer PHAs)** with the Board Chair's signature. To electronically sign the **HUD-50077-ST-HCV-HP** follow the directions below.

Once the form is created, the Board Chair must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-ST-HCV-HP:** Click this button to review the HUD-50077-ST-HCV-HP in printed format.

C. **Apply Changes:** Click this button to save any changes to the HUD-50077-ST-HCV-HP form.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-ST-HCV-HP submission. If the ED information is inaccurate, you'll need to correct it in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-ST-HCV-HP:** Click this button to delete the HUD-50077-ST-HCV-HP form.

F. **Sign Document (Board Chair)**: Click this button to sign and submit the HUD-50077-ST-HCV-HP certificate since it is required for the HUD-50075 submission.

After verifying the accuracy of the information and setting the **Electronic Signature** to **True**, the Board Chair must execute the following steps:

1. Click the **Sign Document (Board Chair)** button to electronically sign and submit the HUD-50077-ST-HCV-HP certificate.

2. **Signature Text**: Type your name in the field.
3. Click the **Sign Document** button to sign the form.

4. Click the **OK** button to agree to the certifications.

5. The form has been signed. Click the **OK** button to continue the process.

Note: The Board Chair can delete HUD-50077-ST-HCV-HP if the Annual Plan was not submitted yet.

6. Click the **Return to PHA Annual Plan** button to return to the HUD-50075 submission.

Submitting the HUD-50077-ST-HCV-HP with Wet Signature (Board Chair)

HUD requires PHAs to submit **HUD-50077-ST-HCV-HP Certifications of Compliance with PHA Plan and Related Regulations (Standard, Troubled, HCV-Only, and High Performer PHAs)** with the Board Chair's signature. To manually sign the form, the form must be printed, manually signed by the Board Chair, scanned and uploaded to the portal.

Note: It is preferable the Board Chair electronically signs the HUD-50077-HCV-HP form by following the steps outlined in Submitting the HUD-50077-HCV-HP with Electronically Signature section (Board Chair).

Once the form is created, the Board Chair must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-ST-HCV-HP:** Click this button to review the HUD-50077-ST-HCV-HP in printed format.

C. **Apply Changes:** Click this button to save any changes to the HUD-50077-ST-HCV-HP form.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-ST-HCV-HP submission. If the ED information is inaccurate, you'll need to correct it in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-ST-HCV-HP:** Click this button to delete the HUD-50077-ST-HCV-HP form.

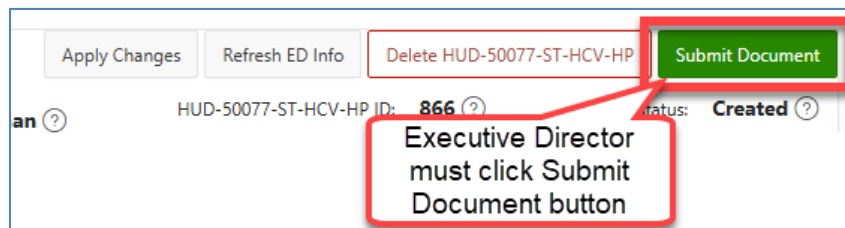After verifying the accuracy of the information and setting the **Electronic Signature** to **False**, the Board Chair must execute the following steps:
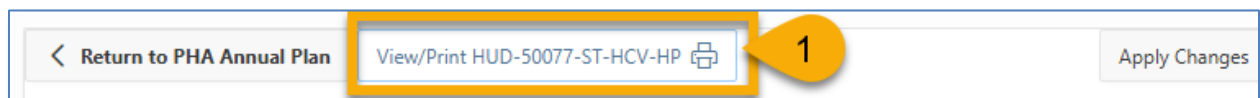
1. Click the **View/Print HUD-50077-ST-HCV-HP** button to download the form. Save the document to your computer.

2. Select the **Destination** you want to print to.
3. Click the **More settings** option.
4. Select **Headers and Footers** checkbox.
5. Click the **Print** button to print the form.
6. Board Chair must sign and date underneath the **Name of Board Chairman** section; Executive Director must sign and date underneath the **Name of Executive Director** section.

Note: For wet signatures the Board Chair and the Executive Director need to sign the same form.

Before uploading the form, the PHA must ensure HUD-50077-ST-HCV-HP Form ID number in the signed and scanned attachment matches the HUD-50077-ST-HCV-HP ID in the portal (see the

image below).

Once the form is scanned, **PHA/ED or State or Local Official** must continue with the following steps:

7. Click the **Signed form HUD-50077-ST-HCV-HP Add/Delete/View Attachment** button.

A. **Document Type**: Select the appropriate document type.
B. **Document View**: This field is defaulted to **PHA and HUD View** and cannot be changed for PHA users. The **PHA and HUD View** option makes the attachment viewable by both PHA and HUD users.
C. **Comment**: Enter comments related to the document.

D. **File browse**: Either **Drag and Drop** the file or click the **Choose File** button to search and select the file.

E. Click the **Upload File** button.

The file appears in a list at the bottom of the pop-up window.

Click the **Download** hyperlink to open and download the file. Click the trash can icon (🗑) to delete the file.

F. Click the **Close & Return** button when finished.

 Note: The Board Chair can delete HUD-50077-ST-HCV-HP if the Annual Plan was not submitted yet.

8. Click the **Return to PHA Annual Plan** button to return to the HUD-50075 submission.

Executive Director Screenshot: Once the form is uploaded, the **Executive Director user** must open and submit the form.

Submitting the HUD-50077-ST-HCV-HP with Electronic Signature (Executive Director)

HUD requires PHAs to submit HUD-50077-ST-HCV-HP **PHA Certifications of Compliance with the PHA Plans and Related Regulations (Standard, Troubled, HCV-Only, and High Performer PHAs) form** with the Executive Director's signature. To electronically sign the **HUD-50077-ST-HCV-HP** follow the directions below.

Once the form is created, the ED must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-ST-HCV-HP:** Click this button to review the HUD-50077-ST-HCV-HP in printed format.

C. **Apply Changes:** Click this button to save any changes to the HUD-50077-ST-HCV-HP form.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-ST-HCV-HP submission. If the ED information is inaccurate, you'll need to correct it in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-ST-HCV-HP:** Click this button to delete the HUD-50077-ST-HCV-HP form.

F. **Sign Document (Executive Director)**: Click this button to sign and submit the HUD-50077-ST-HCV-HP as part of the HUD-50075 submission.

1. Click the **Sign Document (Executive Director)** button to submit the HUD-50077-ST-HCV-HP certificate since it is required for the HUD-50075 submission.

2. **Signature Text**: Type your name in the field.
3. Click the **Sign Document** button to sign the form.

4. Click the **OK** button to agree to the certifications.

5. The form has been signed. Click the **OK** button to continue the process.

Note: The Executive Director can delete HUD-50077-ST-HCV-HP if the Annual Plan was not submitted yet.

6. Click the **Return to PHA Annual Plan** button to return to the HUD-50075 submission.

Submitting the HUD-50077-ST-HCV-HP with Wet Signature (Executive Director)

HUD requires PHAs to submit HUD-50077-ST-HCV-HP **PHA Certifications of Compliance with the PHA Plans and Related Regulations (Standard, Troubled, HCV-Only, and High Performer PHAs) form** with the Executive Director's signature. To manually sign the form, the form must be printed, manually signed by the Executive Director, scanned and uploaded to the portal.

Note: It is preferable the Executive Director electronically signs the HUD-50077-ST-HCV-HP form by following the steps outlined in Submitting the HUD-50077-ST-HCV-HP with Electronically Signature (Executive Director) section.

Once the form is created, the ED must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:
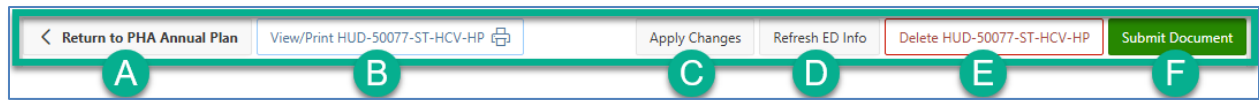
A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-ST-HCV-HP:** Click this button to review the HUD-50077-ST-HCV-HP in printed form.

C. **Apply Changes:** Click this button to save any changes to the HUD-50077-ST-HCV-HP format.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-ST-HCV-HP submission. If the ED information is inaccurate, you'll need to correct it in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-ST-HCV-HP:** Click this button to delete the HUD-50077-ST-HCV-HP form.

F. **Submit Document:** Click this button to submit the HUD-50077-ST-HCV-HP certificate since it is required for the HUD-50075 submission.
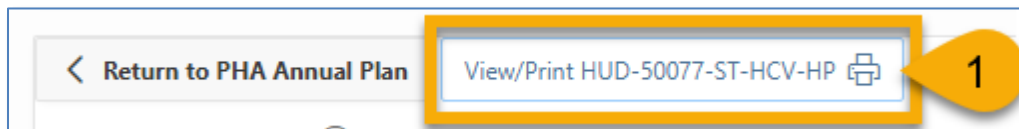
1. Click the **View/ HUD-50077-ST-HCV-HP** button to view and print the form to obtain a signature.

2. Select the **Destination** you want to print to.
3. Click the **More settings** option.
4. Select **Headers and Footers** checkbox.
5. Click the **Print** button to print the form.
6. Executive Director must sign and date underneath the **Name of Executive Director** section; Board Chair must sign and date underneath the **Name of Board Chairman** section.

Note: For wet signatures the Board Chair and the Executive Director need to sign the same form.

Before uploading the form, the PHA must ensure HUD-50077-ST-HCV-HP Form ID number in the signed and scanned attachment matches the HUD-50077-ST-HCV-HP ID in the portal (see the image below).

Once the form is scanned, **PHA/ED or State or Local Official** must continue with the following steps:

7. Click the **Signed form HUD-50077-ST-HCV-HP Add/Delete/View Attachment** button.

A. **Document Type**: Select the appropriate document type.
B. **Document View**: This field is defaulted to **PHA and HUD View** and cannot be changed for PHA users. The **PHA and HUD View** option makes the attachment viewable by both PHA and HUD users.
C. **Comment**: Enter comments related to the document.
D. **File browse**: Either **Drag and Drop** the file or click the **Choose File** button to search and select the file.

E.   Click the **Upload File** button.

The file appears in a list at the bottom of the pop-up window.

Click the **Download** hyperlink to open and download the file. Click the trash can icon (🗑) to delete the file.

F.   Click the **Close & Return** button when finished.

Note: The Executive Director can delete HUD-50077-ST-HCV-HP if the Annual Plan was not submitted yet.
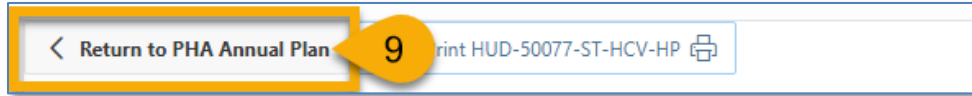
Once the form is uploaded, **ED user** must submit the form:

8.   Click the **Submit Document** button to submit the HUD-50077-ST-HCV-HP certificate.

The certification has been submitted.

< Return to PHA Annual Plan 9 rint HUD-50077-ST-HCV-HP 🖨

Completing Supplemental Form HUD-50077-CRT-SM

Creating Supplemental Form HUD-50077-CRT-SM (PHA, ED or Board Chair)

HUD requires PHAs to submit **HUD-50077-CRT-SM Certifications of Compliance with PHA Plan and Related Regulations (Small PHAs)** with the Board Chair's and Executive Director's signatures. To create the HUD-50077-CRT-SM, PHA, ED, and Board Chair must follow the steps below.

> Note: It is preferable the Executive Director and Board Chair electronically sign the HUD-50077-CRT-SM by following the steps outlined in Submitting the HUD-50077-CRT-SM with Electronic Signature (Board Chair) and Submitting the HUD-50077-CRT-SM with Electronic Signature (Executive Director). If for some reason a Wet Signature is desired, please follow directions for Submitting the HUD-50077-CRT-SM with Wet Signature (Board Chair) and for Submitting the HUD-50077-CRT-SM with Wet Signature (Executive Director).

1. Click the **HUD-50077-CRT-SM** button to begin the process to submit the HUD-50077-CRT-SM certificate.

2. **The PHA certifies that the following policies, programs, and plan components have been revised since submission of its last Annual PHA Plan (check all policies, programs, and components that have been changed):** Scroll down and check the appropriate boxes.

3. Scroll down and check the **5-Year PHA Plan for Fiscal Year 20_-20_** if this form is submitted for the 5-Yeah PHA Plan.

Scroll down further to the Signature section.

4. **Electronic Signature**: Select **True**.
5. **Name of Board Chairman**: Enter the name of the Board Chair.
6. **Email of Board Chairman**: Enter the email of the Board Chair.

7. Click the **Create** button.
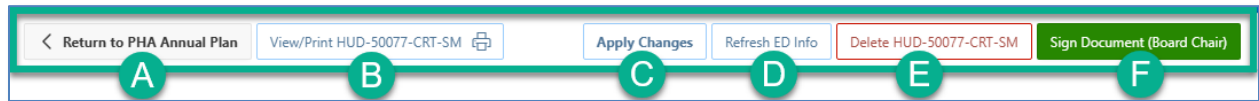
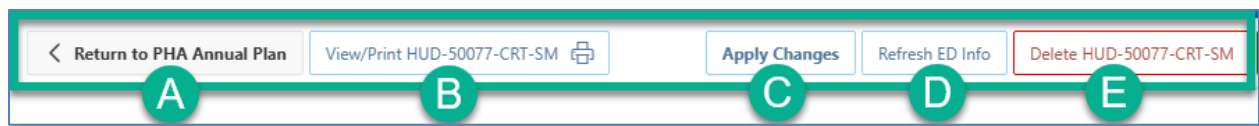## Submitting the HUD-50077-CRT-SM with Electronic Signature (Board Chair)

HUD requires PHAs to submit **HUD-50077-CRT-SM Certifications of Compliance with PHA Plan and Related Regulations (Small PHAs)** with the Board Chair's signature. To electronically sign the form, follow the directions below.
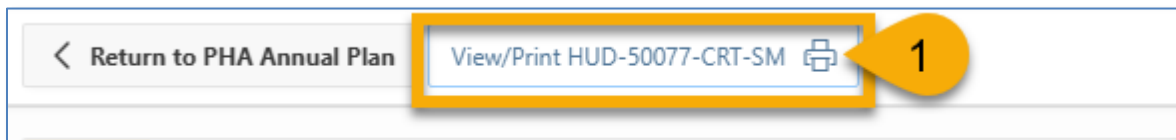
Once the form is created, the Board Chair must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-CRT-SM:** Click this button to review the HUD-50077-CRT-SM in printed format.

C. **Apply Changes:** Click this button to save any changes to the HUD-50077-CRT-SM form.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-CRT-SM submission. If the ED information is inaccurate, you'll need to correct it in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-CRT-SM:** Click this button to delete the HUD-50077-CRT-SM form.

F. **Sign Document (Board Chair)**: Click this button to sign and submit the HUD-50077-CRT-SM certificate since it is required for the HUD-50075 submission.

After verifying the accuracy of the information and setting the **Electronic Signature** to **True**, the Board Chair must execute the following steps:

1. Click the **Sign Document (Board Chair)** button to electronically sign and submit the HUD-50077-CRT-SM certificate since it is required for the HUD-50075 submission.

2. **Signature Text**: Type your name in the field.
3. Click the **Sign Document** button to sign the form.

4. Click the **OK** button to agree to the certifications.

5. The form has been signed. Click the **OK** button to continue the process.

> Note: The Board Chair can delete HUD-50077-CRT-SM if the Annual Plan was not submitted yet.

6. Click the **Return to PHA Annual Plan** button to return to the HUD-50075 submission.

Submitting the HUD-50077-CRT-SM with Wet Signature (Board Chair)

HUD requires PHAs to submit **HUD-50077-CRT-SM Certifications of Compliance with PHA Plan and Related Regulations (Small PHAs)** with the Board Chair's signature. To manually sign the form, the form mist be printed ,manually signed by the Board Chair, scanned and uploaded to the portal.

Note: It is preferable the Board Chair electronically signs the HUD-50077-CRT-SM form by following the steps outlined in Submitting the HUD-50077-CRT-SM with Electronic Signature (Board Chair) section.

Once the form is created, the Board Chair must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-CRT-SM:** Click this button to review the HUD-50077-CRT-SM in printed format.

C. **Apply Changes:** Click this button to save any changes to the HUD-50077-CRT-SM form.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-CRT-SM submission. If the ED information is inaccurate, you'll need to correct it in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-CRT-SM:** Click this button to delete the HUD-50077-CRT-SM form.

After verifying the accuracy if the information and setting the **Electronic Signature** to **False**, the Board Chair must execute the following steps:

1. Click the **View/Print HUD-50077-CRT-SM** button to view and print the form to obtain a signature.

2. Select the **Destination** you want to print to.
3. Click the **More settings** option.
4. Select **Headers and Footers** checkbox.
5. Click the **Print** button to print the form.
6. Board Chair must sign and date underneath the **Name of Board Chairman** section; Executive Director must sign and date underneath the **Name of Executive Director** section.

Note: For wet signatures the Board Chair and the Executive Director need to sign the same form.
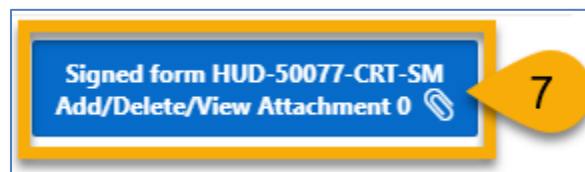
Before uploading the form, the PHA must ensure HUD-50077-CRT-SM Form ID number in the signed and scanned attachment matches the HUD-50077-CRT-SM ID in the portal (see the image below.)

Once the form is scanned, **PHA/ED or State or Local Official** must continue with the following steps:

7. Click the **Signed form HUD-50077-CRT-SM Add/Delete/View Attachment** button.

A. **Document Type**: Select the appropriate document type.
B. **Document View**: This field is defaulted to **PHA and HUD View** and cannot be changed for PHA users. The **PHA and HUD View** option makes the attachment viewable by both PHA and HUD users.
C. **Comment**: Enter comments related to the document.
D. **File browse**: Either **Drag and Drop** the file or click the **Choose File** button to search and select the file.
E. Click the **Upload File** button.

The file appears in a list at the bottom of the pop-up window.

Click the **Download** hyperlink to open and download the file. Click the trash can icon (🗑) to delete the file.

F. Click the **Close & Return** button when finished.

📌 **Note: The Board Chair can delete HUD-50077-CRT-SM if the Annual Plan was not submitted yet.**

8. Click the **Return to PHA Annual Plan** button to return to the HUD-50075 submission.
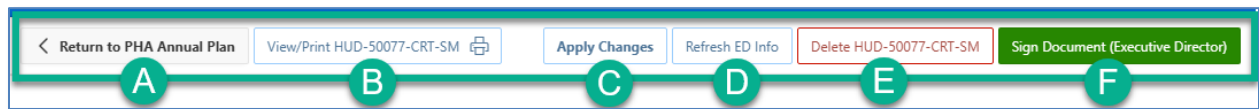

Executive Director Screenshot: Once the form is uploaded, the **Executive Director user** must open and submit the form.

Submitting the HUD-50077-CRT-SM with Electronic Signature (Executive Director)

HUD requires PHAs to submit **HUD-50077-CRT-SM Certifications of Compliance with PHA Plan and Related Regulations (Small PHAs)** with the Executive Director's signature. To electronically sign the **HUD-50077-CRT-SM**, follow the directions below.

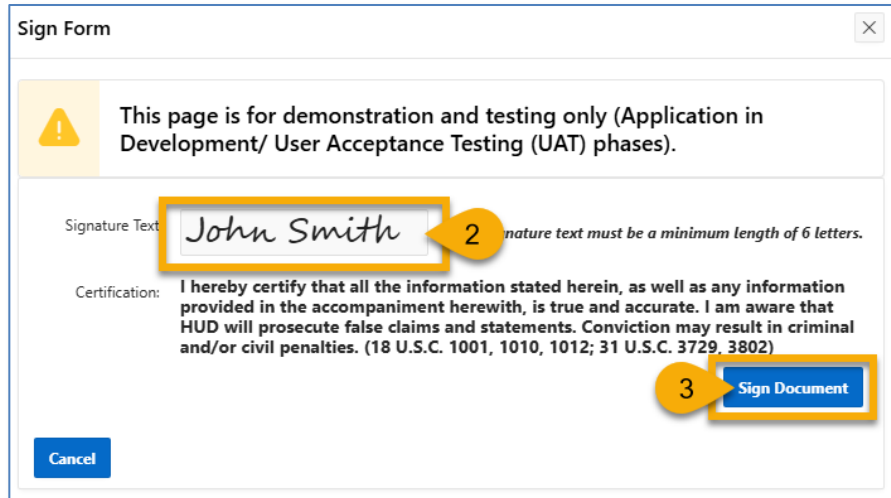Once the form is created, the ED must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-CRT-SM:** Click this button to review the HUD-50077-CRT-SM in printed format.

C. **Apply Changes:** Click this button to save any changes to the HUD-50077-CRT-SM form.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-CRT-SM submission. If the ED information is inaccurate, you'll need to correct it in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-CRT-SM:** Click this button to delete the HUD-50077-CRT-SM form.

F. **Sign Document (Executive Director)**: Click this button to sign and submit the HUD-50077-CRT-SM certificate since it is required for the HUD-50075 submission.

1. Click the **Sign Document (Executive Director)** button to submit the HUD-50077-CRT-SM certificate since it is required for the HUD-50075 submission.

2. **Signature Text**: Type your name in the field.
3. Click the **Sign Document** button to sign the form.

4. Click the **OK** button to agree to the certifications.

5. The form has been signed. Click the **OK** button to continue the process.

Note: The Executive Director can delete HUD-50077-CRT-SM if the Annual Plan was not submitted yet.

6. Click the **Return to PHA Annual Plan** button to return to the HUD-50075 submission.

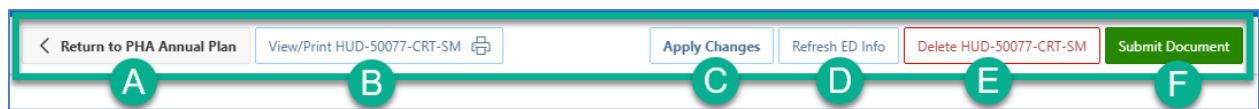*Submitting the HUD-50077-CRT-SM with Wet Signature (Executive Director)*

HUD requires PHAs to submit **HUD-50077-CRT-SM Certifications of Compliance with PHA Plan and Related Regulations (Small PHAs)** with the Executive Director's signature. To manually sign the form, the PHA must print the form, obtain the Executive Director's wet signature, and upload a scanned version of the signed form.
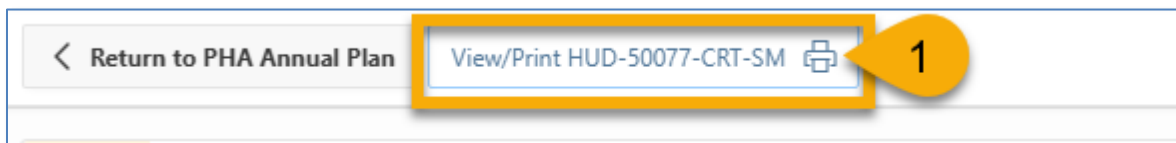
Note: It is preferable the Executive Director electronically signs the HUD-50077-CRT-SM form by following the steps outlined in Submitting the HUD-50077-CRT-SM with Electronic Signature (Executive Director) section.

Once the form is created, the ED must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-CRT-SM:** Click this button to review the HUD-50077-CRT-SM in printed format.

C. **Apply Changes:** Click this button to save any changes to the HUD-50077-CRT-SM form.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-CRT-SM submission. If the ED information is inaccurate, you'll need to correct it in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-CRT-SM:** Click this button to delete the HUD-50077-CRT-SM form.

F. **Submit Document:** Click this button to submit the HUD-50077-CRT-SM certificate since it is required for the HUD-50075 submission.

1. Click the **View/Print HUD-50077-CRT-SM** button to view and print the form to obtain a signature.

2. Select the **Destination** you want to print to.
3. Click the **More settings** option.
4. Select **Headers and Footers** checkbox.
5. Click the **Print** button to print the form.
6. Executive Director must sign and date underneath the **Name of Executive Director** section; Board Chair must sign and date underneath the **Name of Board Chairman** section.

 Note: For wet signatures the Board Chair and the Executive Director need to sign the same form.

Before uploading the form, the PHA must ensure HUD-50077-ST-SM Form ID number in the scanned and signed attachment matches the HUD-50077-ST-SM ID in the portal (see the image below).

Once the form is scanned, **PHA/ED or State or Local Official** must continue with the following steps:

7. Click the **Signed form HUD-50077-ST-CRT-SM Add/Delete/View Attachment** button.

A. **Document Type**: Select the appropriate document type.
B. **Document View**: This field is defaulted to **PHA and HUD View** and cannot be changed for PHA users. The **PHA and HUD View** option makes the attachment viewable by both PHA and HUD users.
C. **Comment**: Enter comments related to the document.
D. **File browse**: Either **Drag and Drop** the file or click the **Choose File** button to search and select the file.
E. Click the **Upload File** button.

The file appears in a list at the bottom of the pop-up window.

Click the **Download** hyperlink to open and download the file. Click the trash can icon (🗑) to delete the file.

F. Click the **Close & Return** button when finished.

📌 Note: The Executive Director can delete HUD-50077-CRT-SM if the Annual Plan was not submitted yet.

Once the form is uploaded, **ED user** must submit the form:

8. Click the **Submit Document** button to submit the HUD-50077-CRT-SM certificate.

The certification has been submitted.

9. Click the **Return to PHA Annual Plan** button to return to the HUD-50075 submission.

Completing Supplemental Form HUD-50077-CR

Creating the HUD-50077-CR with Electronic Signature (PHA, ED or Board Chair)

HUD requires PHAs to submit **HUD-50077-CR Civil Rights Certification (Qualified PHAs)** with the Board Chair's and Executive Director's signatures. To create the HUD-50077-CR, PHA, ED and the Board Chair must follow the steps below:

> **Note: It is preferable that the Executive Director and Board Chair electronically signs the HUD-50077-CR by following the steps outlined in** Submitting the HUD-50077-CR with Electronic Signature (Board Chair) **and** Submitting the HUD-50077-CR with Electronic Signature (Executive Director)**. If for some reason a Wet Signature is desired, please follow directions for** Submitting the HUD-50077-CR with Wet Signature (Board Chair) **and for** Submitting the HUD-50077-CR with Wet Signature (Executive Director)**.**

1. Click the **HUD-50077-CR** button to begin the process to submit the HUD-50077-CR certificate.

2. Electronic **Signature**: Select **True**.
3. **Name of Board Chairperson**: Enter the name of the Board Chair.
4. **Email of Board Chairperson**: Enter the email of the Board Chair.

5. Click the **Create** button.

Submitting the HUD-50077-CR with Electronic Signature (Board Chair)

HUD requires PHAs to submit **HUD-50077-CR Civil Rights Certification (Qualified PHAs)** with the Board Chair's signature. To electronically sign the **HUD-50077-CR**, follow the directions below.

Once the form is created, the Board Chair must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-CR:** Click this button to review the HUD-50077-CR in printed format.

C. **Apply Changes:** Click this button to save any changes to the HUD-50077-CR form.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-CR submission. If the ED information is inaccurate, you'll need to correct it in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-CR:** Click this button to delete the HUD-50077-CR form.

F. **Sign Document (Board Chair)**: Click this button to sign and submit the HUD-50077-CR certificate.

After verifying the accuracy of the information and setting the **Electronic Signature** to **True**, the Board Chair must execute the following steps:
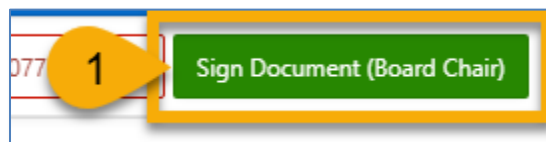
1. Click the **Sign Document (Board Chair)** button to submit the HUD-50077-CR certificate since it is required for the HUD-50075 submission.

2. **Signature Text**: Type your name in the field.
3. Click the **Sign Document** button to sign the form.

4. Click the **OK** button to agree to the certifications.

5. The form has been signed. Click the **OK** button to continue the process.

Note: The Board Chair can delete HUD-50077-CR if the Annual Plan was not submitted yet.

6. Click the **Return to PHA Annual Plan** button to return to the HUD-50075 submission.
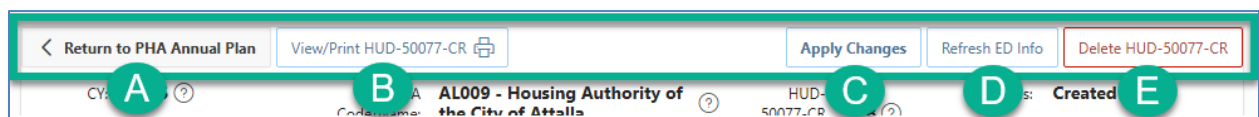
Submitting the HUD-50077-CR with Wet Signature (Board Chair)

HUD requires PHAs to submit **HUD-50077-CR Civil Rights Certification (Qualified PHAs)** with the Board Chair's signature. To manually sign the form, the form must be printed, manually signed by the Board Chair, scanned and uploaded to the portal.

> **Note: It is preferable the Board Chair to electronically signs the HUD-50077-CR form by following the steps outlined in Submitting the HUD-50077-CR with Electronic Signature (Board Chair) section.**

Once the form is created, the Board Chair must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-CR:** Click this button to review the HUD-50077-CR in printed format.

C. **Apply Changes:** Click this button to save any changes to the HUD-50077-CR form.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-CR submission. If the ED information is inaccurate, you'll need to correct it in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-CR:** Click this button to delete the HUD-50077-CR form.

After verifying the accuracy of the information and setting the **Electronic Signature** to **False**, the Board Chair must execute the following steps:

1. Click the **View/Print HUD-50077-CR** button to view and print the form to obtain a signature.

2. Select the **Destination** you want to print to.
3. Click the **More settings** option.
4. Select **Headers and Footers** checkbox.
5. Click the **Print** button to print the form.
6. Board Chair must sign and date underneath the **Name of Board Chairman** section; Executive Director must sign and date underneath the **Name of Executive Director** section.

Note: For wet signatures the Board Chair and the Executive Director need to sign the same form.

Before uploading the form, the PHA must ensure HUD-50077-CR Form ID number in the signed and scanned attachment matches the HUD-50077-CR ID in the portal (see the image below).

Once the form is scanned, **PHA/ED or State or Local Official** must continue with the following steps:

7. Click the **Signed form HUD-50077-ST-CR Add/Delete/View Attachment** button.

A. **Document Type**: Select the appropriate document type.
B. **Document View**: This field is defaulted to **PHA and HUD View** and cannot be changed for PHA users. The **PHA and HUD View** option makes the attachment viewable by both PHA and HUD users.
C. **Comment**: Enter comments related to the document.
D. **File browse**: Either **Drag and Drop** the file or click the **Choose File** button to search and select the file.
E. Click the **Upload File** button.

The file appears in a list at the bottom of the pop-up window.

Click the **Download** hyperlink to open and download the file. Click the trash can icon (🗑) to delete the file.

F.   Click the **Close & Return** button when finished.

📌   Note: The Board Chair can delete HUD-50077-CR if the Annual Plan was not submitted yet.

8.   Click the **Return to PHA Annual Plan** button to return to the HUD-50075 submission.

Executive Director Screenshot: Once the form is uploaded, the **Executive Director user** must submit the form.

Submitting the HUD-50077-CR with Electronic Signature (Executive Director)

HUD requires PHAs to submit HUD-50077-CR **Civil Rights Certification (Qualified PHAs)** with the Executive Director's signature. To electronically sign the **Civil Rights Certification (Qualified PHAs)**, or HUD-50077-CR, follow the directions below.

Once the form is created, the ED must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-CR:** Click this button to review the HUD-50077-CR in printed format.

C. **Apply Changes:** Click this button to save any changes to the HUD-50077-CR form.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-CR submission. If the ED information is inaccurate, you'll need to correct these fields in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-CR:** Click this button to delete the HUD-50077-CR form.

F. **Sign Document (Executive Director)**: Click this button to sign and submit the HUD-50077-CR certificate since it is required for the HUD-50075 submission.

1. Click the **Sign Document (Executive Director)** button to submit the HUD-50077-CR certificate since it is required for the HUD-50075 submission.

2. **Signature Text**: Type your name in the field.
3. Click the **Sign Document** button to sign the form.

4. Click the **OK** button to agree to the certifications.

5. The form has been signed. Click the **OK** button to continue the process.

Note: The Executive Director can delete HUD-50077-CR if the Annual Plan was not submitted yet.

6. Click the **Return to PHA Annual Plan** button to return to the HUD-50075 submission.

Submitting the HUD-50077-CR with Wet Signature (Executive Director)

HUD requires PHAs to submit HUD-50077-CR with the Executive Director's signature. To manually sign the form, the from must be printed, manually signed by the Executive Director, scanned and uploaded to the portal.

📌 Note: It is preferable the Executive Director electronically signs the HUD-50077-CR and follows the steps outlines in [Submitting the HUD-50077-CR with Electronic Signature (Executive Director)](#) section.

Once the form is created, the ED must open and sign the form.

Once the form is opened, the following menu buttons are displayed at the top of the screen:

A. **Return to PHA Annual Plan:** Click this button to return to the PHA's HUD-50075 submission.

B. **View/Print HUD-50077-CR:** Click this button to review the HUD-50077-CR in printed form.
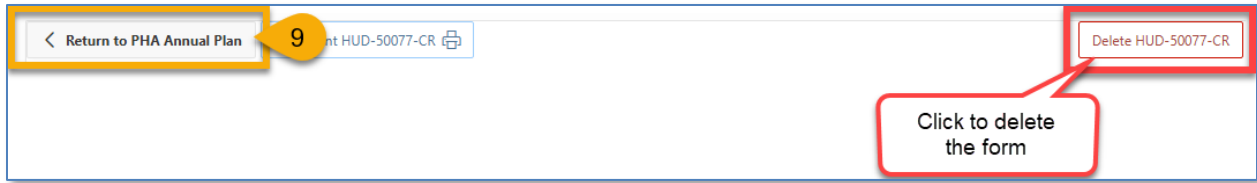
C. **Apply Changes:** Click this button to save any changes to the HUD-50077-CR form.

D. **Refresh ED Info:** Click this button to refresh the Executive Director information for the HUD-50077-CR submission. If the ED information is inaccurate, you'll need to correct these fields in IMS/PIC. Click the Refresh ED Info button to update the latest changes from IMS/PIC. Any changes made to IMS/PIC will take one (1) business day to appear in the Public Housing Portal.

E. **Delete HUD-50077-CR:** Click this button to delete the HUD-50077-CR form.

F. **Submit Document:** Click this button to submit the HUD-50077-CR certificate since it is required for the HUD-50075 submission.

1. Click the **View/Print Hud-50077-CR** button to download the form. Save the document to your computer.

2. Select the **Destination** you want to print to.
3. Click the **More settings** option.
4. Select **Headers and Footers** checkbox.
5. Click the **Print** button to print the form.
6. Executive Director must sign and date underneath the **Name of Executive Director** section; Board Chair must sign and date underneath the **Name of Board Chairman** section.

Note: For wet signatures the Board Chair and the Executive Director need to sign the same form.

Before uploading the form, the PHA must ensure HUD-50077-CR Form ID number in the signed and scanned attachment matches the HUD-50077-CR ID in the portal (see the image below).

Once the form is scanned, **PHA/ED or State or Local Official** must continue with the following steps:

7. Click the **Signed form HUD-50077-ST-CR Add/Delete/View Attachment** button.

A. **Document Type**: Select the appropriate document type.
B. **Document View**: This field is defaulted to **PHA and HUD View** and cannot be changed for PHA users. The **PHA and HUD View** option makes the attachment viewable by both PHA and HUD users.
C. **Comment**: Enter comments related to the document.
D. **File browse**: Either **Drag and Drop** the file or click the **Choose File** button to search and select the file.
E. Click the **Upload File** button.

The file appears in a list at the bottom of the pop-up window.

Click the **Download** hyperlink to open and download the file. Click the trash can icon (🗑) to delete the file.

F.   Click the **Close & Return** button when finished.


> 📌 Note: The Executive Director can delete HUD-50077-CR if the Annual Plan was not submitted yet.

Once the form is uploaded, **ED user** must submit the form:

8.   Click the **Submit Document** button to submit the HUD-50077-CR certificate.

The certification has been submitted.

| < Return to PHA Annual Plan | 9 | nt HUD-50077-CR 🖨 | | Delete HUD-50077-CR |

Click to delete the form

9. Click the **Return to PHA Annual Plan** button to return to the HUD-50075 submission.

General Module Functionalities

Uploading Attachments

To upload documentation, follow the instructions below.

> Note: The below process provides steps on how to upload documentation and applies to any blue button related to attaching the supporting paperwork.
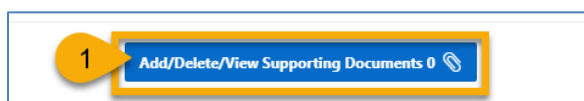
1. Click the **Add/Delete/View Supporting Documents** button to upload attachments.

2. **Document Type**: Select the appropriate document type.
3. **Document View**: This field is defaulted to **PHA and HUD View** and cannot be changed for PHA users. The **PHA and HUD View** option makes the attachment viewable by both PHA and HUD users.
4. **Comment**: Enter comments related to the document.
5. **File browse**: Either **Drag and Drop** the file or click the **Choose File** button to search and select the file.
6. Click the **Upload File** button.

The file appears in a list at the bottom of the pop-up window.

Click the **Download** hyperlink to open and download the file. Click the trash can icon (🗑) to delete the file.

7. Click the **Close & Return** button when finished.

Adding PHA Consortia

To add a PHA Consortia to the PHA Plan, follow the instructions below.

1. Check this box, if the PHA is part of a consortia and is submitting a joint PHA plan.
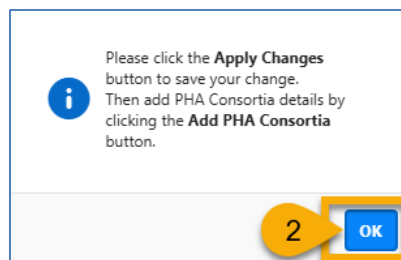
A popup window appears.

2. Click the **OK** button.
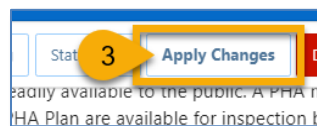
3. Click the **Apply Changes** button.

The PHA Consortia section expands with the ability to add a PHA.

4.   Click **+ Add PHA Consortia** to add a PHA.

5.   Select the **Lead PHA** check box to mark the PHA as the prime.
6.   **Select PHA Code**: Select the appropriate PHA.
7.   **Program(s) in the Consortia**: Enter the programs that are part of the joint consortia.
8.   **Program(s) not in the Consortia**: Enter programs that are **not part** of the joint consortia.
9.   **No. of Units in PH**: Number of Public Housing units is displayed for the selected PHA.
10. **No. of Units in HCV**: Number of Housing Choice Voucher units is displayed for the selected PHA.

Note: The number units are prepopulated and if any corrections need to be made, please contact your local HUD Field Office.

11. Click the **Create & Close** button to add the Consortia PHA.

Note: It is required to add one lead and at least one non-lead PHA to set up a consortium. Repeat Step 4 to add a non-lead PHA(s) to the Consortia.

Validating HUD-50075

The user must validate the HUD-50075 before submitting the form. To validate the submission, follow the instructions below.

1. Click the **Validate** button to ensure there are no error messages.
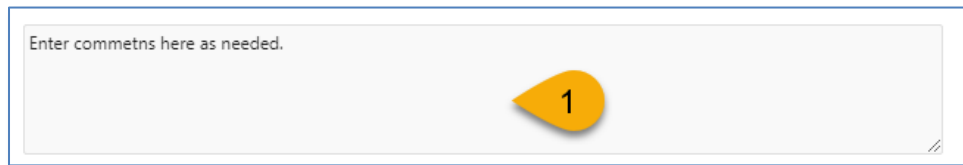
If the system displays error messages, the user must address them prior to the submission of the form. The yellow box outlines the specific errors that need to be addressed.

Once all errors have been addressed. Go back to Step 1. The system displays **The form is ready for submission** message.

Changing HUD-50075

Follow the general directions below to make and save changes to the submission.

1. Enter the changes you would like to make.
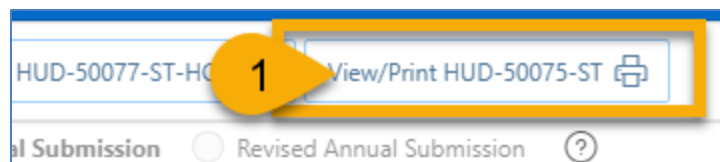
2. Click the **Apply Changes** button to save the changes.

The changes have been saved. The user can proceed with the submission.

View and Print HUD-50075

You may print the HUD-50075 at any time while the form is in the created status or after submitting the form submission.
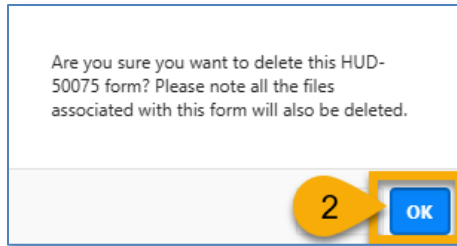

1. Click the **View/Print HUD-50075** button.

2. Select the **Destination** you want to print to.
3. Click the **More settings** option.
4. Select **Headers and Footers** checkbox.
5. Click the **Print** button to print the form.

Deleting HUD-50075

To delete the HUD-50075 submission, follow the steps below.

1. Click the **Delete HUD-50075** button.

2. Click the **OK** button to continue.

The Annual PHA plan has been deleted.

Submitting HUD-50075 (Executive Director)

Once the form HUD-50075 is created, updated, along with signed and submitted HUD-50077-SL certificate and other required certificates, and any necessary supporting documents are attached, the PHA's Executive Director can officially submit the form.

Note: Only Executive Director can submit the HUD-50075 Plan. The Submit button is not available for PHA users.

To submit the HUD-50075 submission, follow the step below.

1. Click the **Submit** button to submit the HUD-50075 submission.

The Annual PHA plan has been submitted.

Status Log

To view the status log for the PHA, follow the directions below.

1. Click the **Status Log** button.

The status log displays the changes in status through the lifecycle of the form, from **Created** to **Accepted** or **Returned**.

View Email Log

To view the email log, follow the directions below.

1. Click the **View Email Log** button to open the popup window.

2. Click the **Close & Return** button to return to HUD-50075.

Received HUD-50075

The Portal notifies the PHA's Executive Director by email when HUD Field Office (FO) has received their HUD-50075 submission and related certifications.

HUD received your form HUD-50075 submission. Your current submission can be viewed by selecting the following from the main navigation:

PHA Reports & Submissions → PHA Submissions → PHA Annual Plans (HUD-50075)

If you have any questions, please contact your local Field Office staff.

Sincerely,

Office of Public and Indian Housing

U.S. Department of Housing and Urban Development

Accepted HUD-50075

The Portal notifies the PHA's Executive Director by email when the HUD Field Office (FO) accepts their HUD-50075 submission and related certifications.

HUD reviewed and accepted your annual PHA plan submission. You may review further and resubmit a new annual PHA plan with any additional updates as required. Your current submission can be viewed by selecting the following from the main navigation:

PHA Reports & Submissions → PHA Submissions → PHA Annual Plans (HUD-50075)

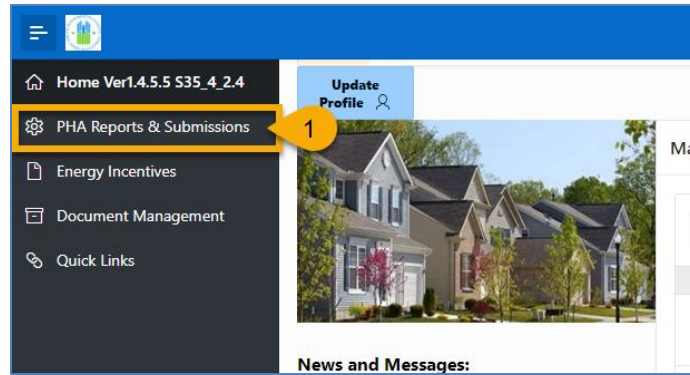If you have any questions, please contact your local Field Office staff.
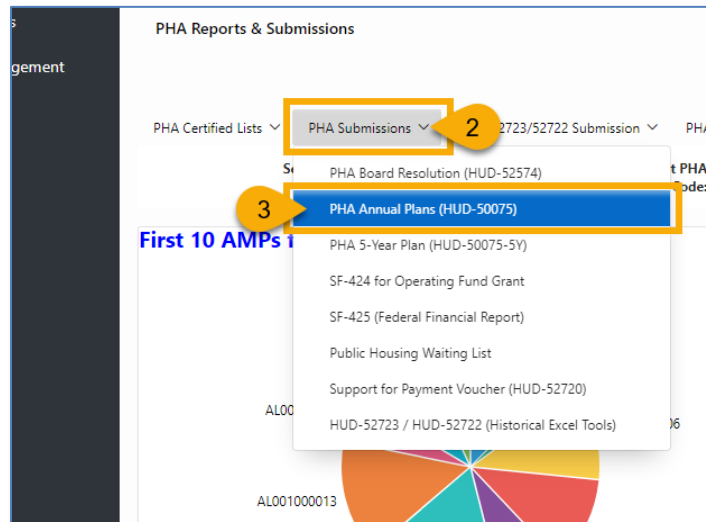
Sincerely,

Office of Public and Indian Housing

U.S. Department of Housing and Urban Development

Creating a Revised HUD-50075

Once the Annual Plan submission is accepted by the Field Office, the PHA has the ability to submit a revised HUD-50075 to the FO for another review. Follow the steps below.

1. On the Portal home page, click **PHA Reports & Submissions** in the left side navigation menu.

2. Click the **PHA Submissions** drop-down menu.
3. Select **PHA Annual Plans (HUD-50075)**.

4. **Select PHA Fiscal Year Beginning (FYB):** Select the appropriate calendar year, which is the funding year for the OpFund grants.

5. Select PHA Code: Select the appropriate PHA.

6. Click the **Generate Annual Plan** button to start a revised Annual Plan submission.

A pop-up window appears with the option to select the appropriate Annual Plan depending on your PHA type.

7. Select the appropriate PHA Plan that states **Revise <Plan Type>** and **Version two (2).** In this example it is a **Revised HCV PHA Plan**.

Note: The system will display only Annual Plan type based on PHA type, designation status, and PHAS and/or SEMAP scores. For example, for Troubled PHA, the system will display only Revise Troubled PHA Plan, while for HCV Only PHA the system will display

Revise HCV PHA Plan and Revise High Performer PHA Plan if this HCV PHA meets the definition of the High Performer under SEMAP score.

Go to [Creating New and Revised HUD-50075 Annual Plan Submissions](#) section to complete the process.

Returned HUD-50075

The Field Office may return the PHA's HUD-50075 submission if the submission contains errors, omissions, missing or incorrect documentation, or any other reason. The Portal notifies the PHA's Executive Director by email when the FO returns their forms.

Refer to instructions on how to resubmit the HUD-50075 in the next section, [Resubmit HUD-50075](#), in response to a Return.

Reverted HUD-50075

Occasionally, PHAs may ask to have their submissions reverted, or Field Offices will revert the submission in order to avoid a "Returned" submission. This avoids PHAs having to resubmit the HUD-50075 form. The submission will revert from "Submitted" status back to "Created" status. This is done when a PHA has forgotten to upload a specific document, or would like to change a number, or some minor change that needs to take place. The Portal notifies the PHA's Executive Director by email when the FO reverts their forms.

HUD reviewed and reverted your annual PHA plan submission. You may review further and resubmit your annual PHA plan with appropriate corrections as requested. If your PHA fails to submit an acceptable PHA Plan in a timely manner, HUD may withhold or reduce future Capital Funding, Operating Funding, or Section 8 administrative fees. Your current submission can be viewed by selecting the following from the main navigation:

PHA Reports & Submissions → PHA Submissions → PHA Annual Plans (HUD-50075)

If you have any questions, please contact your local Field Office staff.

Sincerely,

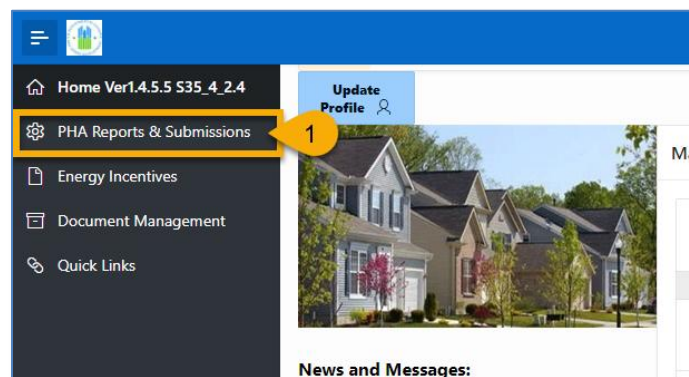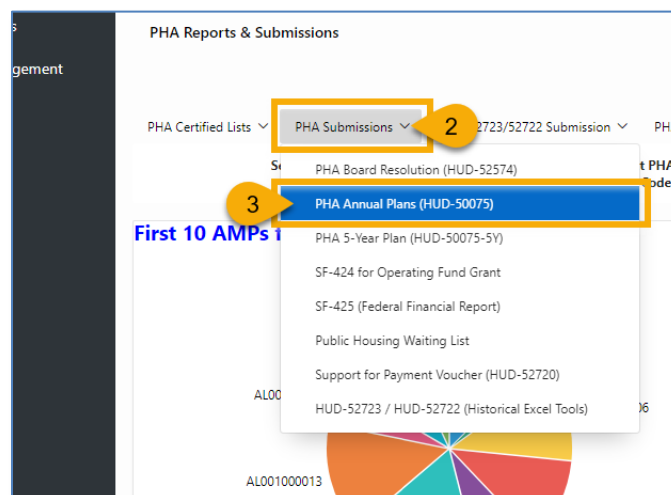*Office of Public and Indian Housing*

U.S. Department of Housing and Urban Development

Resubmit HUD-50075

To resubmit the HUD-50075 submission, in response to a Field Office return, follow the steps below.

1. On the Portal home page, click **PHA Reports & Submissions** in the left side navigation menu.

2. Click the **PHA Submissions** drop-down menu.
3. Select **PHA Annual Plans (HUD-50075)**.

4. **Select PHA Fiscal Year Beginning (FYB):** Select the appropriate calendar year, which is the funding year for the OpFund grants.

5. **Select PHA Code:** Select the appropriate PHA.

6. Click the (✏) pencil icon to review returned comments.
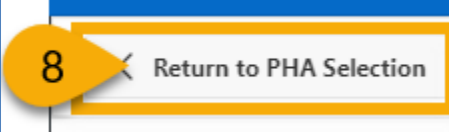
7. **Field Office Returned Comment:** Review the reasons for the returned HUD-50075.

8. Click the **Return to PHA Selection** button to create a new submission.

Return to [Creating New and Revised HUD-50075 Annual Plan Submissions](#) section resubmit the HUD-50075 form.

The Public Housing Portal Statuses

The Portal tracks five (5) different PHA Annual plan statuses.

Created: The PHA created the Annual Plan form and may have started reviewing and updating the form. The PHA must review, update, and submit the form and associated certificate in created status.

Submitted: The PHA submitted the Annual Plan to HUD. PHA cannot edit the form in **Submitted** status, cannot delete existing file attachments, but can upload new documentation if needed.

In Review Status: The HUD field office has started to review the form. PHA cannot edit the form in **In Review** status, cannot delete existing file attachments, but can upload new file attachments if needed.

Accepted: The Field Office has accepted the form. PHA cannot edit the form in **Accepted** status. PHA cannot delete existing file attachments and cannot upload new documentation.

Returned: The Field Office has returned the form to PHA to correct errors or omitted data. PHA cannot edit the form in **Returned** status. PHA cannot delete existing file attachments and cannot upload new documentation. The PHA must fix any errors and omissions and resubmit for HUD's review.

Questions

Do you have any comments, questions, or need help finding information in the Portal? We are here to help!

- For questions about OpFund grants, calculating or understanding OpFund eligibility, PIH regulations, or notices, contact your local FO.
- For questions or technical issues regarding your access to the Portal, contact the Real Estate Assessment Center – Technical Assistance Center (REAC-TAC) by calling 1-888-245-4860 Option #4 or by sending an email to REAC_TAC@hud.gov.
- For questions regarding technical issues with using the Public Housing Portal, contact publichousingportal@hud.gov.