Public Housing Portal

Public Housing Agency User Guide for HUD-52723/52722 Submission for CY 2026

U.S. Department of Housing and Urban Development

Office of Public and Indian Housing

Financial Management Division

Publish Date: August 29, 2025

Table of Contents

Public Housing Portal

The Public Housing Portal (portal) is an online platform for Public Housing Authorities (PHAs) and the Office Public and Indian Housing (PIH). PHAs can review current and historical Forms HUD-52723 and HUD-52722 data. PHAs can complete and submit Operating Fund (OpFund) required forms. This guide provides PHAs the steps to complete and submit the OpFund forms online. 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.

Required Forms HUD-52723/52722 for Operating Fund Grants

HUD determines OpFund Grant eligibility based on the data collected in the Forms HUD-52723 and HUD-52722. PHAs must complete and submit these forms for each project. The information is then reviewed by HUD staff to determine each AMP's Formula Amount and the funds to be obligated for the Funding Period to each AMP.

For guidance on how to complete the OpFund forms, review the latest OpFund Grant Processing Notice. Definition of the forms:

- **HUD-52723 Operating Fund Grant: Calculation of Total Program Expense Level**: This form is used to calculate OpFund Grant eligibility in accordance with regulations in 24 CFR Part 990.
- **HUD-52722 Operating Fund Grant: Calculation of Utilities Expense Level**: This form is used to calculate the utilities expense level component of the project's OpFund Grant eligibility in accordance with regulations in 24 CFR Parts 990.170 – 990.185.

HUD pre-populates much of the OpFund Forms with data sourced from Inventory Management System/PIH Information Center (IMS/PIC), the Financial Data Schedule (FDS), and previous OpFund form submissions. When PHA updates or requests modifications to the pre-populated data, the PHA must provide comments and submit supporting documentation required by HUD. PHA should consult their local HUD Field Office (FO), the latest OpFund Grant Processing Notice, and the instructions to the OpFund forms for further guidance. All PHA's updates and requests for modifications to pre-populated data are subject to HUD review.

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

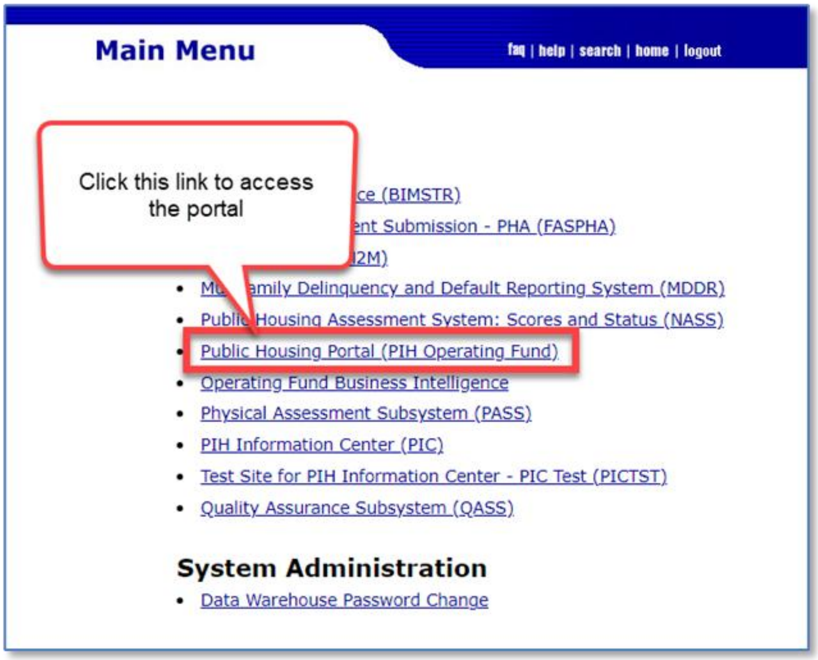
WASS security coordinators must assign the users only one user role. WASS security coordinators must assign users the appropriate user role. The PHA user roles are described below:

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. 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 only read submission records with the exception of the form HUD-50077-SL (Certification by State or Local Office of PHA Consistency with the Consolidated Plan). OPM user can electronically sign/submit or manually sign and attach HUD-50077-SL certificate to the 5-Year PHA Plan.

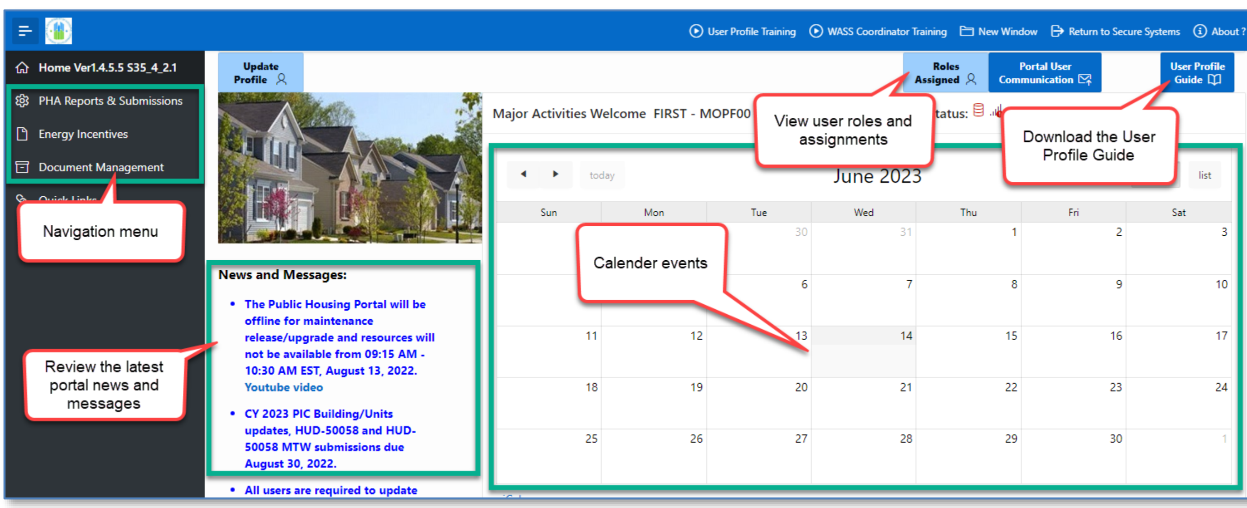
WASS security coordinator can find a user guide to assign user roles from this web page: https://www.hud.gov/program_offices/public_indian_housing/programs/ph/am/webportal.

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.



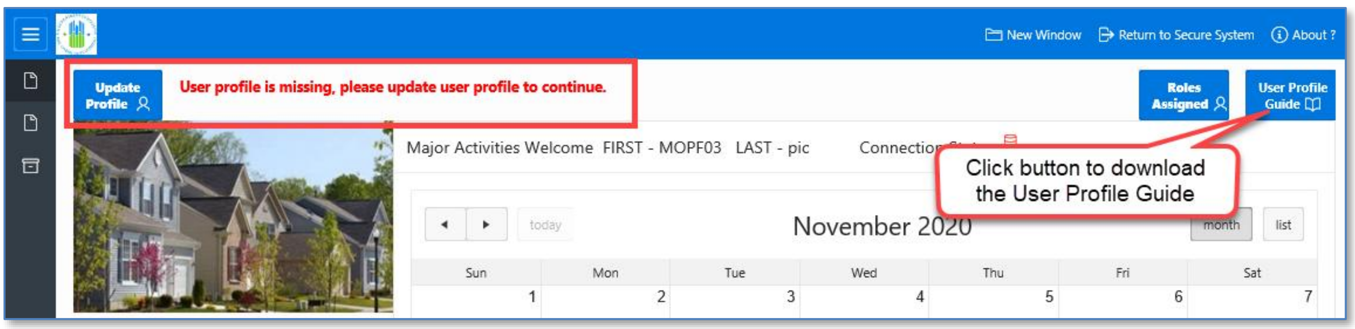
From the home page, PHA users can review upcoming portal submission dates, events, read the latest Portal News and Messages, download the User Profile Guide, update their User Profiles, and navigate to many of the portal's modules.

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.

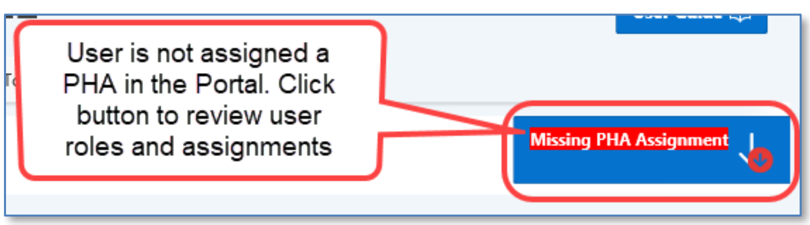


Consult the User Profile user guide to complete your User Profile. The "**User Profile Guide**" is available to download at the portal Home page.

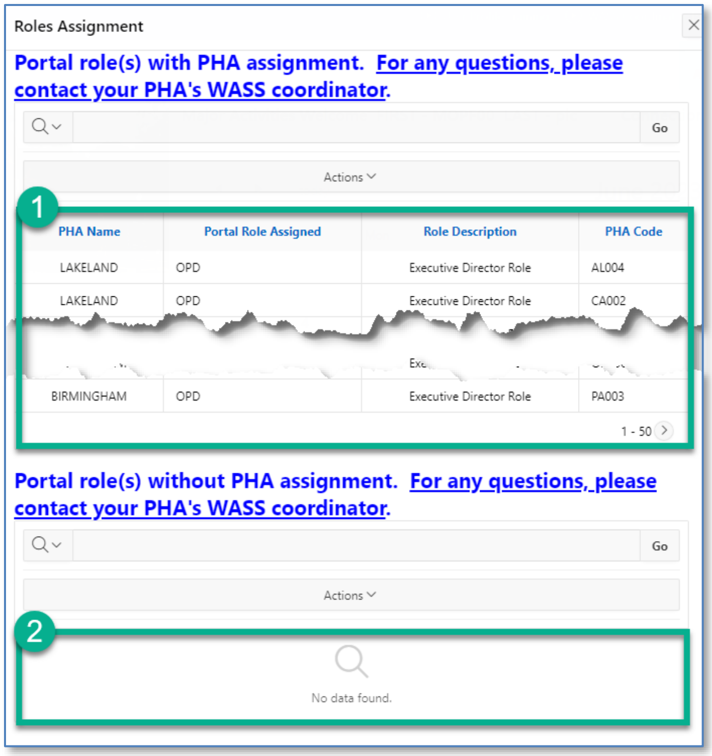
Missing PHA Assignment Warning

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 have associated PHA(s).

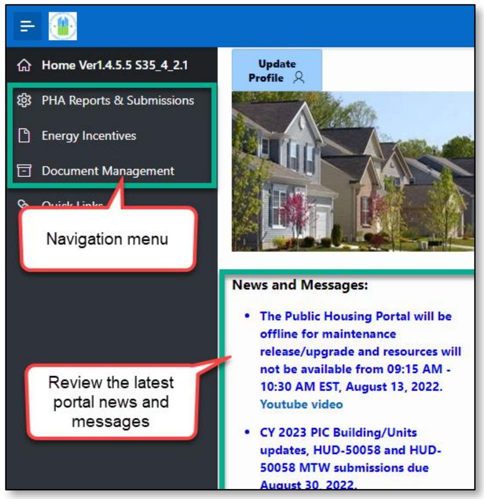
Area 2: Displays Portal role(s) assigned to the user that do not have associated PHA(s).

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:

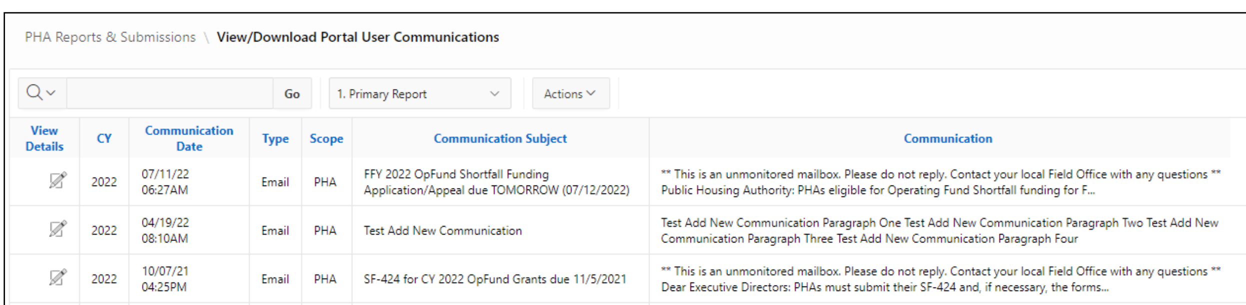


Communication Module

The portal provides a communication module that allows users to view historical listserv and email communications containing Public and Indian Housing (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:

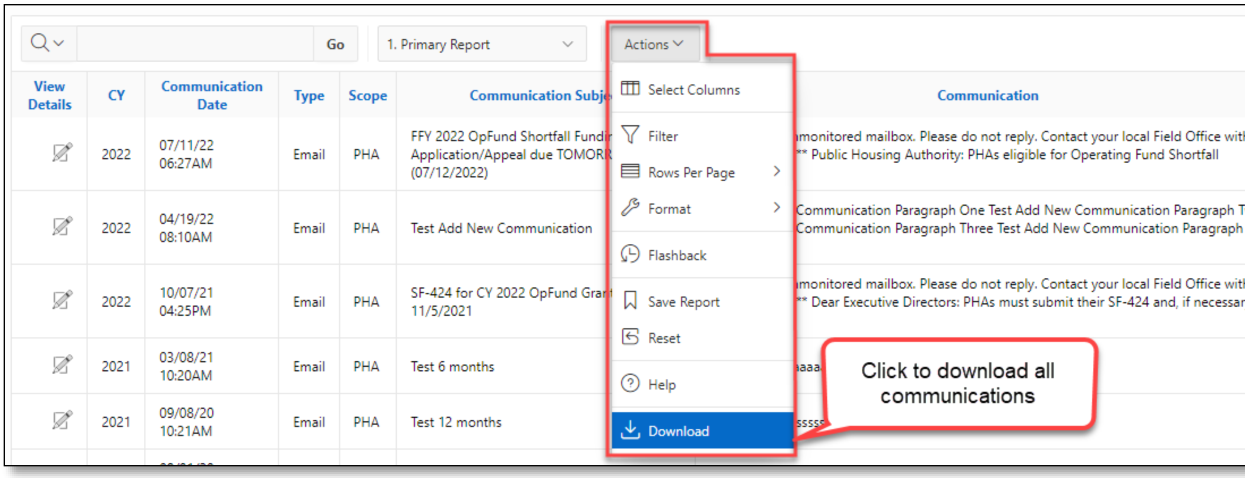


View Details	CY	Communication Date	Type	Scope	Communication Subject	Communication
	2022	07/11/22 06:27AM	Email	PHA	FFY 2022 OpFund Shortfall Funding Application/Appeal due TOMORROW (07/12/2022)	** This is an unmonitored mailbox. Please do not reply. Contact your local Field Office with any questions ** Public Housing Authority: PHAs eligible for Operating Fund Shortfall funding for F...
	2022	04/19/22 08:10AM	Email	PHA	Test Add New Communication	Test Add New Communication Paragraph One Test Add New Communication Paragraph Two Test Add New Communication Paragraph Three Test Add New Communication Paragraph Four
	2022	10/07/21 04:25PM	Email	PHA	SF-424 for CY 2022 OpFund Grants due 11/5/2021	** This is an unmonitored mailbox. Please do not reply. Contact your local Field Office with any questions ** Dear Executive Directors: PHAs must submit their SF-424 and, if necessary, the forms...

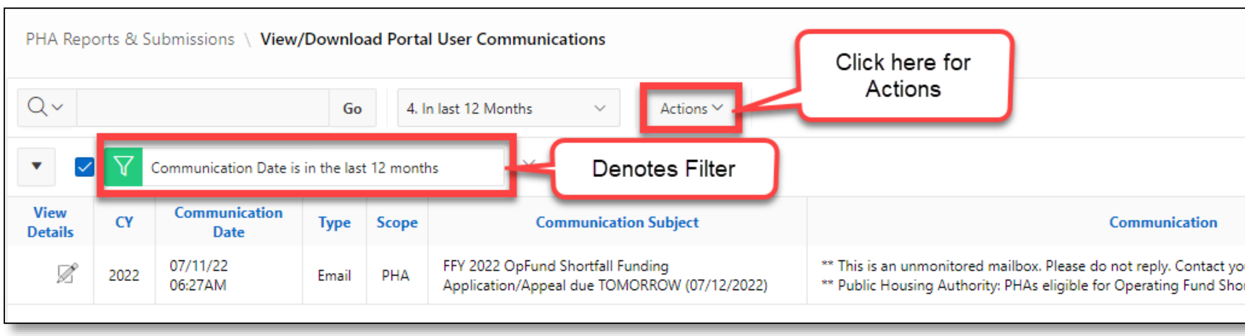
Click the "**Actions**" drop-down menu to perform the following:

- 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.



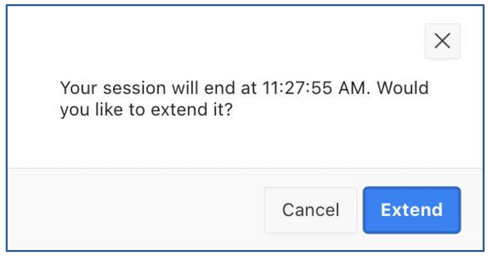
This module may help users to search, filter, sort and quickly locate correspondences from a PHA with a specific piece of information (e.g., correspondence regarding SR-FRB for a specific PHA).



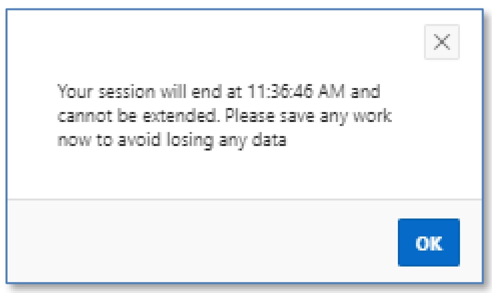
Users can view details from each correspondence and content from the email or download the email and file attachments, as necessary.

Session Time-Out

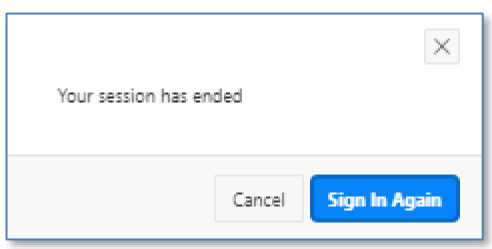
Due to HUD-issued security requirements, if a user is inactive for ten (10) continuous minutes, the portal displays a pop-up message asking the user if the session needs to be extended or not. If the user doesn't extend the session the system will end the session in five (5) minutes after the pop-up 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:



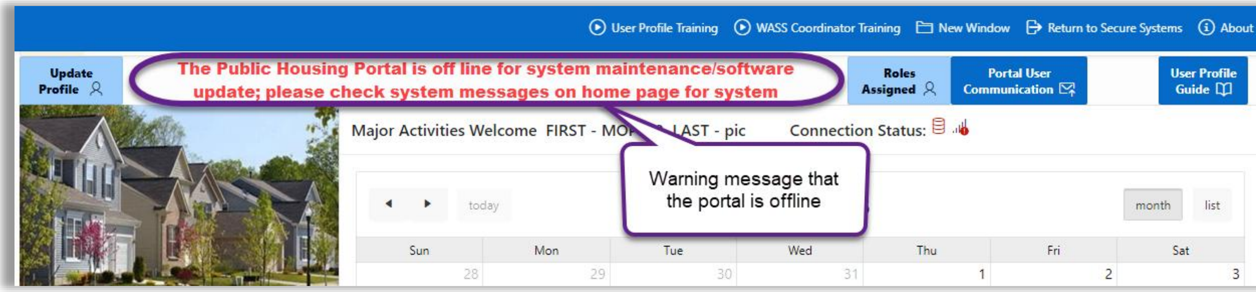
Click the **OK** button and use the remaining five (5) minutes to save any updates to forms. Once the session is terminated, the portal displays the following warning message:



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

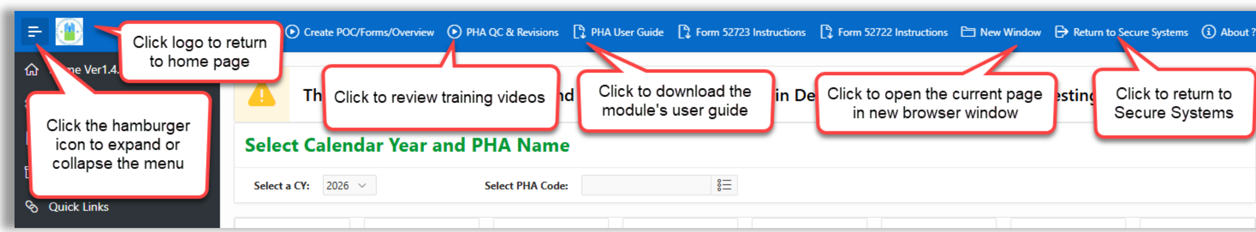
Users may be locked out of the portal during system maintenance and software updates. Users are notified when the system is offline with a warning message displayed on the home page as shown below.



The portal will be available once the system maintenance or software updates are completed.

Navigation Shortcuts and Tips

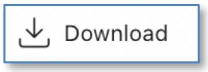
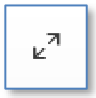
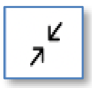
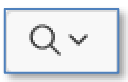
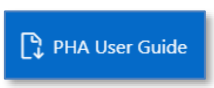
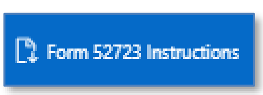
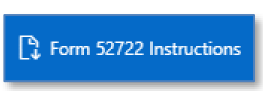
The image below provides basic top navigation shortcuts located near the top of the portal.



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**" button downloads this "PHA User Guide for HUD-52723/52722 Submission."

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.

Click this icon to expand or minimize the navigation menu

	Click this icon to minimize the navigation menu
	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 (at the beginning of the search bar) to select a column heading to perform a search on
	Click this button to reveal additional features to manipulate reports and tables, such as download the report or filter the data
	Click this button to view and download the Portal PHA user guide
	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)
	Click this button to download the HUD-52723 form instructions. These instructions detail how HUD pre-populates and calculates certain fields, and how the PHA completes, and updates required and editable fields.
	Click this button to download the HUD-52722 form instructions. These instructions detail how HUD pre-populates and calculates certain fields, and how the PHA completes, and updates required and editable fields.

Submission Types

PHAs may make four (4) types of submissions during the calendar year based on when they make the submission and whether the submission corrects returned submissions, addresses quality control findings, or makes PHA and FO corrections to HUD accepted submissions. The submission types are explained below:

- Initial Submission: The PHA's first OpFund form submission to HUD for the funding year.
- Resubmission: The PHA may resubmit their OpFund forms to modify the original HUD-accepted or returned submissions. PHAs can make resubmissions to a HUD-accepted resubmissions. **HUD accepts resubmissions before the funding year's deadline, which is the same as the original submission deadline.**
- Quality Control (QC) Submission: **Once HUD accepts at least one (1) Initial Submission or Resubmission, PHA or FO can create a QC Submission** to address HUD's QC findings. FOs may address QC submissions after consulting with the PHA. HUD requires the PHA and/or FO to address all QC findings.
- Revision Submissions: **Once HUD accepts at least one (1) Initial Submission or Resubmission, PHA or FO can create a Revision Submission** to request a change to the last HUD-accepted/returned submission. The request for Revision Submission must include the reason for the change(s). FOs may request a Revision Submission after consulting with the PHA. HUD only accepts Revision Submissions for reasons noted in the OpFund Grant Processing Notice for the applicable funding year. Review the notice for eligible reasons to request a Revision Submission and corresponding deadlines.

Creating a Point of Contact

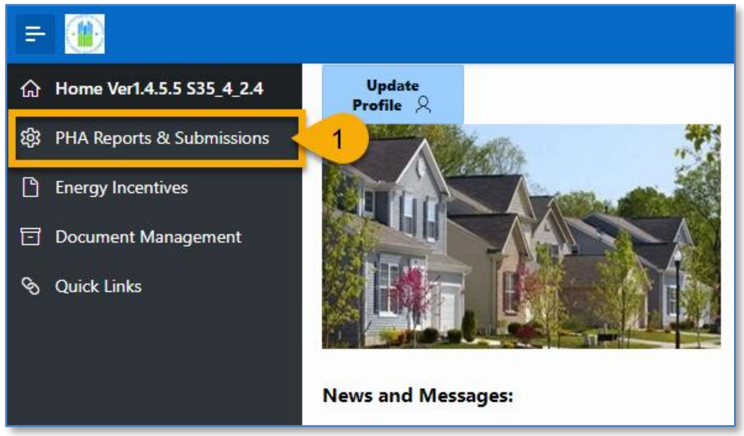
A Point of Contact (POC) is required so that HUD has someone to contact, ask questions, and/or request further information and documentation from to support the data provided on the PHA's OpFund forms. PHAs must set a POC before they can create their OpFund forms.

The OpFund Portal pre-populates the POC with the logged-in user's User Profile information. Users should ensure their information is up-to-date and accurate.

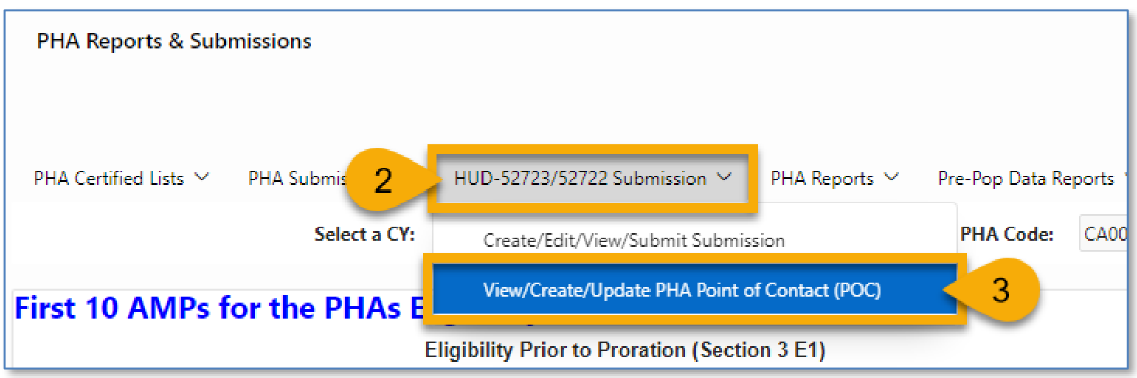
Note:

1. **The user must be logged into the Portal to set themselves as the POC for a submission.**
2. **Anyone with the appropriate WASS security role can create and update a PHA's OpFund forms.**

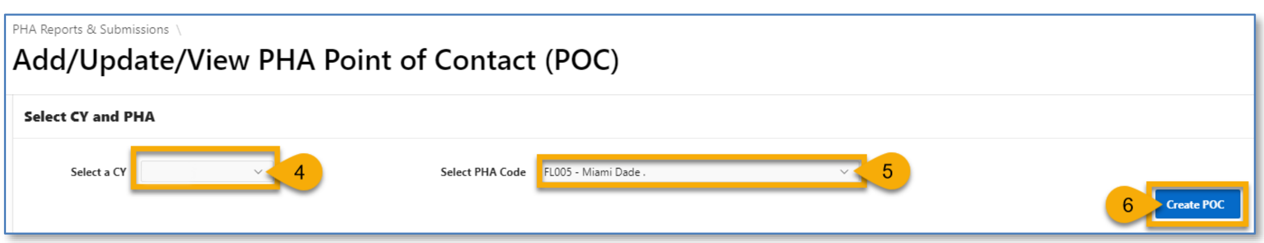
To create a point of contact, follow the steps below:



1. On the Portal home page, click "**PHA Reports & Submissions**" in the left side navigation menu.

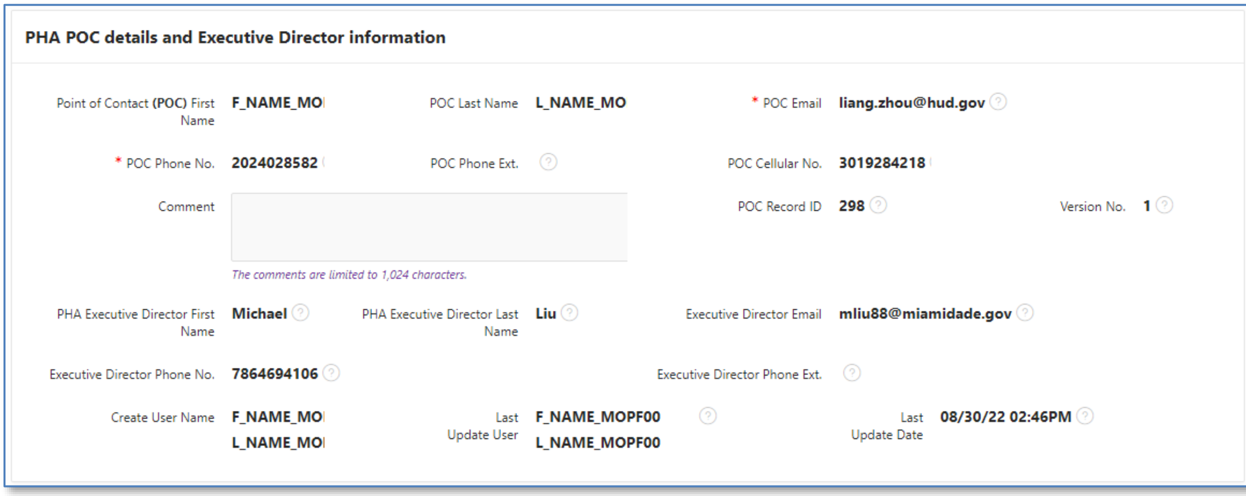


2. Click the "**HUD-52723/52722 Submission**" drop-down menu.
3. Select "**View/Create/Update PHA Point of Contact (POC)**."



4. **Select a CY:** Select appropriate calendar year, which is the funding year for the OpFund grants.
5. **Select PHA Code:** Select the appropriate PHA.
6. Click the "**Create POC**" button.

The Portal pre-populates the POC information with the current logged-in user's user profile information. The system also automatically populates the PHA's Executive Director's (ED) information with data from IMS/PIC.

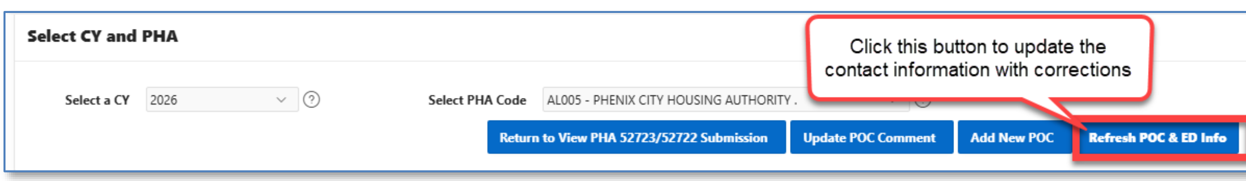


Watch the training video "[Creating a Point of Contact for the Forms 52723 and 52722 Submission Process]" to learn how to create POC information.

Refreshing Point of Contact and Executive Director Information

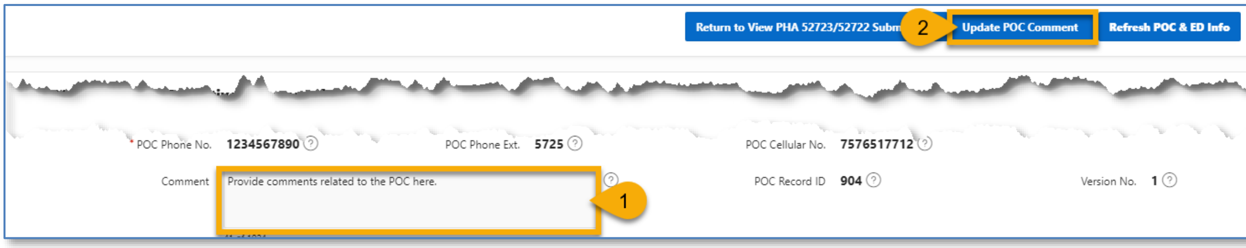
If the POC information is not accurate, the user must first make corrections to their User Profile and then come back to the POC screen and click the "**Refresh POC & ED Info**" button to update the POC information on POC screen.

If the ED information is not accurate, then PHA must first correct the ED's information in IMS/PIC, wait for one (1) business day, and then come back to the POC screen and click the "**Refresh POC & ED Info**" button to update the ED information on POC screen.



Updating Point of Contact Comments

The POC can include comments in the POC section.



1. **Comment:** Enter comments.
2. Click the “**Update POC Comment**” button.

The user may delete, edit, or append the comments and click the “**Update POC Comment**” button to save the changes.

Changing a Point of Contact

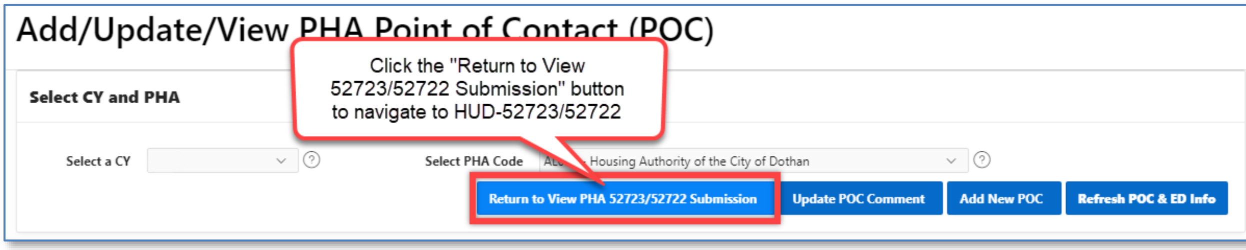
A PHA may update or replace a POC during a funding year. <u>The newly designated POC must log in the Portal and click the “**Add New POC**” button.</u> The current logged-in user will become the POC.

The Portal pre-populates the POC information with the user’s User Profile details and the PHA’s ED information with the latest data from IMS/PIC. If the PHA ED is changed, click the “**Refresh POC & ED Info**” button to synchronize the ED information between IMS/PIC and OpFund.

The table at the bottom of the POC web page displays the list of all POCs associated with a PHA. The record with the highest “**Version No.**” provides information on current POC for that PHA.

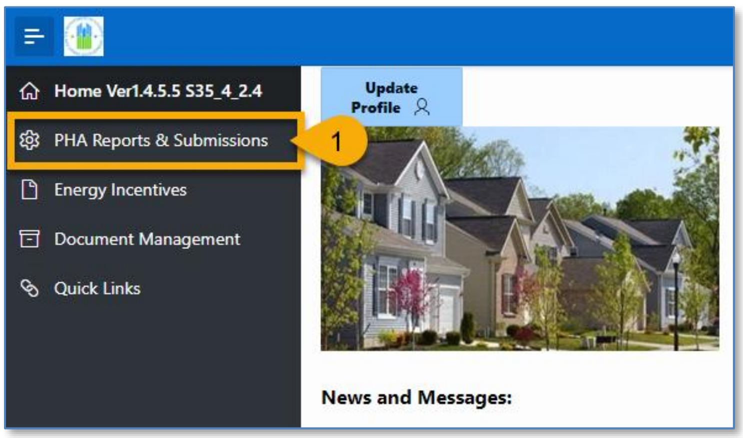
Version No.	POC Record ID	CY	PHA Code	POC First Name	POC Email	Comment	POC Cellular No.	PHA ED First Name	PHA ED Last Name	ED Phone No.	ED Phone Ext.	ED Email	Created User Name	Last Update User
2	9523	2024	AL007	Johnson1	Johnson.Abraham@hud.gov	-	3019284218	Glenn D.	Franklin	3347946713	0	gf@dothanhousing.org	Johnson1 Abraham	Johnson Abrahar
1	9522	2024	AL007	Larissa1	larissa.khon@hud.gov	-	7576517712	Glenn D.	Franklin	3347946713	0	gf@dothanhousing.org	Larissa1 Khon	Larissa1 Khon

After completing the POC screen, click the “**Return to View PHA 52723/22 Submission**” button to navigate to the HUD-52723/52722 Submission module.

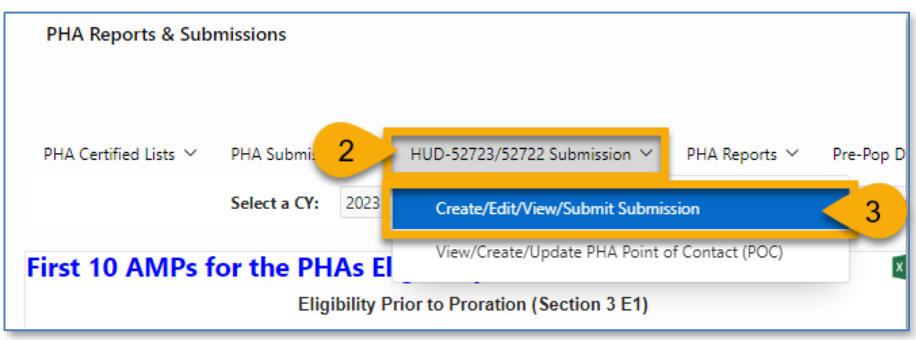


Navigating to the HUD-52723/52722 Submission Module

Follow these steps from any page in the Portal to find the HUD-52723/52722 Submission module.



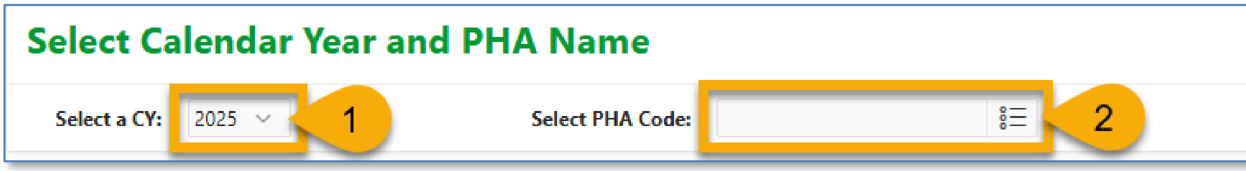
1. On the Portal home page, click "**PHA Reports & Submissions**" in the left side navigation menu.



2. Click the "**HUD-52723/52722 Submission**" drop-down menu.
3. Select "**Create/Edit/View/Submit Submission.**"

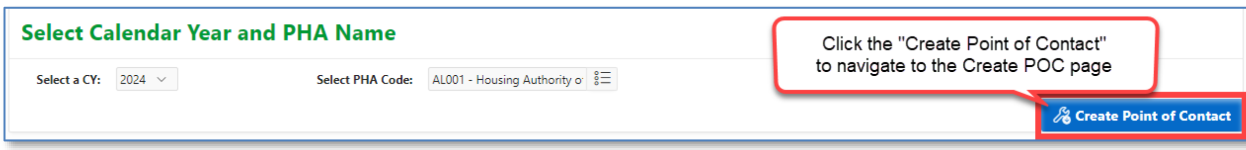
Creating the Forms HUD-52723 and HUD-52722 Initial Submission

The user can follow the steps listed below to create the Forms HUD-52723 and HUD-52722 submission:

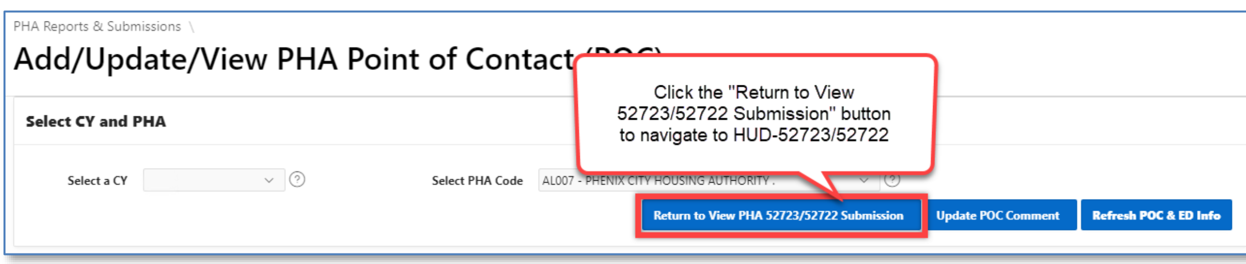


1. **Select a CY:** Select the appropriate calendar year, which is the funding year for the OpFund grants.
2. **Select PHA Code:** Select the appropriate PHA.

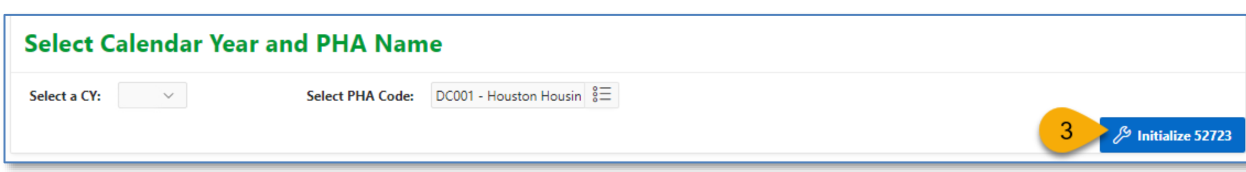
If the PHA did not previously set up a POC for the OpFund forms submission for that PHA and the funding year, click the "**Create Point of Contact**" button. This will navigate the user to the "Create POC" page.



After the User POC is established (refer to "Creating a Point of Contact" section) continue to the next step to initialize the submission. To Initialize the submission, the user must click the "**Return to View PHA 52723/22 Submission**" button.



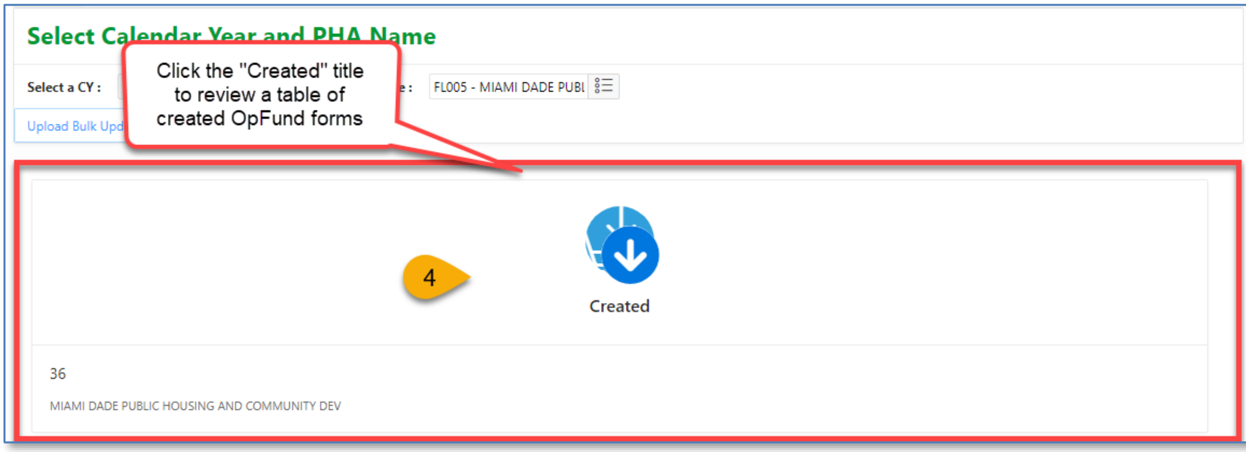
Initialize the PHA's OpFund forms.



3. Click the "**Initialize 52723**" button.

Note: Once the user clicks the "Initialize 52723" button, all forms for the development inventory of the selected PHA will be created. If a new project is added to the inventory, the "Initialize 52723" button will reappear again. The user will need to click this button again to create a new AMP inventory within the Portal.

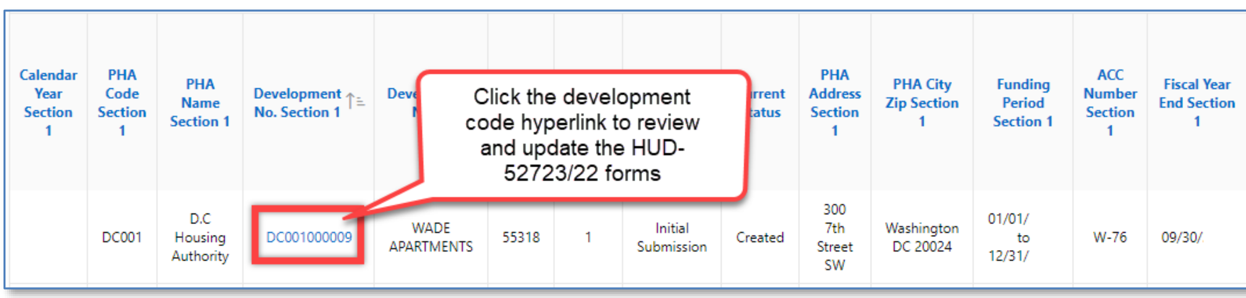
The Portal creates OpFund forms for each OpFund grant-eligible development in IMS/PIC.



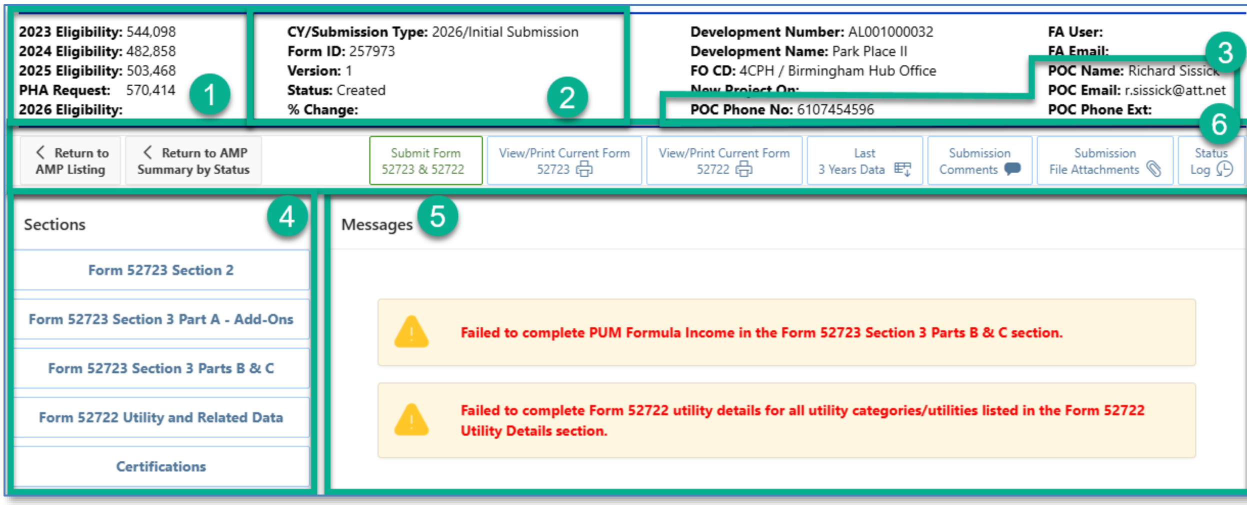
4. Click the "**Created**" status icon to view the list of OpFund forms in "**Created**" status.

Reviewing the Forms HUD-52723 and HUD-52722

To review and update the Portal forms for any development, click the development number hyperlink from the table, as shown below:



Click the hyperlink to open the development's OpFund HUD-52723/52722 form page.



Once a user clicks on a development number hyperlink within the "**Development No. Section 1**" column, the system displays a dashboard that allows the user to navigate to different sections and elements within OpFund forms during the submittal and review processes.

Area 1: Displays the development's eligibility for the last three (3) funding years. The PHA's requested eligibility for the applicable funding year is auto calculated based on the current OpFund forms and the HUD accepted eligibility for the applicable funding year. The applicable funding year eligibility gets updated as the user progresses through and completes the OpFund forms.

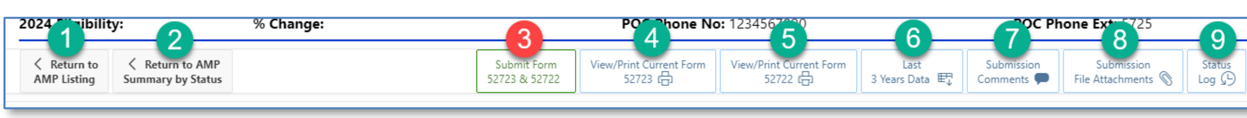
Area 2: Displays the current calendar year, submission type (Initial Submission, Resubmission, etc.), form unique identification number (Form ID), version number, status (Created, Submitted, In Review, Accepted, etc.), and percentage change (the percentage difference between PHA Requested amount and current HUD accepted eligibility amount).

Area 3: Displays the PHA's Point of Contact (POC) details.

Area 4: Provides navigation buttons for users to navigate through OpFund forms' sections including certifications.

Area 5: Displays error messages PHA must address before submitting the OpFund forms. The Asset Management Fee error message will remain until the development's OpFund HUD-52723 form is certified and the utility message will remain until the PHA reviews HUD-52722 utility details section.

Area 6: These buttons are described below (Button 1 through Button 9):



Button 1: **Return to AMP Listing.** Returns the user to the page with the list of "**Latest version of AMP listing for CY 2025**" projects in a certain status.

Button 2: **Return to AMP Summary by Status.** Returns the user to the page with the list of projects in different statuses for a selected PHA.

Button 3: **Submit Form 52723 & 52722**. Submits the development's OpFund forms. The completed forms should be submitted only after a thorough review of each section of the forms. All errors reported in the messages section must be resolved prior to submission.

Note: The "Submit Form 52723 & 52722" button is available only for PHA Executive Directors.

Button 4: **View/Print Current Form 52723.** Click this button to view and/or print the development's current form HUD-52723. This print view updates each time the user clicks the "**Apply Changes / Validate**" button to save changes in any section of the form.

Button 5: **View/Print Current Form 52722** Click this button to view and/or print the development's current form HUD-52722. This print view updates each time the user clicks the "**Apply Changes / Validate**" button to save changes in any section of the form.

Button 6: **Last 3 Years Data.** Opens a pop-up window displaying the last three (3) years of data reported on previous OpFund forms and data for the applicable funding year. The report shows the average data for the last three (3) years, the changes between the last 3 years average and applicable funding year values, and the changes between the last year and applicable funding year data. The report can be downloaded in CSV format.

Button 7: **Submission Comments.** Click this button to review the OpFund form(s) comments for the entire project.

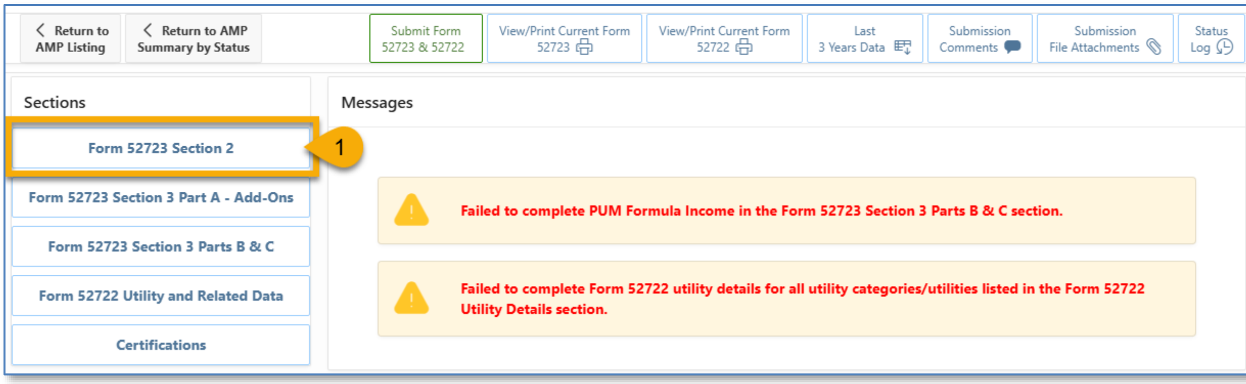
Button 8: **Submission File Attachments.** Click this button to review the OpFund form(s) file attachments for the entire project.

Button 9: **Status Log.** Opens a pop-up window reporting the status change details of the projects OpFund forms for the applicable funding year.

Completing Form HUD-52723 Section 2

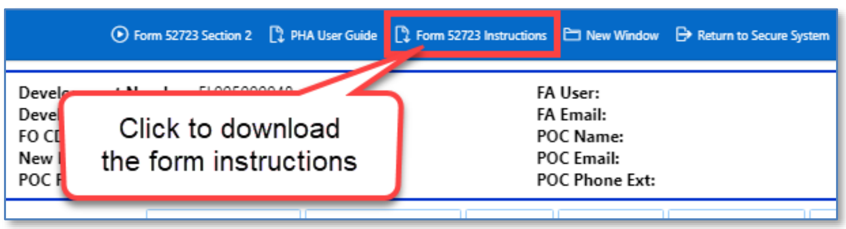
Section 2 of the HUD-52723 form contains unit status data from IMS/PIC. PHAs can only update the data fields for new units and special use units. If any other pre-populated fields are incorrect, the PHA must correct the data in IMS/PIC, contact the local FO, or both.

Watch the training video "Completing Section 2 of Form 52723 – Categorization of Unit Months" to learn how to complete Section 2 of form HUD-52723.

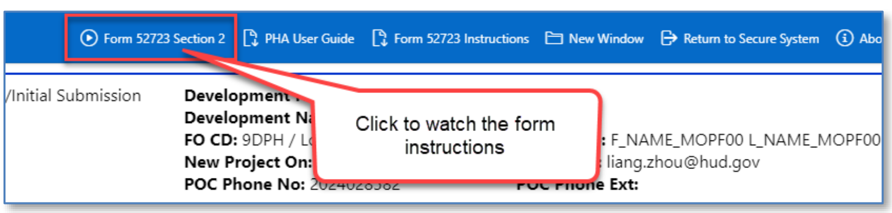


1. From the development dashboard, click the "**Form 52723 Section 2**" button.

Click the "**Form 52723 Instructions**" button at the top ribbon of the Portal to download and view the HUD-52723 form instructions.



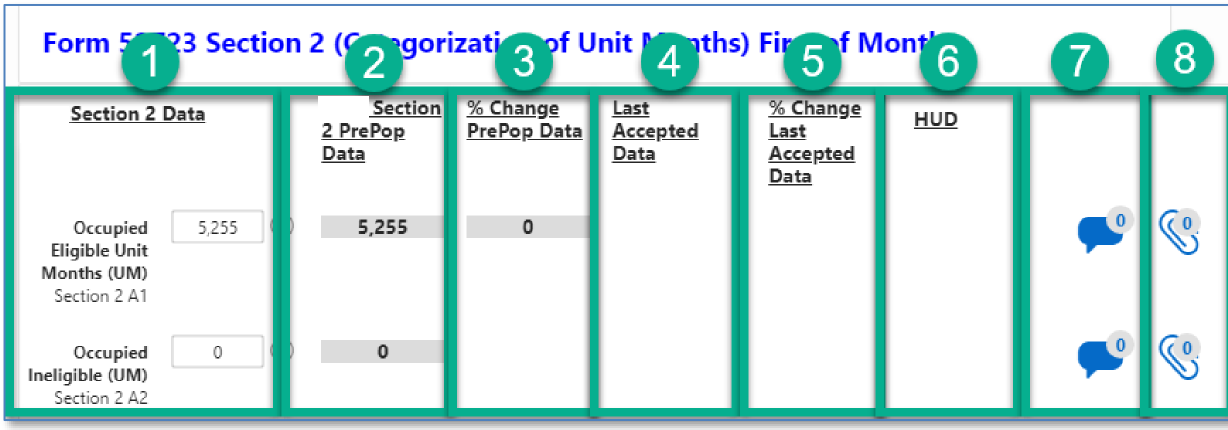
In addition, click the "**Form 52723 Section 2**" button at the top of the Portal to watch a training video (▶) on how to complete this section.



Click the "**PHA User Guide**" button at the top ribbon of the Portal to download and view PHA user workflows.

Form 52723 Section 2 Columns and Line Items

Form 52723 Section 2 has eight (8) columns:



Column 1: **Section 2 Data.** Contains line-item labels and the applicable funding year data. PHA updates the applicable funding year data fields for new units and special use units and can request a change in pre-populated data. PHAs may be required to submit comments and documentation to support these updates and requests.

Column 2: **Section 2 Pre-Pop Data.** The pre-populated data for the applicable funding year data. This data is sourced from IMS/PIC, the FDS, and previous OpFund form submission.

Column 3: **% Change Pre-Pop Data.** The percentage difference between the PHA updated data and the pre-populated data.

Column 4: **Last Accepted Data.** For Resubmissions, QC Submissions, and Revision Submissions, the Portal displays the last HUD accepted data for the applicable funding year.

Column 5: **% Change Last Accepted Data.** For Resubmissions, QC Submissions, and Revision Submissions, the Portal displays the percentage difference between the current PHA data and the last accepted data.

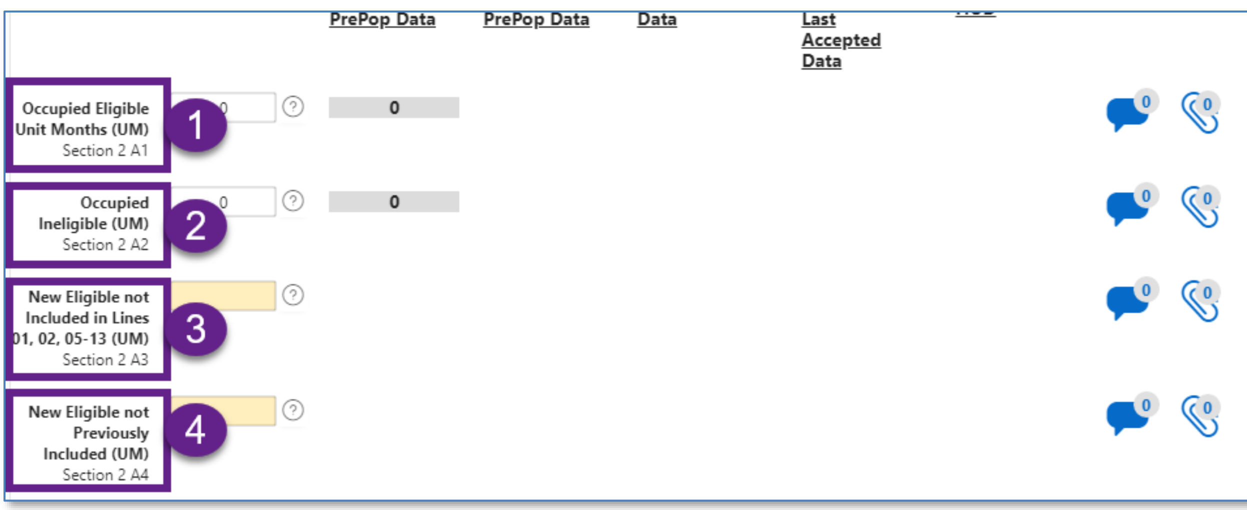
Column 6: **HUD.** HUD updates that may occur during the PIH FO's review.

Column 7: The PHA and HUD comments related to the line item. Click the "**Submission Comments**" button above the section to review comments for the entire project.

Column 8: The PHA and HUD file attachments related to the line item. Click the "**Submission File Attachments**" button above the section to review file attachments for the entire project.

Section 2 Line Items

Section 2 Line Items include **Areas 1 through 9**, as shown below:



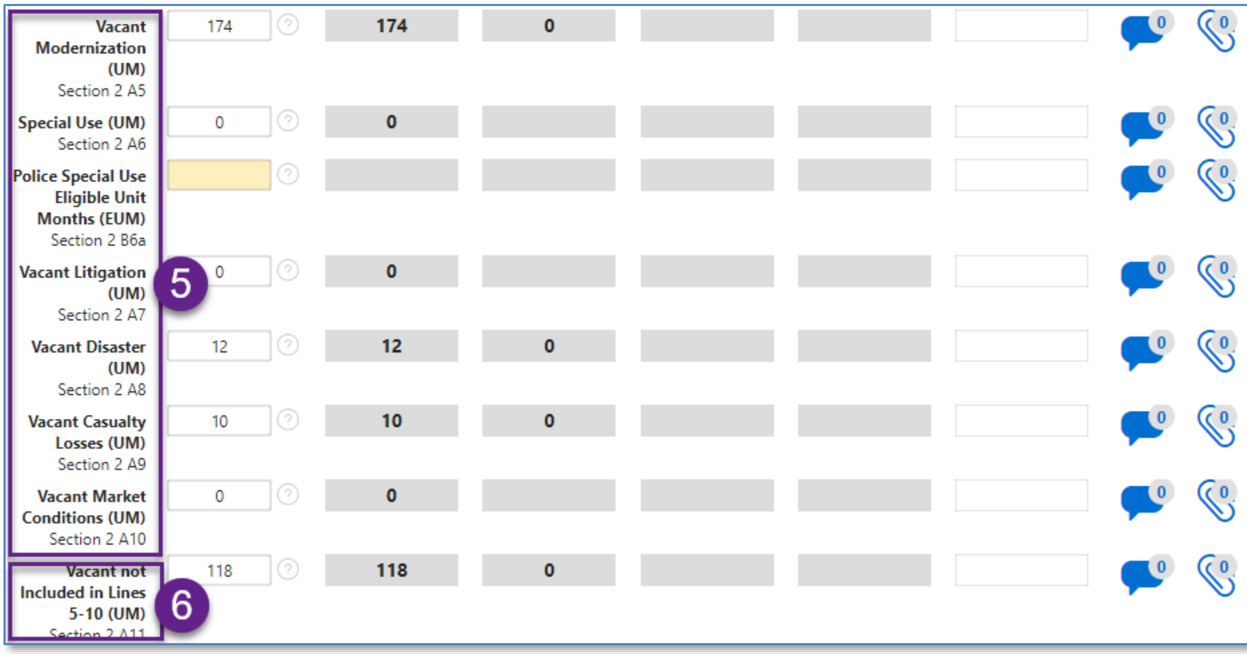
Area 1: **Occupied Eligible Unit Months (UM).** Includes units occupied by a public housing eligible family.

Area 2: **Occupied Ineligible (UM).** Includes units occupied by a PHA/project employee, police officer, or other security personnel who is not otherwise eligible for public housing.

Area 3: **New Eligible not Included in Lines 01, 02, 05-13 (UM).** Occupied new units are eligible to receive OpFund grants during the funding period but are not included on Lines 01, 02 or 05-13 of this section.

Area 4: **New Eligible not Previously Included (UM).** Occupied new units eligible to receive OpFund grants from October 1 to December 31 of previous funding period but not included on previous OpFund forms.

Note: PHAs can only edit Area 3 and Area 4 for New Projects.



Area 5: HUD approved vacant units and special use units eligible for OpFund grants.

Area 6: **Vacant not Included in Lines 5-10 (UM).** Vacant units that are not included in Lines 05 through 10 of the OpFund form.

Area 7: **ACC Asset Reposition Fee (ARF) Eligible (UM).** Annual Contributions Contract (ACC) units that are eligible for Asset Repositioning Fee and were not included in Lines 01 through 11 of the OpFund form.

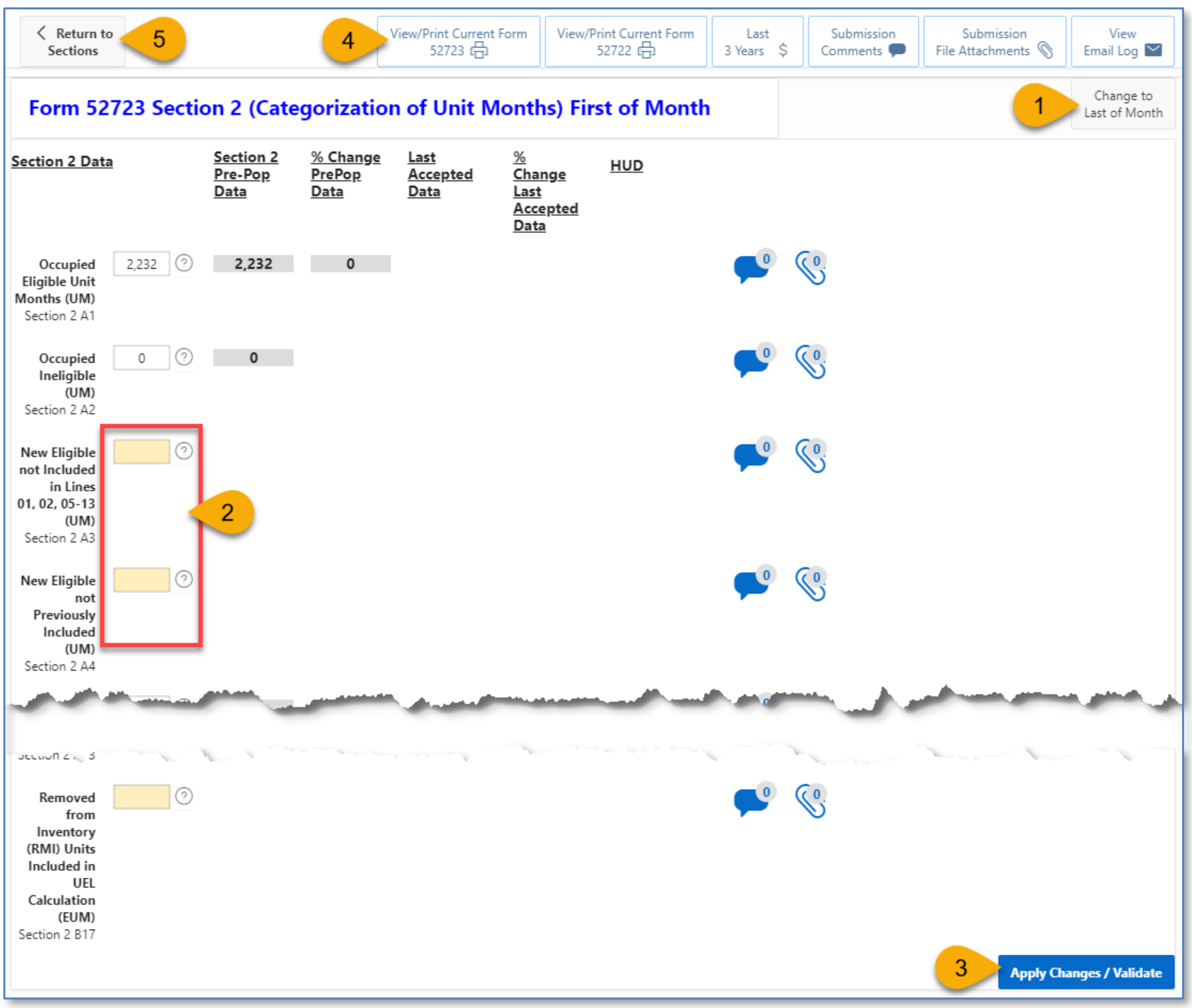
Area 8: **All Other ACC (UM).** All other ACC units that were not included in Lines 01 through 12 of the OpFund form.

Area 9: **Removed from Inventory (RMI) Units Included in UEL Calculation (EUM).** Unit months for which actual consumption is included on Line 01 of form HUD-52722 and that were removed from Lines 01 through 11 because of removal from inventory, including eligibility for the Asset Repositioning Fee.

Note: PHAs can only edit Area 3, Area 4, and Area 9 for Existing Projects.

Completing Form 52723 Section 2 for Existing Projects

Section 2 of the form HUD-52723 contains pre-populated data that PHAs cannot edit. The pre-populated data is derived from the IMS/PIC unit status data reported during the twelve (12) month period ending June 30th, i.e., six (6) months prior to the first day of the funding period. For existing projects, your PHA can only edit or update the yellow highlighted fields which include “New Eligible not included in Lines 01, 02, 05-13 (UM) Section 2 A3”, “New Eligible Not Previously Included (UM) Section 2 A4”, “Police Special Use Eligible Unit Months (EUM) Section 2 B6a”, and “Removed from Inventory (RMI) Units Included in UEL Calculation (EUM) Section 2 B17.” PHAs may request modifications to correct the remaining pre-populated fields through the comment’s functionality (refer to the “Requesting Changes to Form 52723 Section 2 Pre-Populated Data” section).



1. Click the "**Change to Last of Month**" button to change the pre-pop data to the last of the month, if needed. Click the "**Change to First of Month"** button to toggle back the pre-pop data to the first of the month. Note: clicking this button resets any updates applied to the data and resets the data back to the pre-populated values.
2. Update the editable fields (with yellow background) as needed. PHAs can request modifications to correct the remaining non-editable pre-populated values through the comment's functionality (refer to the "Requesting Changes to Form 52723 Section 2 Pre-Populated Data" section).

Note:

a) **For existing projects, your PHA can only edit or update the data fields for new units - Section 2 Column A Lines 03 and 04, and special use units - Column B Line 06a if applicable units removed from inventory but used to calculate actual consumption in the form HUD-52722 Column B Line 17. If any other fields are incorrect, your PHA must correct the data in IMS/PIC prior to the reporting period submission date, as detailed in the corresponding OpFund Processing Notice. Contact your local FO for additional assistance.**

b) **When PHA updates or requests modifications to the pre-populated data, the PHA must provide comments and submit supporting documentation required by HUD. PHA should consult their local FO, the latest OpFund Processing Notice, and the instructions to OpFund forms for further guidance. All PHA updates and requests for modifications to pre-populated data are subject to HUD review.**

3. Click the "**Apply Changes / Validate**" button to save the updates.

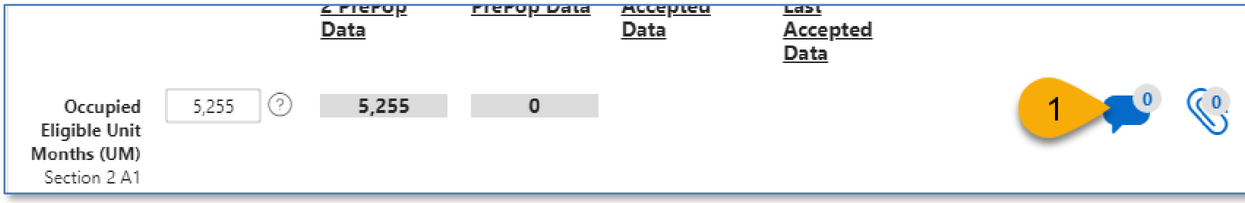
To add comments, request pre-populated data changes, or to upload and delete documents, follow the "Requesting Changes to Form 52723 Section 2 Pre-Populated Data" section below.

4. Click the "**View/Print Current Form 52723**" button to review any changes to the form HUD-52723 after clicking the "**Apply Changes / Validate**" button.
5. Click the "**Return to Sections**" button to return to the development page.

Requesting Changes to Form 52723 Section 2 Pre-Populated Data

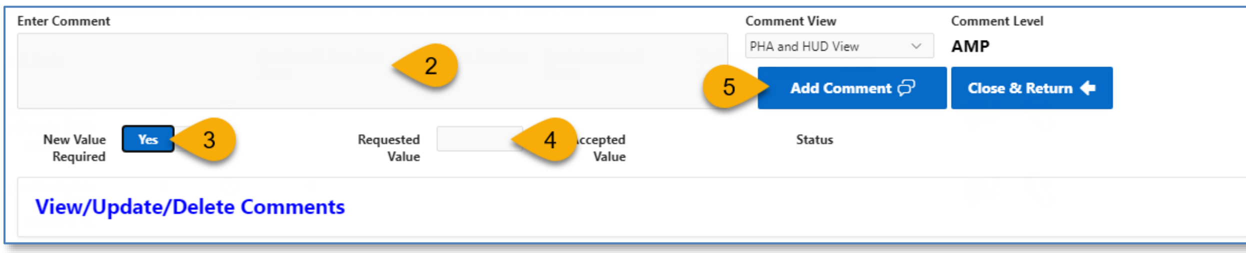
If pre-populated data is incorrect, PHAs can request modification(s) to the incorrect line item(s) using the comments functionality. The PHA may be required to provide documentation to support the change request(s). PHAs must correct the data in IMS/PIC. All PHA requests for modification(s) to pre-populated data are subject to HUD review.

The users can follow the steps listed below to request changes to the pre-populated data values through the comments:

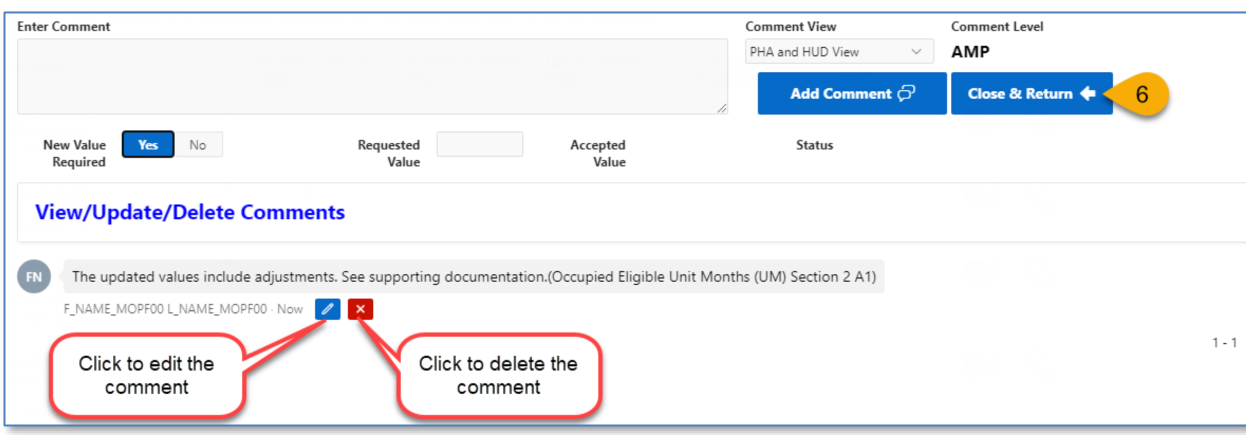


1. Click the comment icon ( ) to the right of the line item to add comment(s) and/or request changes to the line's pre-populated data value.

The system displays the "**Add/View/Update/Delete Comments**" pop-up window:



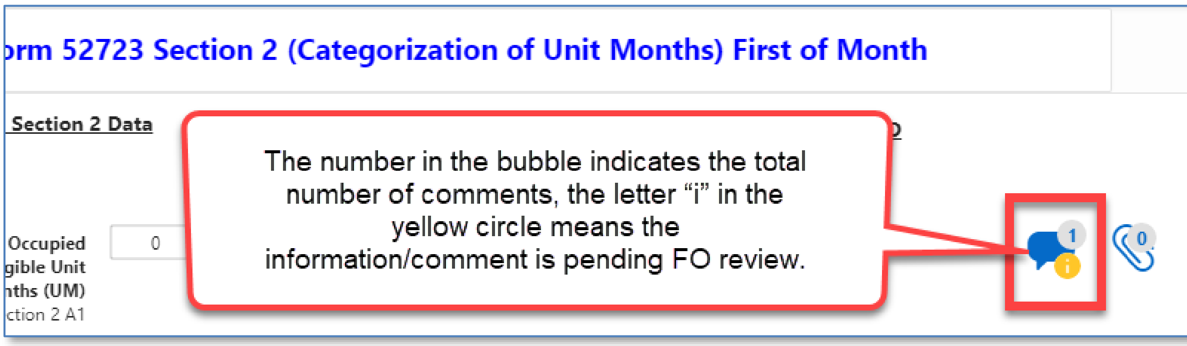
2. **Enter Comment**: Provide comments explaining and supporting the request.
   Note: The "Comment View" field is defaulted to "PHA and HUD View" and cannot be changed for PHA users. The "PHA and HUD View" option makes the comment viewable by both PHA and HUD users.
3. **New Value Required:** Click the "Yes" button.
4. **Requested Value**: Enter a requested value.
5. Click the "**Add Comment**" button to post a comment.



Users can click the pencil icon ( ) to edit a comment, click the X icon ( ) to delete a comment, or follow steps 2 through 5 above to add additional comment(s).

6. Click the "**Close & Return**" button when finished.

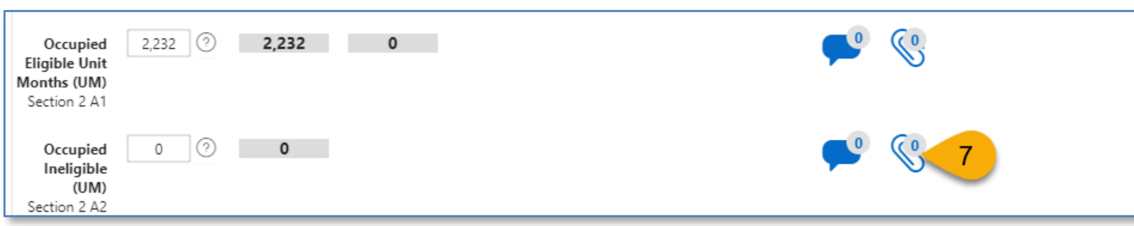
Note: When PHAs request modifications to the pre-populated data, the PHA must provide comments and submit supporting documentation required by HUD to justify these changes. PHAs should consult their local FO, the latest OpFund Processing Notice, and the instructions to the OpFund forms for further guidance. All PHA updates and requests for modifications to pre-populated data are subject to HUD review.



The number displayed on the comment's icon indicates the number of comments associated with a line item. The yellow notification indicates that the PHA has requested new pre-populated data and that it is still pending FO review.

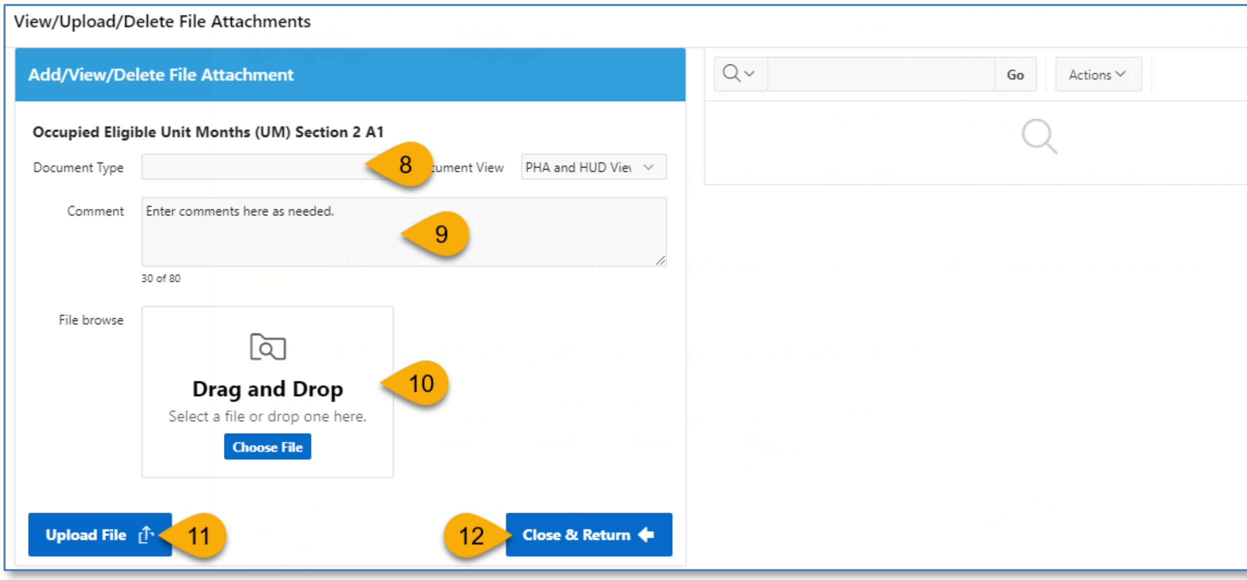
PHAs may be required to attach documents to support requests to modify pre-populated data.

Follow steps 7 through 12 to submit supporting documentation/file attachment(s):

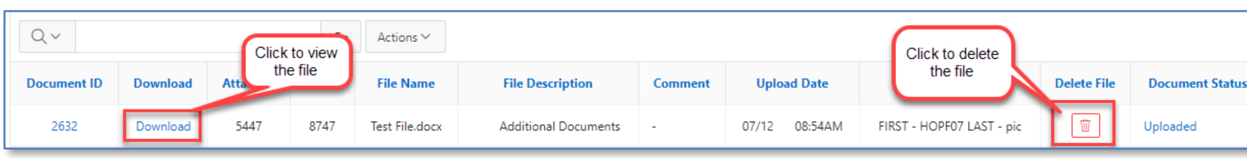


7. Click the paper clip icon ( ) to the right of the line item to add supporting documentation.

The system displays the "**View/Upload/Delete File Attachments**" pop-up window:



8. **Document Type**: Select the appropriate document type for the file being attached. **Note**: The "Document View" 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.
9. **Comment**: Provide comments related to the attachment.
10. **File browse**: Drag and drop the file or click the "**Choose File**" button to open a pop-up window to search for the desired file. Follow your device prompts to complete.
11. After selecting the appropriate file, click the "**Upload File**" button.



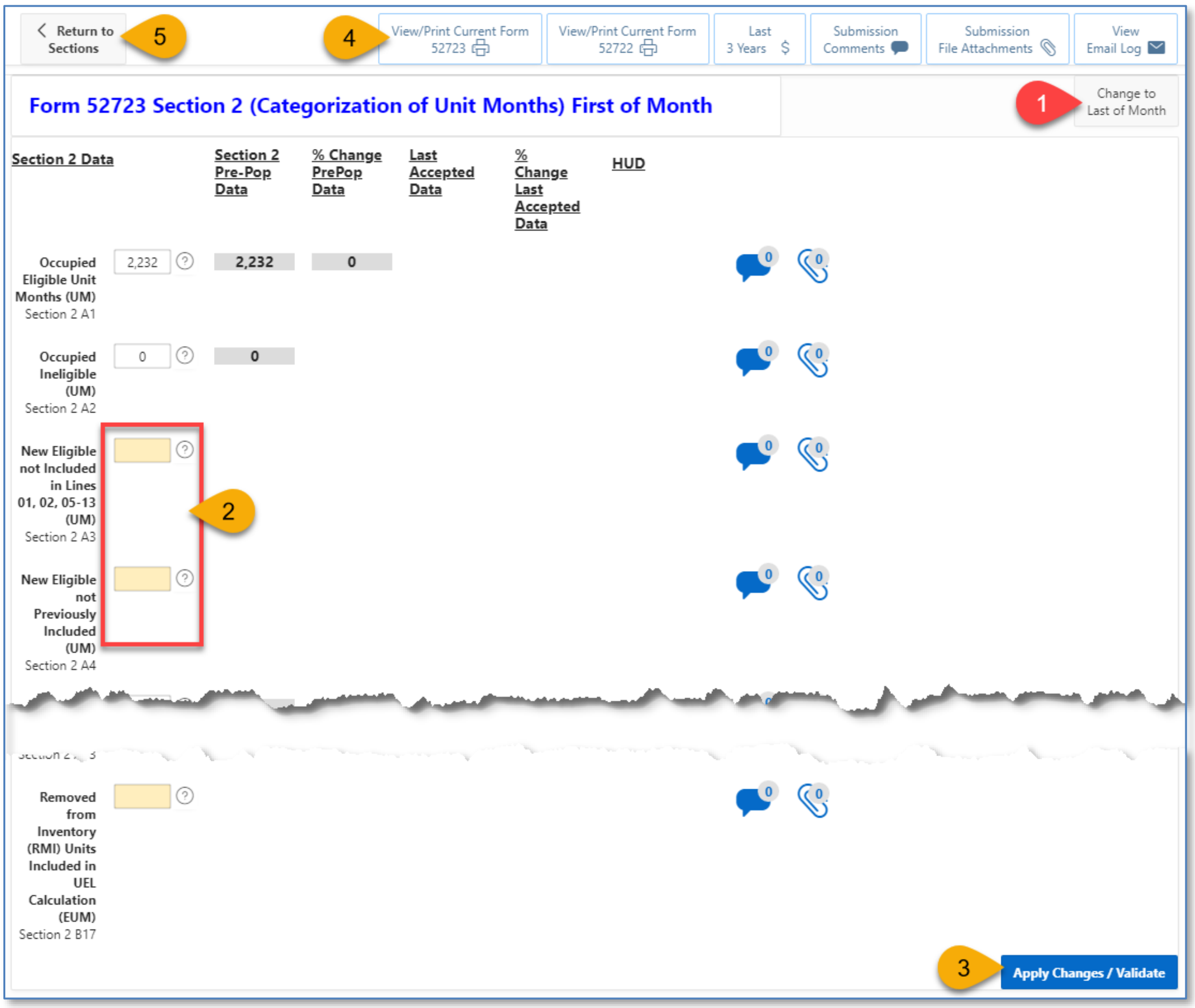
Users can click "**Download**" to download and view the file attached, click the trash bin icon ( ) to delete the file, or follow steps 8 through 11 above to add additional files.

12. Click the "**Close & Return**" button when finished.

The number displayed on the attachment paper clip icon indicates the number of files attached to a line item.

Completing Form 52723 Section 2 for New Projects

For New Projects, PHAs can only edit pre-populated values or add new values in the “New Eligible not included in Lines 01, 02, 05-13 (UM) Section 2 A3” field and in “New Eligible Not Previously Included (UM) Section 2 A4” field of the form HUD-52723.



1. Click the “**Change to Last of Month**” button to change the pre-pop data to the last of the month, if needed. Click the “**Change to First of Month”** button to toggle back the pre-pop data to the first of the month. **Note**: clicking this button resets any updates applied to the data and resets the data back to the pre-populated values.

2. Update fields with the yellow background – Section 2 Line A3 and Line A4.

Note:

a) In accordance with 24 CFR 990.155(b), new units shall be assumed occupied until they have a full reporting period of data. For that reason, for new projects, PHA can only edit or update the data fields for new units in Section 2 Column A Lines 03 and 04.

b) When PHA updates or requests modifications to the pre-populated data, the PHA must provide comments and submit supporting documentation required by HUD to justify these changes. PHA should consult their local FO, the latest OpFund Processing Notice, and the instructions to the OpFund forms for further guidance. All PHA updates and requests for modifications to pre-populated data are subject to HUD review.

3. Click the "**Apply Changes / Validate**" button to save the updates.
4. Click the "**View/Print Current Form 52723**" button to review any changes to the form HUD-52723 after clicking the "**Apply Changes / Validate**" button.

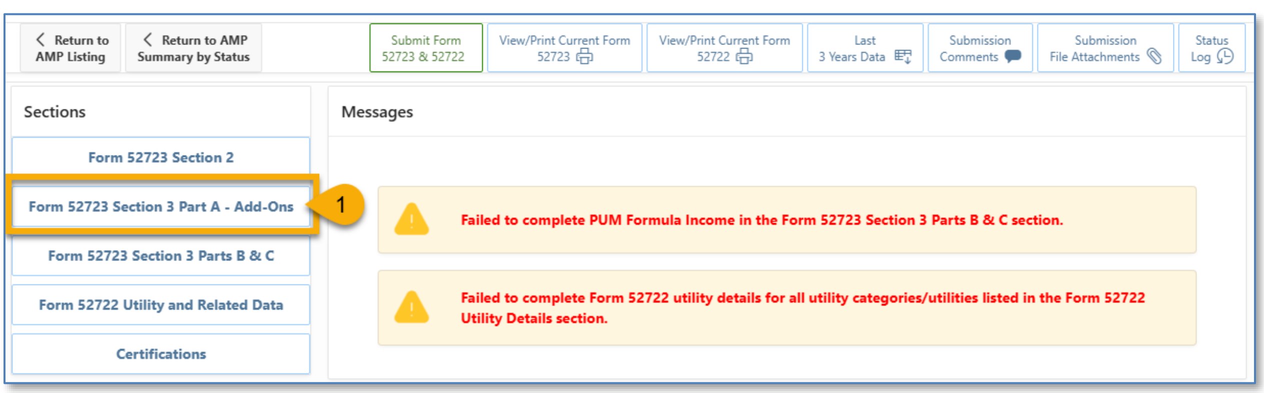
To add comments, request pre-populated data changes, or to upload and delete documents follow the "Requesting Changes to Form 52723 Section 2 Pre-Populated Data" section above.

5. Click the "**Return to Sections**" button to return to the development page.

Completing Form HUD-52723 Section 3 Part A – Add-Ons

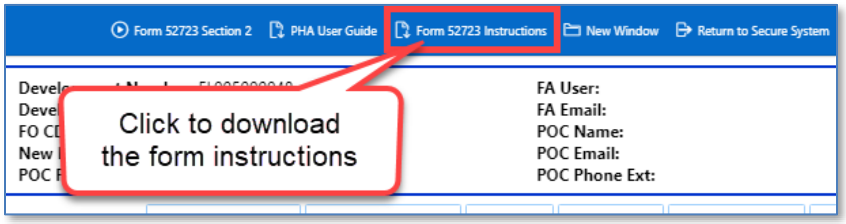
In addition to operating, maintenance, and utility expenses, the OpFund formula allows PHAs to include qualifying "Add-On" expenses to their formula expenses.

Watch the training video "Completing Section 3 Add-Ons, Parts B and C, and Certifications for the Form 52723" to learn how to complete Section 3 Part A – Add-Ons in Form HUD-52723.



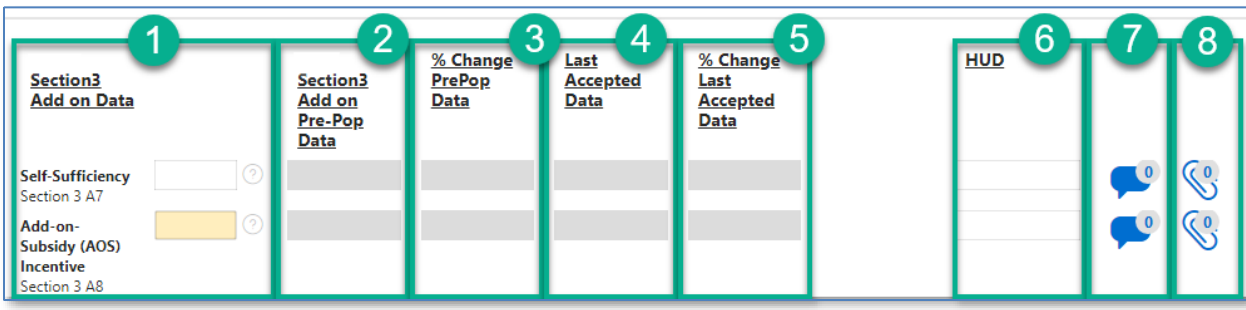
1. From the development page, click the "**Form 52723 Section 3 Part A – Add-Ons**" button.

Click the "**Form 52723 Instructions**" at the top ribbon of the Portal to download and view the HUD-52723 form instructions.



Form 52723 Section 3 (Add-Ons) Columns and Line Items

Form 52723 Section 3 (Add-Ons) has eight (8) columns:



Column 1: **Section 3 Add on Data.** Contains line-item labels and the applicable funding year data. The PHA updates the applicable funding year data fields by adding new values or updating pre-populated values. PHAs may be required to submit comments and documentation to support these updates.

Column 2: **Section 3 Add on Pre-Pop Data.** The pre-populated data the applicable funding year. This data is sourced from IMS/PIC, the FDS, and previous OpFund form submission.

Column 3: **% Change Pre-Pop Data.** The percentage difference between the PHA updated data and the pre-populated data.

Column 4: **Last Accepted Data.** For Resubmissions, QC Submissions, and Revision Submissions, the Portal displays the Last Accepted Data.

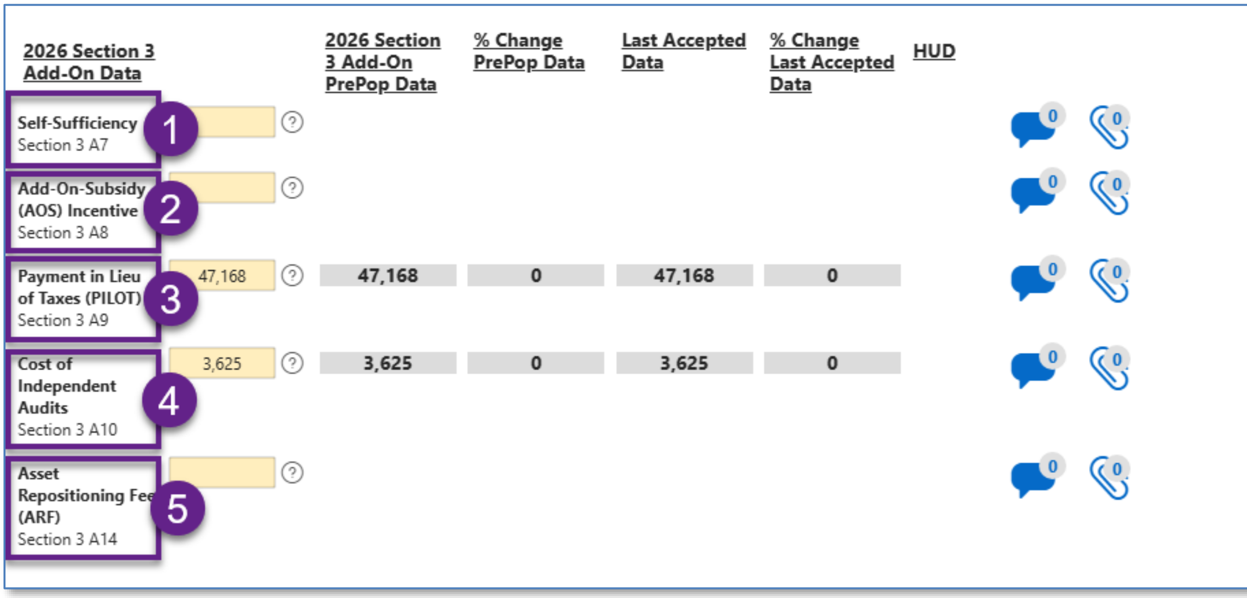
Column 5: **% Change Last Accepted Data.** For Resubmissions, QC Submissions, and Revision Submissions, the Portal displays the percentage difference between the current PHA data and the last accepted data.

Column 6: **HUD.** HUD updates that may occur during the PIH FO's review.

Column 7: The PHA and HUD comments related to the line item. Click the "**Submission Comments**" button above the section to review comments for the entire project.

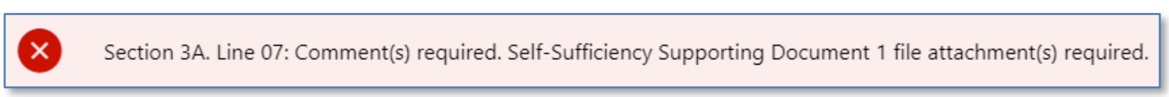
Column 8: The PHA and HUD file attachments related to the line item. Click the "**Submission File Attachments**" button above the section to review file attachments for the entire project.

Form 52723 Section 3 (Add-Ons) Line Items include the following Areas 1 through 5:



Area 1: **Self-Sufficiency.** This is the cost for the elderly disabled service coordinator (EDSC) and associated costs pursuant to 24 CFR 990.190(a). **Only eligible projects can complete this field.** To find the EDSC inflation factor (PEL inflation factor), click the "View/Print Current Form 52723," as explained later in "Viewing and Printing Current Forms HUD-52723 & HUD-52722" section. If the PHA submits a value different from the pre-populated value, the PHA should submit comments and supporting documentation required by HUD for review.

Note: If a PHA initially claims or changes the Self-Sufficiency value (where the updated value is different from the last accepted value), then the PHA must create a comment and attach the Self-Sufficiency Supporting document.



Area 2: **Add-on-Subsidy (AOS) incentive energy performance contract (EPC).** Enter the approved EPC AOS incentive for energy conservation measures pursuant to 24 CFR 990.190(b). PHAs should leave this field blank for projects without an approved AOS. The PHA should submit comments and supporting documentation required by HUD to claim the AOS incentive.

Note: If a PHA initially claims or changes the Add-On-Subsidy Incentive value (where the updated value is different from the last accepted value), then the PHA must create a comment and attach an EPC Approval Letter.

Section 3A. Line 08: Comment(s) required. EPC Approval Letter 1 file attachment(s) required.

Area 3: **Payment in Lieu of Taxes (PILOT).** PILOT is calculated pursuant to 24 CFR 990.190(c). If the PHA submits a value different from the pre-populated value, the PHA should submit comments and supporting documentation required by HUD for review.

Note: If a PHA changes the Payment in Lieu of Taxes (PILOT) value (where the updated value is different from the pre-populated value or last accepted value), then the PHA must create a comment and attach the PILOT document.

Section 3A. Line 09: Comment(s) required. PILOT Document 1 file attachment(s) required.

Area 4: **Cost of Independent Audits.** The OpFund Portal pre-populates this with the most recent actual audit costs of the OpFund Program pursuant to 24 CFR 990.190(d). If the PHA submits a value different from the pre-populated value, the PHA should submit comments and supporting documentation required by HUD for review.

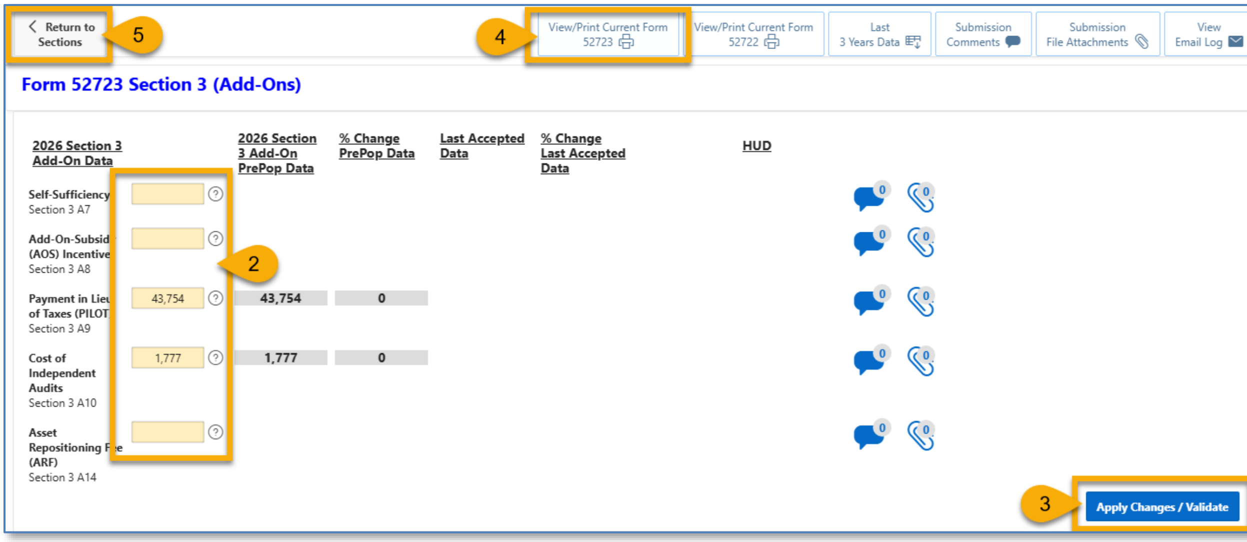
Note: If a PHA changes the Cost of Independent Audits value (where the updated value is different from the pre-populated value or last accepted value), then the PHA must create a comment and attach the Audit document.

Section 3A. Line 10: Comment(s) required. Audit Document 1 file attachment(s) required.

Area 5: **Asset Repositioning Fee.** Asset repositioning fee for eligible units is calculated pursuant to 24 CFR 990.190(h). If the PHA submits a value different from the pre-populated value, the PHA should submit comments and supporting documentation required by HUD for review.

Note: If a PHA changes the Asset Repositioning Fee value (where the updated value is different from the pre-populated value or last accepted value), then the PHA must attach an ARF document.

Section 3A. Line 14: ARF Document 1 file attachment(s) required.



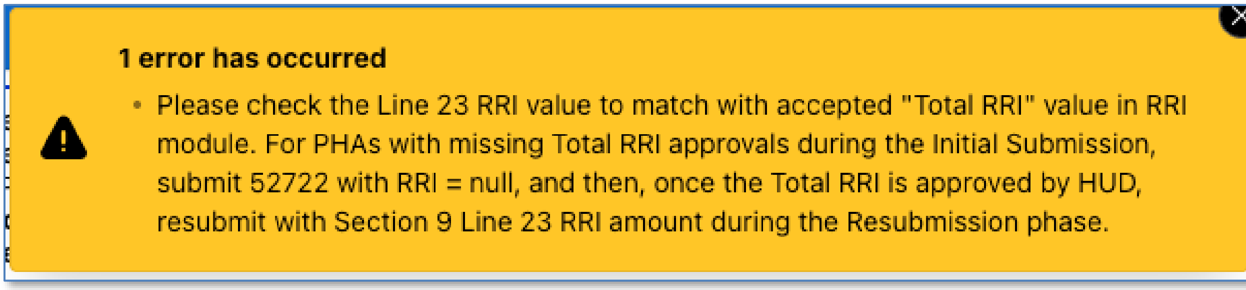
2. Items to note:
    - Section 3 Add-Ons fields with a yellow background are editable by the PHA. The remaining fields cannot be edited by the PHA and are either auto-calculated fields or fields open only for FO edits.
    - If the field is locked (not editable) for the PHA, that means the PHA does not qualify to claim this Add-On line item.
    - When PHA updates or requests modifications to the pre-populated data, the PHA must provide comments and submit supporting documentation required by HUD. PHA should consult their local FO, the latest OpFund Processing Notice, and the instructions to the OpFund forms for further guidance. All PHA updates and requests for modifications to pre-populated data are subject to HUD review.
3. Click the "**Apply Changes / Validate**" button to save the updates.

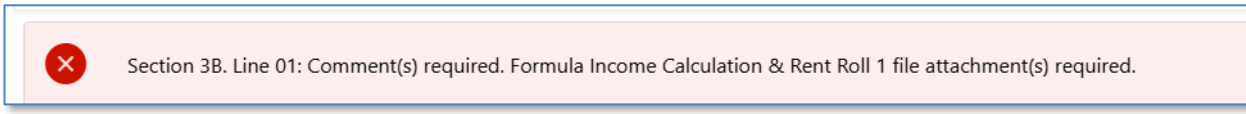
Note: Refer to the "Creating Comments and Uploading File Attachments" section for instructions on how to create and add comments and/or upload and delete supporting documents.

4. Click the "**View/Print Current Form 52723**" button to review any changes to the form HUD-52723 after clicking the "**Apply Changes / Validate**" button.
5. Click the "**Return to Sections**" button to return to a development page.

Creating Comments and Uploading File Attachments

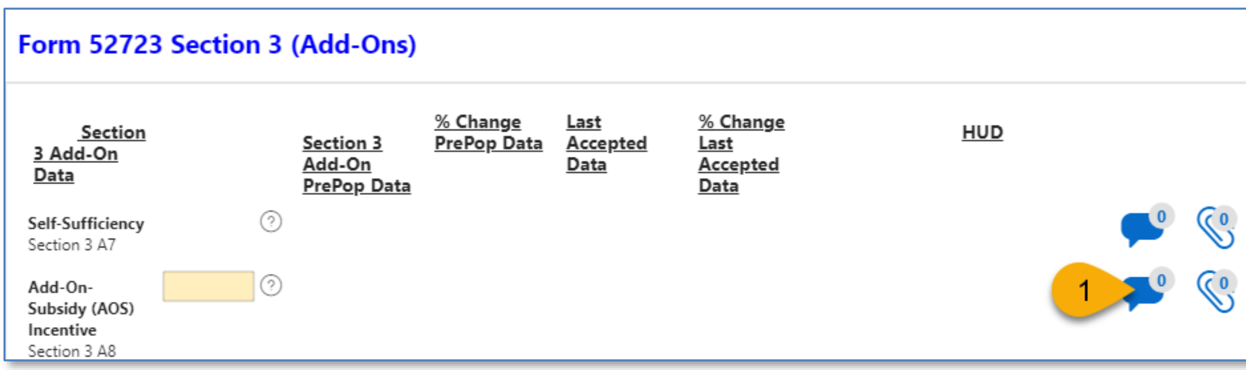
When new data is added to a line item or existing data in a line item is changed, the PHA may be required to enter a comment and/or upload supporting documentation/file attachments to justify the request.





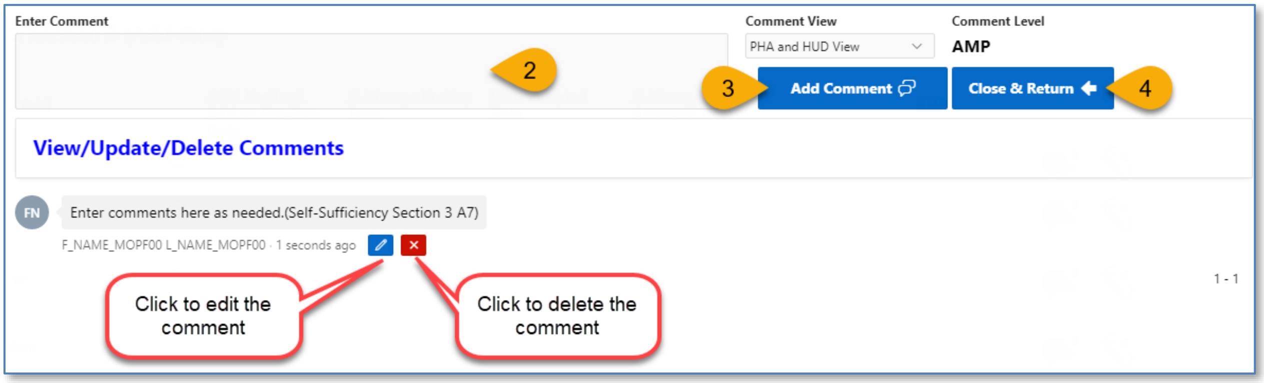
Error or Warning message(s) will appear at the bottom of the screen alerting the PHA user on missing comments and/or supporting documents. The error or warning message also provides the “Document Type” required to select to satisfy the message.

The users can follow the steps listed below to make new comment(s):



1. Click the comment icon ( ) to the right of the line item to add comment(s) and/or request changes to the pre-populated data values.

The system displays the “**Add/View/Update/Delete Comments**” pop-up window:



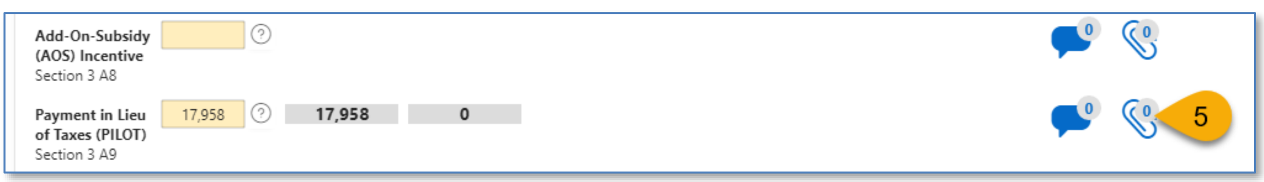
2. **Enter Comment**: Provide comments explaining and supporting the request.
   Note: The “Comment View” field is defaulted to “PHA and HUD View” and cannot be changed for PHA users. The “PHA and HUD View” option makes the comment viewable by both PHA and HUD users.
3. Click the “**Add Comment**” button.

Users can click the pencil icon ( ) to edit a comment, click the X icon ( ) to delete a comment, or follow steps 2 and 3 above to add additional comment(s).

4. Click the “**Close & Return**” button when finished.

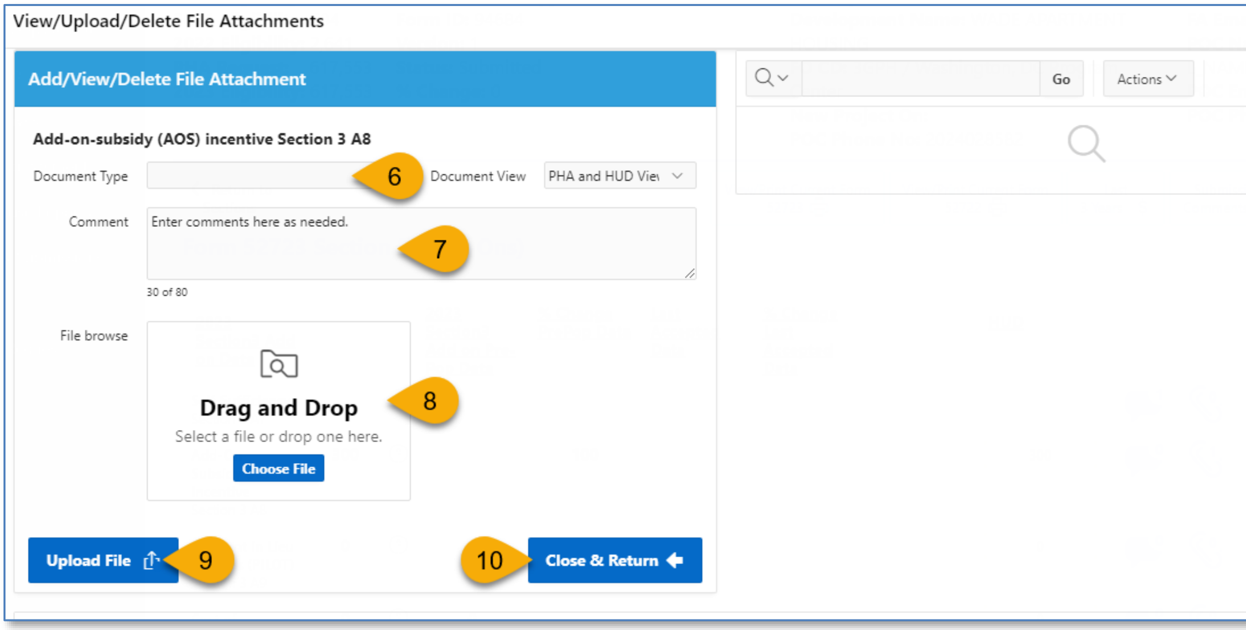
PHAs may be required to attach documents to support requests to modify pre-populated data.

The steps 5 through 10 to submit supporting documentation/file attachment(s):

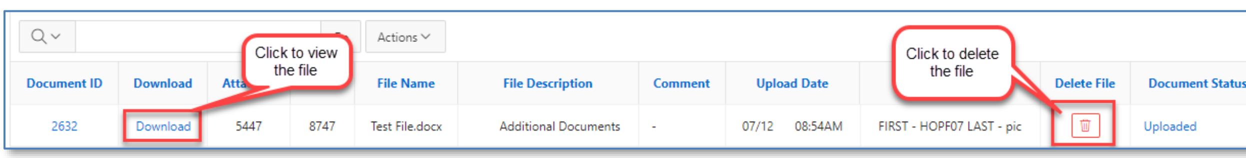


5. Click the paper clip icon ( ) to the right of the line item to add supporting documentation.

The system displays the “**View/Upload/Delete File Attachments**” pop-up window:



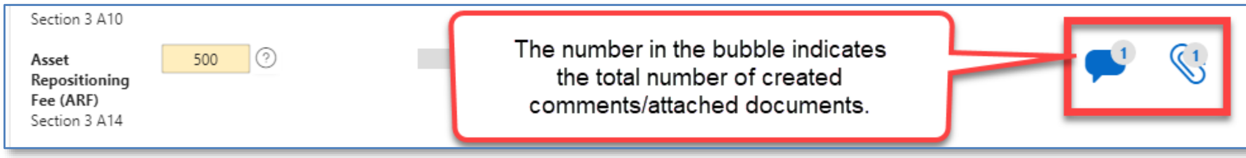
6. **Document Type**: Select the appropriate document type for the file being attached. **Note**: The "Document View" field is defaulted to "PHA and HUD View" and cannot be changed for PHA users. The "PHA and HUD View" option makes the attachment viewable by both PHA and HUD users.
7. **Comment**: Provide comments related to the attachment.
8. **File browse**: Drag and drop the file or click the "**Choose File**" button to open a pop-up window to search for the desired file. Follow your device prompts to complete.
9. After selecting the appropriate file, click the "**Upload File**" button.



Users can click "**Download**" to download and view the file attached, click the trash bin icon (🗑) to delete the file, or follow steps 6 through 9 above to add additional files.

10. Click the "**Close & Return**" button when finished.

Note: PHA must provide comments and submit supporting documentation required by HUD. PHAs should consult their local FO, the latest OpFund Processing Notice, and the instructions to the OpFund forms for further guidance. All PHA updates and requests for modifications of the pre-populated data values are subject to HUD review.



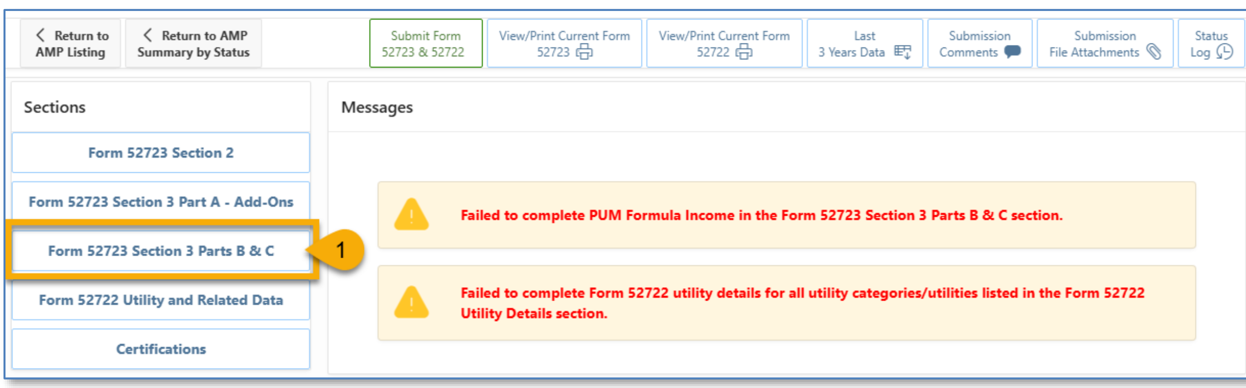
The numbers displayed on the comment and/or paper clip icons indicate the number of comments/documents associated with a line item.

Completing Form HUD-52723 Section 3 Parts B and C

Form 52723 Section 3 displays the development's OpFund grant eligibility. The PHA can make certain eligible updates for Resident Paid Utility Incentive Energy Performance Contract, Moving-to-Work, or other HUD directed changes.

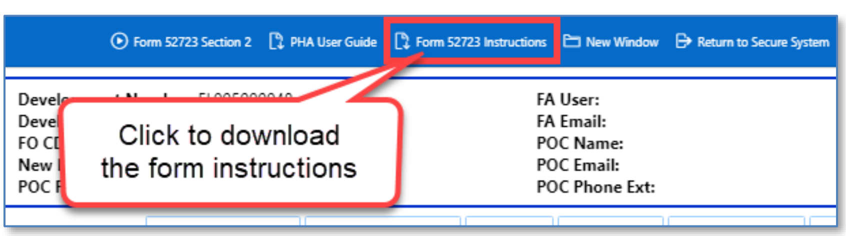
Watch the training video "[Completing Section 3 Add-Ons, Parts B and C, and Certifications for the Form 52723]" to learn how to complete Section 3 Parts B and C in Form HUD-52723.

Note: The PHA user can edit any Section 3 fields with a yellow background. The remaining rows/fields are either automatically calculated or will be edited by HUD staff during the review.



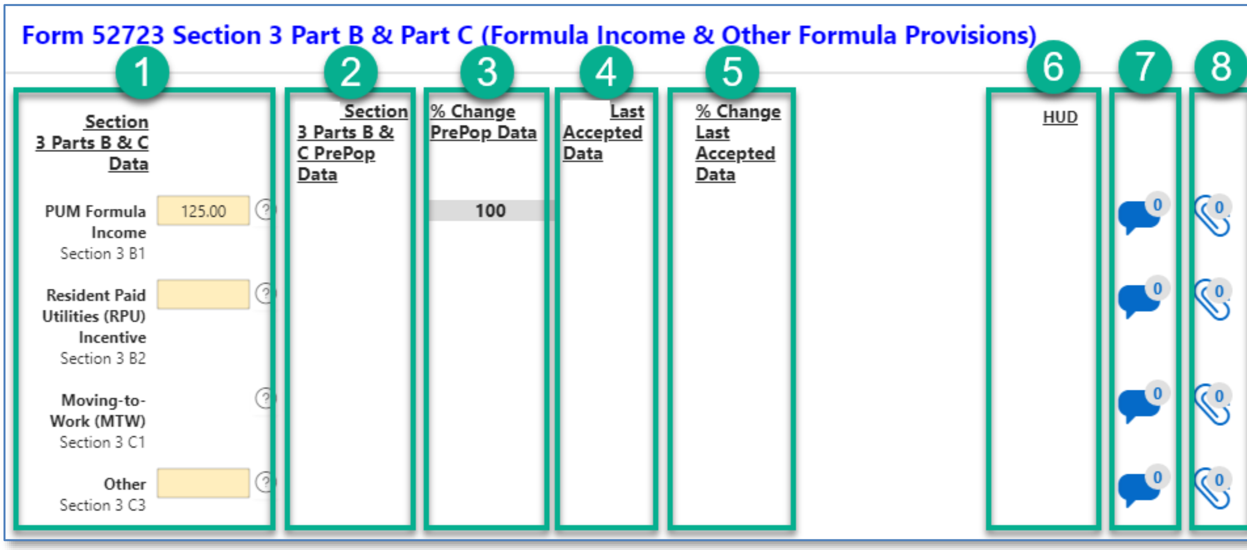
1. From the development page, click the "**Form 52723 Section 3 Parts B & C**" button.

Click the "**Form 52723 Instructions**" at the top ribbon of the Portal to download and view the HUD-52723 form instructions.



Form 52723 Section 3 Part B & Part C Columns and Line Items

Form 52723 Section 3 Part B & Part C has eight (8) columns:



Column 1: **Section 3 Part B & C Data.** Contains line-item labels and the applicable funding year data. PHA updates the applicable funding year data fields by adding new values or updating pre-populated values. PHAs may be required to submit comments and documentation to support these updates.

Column 2: **Section 3 Parts B & C Pre-Pop Data.** The pre-populated data for the applicable funding year. This data is sourced from IMS/PIC, FDS, and previous OpFund form submission.

Column 3: **% Change Pre-Pop Data.** The difference between the PHA updated data and the pre-populated data as a percentage.

Column 4: **Last Accepted Data.** For Resubmissions, QC Submissions, and Revision Submissions, the Portal displays the HUD's last accepted data for the applicable funding year.

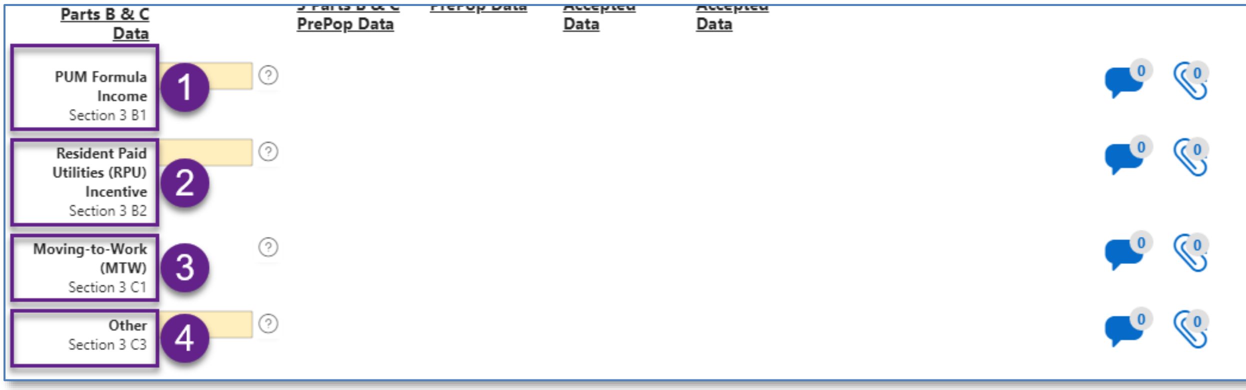
Column 5: **% Change Last Accepted Data.** For Resubmissions, QC Submissions, and Revision Submissions, the Portal displays the percentage difference between the current PHA data and the last accepted data.

Column 6: **HUD.** HUD updates that may occur during the PIH FO's review.

Column 7: The PHA and HUD comments related to the line item. Click the "**Submission Comments**" button above the section to review comments for the entire project.

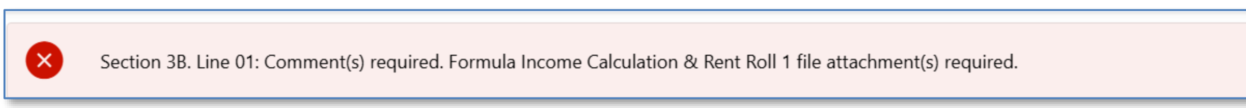
Column 8: The PHA and HUD file attachments related to the line item. Click the "**Submission File Attachments**" button above the section to review file attachments for the entire project.

Form 52723 Section 3 Part B & Part C Line Items include the following areas:



Area 1: **PUM Formula Income**. Enter the formula income PUM provided by HUD as calculated pursuant to 24 CFR 990.195 and 990.170(e). If the PHA submits a value different from the pre-populated value or if HUD did not provide a pre-populated value, or entered 0, the PHA should submit comments and supporting documentation required by HUD for review.

Note: If a PHA claims or lowers the PUM Formula Income value (where the updated value is lower than the pre-populated value or last accepted value), then the PHA must create a comment and attach a Formula Income Calculation document. PHAs may only substitute the pre-populated PUM Formula Income amount with a more recently submitted FYE 2022 FDS audited statement. PHAs that edit the PUM Formula Income must certify to the Field Office that the data is derived from its more recently available audited FYE 2022 FDS submission.

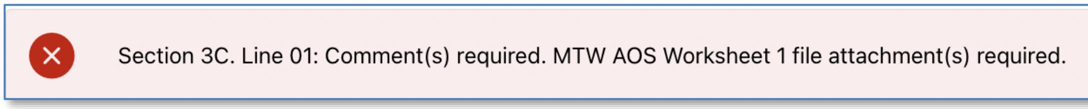


Area 2: **Resident Paid Utilities (RPU) Incentive.** For energy performance contracts (EPC), if the project has an EPC with an RPU, enter the EPC RPU as a negative number. Projects without an approved EPC RPU should leave this field blank. PHAs should leave this field blank for projects without an approved RPU. The PHA should add comments and submit supporting documentation required by HUD to claim the RPU incentive.

Note: If a PHA initially claims or changes Resident Paid Utilities (RPU) value (where the updated value is different from the last accepted value), then the PHA must attach an RPU Supporting document.

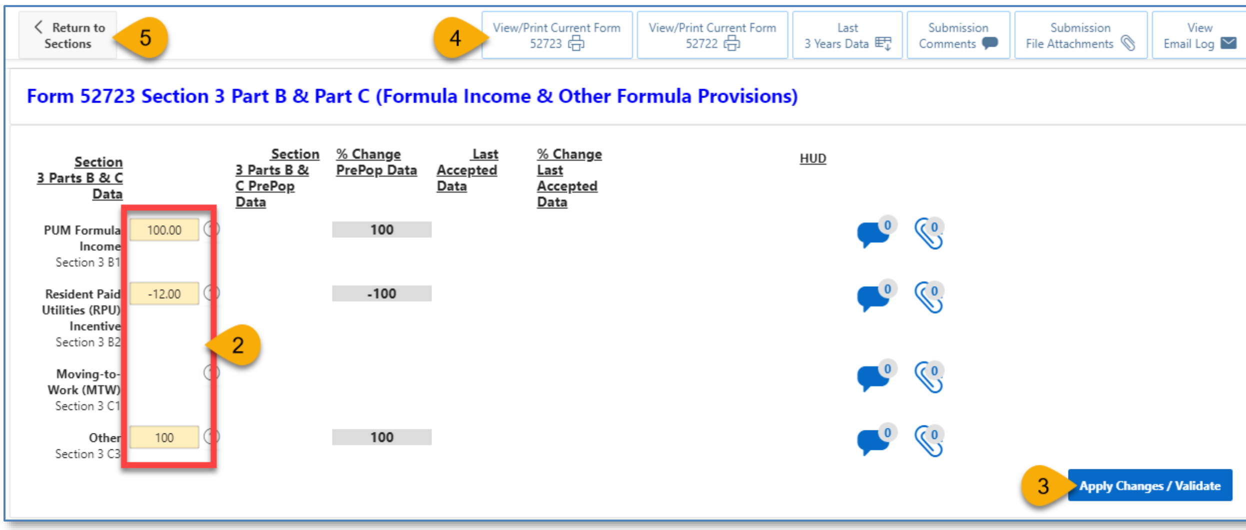
Area 3: **Moving-to-Work (MTW).** If the PHA has an MTW alternative OpFund formula specified in Attachment A of its MTW agreement, it must report the total OpFund eligibility on this line.

Note: If a PHA initially claims or changes the Moving-to-Work (MTW) field (where the updated value is different from the last accepted value), then the PHA must create a comment and attach an MTW AOS Worksheet document to support it.



Area 4: **Other**. Leave it blank unless specific instructions are provided by HUD.

Note: The PHA must create a comment and attach a document to support it.



2. Update the editable fields (with yellow background):
   - Section 3 Parts B and C fields with a yellow background are editable by the PHA. The remaining fields cannot be edited by the PHA and are either auto-calculated fields or fields open only for FO edits.
   - If the field is locked (not editable) for the PHA, that means the PHA does not qualify to claim this line item.
   - When PHA updates or requests modifications to the pre-populated data, the PHA must provide comments and submit supporting documentation required by HUD. PHA should consult their local FO, the latest OpFund Processing Notice, and the instructions to the OpFund forms for further guidance. All PHA updates and requests for modifications to pre-populated data are subject to HUD review.
3. Click the "**Apply Changes / Validate**" button to save updates.
4. Click the "**View/Print Current Form 52723**" button to review any changes to the form HUD-52723 after clicking the "**Apply Changes / Validate**" button.

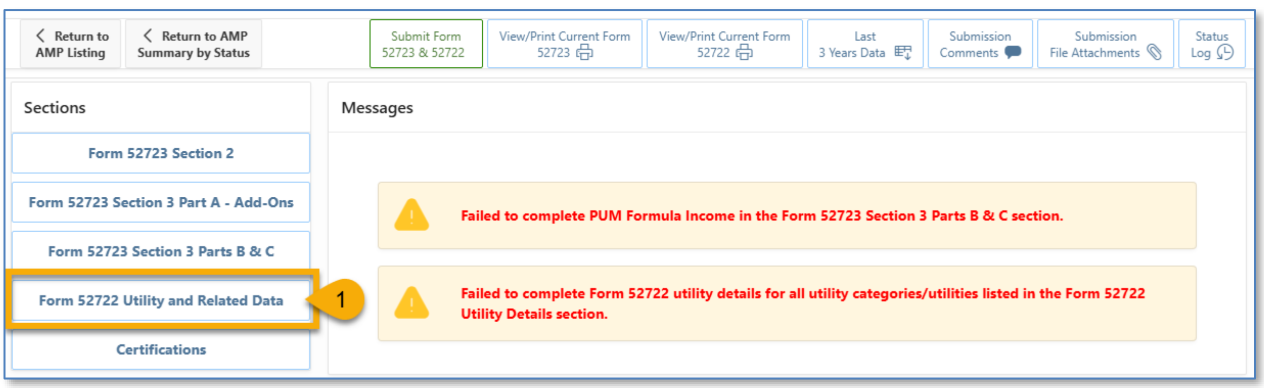
To add comments or upload/delete documents refer to "[Creating Comments and Uploading File Attachments]" section.

5. Click the "**Return to Sections**" button to return to the development page.

Completing Form HUD-52722 Utility and Related Data

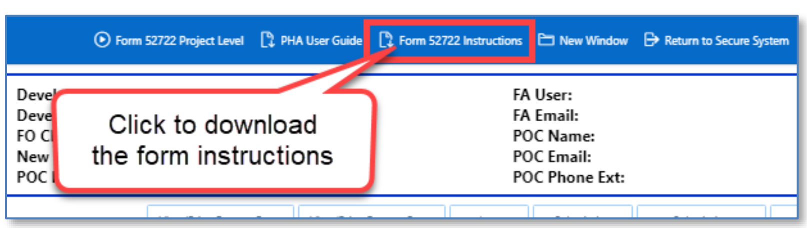
The form HUD-52722 is a sub-form to the form HUD-52723. PHAs complete form HUD-52722 to calculate the development's utility expense level (UEL) portion of the OpFund formula amount. All utility types (i.e., electricity, gas, water, and sewer) must be completed in order to submit form HUD-52723. Projects that do not include PHA-paid utilities or specifically directed by HUD to not complete this section, must select "No" under the "**UEL Requested**" line item in the "**Form 52722 Project Level Utility Data**" page.

Watch the training video "Viewing and Updating Project Level Utility Data" to learn how to complete Form HUD-52722.



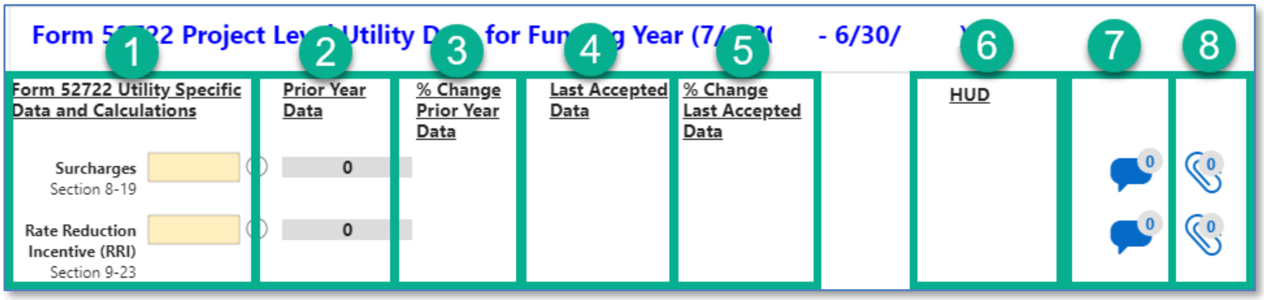
1. From the development page, click the "**Form 52722 Utility and Related Data**" button. The user is directed to "**Form HUD-52722 Project Level Utility Data for Funding Year (7/1/2024 – 6/30/2025)**" page.

Click the "**Form 52722 Instructions**" at the top ribbon of the Portal to download and view the HUD-52722 form instructions.



Form HUD-52722 Project Level Utility Data for Funding Year (7/1/2024 – 6/30/2025) - Columns and Line Items

Form 52722 Project Level Data has eight (8) columns:



Column 1: **Form 52722 Utility Specific Data and Calculations.** Contains line-item labels and the applicable funding year data. The PHA updates the applicable funding year data fields by adding a new value or updating pre-populated values. PHAs may be required to submit comments and documentation to support these updates.

Column 2: **Prior Year Data.** Provides prior year data. This data is sourced from previous year OpFund form HUD-52722 submission.

Column 3: **% Change Prior Year Data.** The percentage difference between the PHA updated data and the prior year data.

Column 4: **Last Accepted Data.** For Resubmissions, QC Submissions, and Revision Submissions, the Portal displays the lates HUD accepted data for the applicable funding year.

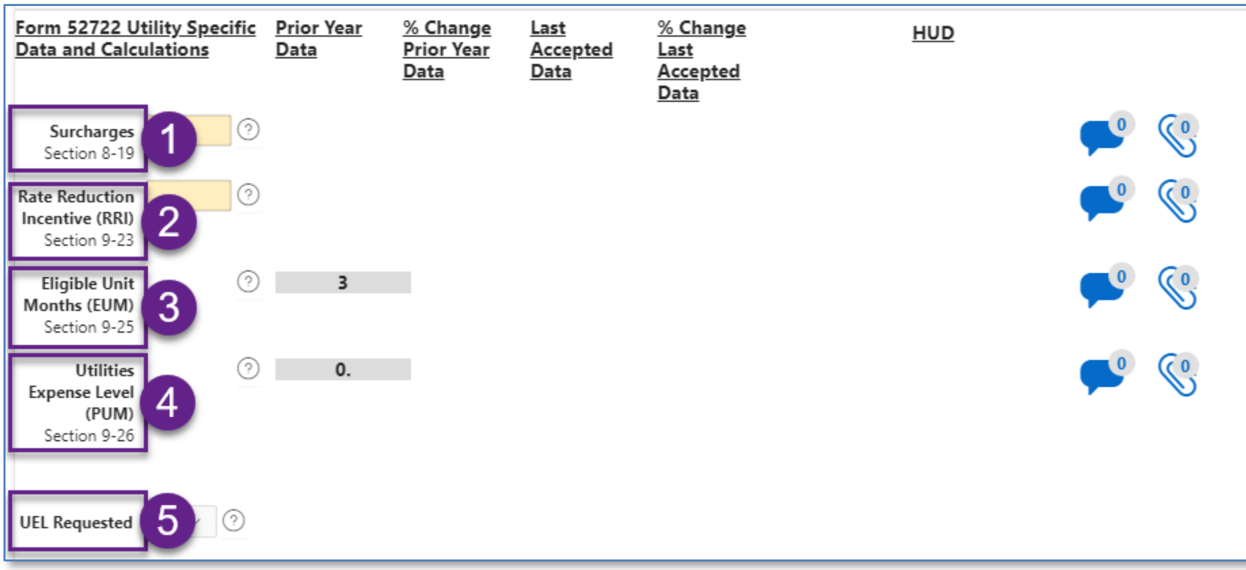
Column 5: **% Change Last Accepted Data.** For Resubmissions, QC Submissions, and Revision Submissions, the Portal displays the percentage difference between the current PHA data and the last accepted data.

Column 6: **HUD.** HUD updates that may occur during the PIH FO's review.

Column 7: The PHA and HUD comments related to the line item. Click the "**Submission Comments**" button above the section to review comments for the entire project.

Column 8: The PHA and HUD file attachments related to the line item. Click the "**Submission File Attachments**" button above the section to review file attachments for the entire project.

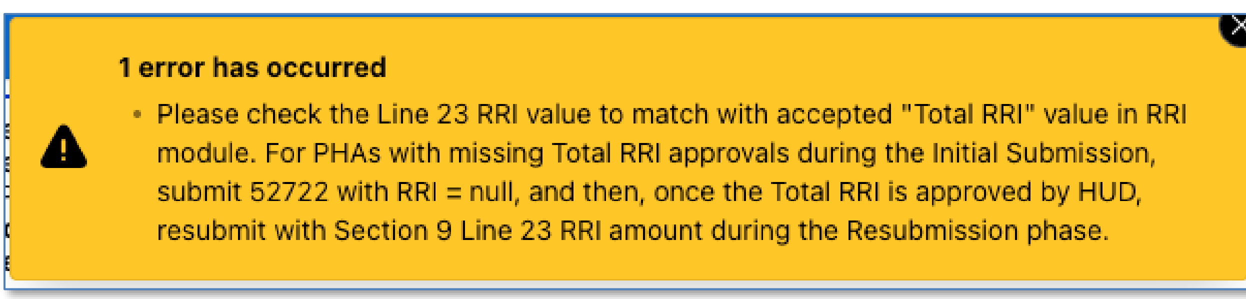
Section "Form 52722 Project Level Utility Data for Funding Year (7/1/2024 – 6/30/2025)" Line Items include Areas 1 through 5:



Area 1: **Surcharges for excess consumption of PHA-supplied utilities.** Enter the number of charges to residents for excess utility consumption for PHA-supplied utilities during the reporting period.

Area 2: **Rate Reduction Incentive (RRI)**. Enter the total amount in whole dollars per project for all utilities with an HUD approved rate reduction incentive. Each utility rate reduction incentive per project is approved pursuant to 24 CFR 990.185(b) and may not exceed the calculated actual utility costs as they would have been if the rate savings action had not been taken PHAs should leave this field blank for projects without an approved RRI. The PHA should submit supporting documentation recommended by HUD to claim the RRI.

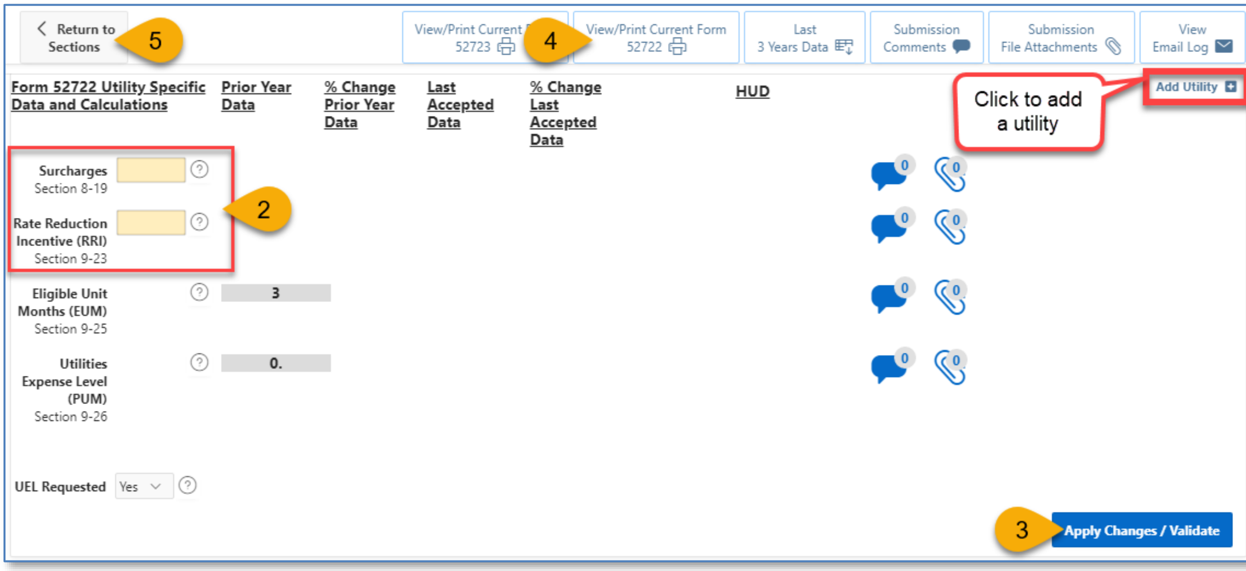
Note: If a PHA claims the Rate Reduction Incentive (RRI) value (where the value is different from the "Total RRI" value on the Accepted RRI submission, or if the PHA currently has no Accepted RRI submission, but claims the Rate Reduction Incentive (RRI) value , the system will throw an error message.



Area 3: **Eligible Unit Months (EUM)**. This data is pulled from the form HUD-52723 (Line 15 plus Line 17 minus Line 04 from Section 2, column B).

Area 4: **Utilities Expense Level (PUM)**. This is the UEL per unit month for the project.

Area 5: **Utilities Expense Level (UEL) Requested.** If the project does not include any PHA-paid utilities or the PHA is not required to submit a form HUD-52722, then this indicator should be set to "No." Otherwise, "UEL Requested" should be set to "Yes."



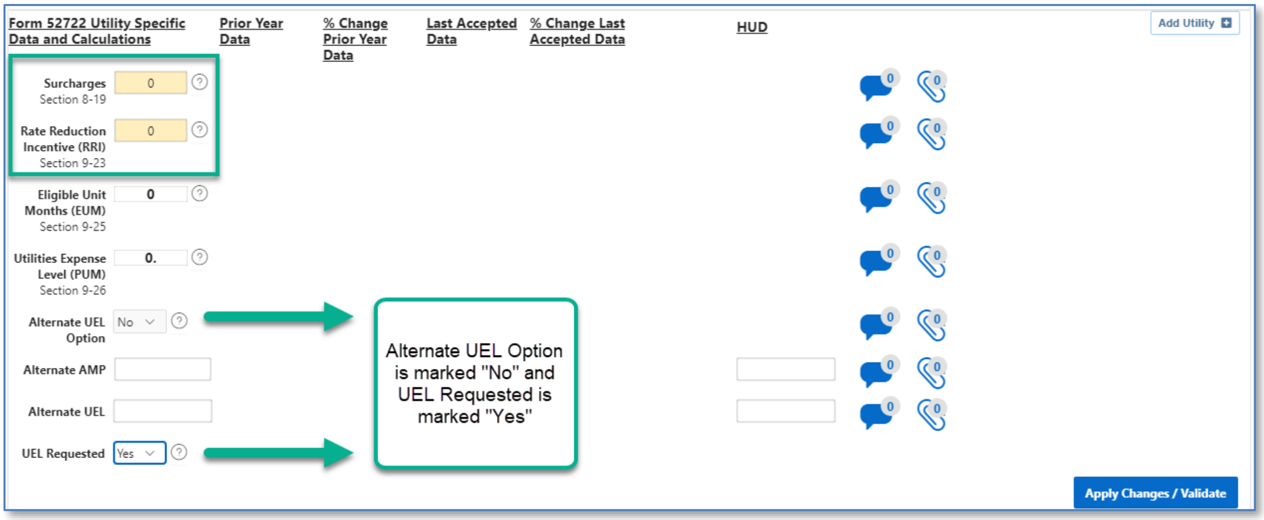
2. Update the editable fields (with yellow background):

Note: PHA should provide comments and submit supporting documentation required by HUD. PHAs should consult their local FO, the latest OpFund Processing Notice, and the instructions to the OpFund forms for further guidance. All PHA updates and requests for modifications are subject to HUD review.

3. Click the "**Apply Changes / Validate**" button to save updates.
4. Click the "**View/Print Current Form 52722**" button to review any changes to the form HUD-52722 after clicking the "**Apply Changes / Validate**" button.

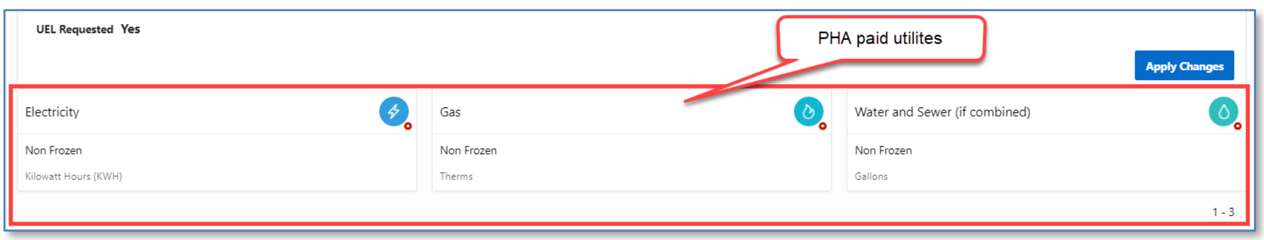
To add comments or upload/delete documents refer to "Creating Comments and Uploading File Attachments" section.

5. Click the "**Return to Sections**" button to return to the development page.



The PHA user can only edit the line items for "**Surcharges**" and "**Rate Reduction Incentive (RRI)**" when "**UEL Requested**" indicator is marked "**Yes**." Projects that do not include PHA-paid utilities are not required to submit the form HUD-52722 and should select "**No**" in the "**UEL Requested**" drop-down. The "**UEL Requested**" field is disabled if the AMP has at least one utility in the Portal.

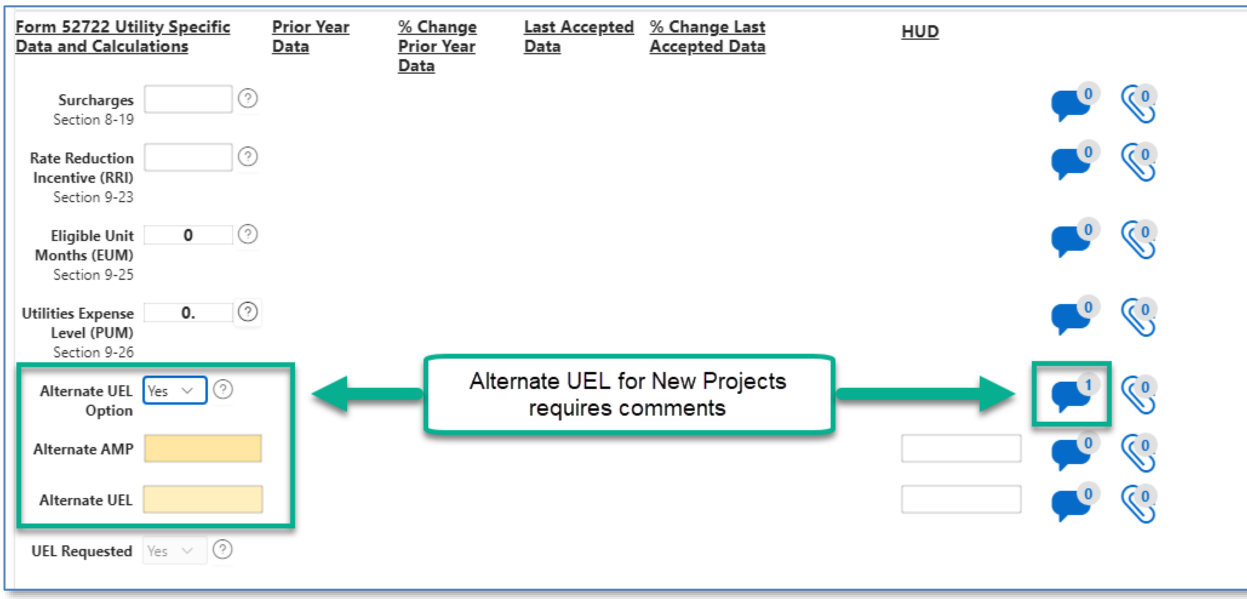
Note: The "UEL Requested" field is editable only when there are no utilities reported under a development. If existing utilities need to be removed, the user should delete all the existing utilities and save the changes. Once the utilities are removed the "UEL Requested" field becomes editable to PHA user.



The UEL is the product of the utility rate, the payable consumption level, and the utilities inflation factor. It is expressed as a per unit month (PUM) dollar amount. New Projects cannot request a new UEL. Funding for new projects differs from existing projects due to the timing and availability of certain data elements that drive the OpFund Grant formula. For example, new projects lack sufficient utility information necessary to calculate a stand-alone UEL. That is why New Projects must determine Alternate UEL and AMP using the method described in the next section (Alternate UEL for New Projects).

Alternate UEL for New Projects

PHAs may use an Alternate UEL for new projects. The Alternate UEL is derived from a comparable project, where the comparable project is similar in size and scope. The comparable project should also have similar occupancy, consumption activity, and should be paying for the same activity for the utility (i.e., PHA pays electricity for heat (which would be included in the form HUD-52722), residents pay electricity for lights and cooking (which would not be included in the form HUD-52722)). PHAs should work with their local FO to identify an Alternate UEL and AMP.



Line-item "**Alternate AMP**" and "**Alternate UEL**" become available for data entry when "**Alternate UEL Option**" is set to "**Yes**."

Note: "Alternate UEL Option" line item for New Projects requires a comment to proceed further.

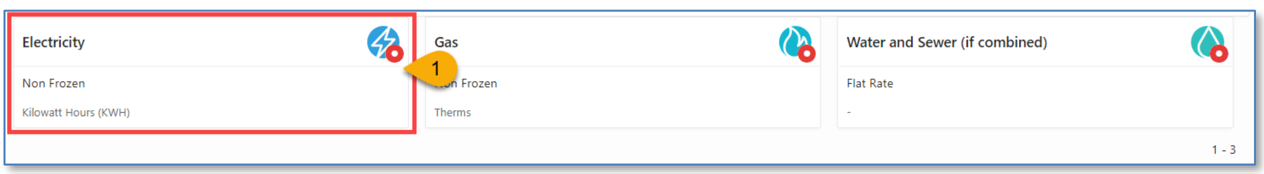
Completing Form HUD-52722 Utility Consumption and Costs Section

Watch the training video "[Viewing and Updating Non-Frozen, Frozen EPC, Frozen Other, and Flat Rate Utilities Data]()" to learn how to complete Form HUD-52722 utility details section.

While for Non-Frozen, Frozen EPC, and Frozen Other rolling base incentive consumption level categories the PHA must provide the actual consumption and actual utility cost for each utility, for Flat Rate category PHA must provide only the actual utility cost. The OpFund form tracks utilities submitted in the previous calendar year. Utilities are tracked by type (i.e., electricity, gas, water) and by category, which is further explained below:

- Non-Frozen: The utility is charged based on consumption and does not have a HUD-accepted frozen rolling base.
- Frozen EPC: The project has an EPC, and the utility has a HUD-approved frozen rolling base incentive pursuant to 24 CFR 990.185(a)(1). The PHA should submit supporting documentation required by HUD to support its selection for Frozen EPC.
- Frozen Other: The utility is eligible to freeze the rolling base at accepted or HUD-approved rolling base consumption levels. The PHA may not omit the utility from submission or submit rolling base consumptions levels or units of consumptions that modify the eligible or HUD-approved levels. The PHA may not add additional utilities with Frozen Other without HUD approval.
- Flat Rate: The utility is charged at a fixed fee regardless of usage.

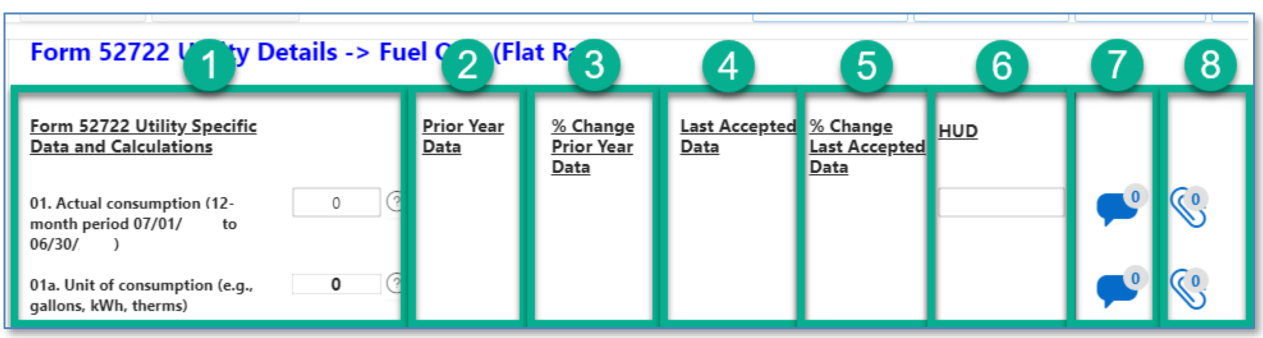
Note: A development cannot have the same combination of utility type and utility category more than once (i.e., a development cannot have electricity with non-frozen utility category listed more than once).



1. Click the desired utility type.

Form HUD-52722 Utility Level Columns and Line Items

Form HUD-52722 Utility Level has eight (8) columns:



Column 1: **Form 52722 Utility Specific Data and Calculations.** Contains line-item labels and the applicable funding year data. PHA updates the applicable funding year data fields by adding or updating pre-populated values. PHAs may be required to submit comments and documentation to support these updates.

Column 2: **Prior Year Data.** Provides prior year data. This data is sourced from previous year OpFund form HUD-52722 submission.

Column 3: **% Change Prior Year Data.** The percentage difference between the PHA updated data and the prior year data.

Column 4: **Last Accepted Data.** For Resubmissions, QC Submissions, and Revision Submissions, the Portal displays the last HUD accepted data for the applicable funding year.

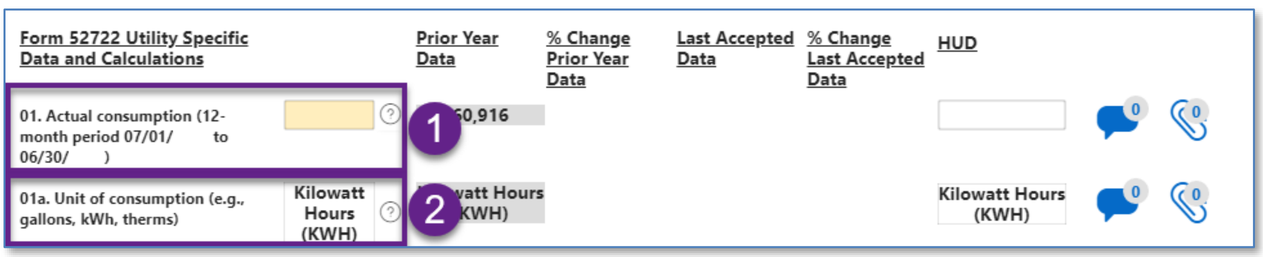
Column 5: **% Change Last Accepted Data.** For Resubmissions, QC Submissions, and Revision Submissions, the Portal displays percentage difference between the current PHA data and the last accepted data.

Column 6: **HUD.** HUD updates that may occur during the PIH FO's review.

Column 7: The PHA and HUD comments related to the line item. Click the "**Submission Comments**" button above the section to review comments for the entire project.

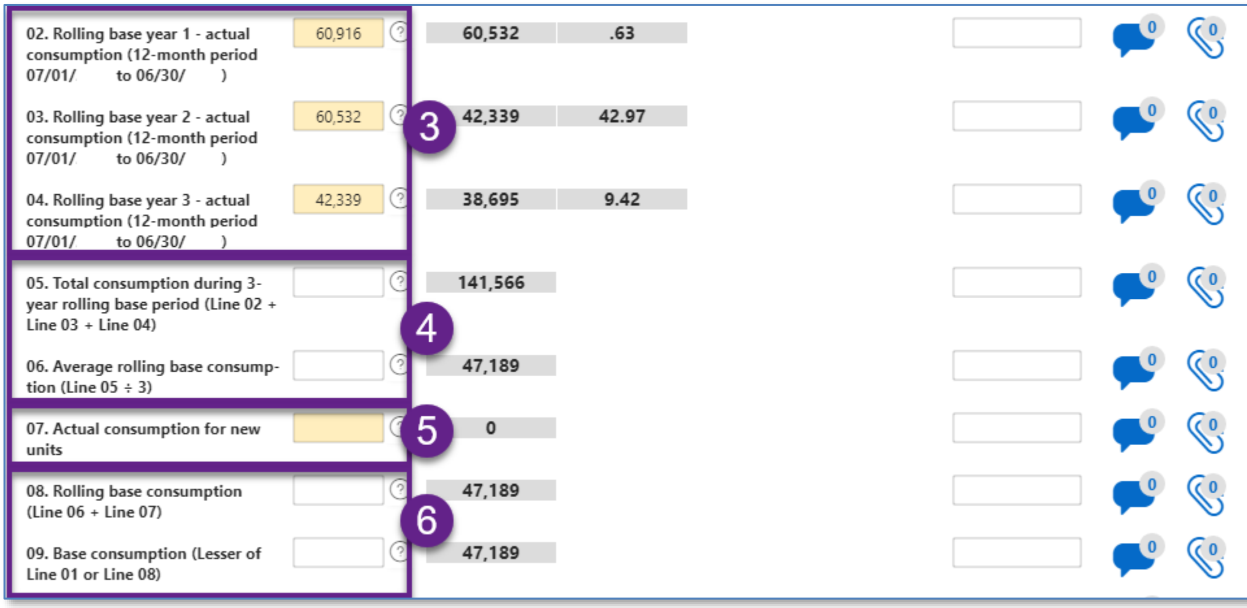
Column 8: The PHA and HUD file attachments related to the line item. Click the "**Submission File Attachments**" button above the section to review file attachments for the entire project.

Form HUD-52722 Utility Level Line Items include the following areas (Areas 1 through 13):



Area 1: **Actual Consumption**. Enter the actual total consumption for the reporting period. The PHA should submit supporting documentation required by HUD to support the actual consumption entered in the form. The value is zero for the Flat Rate consumption level category.

Area 2: **Unit of Consumption**. Review the unit of measurement for the consumption shown on Line 01. The value is zero for Flat Rate.

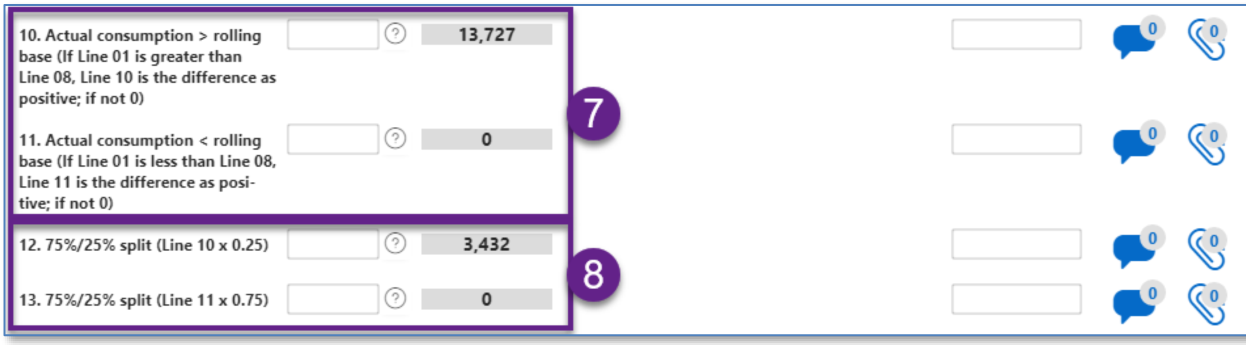


Area 3: **Rolling base consumption**. The Portal pre-populates the rolling base with the last three (3) years of actual consumption or the HUD-approved rolling base for Frozen EPC or Frozen Other utilities. The PHA should submit supporting documentation required by HUD to support changes to the rolling base or if the PHA first claims the EPC. The values are “Flat Rate” for the Flat Rate consumption level category.

Area 4: **Average rolling base consumption**. The Portal automatically calculates the average rolling base **consumption**. The value is zero for Flat Rate.

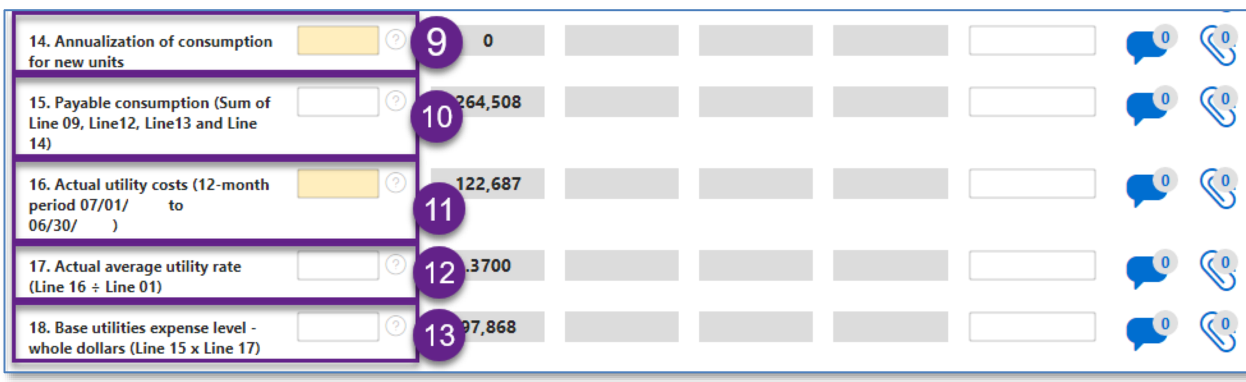
Area 5: **Actual consumption for new units**. Enter the actual consumption for any new units included in Line 01 that have less than twelve (12) months of actual consumption data. The consumption reported in this line should also be included in Line 01. The consumption entered on this line will be used to adjust the rolling base to include new units. This is blank for the Frozen EPC, Frozen Other, and Flat Rate consumption level categories.

Area 6: The Portal automatically calculates the rolling base consumption and base consumption. The values are zero for Flat Rate.



Area 7: The Portal calculates the difference between Actual Consumption and Rolling Base Consumption. These values are zero for the Frozen EPC, Frozen Other, and Flat Rate consumption level categories.

Area 8: The Portal calculates additional payable consumption using the difference between the Actual Consumption and the Rolling Base Consumption. These values are zero for the Frozen EPC, Frozen Other, and Flat Rate consumption level categories.



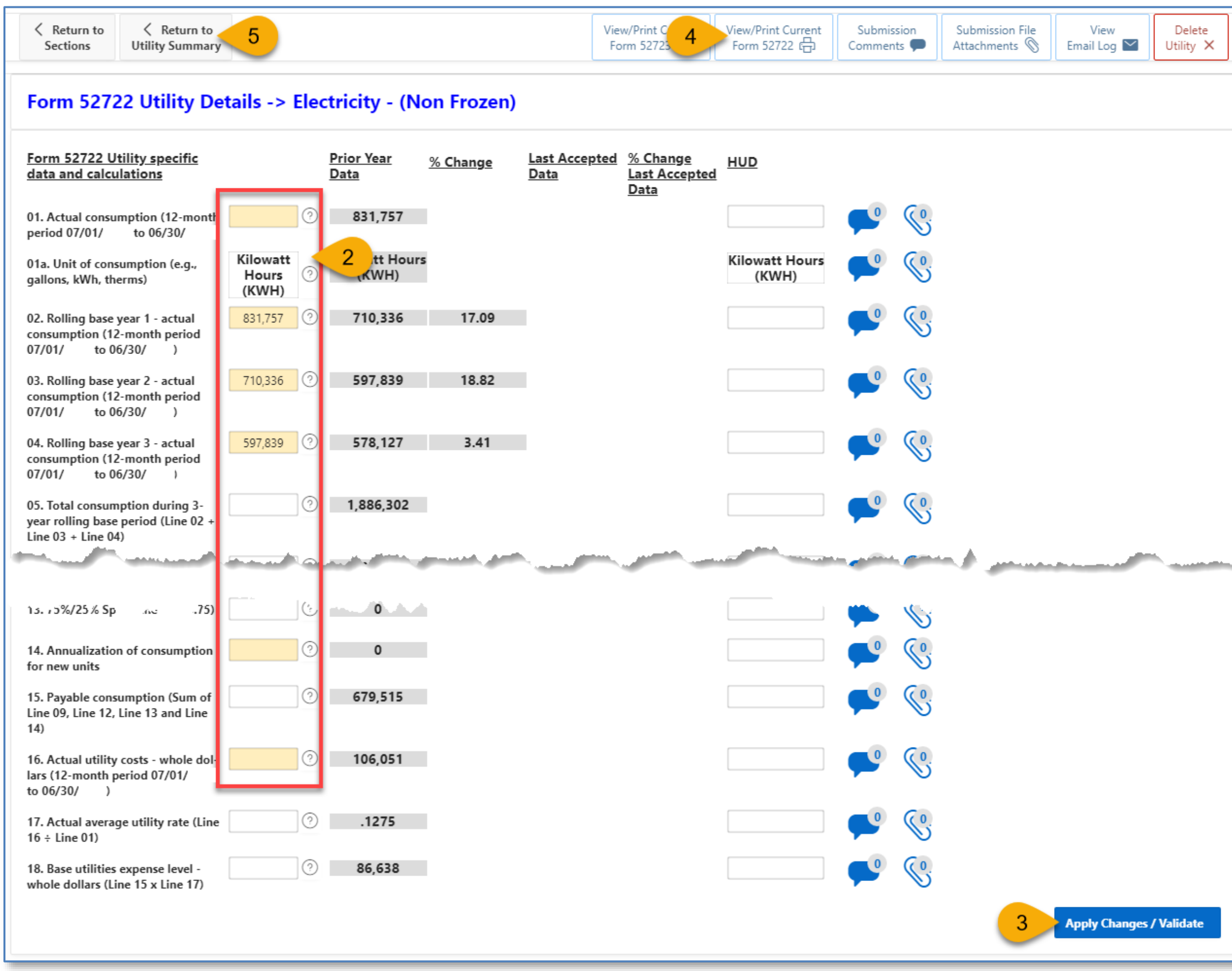
Area 9: **Annualization of consumption for new units**. Enter the estimated consumption for new units that are eligible for operating funds during the funding period but do not have a full twelve (12) months of actual consumption data on Lines 01 and 07. The amount of consumption entered on this line item should reflect the estimated difference between a full year of consumption and the number of months reported on Lines 01 and 07. For example, if the PHA/project reports four (4) months of consumption for new units on Lines 01 and 07, the PHA/project would then estimate an additional eight (8) months of consumption for these new units on this line item. This is blank for the Frozen EPC, Frozen Other, and Flat Rate consumption level categories.

Area 10: **Payable consumption**. The Portal calculates the payable consumption which is used to determine the base utilities expense level for the utility. The value is zero for the Flat Rate consumption level category.

Area 11: **Actual utility costs**. Enter the actual total utility costs for the reporting period ending June 30th for the consumption entered in Line 01. Round to whole dollars. The PHA should submit supporting documentation required by HUD to support the actual utility costs entered in the form.

Area 12: **Actual average utility rate.** The Portal automatically calculates the actual average utility rate. The value is zero for the Flat Rate consumption level category.

Area 13: **Base utility expense level**. The Portal automatically calculates the base utility expense level for each utility. The Portal uses the actual utility costs in Line 16 for the Flat Rate consumption level category.



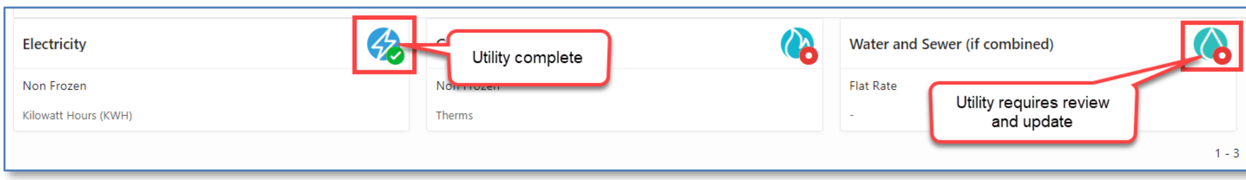
2. Update the editable fields (with yellow background):
   a. Form 52722 Utility Details section fields with a yellow background are editable by the PHA. The remaining fields are auto-calculated fields and cannot be edited by the PHA.

b. When a PHA updates the pre-populated values, the PHA must provide comments and submit supporting documentation required by HUD. PHA should consult their local FO, the latest OpFund Processing Notice, and the instructions to the OpFund forms for further guidance. All PHA updates to pre-populated data are subject to HUD review.

3. Click the "**Apply Changes / Validate**" button to save updates.
4. Click the "**View/Print Current Form 52722**" button to review any changes to the form HUD-52722 after clicking the "**Apply Changes / Validate**" button.

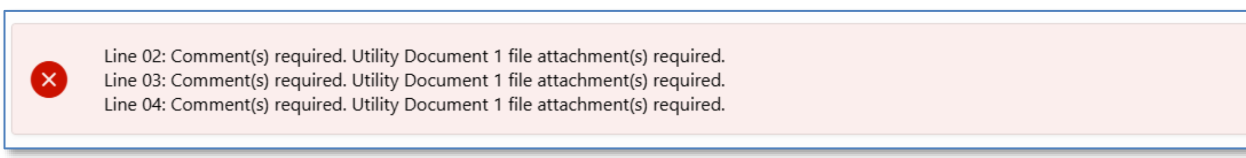
To add comments or upload/delete documents refer to "[Creating Comments and Uploading File Attachments]" section.

5. Click the "**Return to Utility Summary**" button to return to the Form 52722 Project Level Utility Data page/Form 52722 dashboard.

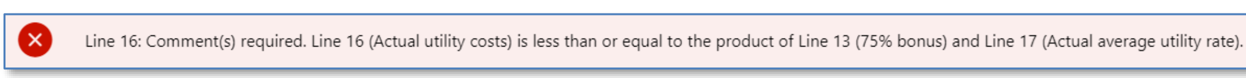


The green checkmark icon indicates that the PHA reviewed, updated, and provided all required values for the utility. The red circle icon indicates that the utility is missing required data values.

Note: Please note the warnings and errors that can be received when entering in data for the utilities.



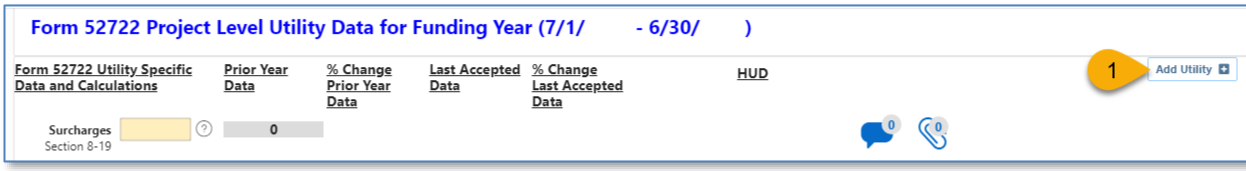
Within the Utility modules, warning messages for providing comments and supporting documents will appear if the Rolling Base Year 1, 2, and 3 data is changed.



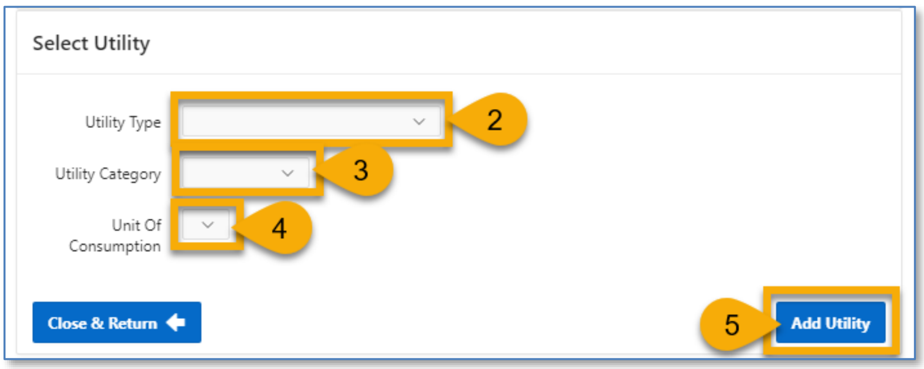
If the product of the Utility Consumption Incentive in Line 13 and Average Utility Rate in Line 17 is equal or greater than Actual Utility Costs recorded in Line 16 then a comment is required.

Adding a Utility

PHA should follow the steps below to add a new utility to the project, or to add an existing utility with updated utility category, or to add an existing utility when an existing utility was split into more than one category:



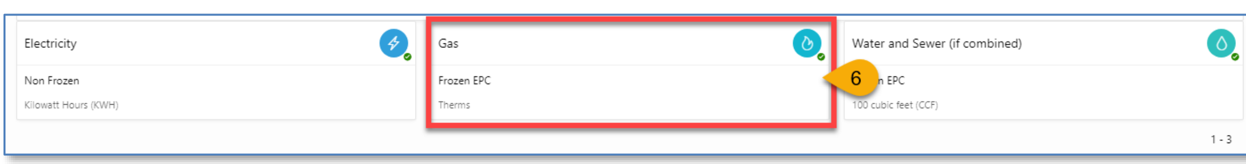
1. Click the "**Add Utility**" button on the right side of the page. The system displays the "**Add Utility**" pop-up window.



2. **Utility Type:** Select the appropriate utility.
3. **Utility Category**: Choose from Non-Frozen, Frozen EPC, Frozen Other, or Flat Rate consumption level categories.

Note: A development cannot have the same combination of utility type and utility category more than once (i.e., a development cannot have electricity with non-frozen utility category listed more than once).

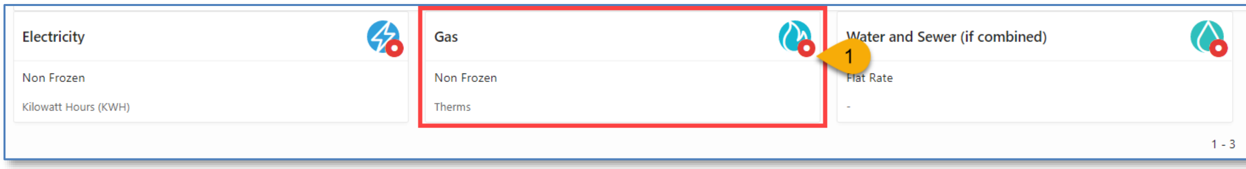
4. **Unit of Consumption**: Select the appropriate unit of consumption. This field is unavailable for Flat Rate utilities.
5. Click the "**Add Utility**" button to add the utility.



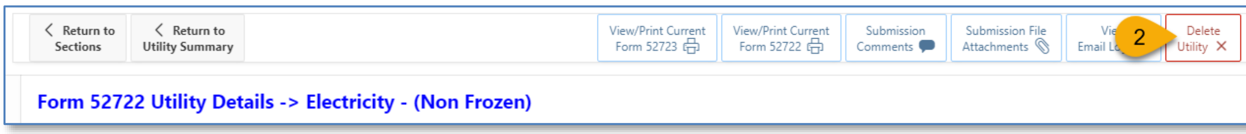
6. Click the newly added utility (with red circle icon) and follow the steps listed in the "[Completing Form HUD-52722 Utility Consumption and Costs Section](#)" section.

Deleting a Utility

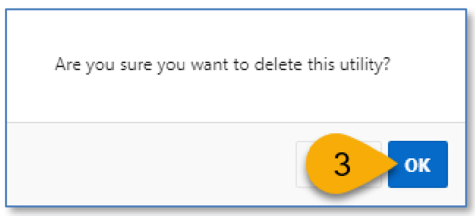
PHA should follow the steps below to delete a utility (when a PHA no longer pays for that utility) or to change the utility type, or to change the utility category.



1. Click the utility that needs to be deleted.

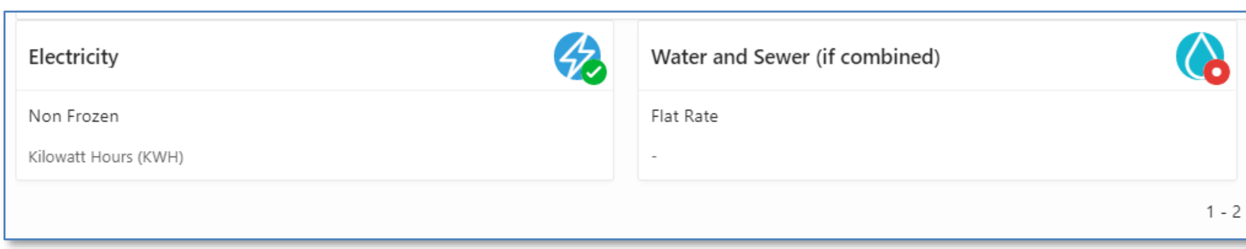


2. Click the "**Delete Utility**" button.



3. Click "**OK**" in the pop-up window.

The system removes the utility from the "**Form 52722 Utility and Related Data**" dashboard.



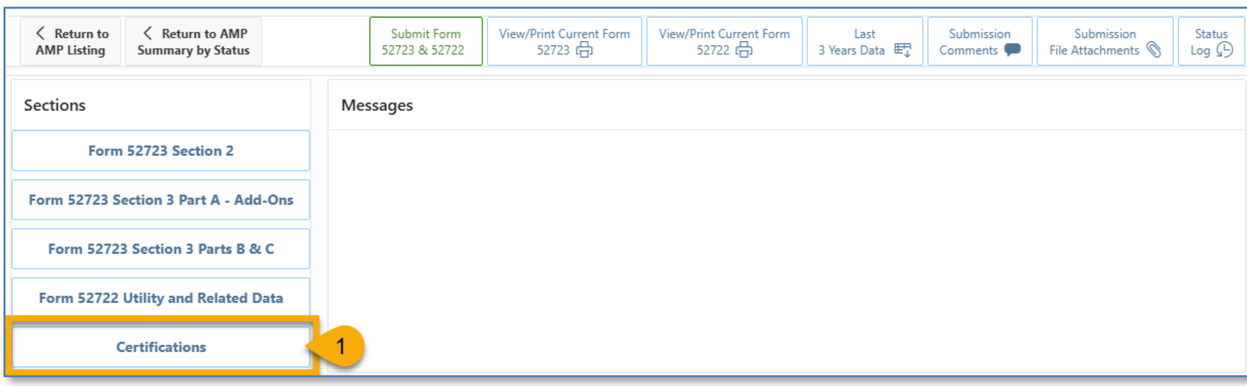
Note:

1) When a certain combination of the utility type, utility category and unit of consumption gets deleted by the PHA user, and then the same combination is added back, the system retrieves all deleted values and brings theme back with the exception of comments and attachments.
2) When a certain combination of the utility type, utility category and unit of consumption gets deleted by the PHA user, and then the combination of the same utility type and the same utility category with a different unit of consumption is

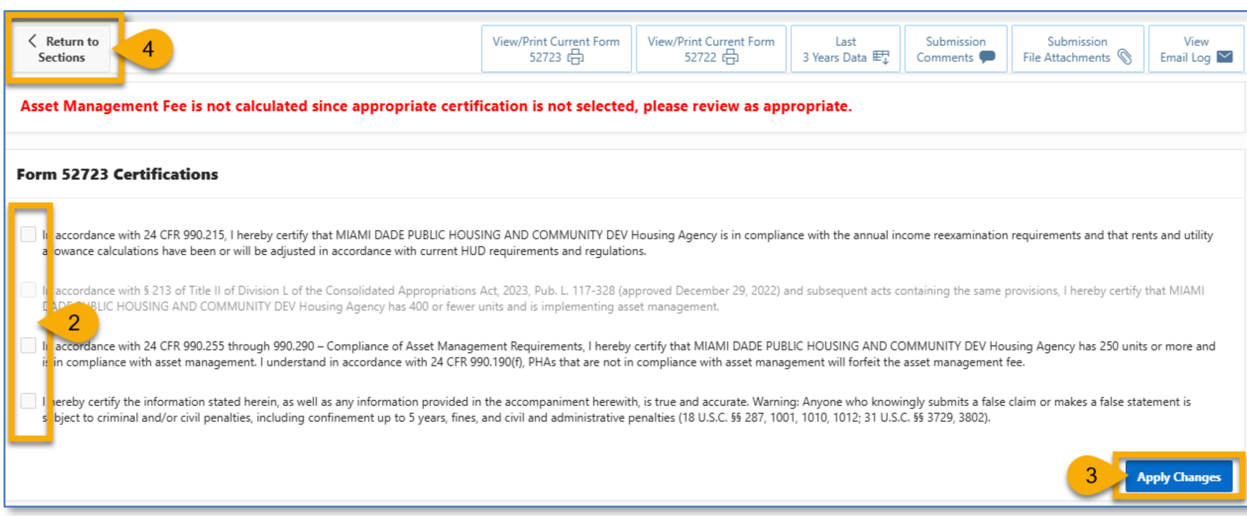
added back, the system retrieves the Prior Year Data and the Last Accepted Data values (if any) and brings them back. All values that were entered by the PHA are permanently deleted and displayed as blank values.

Completing Certifications Section

For each development, before submitting the forms to HUD, a PHA must select certifications that are applicable to the PHA and the development in the "Certifications" section of the Portal.

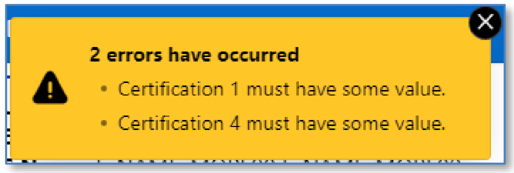


1. From the Portal development page, click the "**Certifications**" button.



2. Select the appropriate certifications:
   - The PHA must select the first and last certifications.
   - The PHA must select the second or third certification to receive the Asset Management Fee Add-On. These certifications are enabled based on the PHA's total number of ACC units gathered during the inventory validation.
3. Click the "**Apply Changes**" button to save the selections.

The system displays an error(s) if the correct certifications are not selected.



Resolve the errors and click the "**Apply Changes**" button.

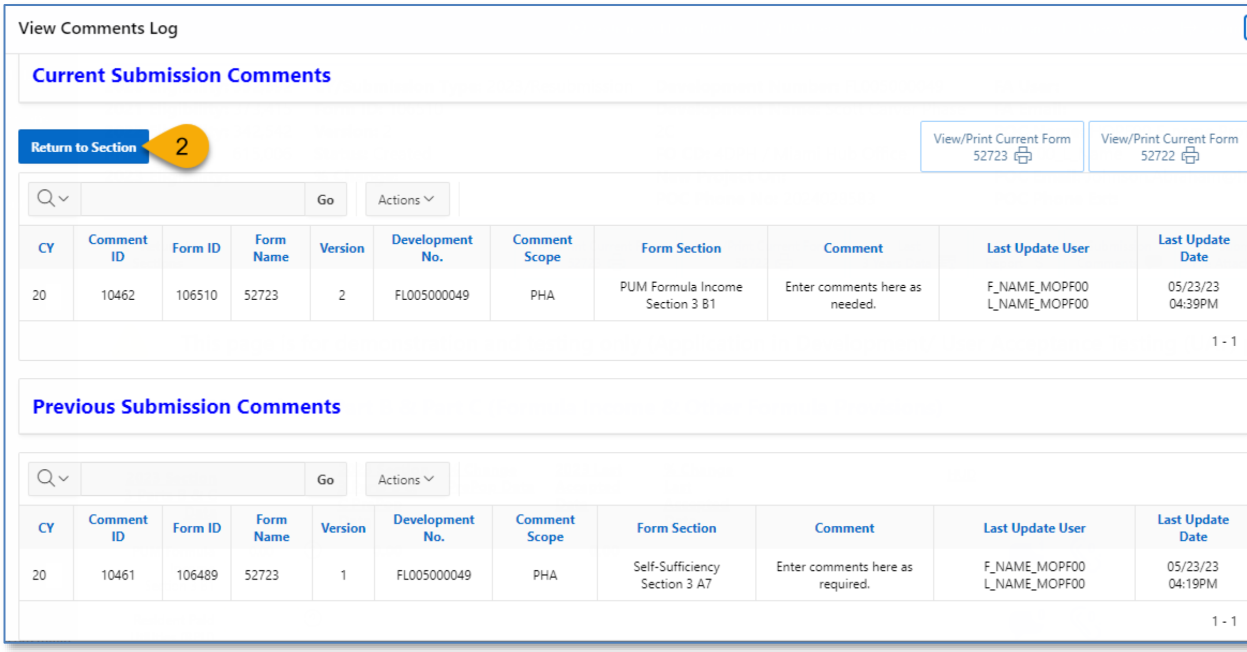
4. Click the "**Return to Sections**" button to return to the development page.

Reviewing Submission Comments

The "**Submission Comments**" button is available from the development dashboard and from all sections of the development in the Portal. This log contains OpFund forms comments for all submission versions for the development.

1. Click the "**Submission Comments**" button. The system displays the "**View Comments Log**" pop-up window.

The "**View Comments Log**" pop-up window displays all the comments added to the development's OpFund Forms including current submission comments and any previous submission comments for the current funding period.



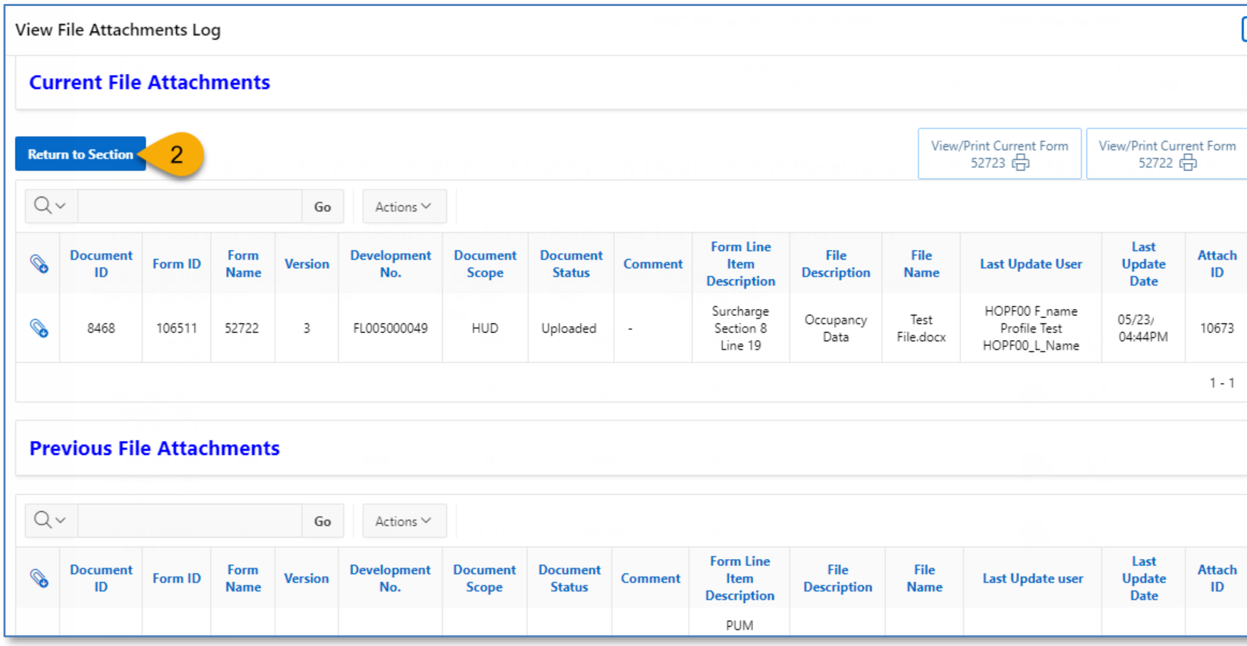
2. Click "**Return to Section**" to close the pop-up window.

Reviewing Submission File Attachments

The "**Submission File Attachments**" button is available from the development dashboard and from all sections of the development in the Portal. This log contains the OpFund forms file attachments for all submission versions for the development.

1. Click the "**Submission File Attachments**" button. The system displays the "**View File Attachments Log**" pop-up window.

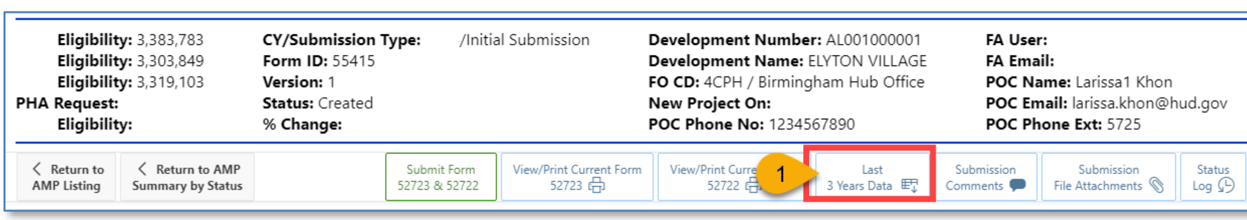
The "**View File Attachments Log**" pop-up window displays all the file attachments added to the development's OpFund Forms including current submission attachments and any previous submission attachments for the current funding period.



2. Click “**Return to Section**” to close the pop-up window.

Reviewing Last 3 Years of Data

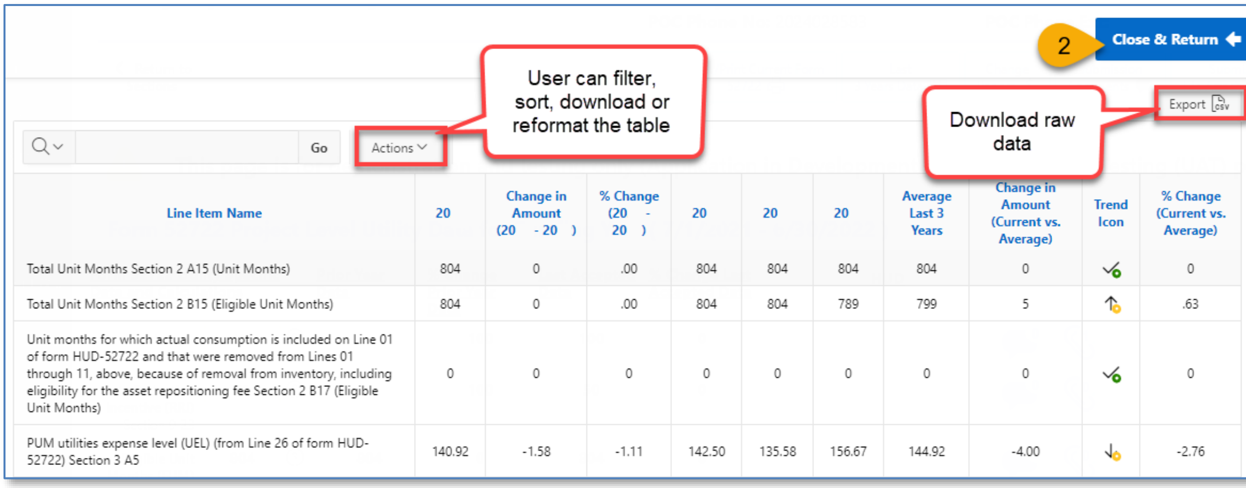
The “**Last 3 Years Data**” button is available from the development dashboard and from all sections of the development in the Portal.



1. Click the “**Last 3 Years Data**” button. The system displays the “**Last 3 Years of Data**” pop-up window.

The “**Last 3 Years of Data**” pop-up window displays the key data values of the AMP’s OpFund forms from the last three (3) years and the data from the applicable funding year. The report shows the average data for the last three (3) years, the changes between the last 3 years average and applicable funding year values, and the changes between the last year and applicable funding year data.

Note: There will be no data displayed in the “Last 3 Years Data” report if the data does not exist for ANY of the prior three (3) years.



Line Item Name	20	Change in Amount (20 - 20)	% Change (20 - 20)	20	20	20	Average Last 3 Years	Change in Amount (Current vs. Average)	Trend Icon	% Change (Current vs. Average)
Total Unit Months Section 2 A15 (Unit Months)	804	0	.00	804	804	804	804	0		0
Total Unit Months Section 2 B15 (Eligible Unit Months)	804	0	.00	804	804	789	799	5		.63
Unit months for which actual consumption is included on Line 01 of form HUD-52722 and that were removed from Lines 01 through 11, above, because of removal from inventory, including eligibility for the asset repositioning fee Section 2 B17 (Eligible Unit Months)	0	0	0	0	0	0	0	0		0
PUM utilities expense level (UEL) (from Line 26 of form HUD-52722) Section 3 A5	140.92	-1.58	-1.11	142.50	135.58	156.67	144.92	-4.00		-2.76

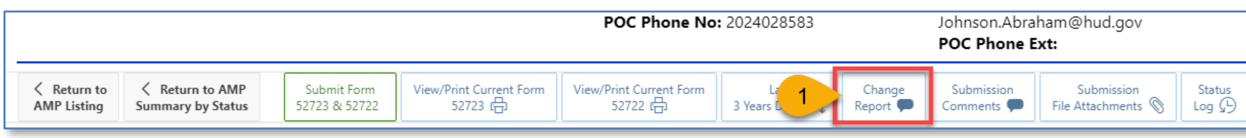
2. Click "**Close & Return**" to close the pop-up window.

The user can export the data in CSV format or filter, sort, or reformat the table for ease of review.

Reviewing the Change Report

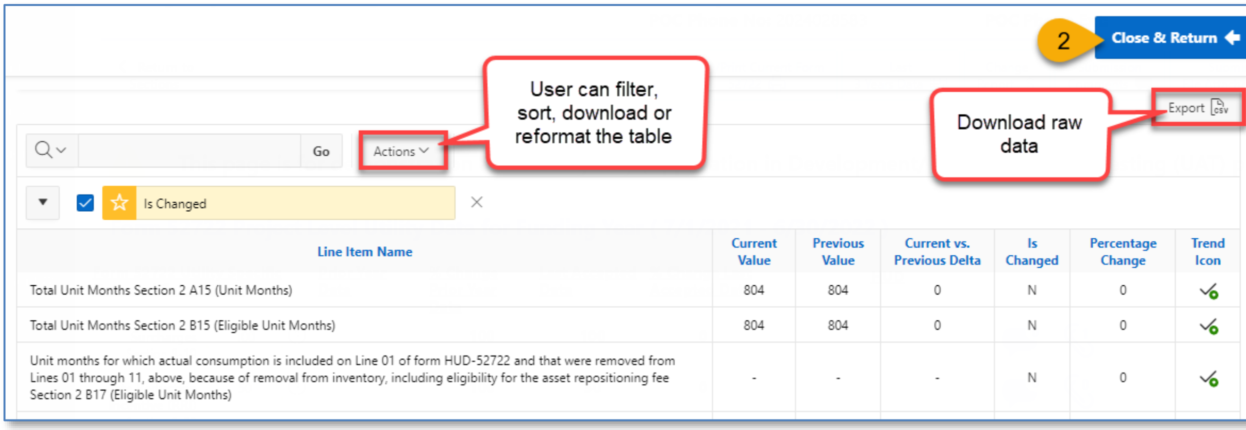
The "**Change Report**" is available for Resubmissions, QC Submissions, and Revision Submissions. It is accessible from the development dashboard and from all sections of the development in the Portal.

Note: The "Change Report" button is only available during Resubmissions, QC Submissions, or Revision Submissions.



1. Click the "**Change Report**" button. The system displays the "**Change Report**" pop-up window.

The "**Change Report**" pop-up window displays the previously accepted form submission values, and the updates made on the current form on key line items of the form HUD-52723. It also displays the percentage change from the previous form value to the current form value and conveys if the value was changed or not.



The user can export the data in CSV format or filter, sort, or reformat the table for ease of review.

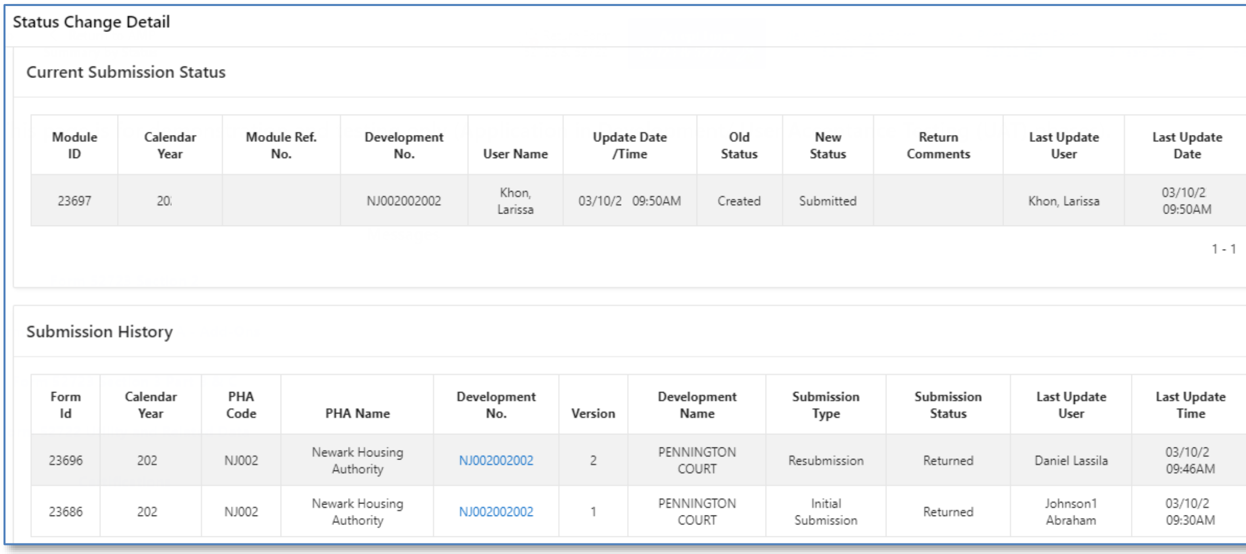
2. Click "**Close & Return**" to close the pop-up window.

Reviewing the Status Log

The "**Status Log**" button is available from the development dashboard in the Portal and provides the status history of the project's OpFund submissions for the applicable funding year.

1. Click the "**Status Log**" button. The system displays the "**Status Change Detail**" pop-up window.

The "**Status Change Detail**" pop-up window displays the current submission status and the status history of all previously submitted versions of the project's OpFund forms for the current funding period.



Status Change Detail

Current Submission Status

Module ID	Calendar Year	Module Ref. No.	Development No.	User Name	Update Date /Time	Old Status	New Status	Return Comments	Last Update User	Last Update Date
23697	20		NJ002002002	Khon, Larissa	03/10/2 09:50AM	Created	Submitted		Khon, Larissa	03/10/2 09:50AM

1 - 1

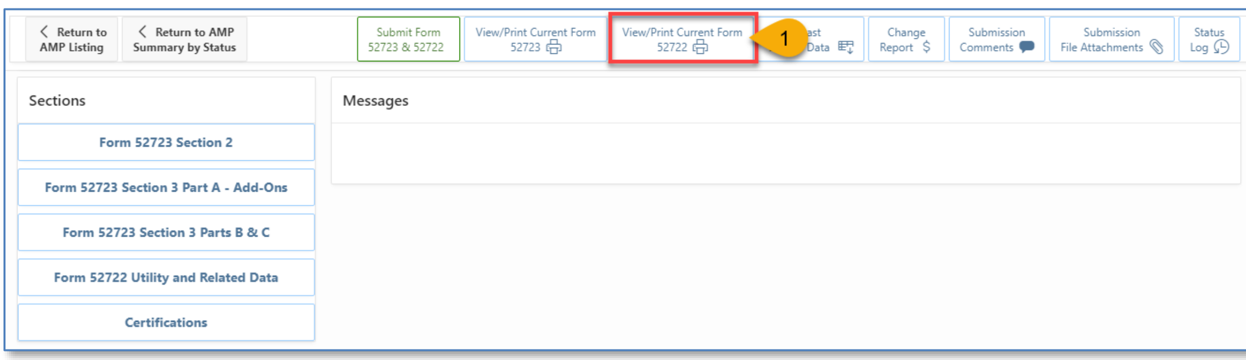
Submission History

Form Id	Calendar Year	PHA Code	PHA Name	Development No.	Version	Development Name	Submission Type	Submission Status	Last Update User	Last Update Time
23696	202	NJ002	Newark Housing Authority	NJ002002002	2	PENNINGTON COURT	Resubmission	Returned	Daniel Lassila	03/10/2 09:46AM
23686	202	NJ002	Newark Housing Authority	NJ002002002	1	PENNINGTON COURT	Initial Submission	Returned	Johnson1 Abraham	03/10/2 09:30AM

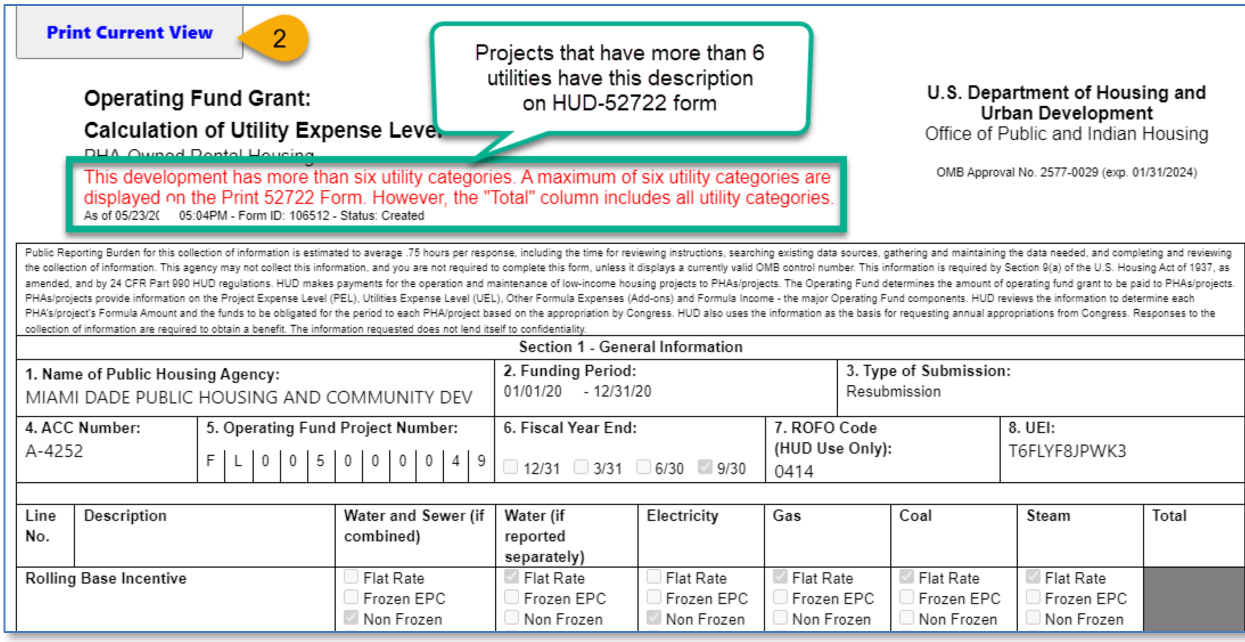
Viewing and Printing Current Forms HUD-52723 & HUD-52722

PHAs may view and print forms HUD-52723 and HUD-52722.

To view and print form HUD-52722, follow these steps:



1. Click the "**View/Print Current Form 52722**" button to view the entire form HUD-52722 for the current submission. The PHA user must review the entire form before submitting it for FO review.



Operating Fund Grant:
Calculation of Utility Expense Leve
PHA Owned Rental Housing
This development has more than six utility categories. A maximum of six utility categories are displayed on the Print 52722 Form. However, the "Total" column includes all utility categories.
As of 05/23/2(05:04PM - Form ID: 106512 - Status: Created

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

OMB Approval No. 2577-0029 (exp. 01/31/2024)

Public Reporting Burden for this collection of information is estimated to average .75 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB control number. This information is required by Section 9(a) of the U.S. Housing Act of 1937, as amended, and by 24 CFR Part 990 HUD regulations. HUD makes payments for the operation and maintenance of low-income housing projects to PHAs/projects. The Operating Fund determines the amount of operating fund grant to be paid to PHAs/projects. PHAs/projects provide information on the Project Expense Level (PEL), Utilities Expense Level (UEL), Other Formula Expenses (Add-ons) and Formula Income - the major Operating Fund components. HUD reviews the information to determine each PHA's/project's Formula Amount and the funds to be obligated for the period to each PHA/project based on the appropriation by Congress. HUD also uses the information as the basis for requesting annual appropriations from Congress. Responses to the collection of information are required to obtain a benefit. The information requested does not lend itself to confidentiality.

Section 1 - General Information

1. Name of Public Housing Agency:	2. Funding Period:	3. Type of Submission:
MIAMI DADE PUBLIC HOUSING AND COMMUNITY DEV	01/01/20 - 12/31/20	Resubmission

4. ACC Number:	5. Operating Fund Project Number:	6. Fiscal Year End:	7. ROFO Code (HUD Use Only):	8. UEI:
A-4252	F L 0 0 5 0 0 0 0 4 9	12/31 3/31 6/30 9/30	0414	T6FLYF8JPWK3

Line No.	Description	Water and Sewer (if combined)	Water (if reported separately)	Electricity	Gas	Coal	Steam	Total
	Rolling Base Incentive	Flat Rate Frozen EPC Non Frozen	Flat Rate Frozen EPC Non Frozen	Flat Rate Frozen EPC Non Frozen	Flat Rate Frozen EPC Non Frozen	Flat Rate Frozen EPC Non Frozen	Flat Rate Frozen EPC Non Frozen	

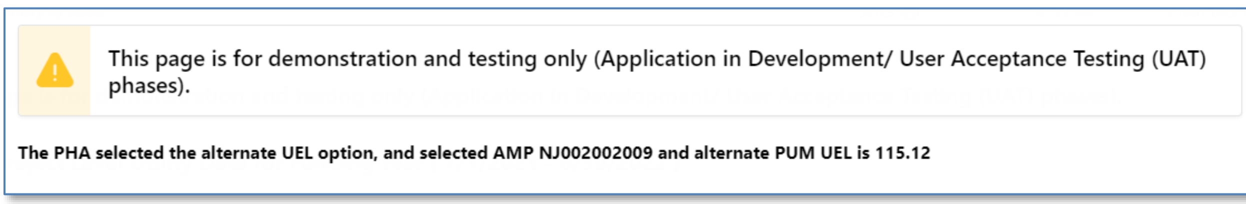
The system displays a pop-up window with a preview of form HUD-52722.

Note: Projects that have more than six (6) utilities have a red note highlighting that a maximum of six (6) utility categories are displayed on the Print 52722 Form, but the "Total" column value includes values for all utility categories. All additional categories must be viewed and reviewed in the Portal.

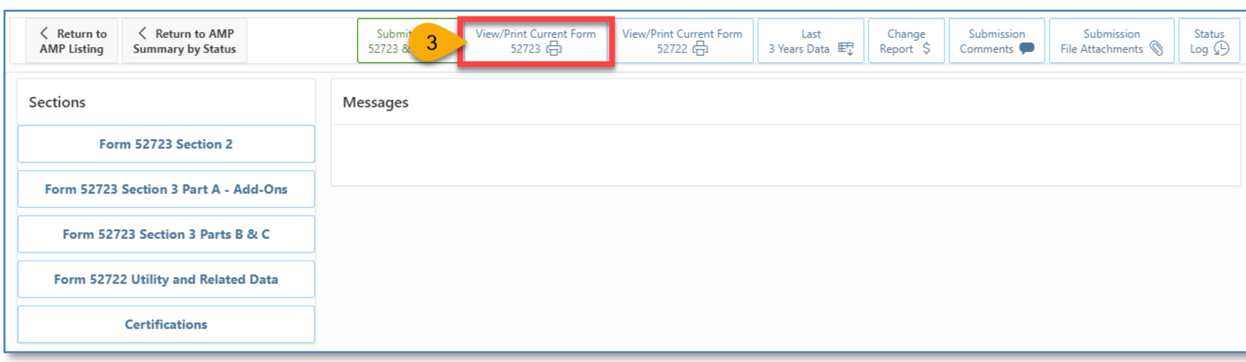
2. Click the "**Print Current View**" button on the form and follow your PC's prompts to print the form HUD-52722.

PHAs must ensure that the printed HUD-52722 Form ID matches the HUD-52722 Form ID in the Portal.

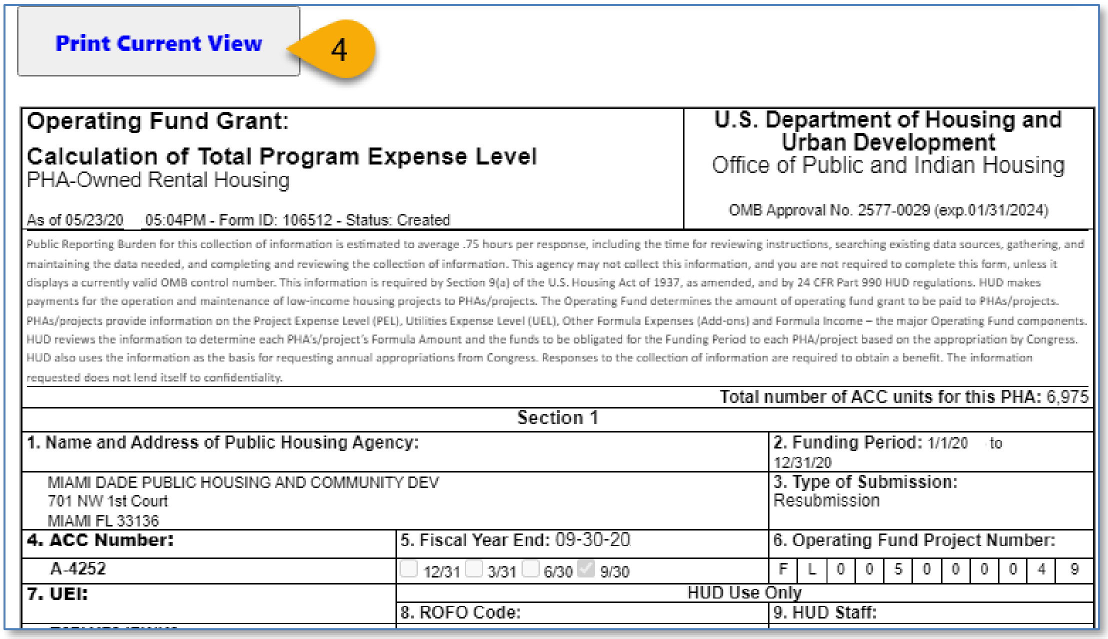
Note: There is no print preview available for form HUD-52722 for New Projects with Alternative UEL, as shown below.



To view and print form HUD-52723, follow these steps:



3. Click the "**View/Print Current Form 52723**" button to view the entire form HUD-52723 for the current submission. PHA users must review the entire form before submitting it for FO review.


Print Current View

4

Operating Fund Grant:
Calculation of Total Program Expense Level
PHA-Owned Rental Housing

As of 05/23/20 05:04PM - Form ID: 106512 - Status: Created

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

OMB Approval No. 2577-0029 (exp.01/31/2024)

Public Reporting Burden for this collection of information is estimated to average .75 hours per response, including the time for reviewing instructions, searching existing data sources, gathering, and maintaining the data needed, and completing and reviewing the collection of information. This agency may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB control number. This information is required by Section 9(a) of the U.S. Housing Act of 1937, as amended, and by 24 CFR Part 990 HUD regulations. HUD makes payments for the operation and maintenance of low-income housing projects to PHAs/projects. The Operating Fund determines the amount of operating fund grant to be paid to PHAs/projects. PHAs/projects provide information on the Project Expense Level (PEL), Utilities Expense Level (UEL), Other Formula Expenses (Add-ons) and Formula Income – the major Operating Fund components. HUD reviews the information to determine each PHA's/project's Formula Amount and the funds to be obligated for the Funding Period to each PHA/project based on the appropriation by Congress. HUD also uses the information as the basis for requesting annual appropriations from Congress. Responses to the collection of information are required to obtain a benefit. The information requested does not lend itself to confidentiality.

Total number of ACC units for this PHA: 6,975

Section 1

1. Name and Address of Public Housing Agency:
MIAMI DADE PUBLIC HOUSING AND COMMUNITY DEV
701 NW 1st Court
MIAMI FL 33136

2. Funding Period: 1/1/20 to 12/31/20

3. Type of Submission: Resubmission

4. ACC Number: A-4252

5. Fiscal Year End: 09-30-20
12/31 3/31 6/30 9/30

6. Operating Fund Project Number: F L 0 0 5 0 0 0 0 4 9

7. UEI:

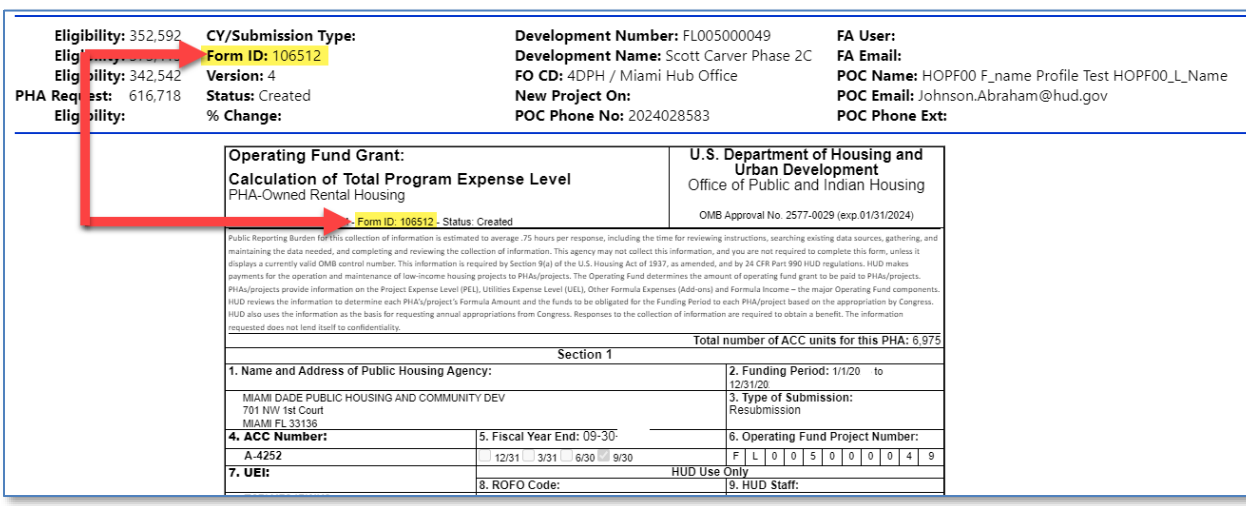
HUD Use Only

8. ROFO Code:

9. HUD Staff:

4. Click the "**Print Current View**" button on the form and follow your PC's prompts to print the form HUD-52723.

PHAs must ensure that the printed HUD-52723 Form ID matches the HUD-52723 Form ID in the Portal.


Eligibility: 352,592
Eligibility: 342,542
PHA Request: 616,718
Eligibility:

CY/Submission Type:
Form ID: 106512
Version: 4
Status: Created
% Change:

Development Number: FL005000049
Development Name: Scott Carver Phase 2C
FO CD: 4DPH / Miami Hub Office
New Project On:
POC Phone No: 2024028583

FA User:
FA Email:
POC Name: HOPF00 F_name Profile Test HOPF00_L_Name
POC Email: Johnson.Abraham@hud.gov
POC Phone Ext:

Operating Fund Grant:
Calculation of Total Program Expense Level
PHA-Owned Rental Housing
- Form ID: 106512 - Status: Created

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB Approval No. 2577-0029 (exp.01/31/2024)

Total number of ACC units for this PHA: 6,975

Section 1

1. Name and Address of Public Housing Agency:
MIAMI DADE PUBLIC HOUSING AND COMMUNITY DEV
701 NW 1st Court
MIAMI FL 33136

2. Funding Period: 1/1/20 to 12/31/20

3. Type of Submission: Resubmission

4. ACC Number: A-4252

5. Fiscal Year End: 09-30-

6. Operating Fund Project Number: F L 0 0 5 0 0 0 0 4 9

7. UEI:

HUD Use Only

8. ROFO Code:

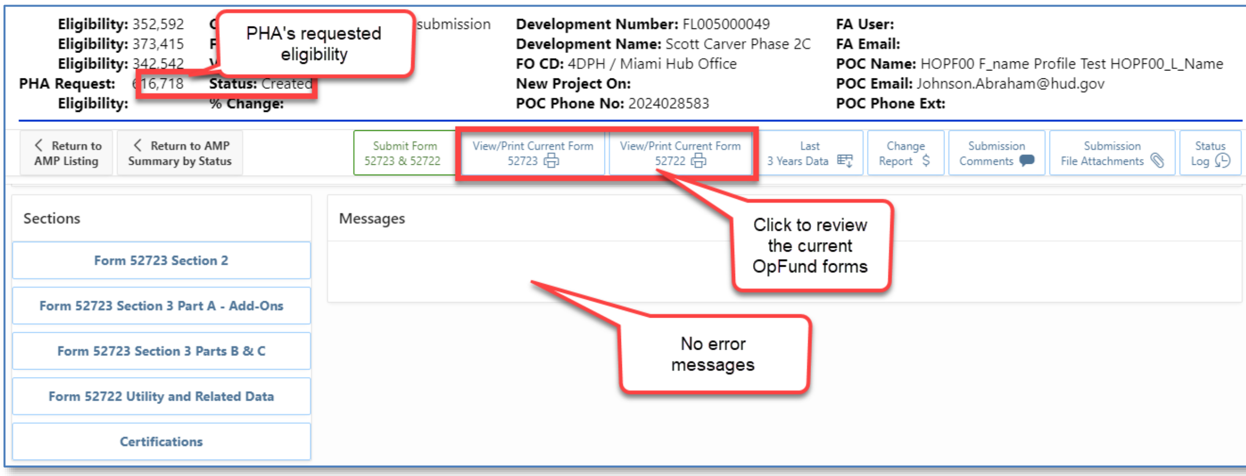
9. HUD Staff:

Submitting Forms HUD-52723 and HUD-52722

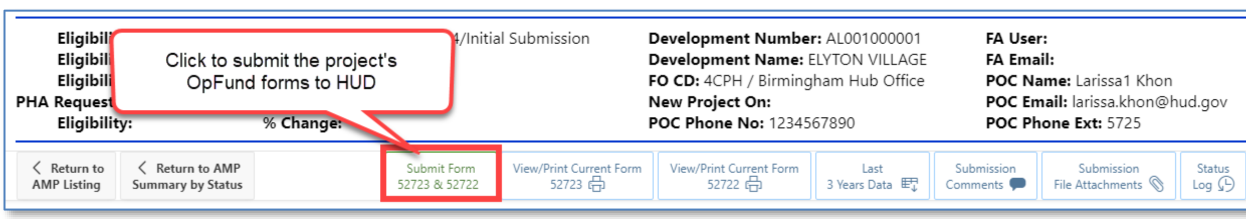
After reviewing and updating all sections of the OpFund forms and resolving any error messages, the PHA may proceed to submit the OpFund forms.

Note: Only users with the OPD role can submit OpFund forms.

Note: If the HUD-52723 & HUD-52722 submission meets certain criteria, then the Public Housing Portal automatically Accepts the submission. The Field Office review is not required.



Before submitting, review the development's information, review PHA requested value, check and resolve any error messages, and click the "**View/Print Current Form 52723**" and "**View/Print Current Form 52722**" buttons to review the forms in its entirety.



1. If satisfied with the review, click the "**Submit Form 52723 & 52722**" button.

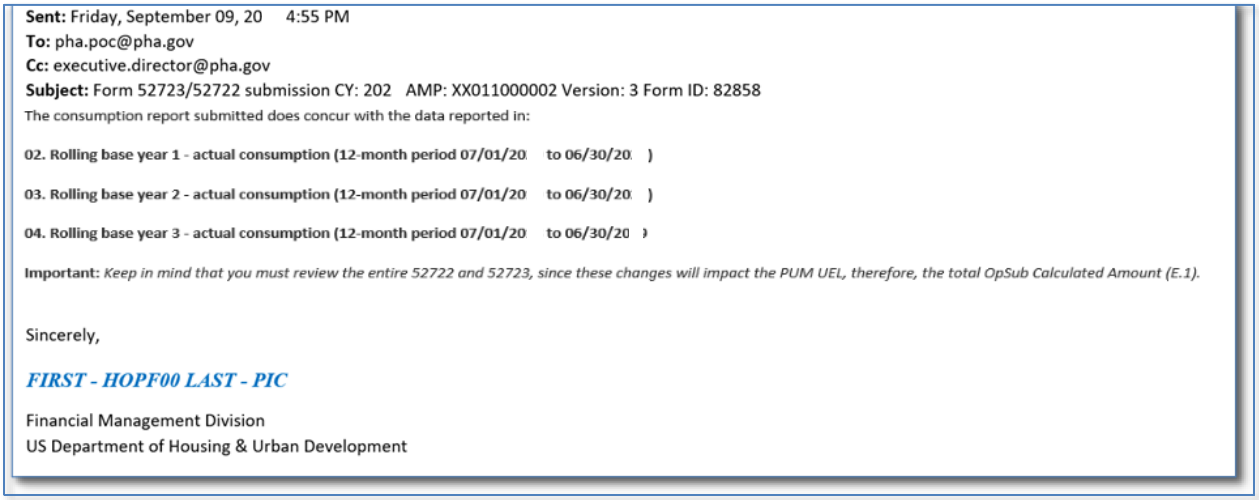
The status of the development changes from "**Created**" to "**Submitted**.

Note:

1. While Forms HUD-52723/52722 are in "Submitted" or in "In Review" statuses, PHAs cannot edit the data values, cannot add new comments nor edit/delete their existing comments. PHAs can upload, but not delete their file attachments.
2. While Forms HUD-52723/52722 are in "Approved," "Returned," or "FMD Review" statuses, PHAs cannot edit the data values, nor can they edit/delete/add comments or file attachments.

Follow-up Email During HUD Review Submission

HUD may request additional comments, supporting documents, or both during their review of OpFund forms. HUD may send their request for additional comments and documents by an email generated through the Portal. These emails are sent to the POC with a copy sent to the PHA's ED and the FO. An example of this email is provided below:



Sent: Friday, September 09, 20 4:55 PM
To: pha.poc@pha.gov
Cc: executive.director@pha.gov
Subject: Form 52723/52722 submission CY: 202 AMP: XX011000002 Version: 3 Form ID: 82858

The consumption report submitted does concur with the data reported in:

02. Rolling base year 1 - actual consumption (12-month period 07/01/20 to 06/30/20)

03. Rolling base year 2 - actual consumption (12-month period 07/01/20 to 06/30/20)

04. Rolling base year 3 - actual consumption (12-month period 07/01/20 to 06/30/20)

Important: *Keep in mind that you must review the entire 52722 and 52723, since these changes will impact the PUM UEL, therefore, the total OpSub Calculated Amount (E.1).*

Sincerely,

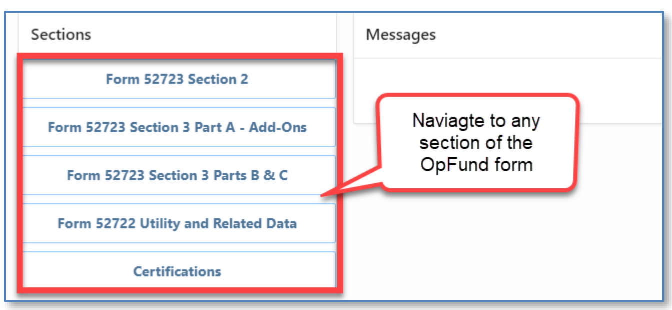
FIRST - HOPF00 LAST - PIC

Financial Management Division
US Department of Housing & Urban Development

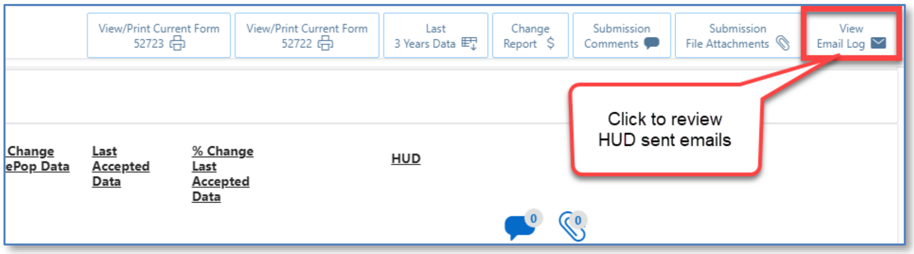
Viewing Email Log

The Portal keeps a log of the emails HUD sends to the PHA through the Portal. The email log is accessible through any section of the OpFund Form.

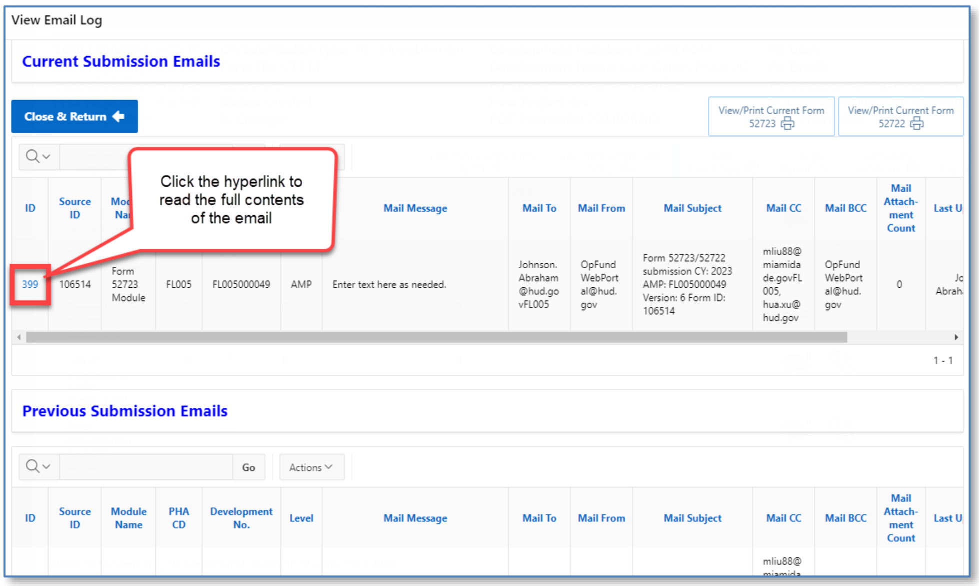
Note: HUD staff can email the PHA through the Public Housing Portal while the submission is in "Created", "Submitted", "In Review", and "FMD Review" statuses.



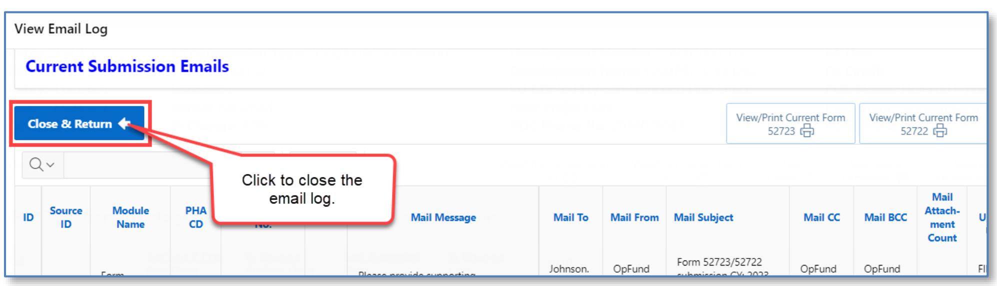
1. Navigate to any section of the OpFund form. Click the "**View Email Log**" button. The system opens the "View Email Log" which contains log of all emails for an AMP, both current submission emails, and any previous submission emails for the applicable funding year.



2. Click the number hyperlink in the "**ID**" column to open and read the full contents of the email.



3. Click the "**Close & Return**" button to close the email log.



Accepted Submissions

The Portal sends auto-generated email notifications to the POC and PHA's ED when the OpFund forms HUD-52723/52722 are Accepted.

HUD accepted the Operating Fund submission (HUD-52723/52722) for the project listed below. The project's eligibility is subject to change due to proration and future corrections to the forms.

Form ID: 338612

Project number/AMP: AK001000213 Version: 2

Difference between PHA requested and HUD accepted eligibility = $144.00

You can find accepted forms in the Public Housing Portal by following the navigation below:

PHA Reports & Submissions → HUD-52723/52722 Submission → Create/Edit/View/Submit Submission

If you have any additional questions, please contact your local HUD Field office.

Sincerely,

Office of Public and Indian Housing

U.S. Department of Housing and Urban Development

Returned Submissions

FO or FMD may return the PHA's OpFund forms if the submission contains errors, omissions, missing or incorrect documentation, or for any other reason. The Portal sends auto-generated email notifications to the POC and the PHA's ED when FO/FMD returns their OpFund forms HUD-52723/52722.

HUD returned the Operating Fund submission (Form HUD 52723/52722) for the project number referenced above. The reason for return is provided below. The submission status and relevant comments can be viewed by following the navigation below:

PHA Reports & Submissions → HUD-52723/52722 Submission → Create/Edit/View/Submit Submission

Return comment:

Return comments ....

Please create a new Revision Submission and resubmit after making the requisite corrections for further processing. If you have any follow-up questions related to this submission, please contact your local Field Office staff.

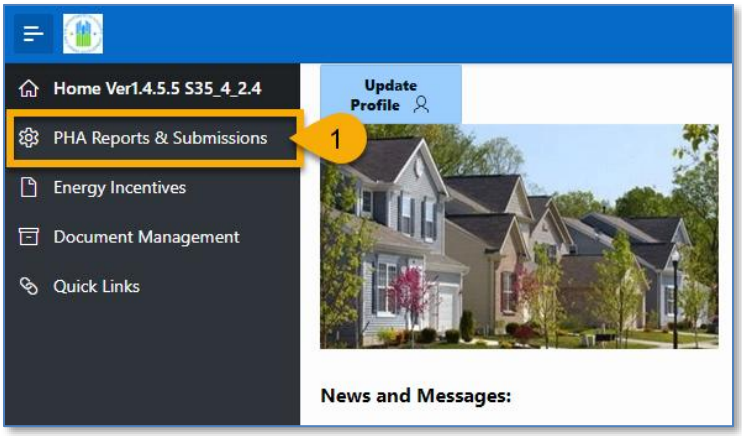
Sincerely,

Office of Public and Indian Housing

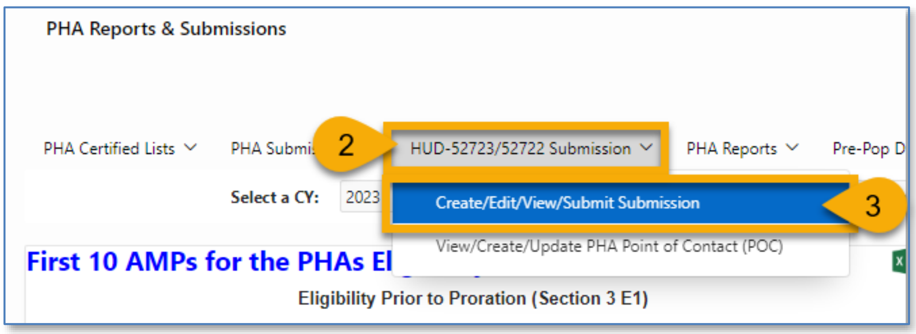
U.S. Department of Housing and Urban Development

Reviewing Returned Submissions

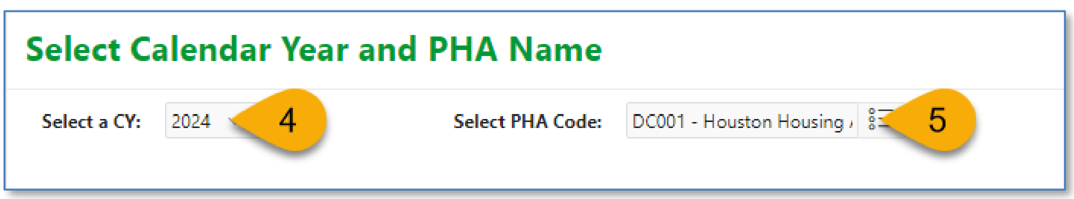
Follow the steps below to fix any returned submissions:



1. On the Portal home page, click "**PHA Reports & Submissions**" in the left side navigation menu.

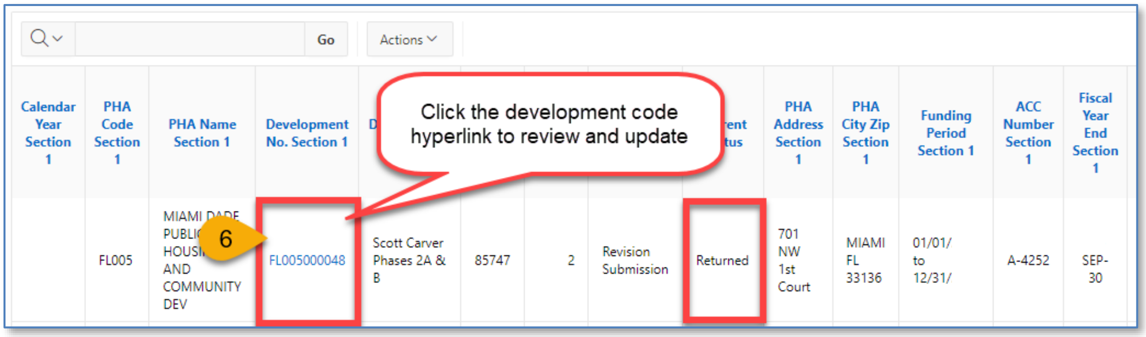


2. Click the "**HUD-52723/52722 Submission**" drop-down menu.
3. Select "**Create/Edit/View/Submit Submission.**"

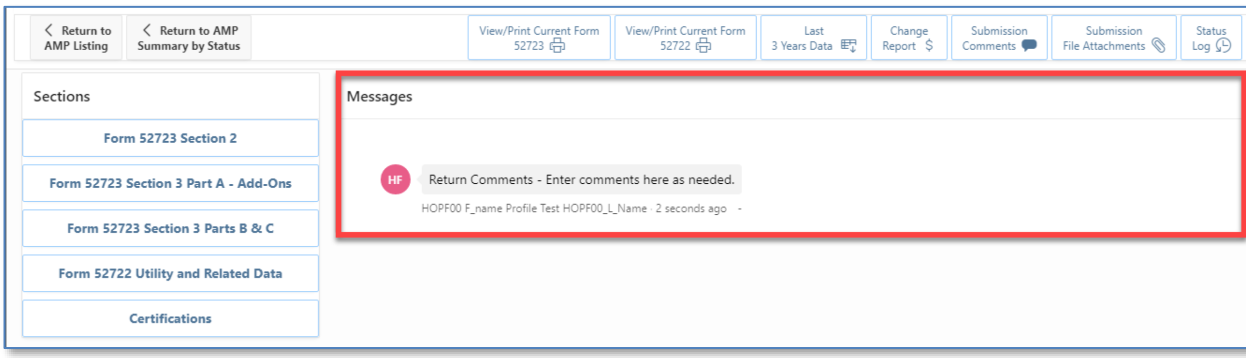


4. **Select a CY**: Select the appropriate calendar year, which is the funding year for the OpFund grants.
5. **Select PHA Code:** Select the PHA Code.

Find the latest version of the forms for your development in the "**Returned**" status.



6. Click the development number hyperlink within the "**Development No. Section 1**" column to open and review the return comments.



The system displays the Portal development page with the return comments in the "Messages" section as shown above. The FO or FMD response and the reason to why the submission was returned will be displayed in the "Messages" section. The PHA must create a new Resubmission/QC Submission/Revision Submission based on the submission type deadlines, update any errors and omissions, and resubmit the forms to HUD for review.

Reverted Submission

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.

The FMD has reverted the Operating Fund submission (Form HUD-52723/52722) for the project number referenced in the subject line back to "In Review." The reason why the submission was reverted for further FO review is provided below. The submission status and relevant comments can be viewed by following the navigation below:

PHA Reports & Submissions → HUD-52723/52722 Submission → Create/Edit/View/Submit Submission

FMD comment:

Reverted to FO staff

Please review and take all necessary actions, then resubmit. If you have any follow-up questions related to this submission, please contact the FMD staff assigned to this submission.

Sincerely,

Office of Public and Indian Housing

U.S. Department of Housing and Urban Development

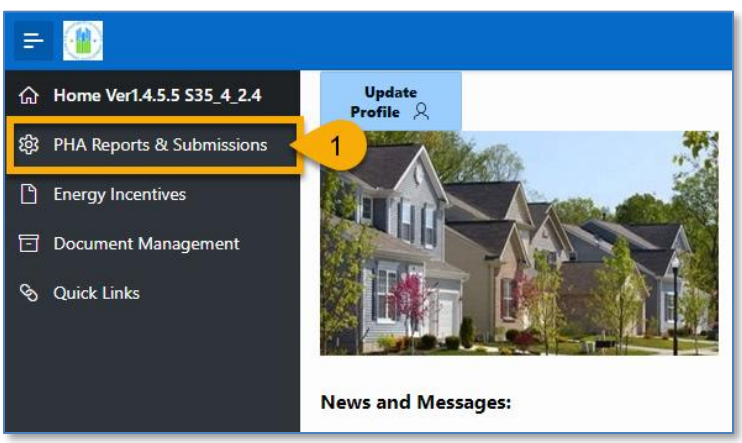
Creating a Resubmission

If a PHA's Initial Submission was accepted or returned, then the PHA can create a Resubmission of the Initial Submission. The PHA must upload all new applicable documents and provide corresponding comments.

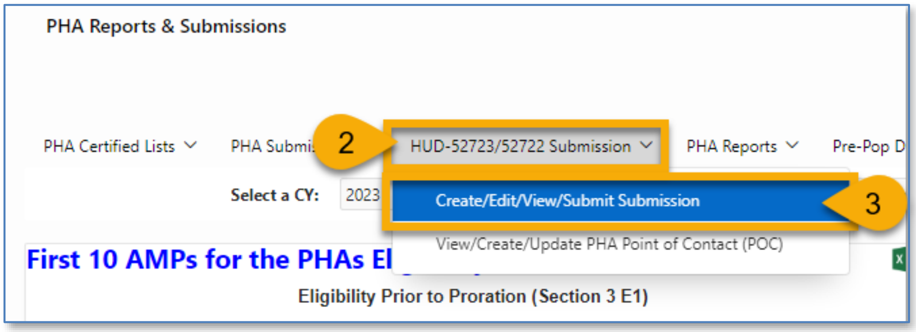
Note:

- If a submission was previously accepted, and the PHA wishes to make changes and resubmit, then the resubmission will carry forward any previously accepted changes to pre-populated data.
- If a submission was previously returned, then the PHA must make changes and resubmit. The resubmission will NOT carry forward any previously accepted pre-populated data change requests; it will carry forward the original pre-populated values.

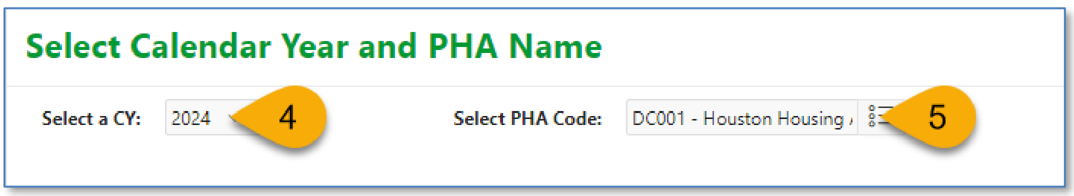
Follow the steps below to create a Resubmission:



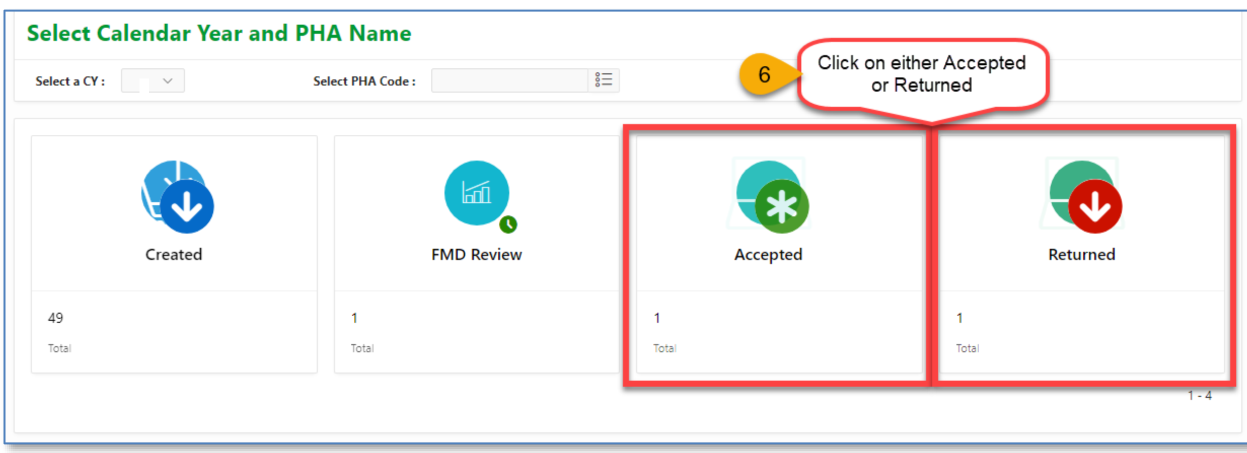
1. On the Portal home page, click "**PHA Reports & Submissions**" in the left side navigation menu.



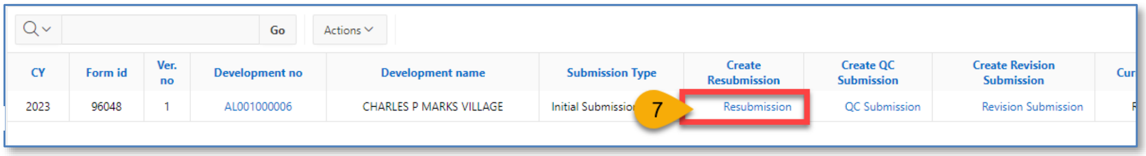
2. Click the "**HUD-52723/52722 Submission**" drop-down menu.
3. Select "**Create/Edit/View/Submit Submission.**"



4. **Select a CY**: Select the appropriate calendar year, which is the funding year for the OpFund grants.
5. **Select PHA Code:** Select the PHA Code.

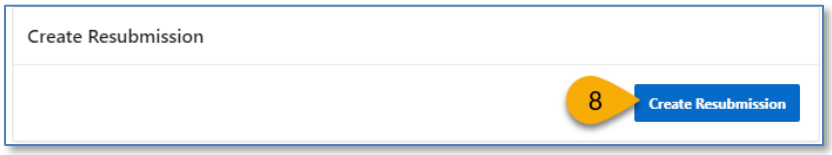


6. Click the "**Accepted**" or "**Returned**" status dashboard icons to view the list of submissions in that status and then create a Resubmission.



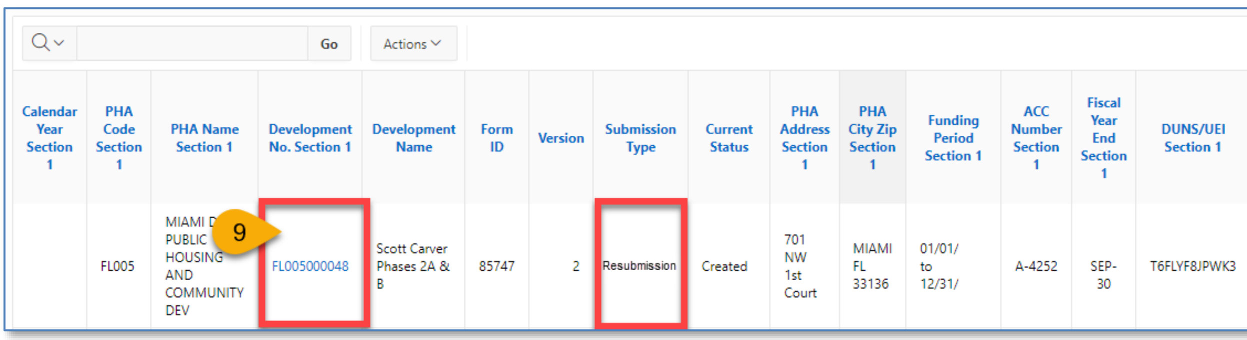
Find the “**Development No.”** you would like to create a Resubmission for.

7. Click the “**Resubmission**” hyperlink for selected development.



8. Click the “**Create Resubmission**” button.

Find the latest version of the forms for your development in the “**Created**” status.



9. Click the development number hyperlink within the “**Development No. Section 1**” column to open the Resubmission development page.

Follow the steps in the “Reviewing the Forms HUD-52723 and HUD-52722” section to review and complete the resubmission forms.

Quality Control of the Forms HUD-52723 and HUD-52722

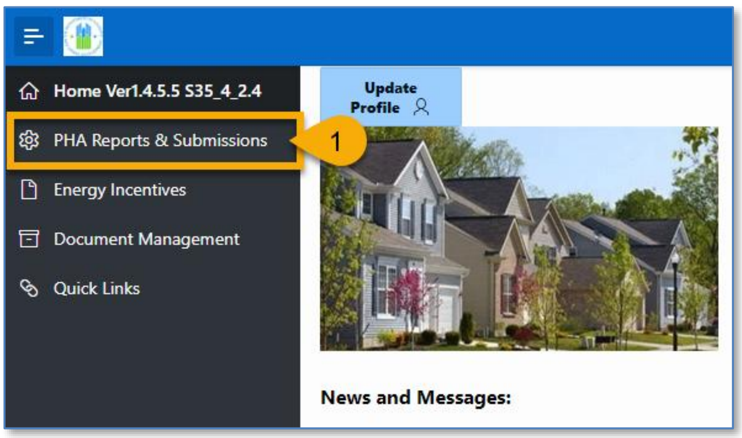
Annually, HUD conducts Quality Control (QC) reviews of the Form HUD-52723/52722 submissions. HUD’s QC reviews check that the submitted data accepted by HUD falls within an acceptable range based on the historically available national data, confirm that the request for funding meets HUD regulations, and ensure the PHAs' eligibility for the requested funding. PHAs must address all QC items, which could entail correcting data value(s) on the forms or submitting supporting documentation to justify the data. HUD will update and resolve QC items not addressed by the PHA. HUD’s updates to the forms could change the PHA’s OpFund eligibility.

Creating a Quality Control Submission

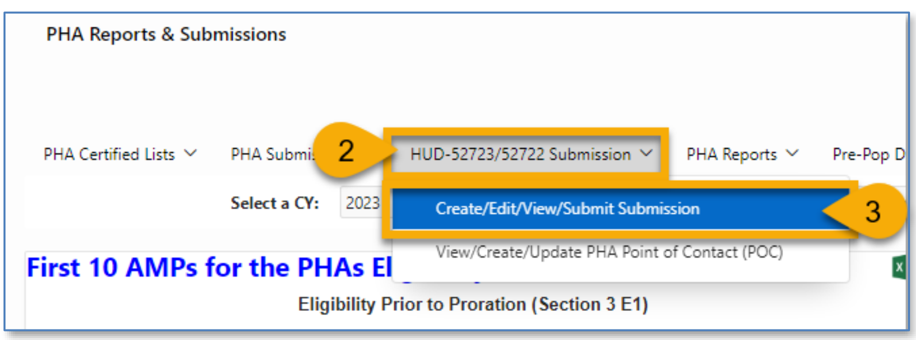
If a PHA is advised that there is a pending Form HUD-52723/52722 Quality Control (QC) Submission for a certain Form ID and Development Number, the PHA must create a Quality Control submission ("QC Submission"), review and address QC items/findings published on the "View QC Items" screen, make necessary adjustments, add comments, upload supporting documents/file attachments to remedy QC concerns, and submit the HUD-52723/52722 forms within the allocated time period for FO review. The QC Submission will be created based off of the last HUD-accepted submission. All data values accepted in the last HUD-accepted submission will be carried over to a QC Submission as pre-populated values.

Watch the training video "HUD-52723/52722 QC & Revision Submission (PHA)" to learn how to create a Quality Control Submission.

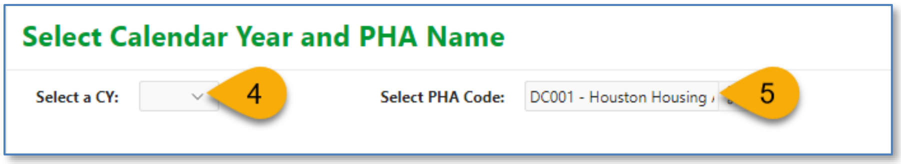
Follow the steps below to find the HUD-52723/52722 Submission Module.



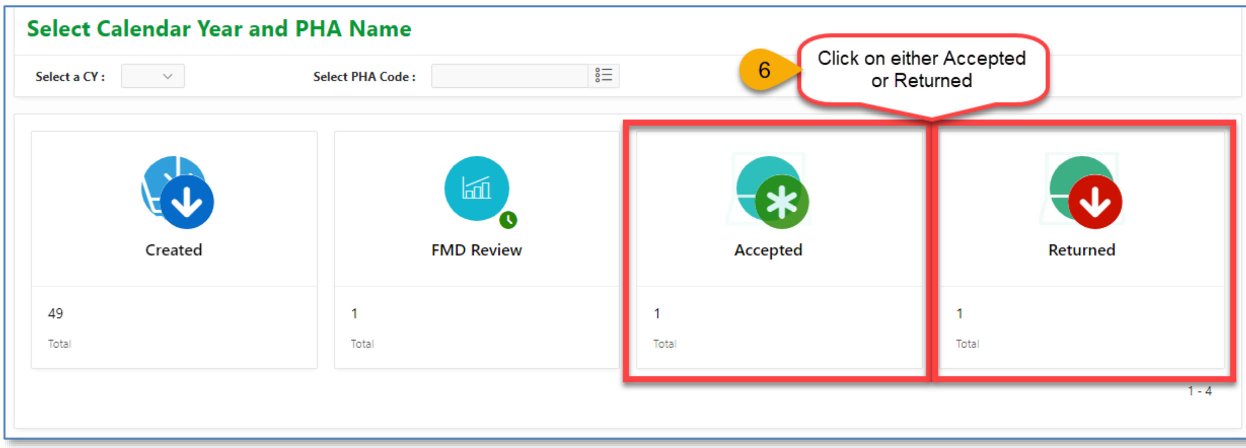
1. On the Portal home page, click "**PHA Reports & Submissions**" in the left side navigation menu.



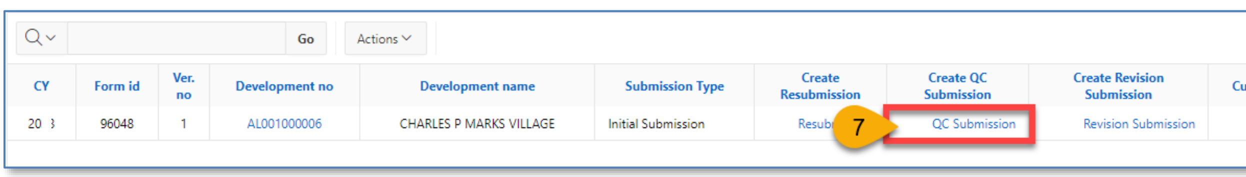
2. Click the "**HUD-52723/52722 Submission**" drop-down menu.
3. Select "**Create/Edit/View/Submit Submission.**"



4. **Select a CY**: Select the appropriate calendar year, which is the funding year for the OpFund grants.
5. **Select PHA Code:** Select the PHA Code.

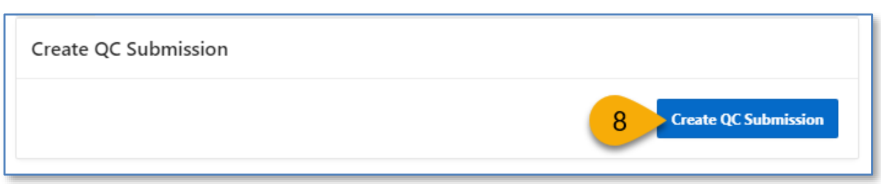


6. Click the "**Accepted**" or "**Returned**" status dashboard icons to view the list of submissions in that status and to create a QC Submission.



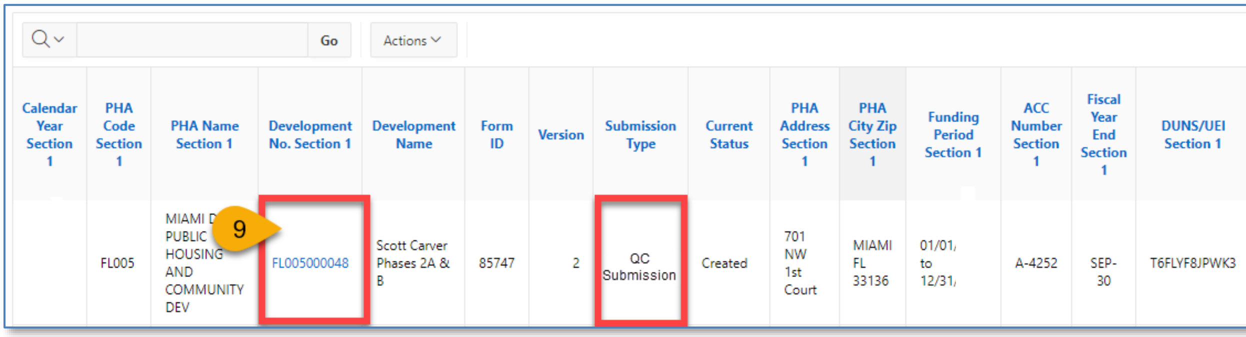
Find the "**Development No.**" you must create a QC Submission for.

7. Click the "**QC Submission**" hyperlink.

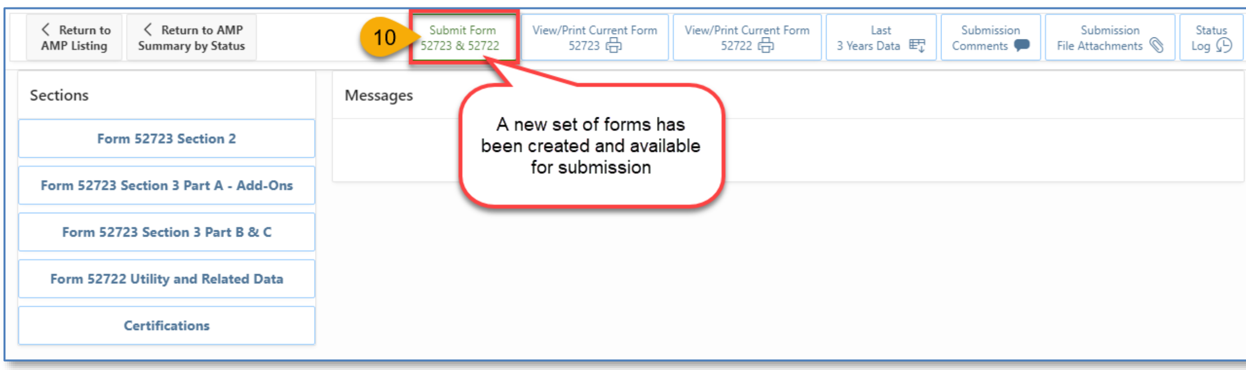


8. Click the "**Create QC Submission**" button.

Scroll down and look for the Submission Type “**QC Submission**.” Find the latest version of the forms for the selected development in the “**Created**” status.



9. Click the development number hyperlink within the “**Development No. Section 1**” column to open the QC Submission development page.

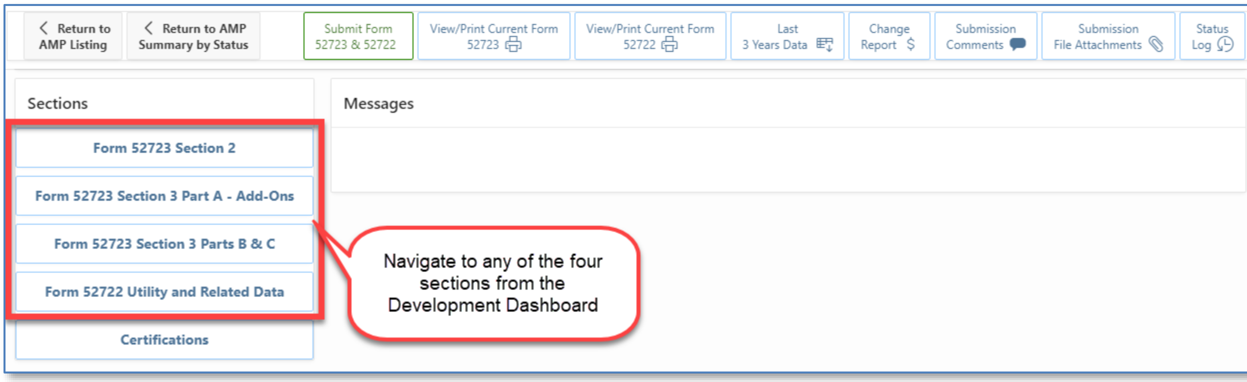


PHA must update newly created QC Submission, review and address QC items/findings published on the "View QC Items" screen, make necessary adjustments, add comments, upload supporting documents/file attachments to address QC concerns. Review the “View QC Items” section for further guidance.

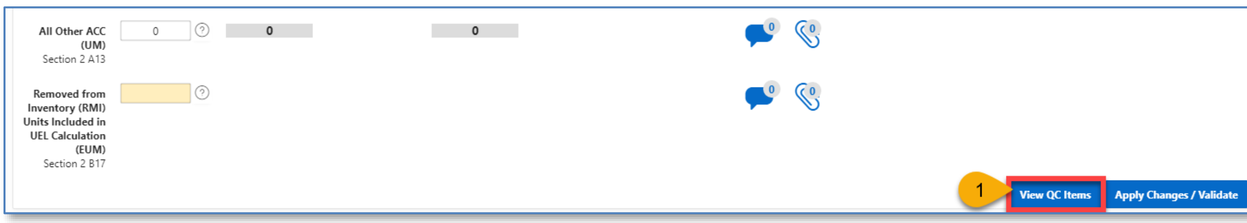
10. Click the “**Submit Form 52723 & 52722**” button to submit the QC Submission forms to HUD for review.

View QC Items

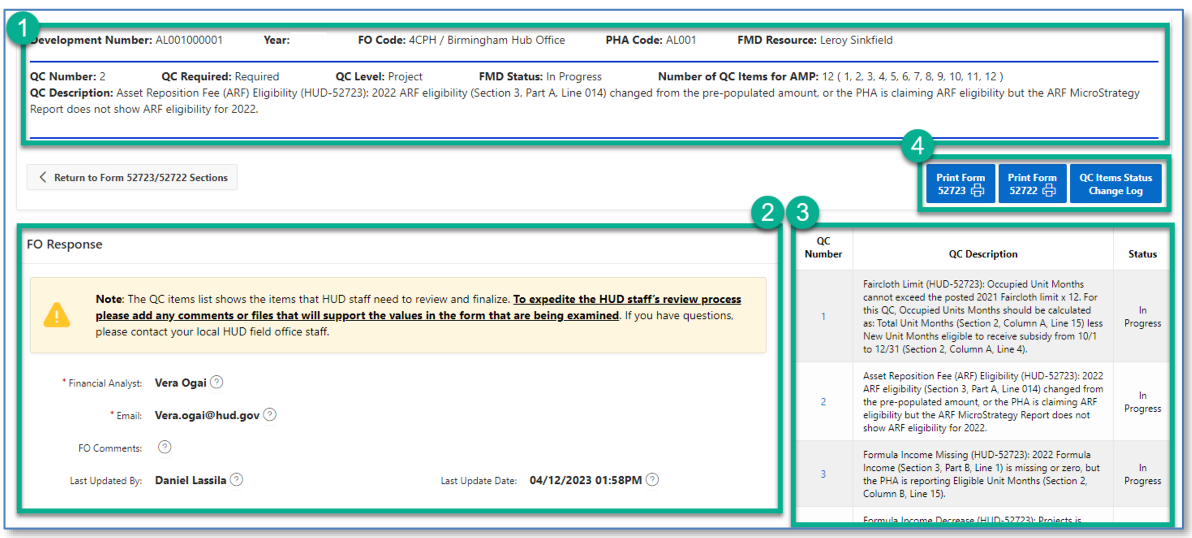
The PHA can only view Quality Control (QC) Items during the QC Submission, the PHA cannot edit data on the “**View QC Items**” screen. The PHA must upload all applicable documents and provide comments on the QC Submission. Follow the steps below to locate the QC items.



1. Navigate to any of the four (4) sections to review QC items.



2. Scroll down the webpage and click the "**View QC Items**" button.



Area 1: Displays development number, development's QC Item Number, Level, total number of QC items for this development, description of the QC item, and other pertinent QC data.

- **QC Number**: The QC code that identifies the categorization of the QC item.
- **QC Required**: Indicates if the QC item requires a resolution.

- **QC Level**: Identifies if a QC item is at the PHA level or Project (AMP or development) level. "PHA" indicates that QC item requires correction from all PHA's projects, and "Project" indicates that QC item requires correction from a single Project.
- **QC Item Status**: The current status if the selected QC item.
- **Number of QC Items of AMP**: Provides the total number of QC items for the development along with each specific QC Number.
- **QC Description**: Detailed explanation of the QC item that needs to be addressed by the PHA.

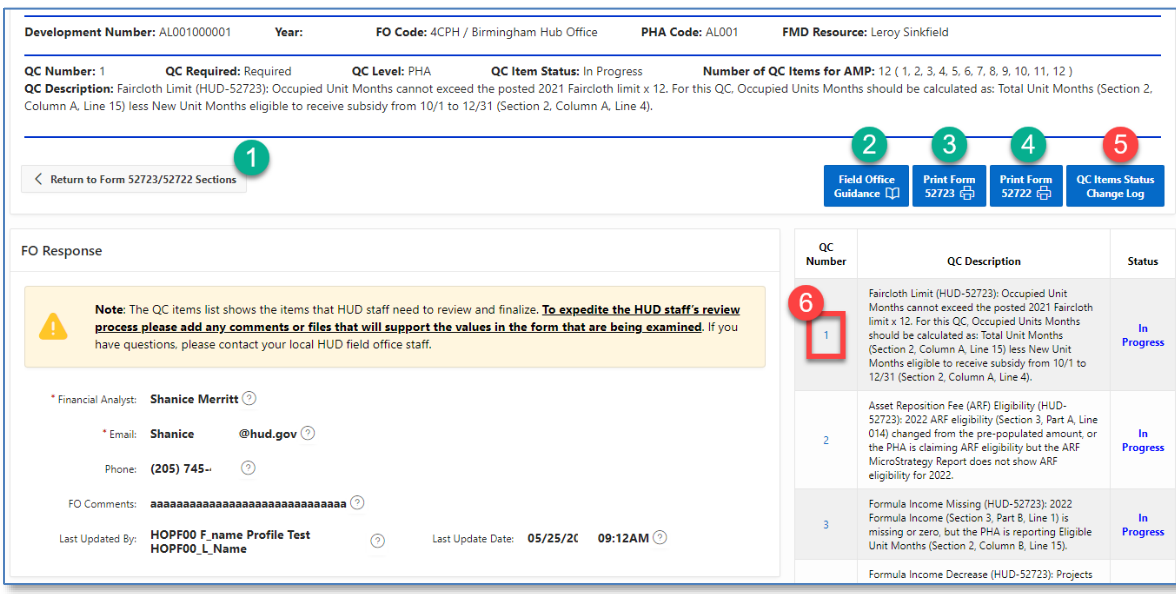
Area 2: Displays the FO Response with contact information and comments.

Note: Areas 1, 2 and "QC Items Status Change Log" change based on selected QC Item under Area 3 "QC Number" column.

Area 3: Displays the number for each QC item, its description, and the QC item review status (Submitted, In Progress, or Closed). Only FO user can update the status of the QC items.

Note: Area 3 is empty if there is only 1 QC Item for the QC Submission.

Area 4: Click these buttons to print Form HUD-52723 and Form HUD-52722 or to review the QC Item Status Change Log.



Button 1: "**Return to Form 52723/52722 Sections**" button takes the user back to the development Sections page.

Button 2: Click the "**Field Office Guidance"** button to view the Field Office Guidance for Quality Change items.

Button 3: Click the "**Print Form 52723"** button to view and/or print the development's current form HUD-52723. This print view updates each time the user clicks the "**Apply Changes / Validate**" button to save changes in each section.

Button 4: Click the "**Print Form 52722"** button to view and/or print the development's current form HUD-52722. This print view updates each time the user clicks the "**Apply Changes / Validate**" button to save changes in the utility section.

Button 5: The "**QC Items Status Change Log"** button opens a QC items status change log with the status change history and the current status of a QC item. The log also tracks the last update date and the FO username making this update.

Current Submission Status

Module ID	Calendar Year	Module Ref. No.	Development No.	User Name	Update Date /Time	Old Status	New Status	FO Submission Comments	Last Update User	Last Update Date
	20:	1	AL001000006	Abraham, Johnson1	04/12/... 09:45AM	In Progress	Submitted	Enter comments here as needed.	Abraham, Johnson1	04/12/... 09:45AM

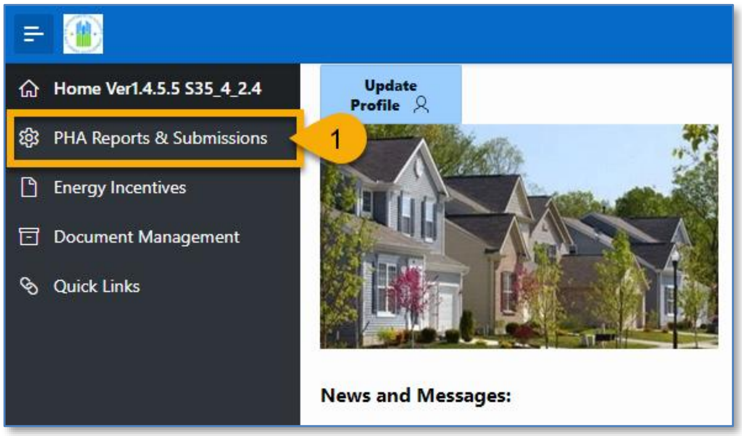
1 - 1

Button/Link 6: The QC Number link displays the information about a particular QC Item as well as the FO Response details.

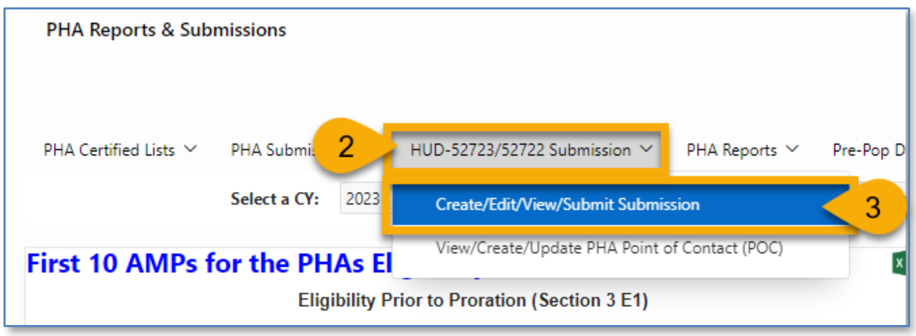
Creating a Revision Submission

The PHA may request a revision to the last HUD-accepted submission for reasons described in the applicable OpFund Processing Notice. The PHA must upload all new applicable documents, provide comments, and select appropriate revision categories based on the section and line item they are revising. The latest HUD-accepted submission replaces the pre-populated data with the latest HUD-accepted data. Follow the steps below to find the HUD-52723/52722 Submission Module.

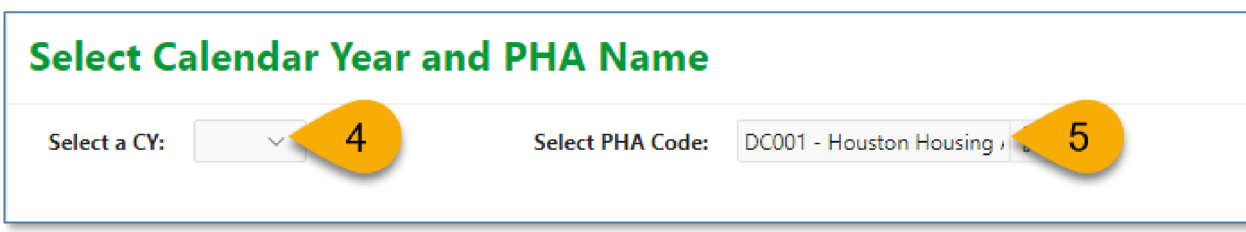
Watch the training video "HUD-52723/52722 QC & Revision Submission (PHA)" to learn how to create a Revision Submission.



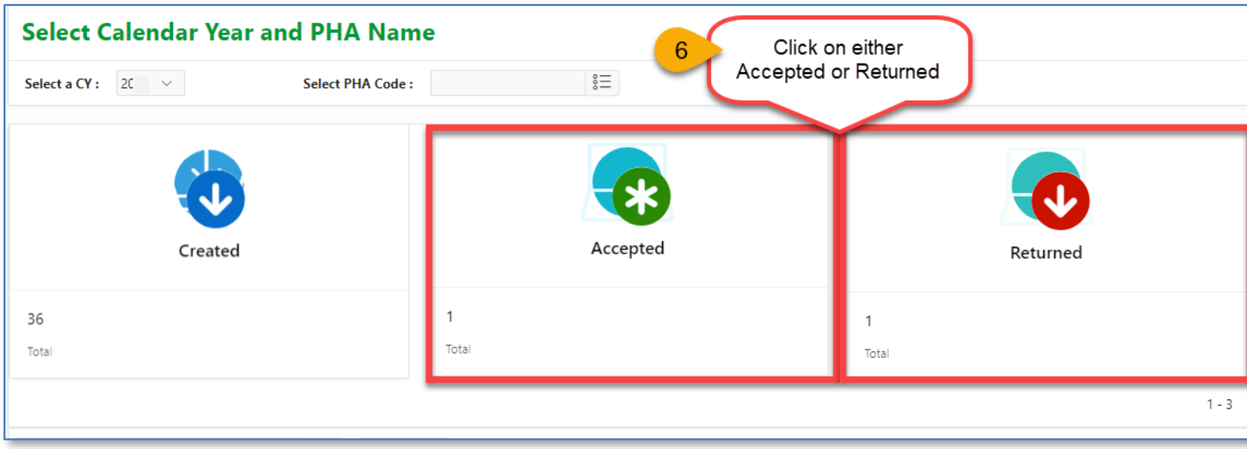
1. On the Portal home page, click "**PHA Reports & Submissions**" in the left side navigation menu.



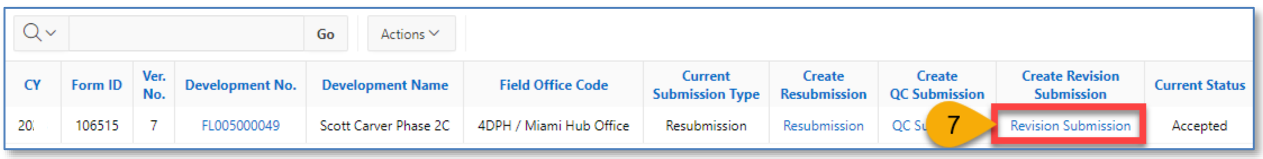
2. Click the "**HUD-52723/52722 Submission**" drop-down menu.
3. Select "**Create/Edit/View/Submit Submission.**"



4. **Select a CY**: Select the appropriate calendar year.
5. **Select PHA Code:** Select the PHA Code.

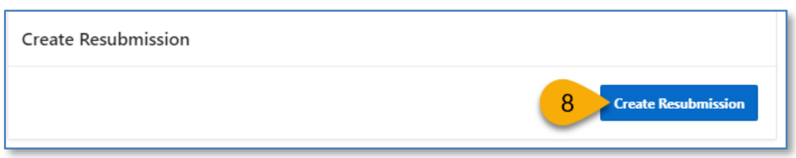


6. **Click** the "**Accepted**" or "**Returned**" status dashboard icons to view the list of submissions in that status and create a Revision Submission.



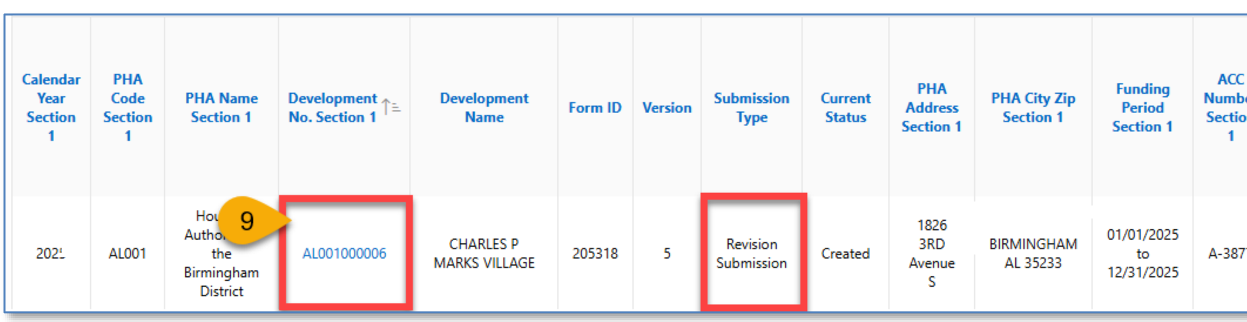
Find the "**Development No.**" you would like to create a Revision Submission for.

7. Click the "**Revision Submission**" hyperlink.

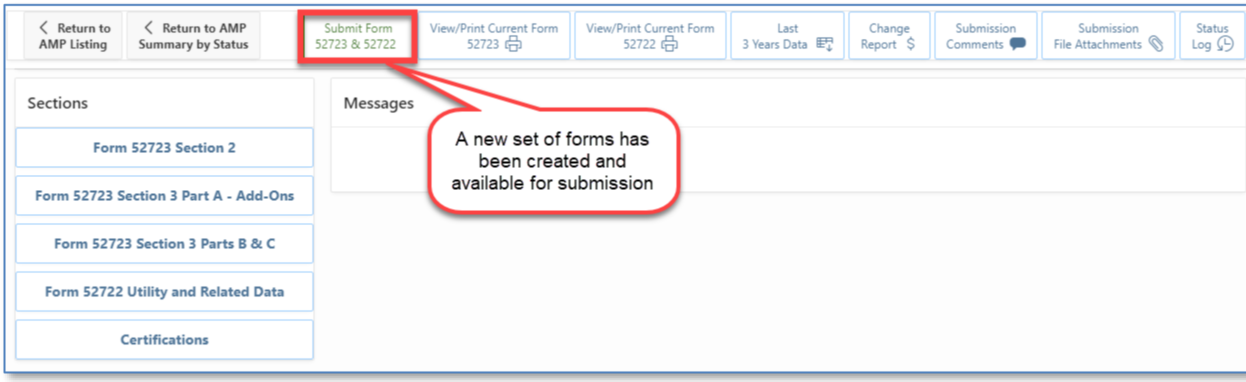


8. Click the "**Create Revision Submission**" button.

Scroll down and look for the Submission Type "**Revision Submission**." Find the latest version of the forms for the selected development in the "**Created**" status.



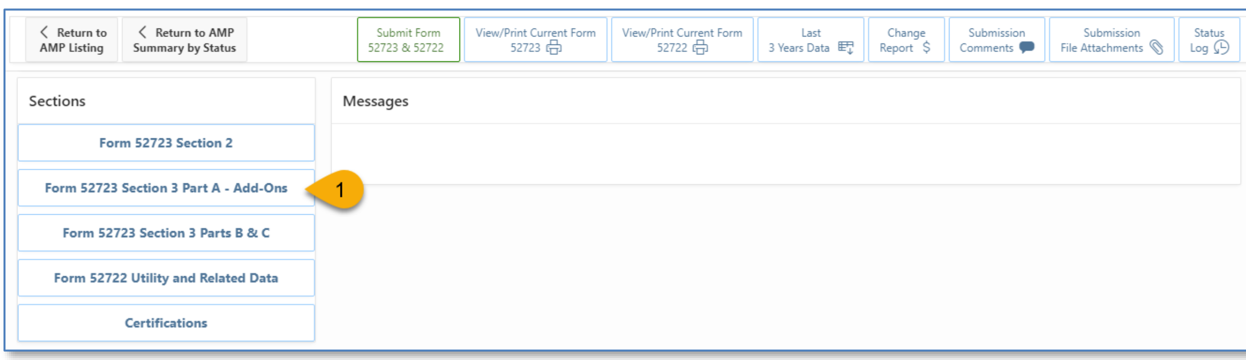
9. Click the development number hyperlink within the "**Development No. Section 1**" column to open the Revision Submission development page.



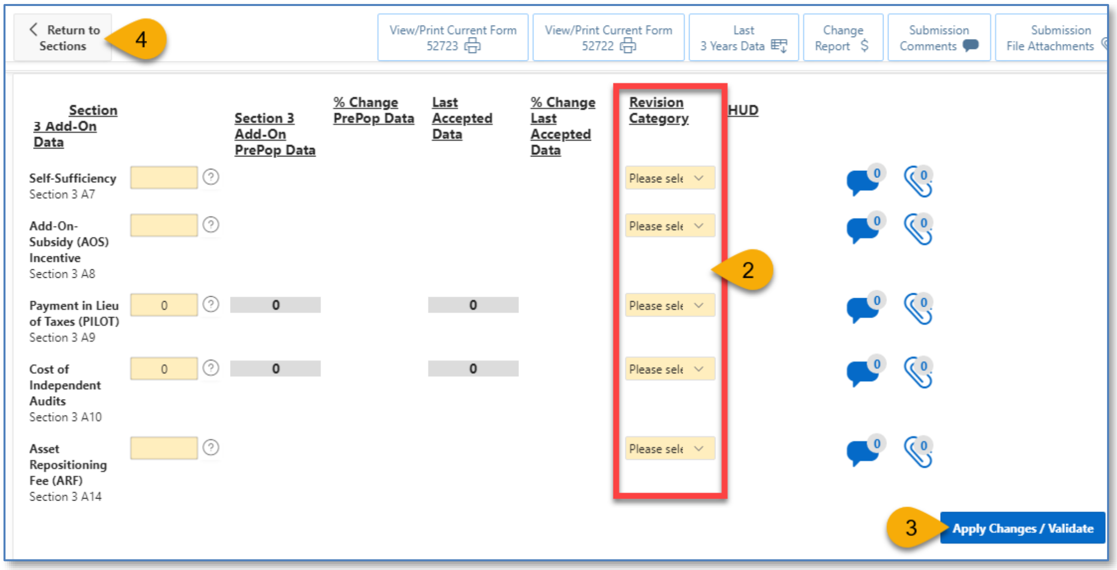
PHA must update newly created Revision Submission, review, provide supporting comments and documentation and then submit the forms HUD-52723/52722 for HUD review by clicking on the "**Submit Form 52723 & 52722**" button on the development page.

Completing Form HUD-52723 Section 3 Part A – Add-Ons - Revision Submissions

Follow the steps below to select a Revision Category in the "**Form 52723 Section 3 Part A – Add-Ons**" section:



1. Click the "**Form 52723 Section 3 Part A – Add-Ons**" button.



Update value(s) for line item(s) that should be revised. For each revised line item, select the appropriate "**Revision Category.**" Review the applicable OpFund Processing Notices for the details on Revision Categories.

Note: Any changed dollar line-item amount will require supporting comments and documentation.

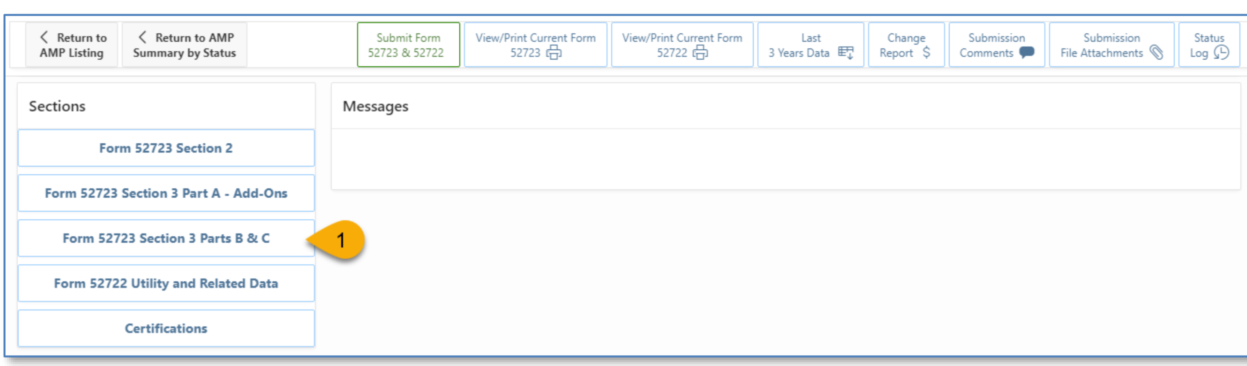
2. Choose the "Revision Category" to support the value change.
3. Click the "**Apply Changes / Validate**" button.

To add comments or upload/delete documents refer to "Creating Comments and Uploading Documents" section.

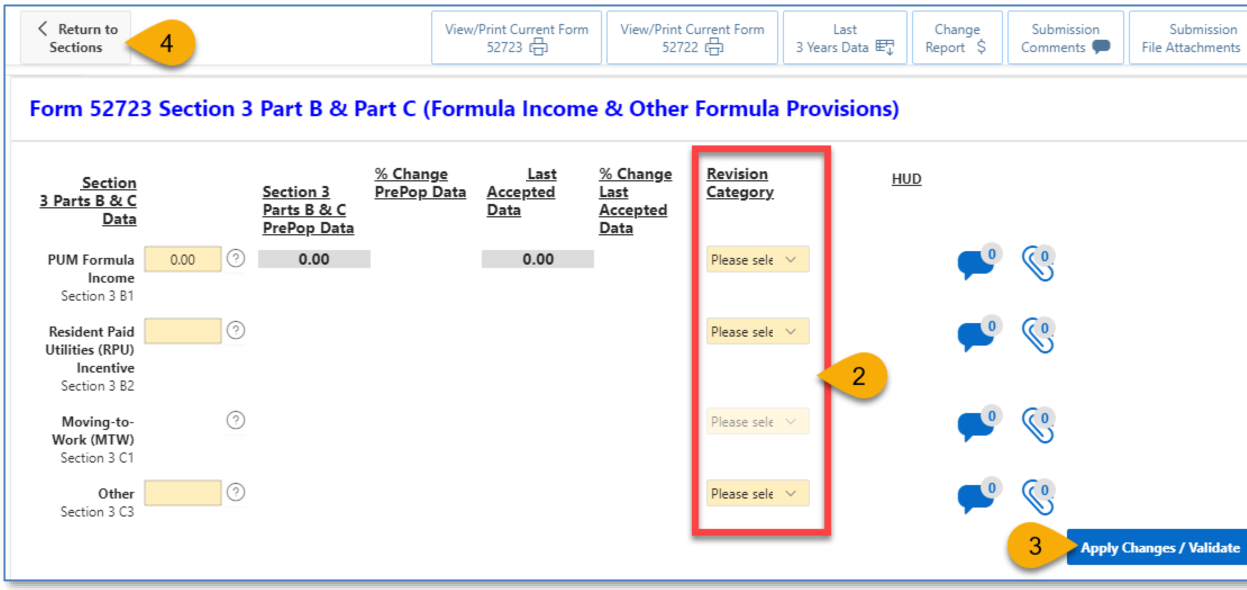
4. Click the "**Return to Sections**" button to return to the development page.

Completing Form HUD-52723 Section 3 Parts B & C - Revision Submissions

Follow the steps below to select a Revision Category in the "**Form 52723 Section 3 Parts B & C**" section:



1. Click the “**Form 52723 Section 3 Parts B & C**” button.



Update value(s) for line item(s) that should be revised. For each revised line item, select the appropriate “**Revision Category.**”

Note: Any changed dollar line-item amount will require supporting comments and documents.

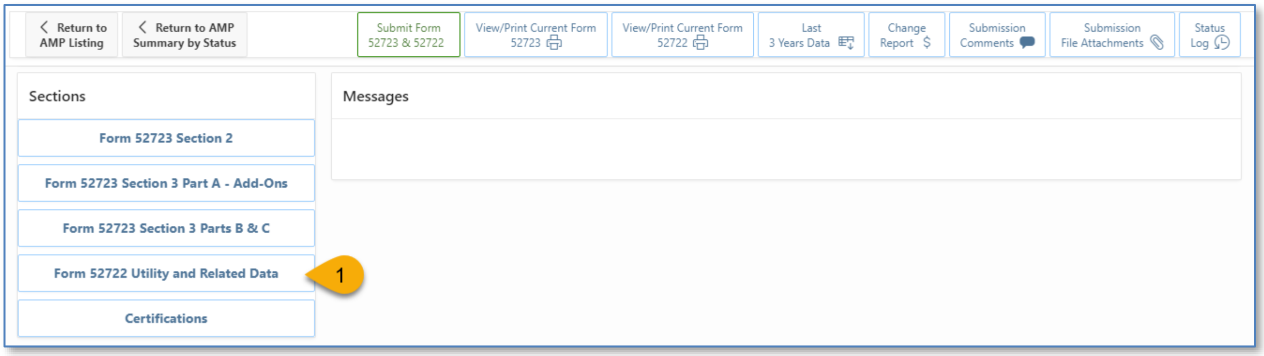
2. Choose the “**Revision Category**” to support the value change.
3. Click the “**Apply Changes / Validate**” button.

To add comments or upload/delete documents refer to “Creating Comments and Uploading Documents” section.

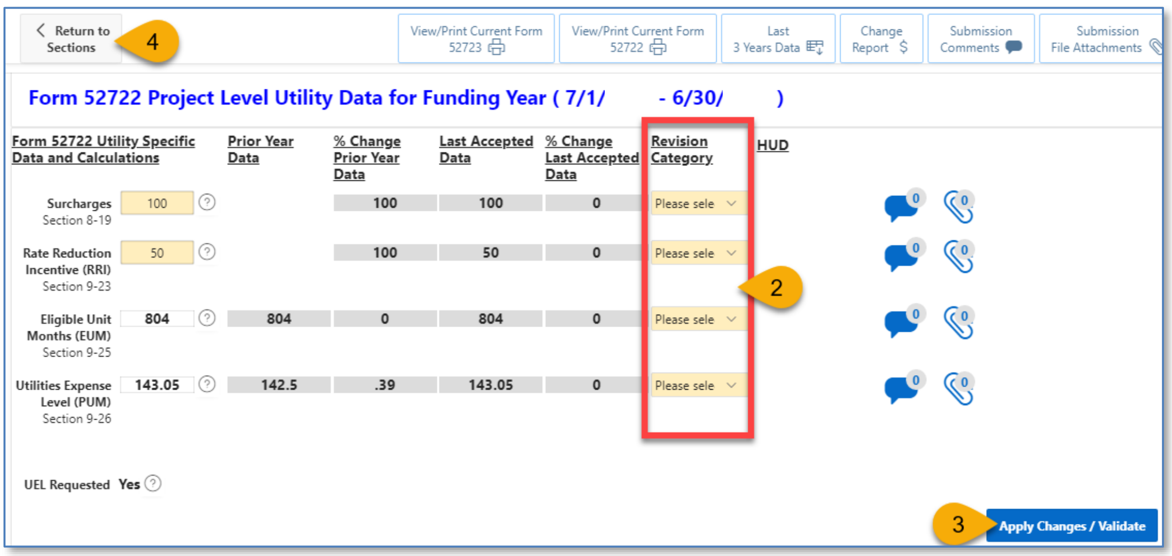
4. Click the “**Return to Sections**” button to return to the development page.

Completing Form HUD-52722 Utility and Related Data - Revision Submissions

Follow the steps below to select a Revision Category in the “**Form 52722 Utility and Related Data**” section:



1. Click the "**Form 52722 Utility and Related Data**" button.



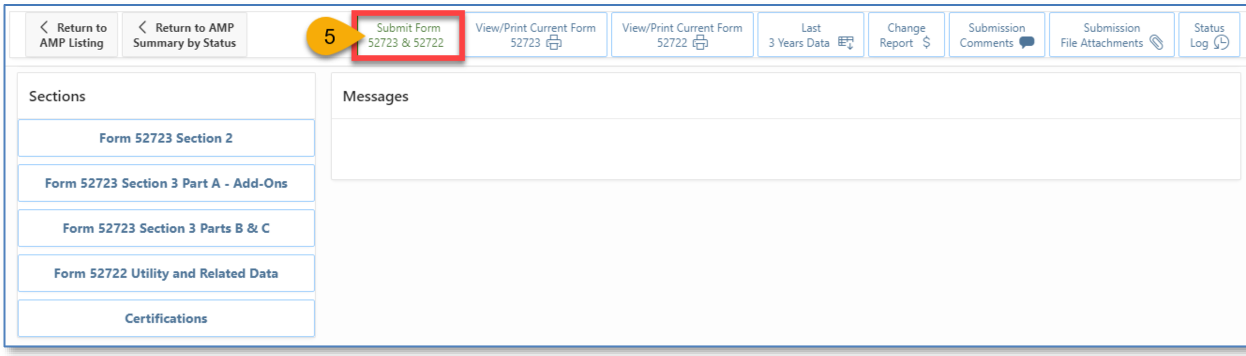
Update value(s) for line item(s) that should be revised. For each revised line item, select the appropriate "**Revision Category.**"

Note: Any changed dollar line-item amount will require supporting comments and documents.

2. Choose the "**Revision Category**" to support the value change.
3. Click the "**Apply Changes / Validate**" button.

To add comments or upload/delete documents refer to "Creating Comments and Uploading Documents" section.

4. Click the "**Return to Sections**" button to return to the development page.

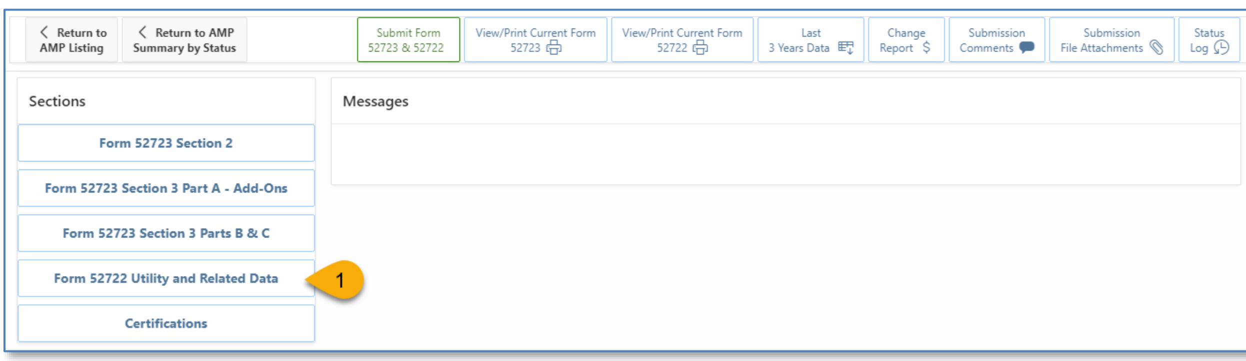


5. Click “**Submit Form 52723 & 52722**” button to submit the Revision Submission forms.

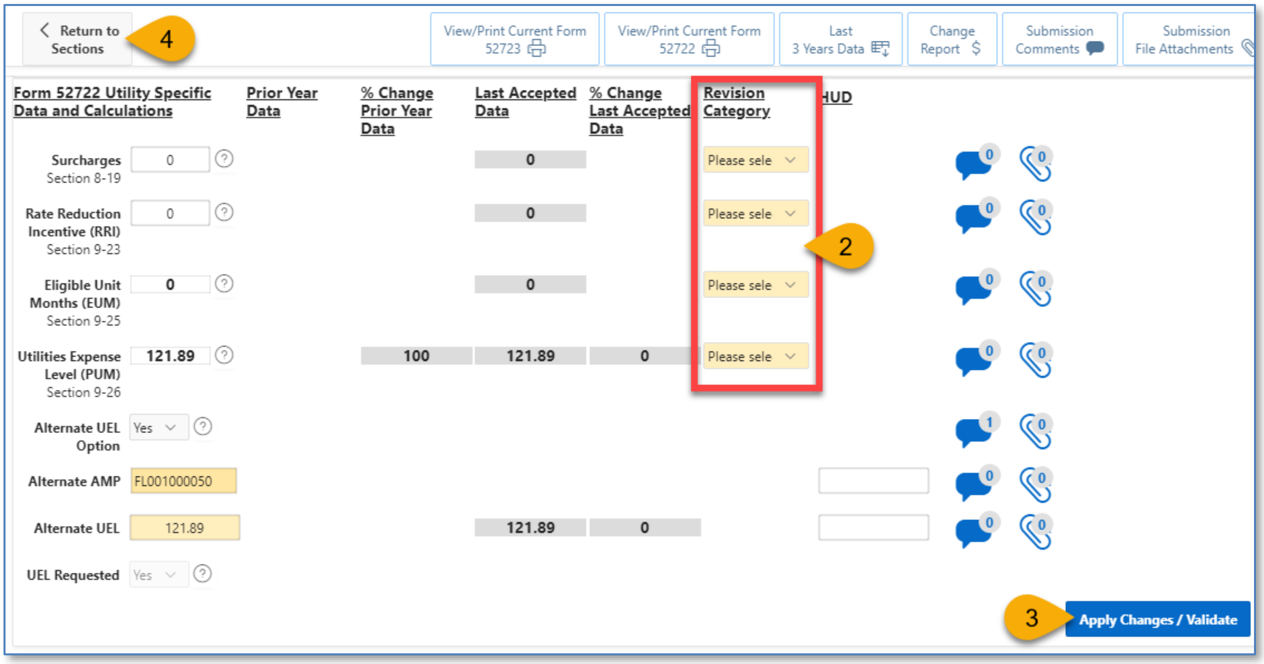
Note: The “Submit Form 52723 & 52722” button is available only to a PHA Executive Director.

Completing Form HUD-52722 Utility and Related Data for New Projects - Revision Submissions

Follow the steps below to select a Revision Category in the Utility and Related Data section for New Projects:



1. Click the “**Form 52722 Utility and Related Data**” button.



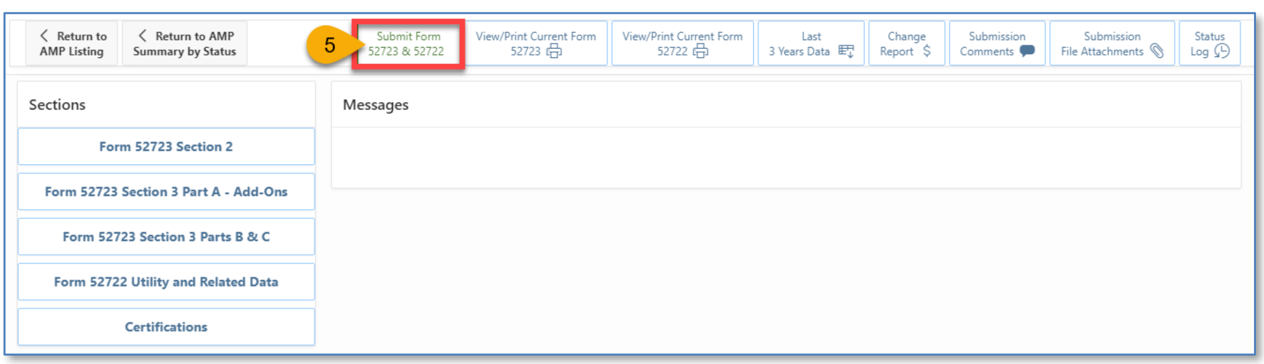
Update value(s) for line item(s) that should be revised. For each revised line item, select the appropriate "**Revision Category.**"

Note: Any changed dollar line-item amount will require supporting comments and documents.

2. Choose the "**Revision Category**" to support the value change.
3. Click the "**Apply Changes / Validate**" button.

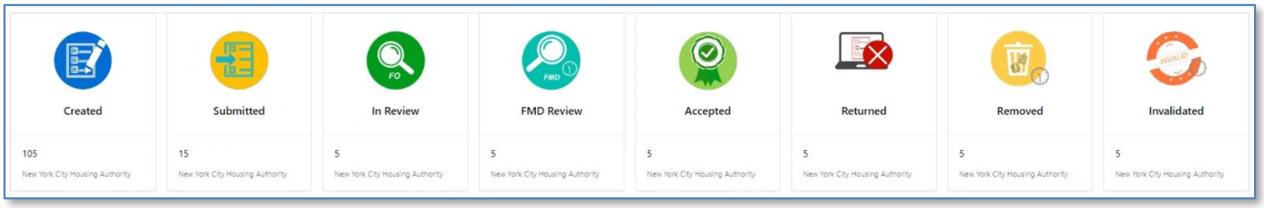
To add comments or upload/delete documents refer to "Creating Comments and Uploading Documents" section.

4. Click the "**Return to Sections**" button to return to the development page.



5. Click "**Submit Form 52723 & 52722**" button to submit the Revision Submission forms to HUD for review.

The Public Housing Portal Statuses



The Portal tracks eight (8) different OpFund form HUD-52723/52722 statuses.

Created: The PHA created Forms HUD-52723/52722 and may have started reviewing and updating the forms HUD-52723/52722. The PHA must review, update, and submit all forms in created status. The PHA user and Executive Director can add/edit/delete their own comments. They can add/delete their own attachments as well as delete each other's attachments.

Submitted: The PHA submitted these forms to HUD. PHA cannot edit forms in "Submitted" status. The PHA user and Executive Director cannot add/edit/delete their own comments. They can add new attachments but cannot delete existing ones.

In Review: The FO started to review the forms. PHA cannot edit forms in "In Review" status, cannot add new comments, cannot edit/delete existing comments, cannot delete existing file attachments, but can upload new file attachments if needed.

FMD Review: The FO submitted PHA's forms to the Financial Management Division (FMD) for review. PHA/FO cannot edit forms in "FMD Review" status, nor can edit/delete/add comments or attachments. This status is applicable to QC/Revision Submissions only.

Accepted: The FO and FMD has accepted the forms. FO user accepts the forms for Initial Submissions and Resubmissions. FMD users accept the forms for QC/Revision Submissions only. The forms cannot be edited in "Accepted" status, including editing/deleting/adding comments or attachments.

Returned: The FO or FMD returned these forms to PHA to correct errors or omitted data. PHA/FO cannot edit forms in "Returned" status, nor can edit/delete/add comments or attachments. The PHA must create a Resubmission/QC Submission/Revision Submission based on the submission type deadlines, update any errors and omissions, and submit for HUD's review.

Removed: The forms were created in error and removed by HUD at the request of the PHA or FO. HUD did not make any payments to the PHA based on this submission.

Invalidated: These forms are for projects that received a portion of OpFund grants during the funding year but are no longer eligible to receive future OpFund grants, and the development has been removed from inventory. Only FMD can invalidate these forms.

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.