



Instructions for Maintaining HA Contacts

March 2019

If you do not fully understand how to maintain your HA Contacts, please contact your local field office PIC Coach. Mistakes cannot be deleted from IMS-PIC and workarounds to correct the data will leave skew the accuracy of the data.

Tips:

- If you have a change in your HA Contacts, especially executive director, board chairperson, or mayor/local official, please notify your local HUD office so they are aware of the change as well. IMS-PIC does not send the field office a notification when this area of IMS-PIC changes.
- Please remember to log out of the system after you are done – closing the browser window without logging out of both IMS-PIC and Secure Systems will cause problems when you try to login to the systems in the future.

Table of Contents

Guidance for What to Do and When to Do It.....	3
Important notes:.....	3
A new executive director.....	3
A new board chairperson that is an existing or former board member	3
A new board chairperson that has not been on your board or served in a role for your PHA before	4
A new board member that has not been on your board or served in a role for your PHA before.....	4
A new mayor/local official	4
Add A New HA Contact.....	5
Add the Mailing and Physical Addresses for an HA Contact	6
Modify the Information for an HA Contact	7
Add a Role to an HA Contact.....	8
Make an HA Contact Inactive/Deactivate the Role(s) of an HA Contact	9

HUD Staff Temporary Office Occupancy Report Reports

Housing Authority **HA Contacts** HA History Comments Approval

List

Select View: Field Office HA

Hub: 7HKNC Kansas City Hub

Field Office:

Housing Authority:

Housing Authority Contact List

Create Contact

Contact Status: Active

Records 1 to 7 of 7

Contact ▲	Role	Phone Number	Email
	Board Vice Chairperson		
	Board Chairperson		
	Board Member		
	Accountant		
	Mayor		
	Board Member		
	Executive Director		

Example of HA Contacts List page

Guidance for What to Do and When to Do It

Many different situations can arise that result in the need to update the HA Contacts list in IMS-PIC. Below is guidance for the most common situations and what you should do for them. As with many things in the real world there may be a situation that is not addressed here. If you are at all unsure about what to do please contact your local PIC coach. As with most things in IMS-PIC, nothing can be deleted and once an Effective Date has been entered or an Effective End Date has passed it cannot be edited.

Important notes:

- If a person has possibly been associated with your PHA previously you should check the inactive contacts list using the Contact Status drop down box on the Housing Authority Contact List page before adding a new contact. If you find this person on the inactive list, you can use steps 3-7 on page 6 to add a new role to make them active again. Double check all information, including mailing and physical addresses, for the contact to make sure it is up to date.
- One of the purposes of HA Contacts is to give us a history of who has been associated with your PHA. **At no time should you change a contact's name to a new contact's name to update your contacts.** We lose that history if a name is changed – it makes it appear as though that person has served in that role for a different period of time than they did.

For most of the situations below there are two steps and they must be completed in the list order to get the desired results.

A new executive director

- This change will not only involve the HA Contacts list but will also involve that person obtaining access to HUD's online systems. Please contact your local field office PIC Coach for assistance with this.
- The steps for making the former executive director inactive and adding the new executive director may be performed by the PHA or the local HUD office depending on the circumstances and timing of gaining access to the system.
- First, you must take care of the former executive director.
 - ✓ You will need to follow the instructions on page 7 to make the executive director role inactive. *If there are any other roles assigned to the contact, you may want to look at those as well.*
 - ➔ You must make sure the Effective End Date you input for the executive director role is before the date the new executive director started; otherwise you will receive an error.
- Second, designate the new executive director.
 - ✓ You will need to add the new executive director by following the steps on page 3. After you have completed adding the contact, follow the instructions on page 4 to add the mailing and physical address for this contact.
 - ➔ If by some chance the new executive director used to serve in another role at the PHA see the "important note" above about accessing the inactive contacts so you can add a new role to them per the instructions on page 6 of this document. Depending on the role they used to serve in and how long it has been since they served in that role you may want to discuss this with your local field office to make sure there is no conflict of interest.

A new board chairperson that is an existing or former board member

- First, you must deal with the former board chairperson.
 - ✓ If the former board chairperson is going to remain on the board as a board member, make sure they have the board member role assigned to them. If not, follow the steps on page 6 of this

document to add the board member role. Once you have added the board member role you will need to follow the instructions on page 7 to make the board chairperson role inactive.

- ✓ If the former board chairperson is not going to remain on the board, follow page 7 to make that contact inactive.
- You must make sure the Effective End Date you input for the board chairperson role is before the date the new board chairperson will start; otherwise you will receive an error.
- Second, designate the new board chairperson.
 - ✓ If the person is an existing board member: To add the new role of board chairperson to an existing board member that is in IMS-PIC, follow the steps on page 6 of this document. Next, you need to make the board member role inactive for the new board chairperson, follow the steps on page 7.
 - ✓ For a former board member/contact: If this person used to be a board member or other type of contact but is not currently serving in a role see the “important note” above about accessing the inactive contacts so you can add a new role to them per the instructions on page 6 of this document.

A new board chairperson that has not been on your board or served in a role for your PHA before

- First, you must take care of the former board chairperson.
 - ✓ If the former board chairperson is going to remain on the board as a board member, make sure they have the board member role assigned to them. If not, follow the steps on page 6 of this document to add the board member role. Next, once you have added the board member role you will need to follow the instructions on page 7 to make the former board chairperson role inactive.
 - ✓ If the former board chairperson is not going to remain on the board, follow page 7 to make that contact inactive.
 - You must make sure the Effective End Date you input for the board chairperson role is before the date the new board chairperson started.
- Second, designate the new board chairperson.
 - ✓ Add the new board chairperson according to the instructions on page 3 of this document. After you have completed adding the contact, follow the instructions on page 4 to add the mailing and physical address for this contact.

A new board member that has not been on your board or served in a role for your PHA before

- Add the new board member according to the instructions on page 3 of this document. After you have completed adding the contact, follow the instructions on page 4 to add the mailing and physical address for this contact.

A new mayor/local official

- First, you must take care of the former mayor/local official by following the steps on page 7 of this document to make that role (and contact, if applicable) inactive.
- Second, you will need to add the new mayor/local official
 - ✓ If the new mayor/local official has never served in a role for your PHA before you will add them as a new contact by following the steps on page 3. After you have completed adding the contact, follow the instructions on page 4 to add the mailing and physical address for this contact.
 - ✓ If this person has previously served in a role for your PHA, but is not currently doing so, see the “important note” above about accessing the inactive contacts so you can add a new role to them per the instructions on page 6 of this document.

Add A New HA Contact

When someone begins to work for/with your housing authority (i.e. new Executive Director, board member, or mayor you will want to add their information to your HA Contact list in IMS-PIC. If someone was previously in certain positions in/with your housing authority (i.e. Executive Director, Board Chairperson, Mayor, etc.) you will want to make sure their listing in the HA Contacts list is made inactive before you add the new contact, otherwise IMS-PIC will give you an error and will not let you add the new contact. For instructions on how to make someone inactive see the instructions on page 7.

1. Once you are logged into IMS-PIC, select the Housing Agency sub module under Housing Inventory on the PIC Main page.
2. There is a row of tabs at the top of the new page that comes up. Single click on the tab that says HA Contacts.
3. You are now presented with a page with a section titled Housing Authority Contact List. This list includes your Executive Director, board members, local officials, etc. To add a new HA Contact, single click on the **Create Contact** link on the right side of the screen.
4. A page will be displayed that has several boxes for you to fill in. Fill in the name, phone number, fax number (if applicable), and email address. Title is not required—if the person is a board member you do not need to type board member—that will be designated in the next step. **If the contact has an email address, please enter it – whenever possible HQ prefers to contact people via email and it is also beneficial for field offices as well. This information is maintained in this secure system and is not available to the public.**
5. Next, choose the role that this person is serving in from the drop down box next to the word role. You may have to scroll through the box to find the one you're looking for. Examples:
 - Select Board Chairperson for board chairperson/chairman/president.
 - Select Board Vice Chairperson for board vice chairperson/vice president. If you prefer the vice chairperson have the role of board member that is fine.
 - Select Board Member for board members that are not resident board members/commissions.
 - Select Board Member-Resident for resident board members.
 - Select Mayor for mayor. Do **NOT** select Local Official.
 - Select Local Official only if your PHA is a multi-jurisdiction PHA (i.e. regional or joint).
6. You also need to fill in the Effective Date that this person started in this role. The Effective End Date field is **not** required and should be left blank unless there is a definite end to the term (e.g. person serving in a role temporarily). If you put in an Effective End Date you will have to remember to go back in if the person stays in that position and change it before it passes—failure to do so would result in the contact and/or role becoming inactive. While this can be rectified by adding the role to the contact again it is easier to just leave it blank if you're not sure of the definite end date. Make sure the Effective Date is correct; it cannot be edited once the information is saved.
7. When you are finished filling in this information single click on the **Save** push button. This will add the new HA Contact to the HA Contact list for your housing authority. You will be taken back to the HA Contact list page.
8. **After you add a new contact you must provide a mailing and physical address for each contact. Please follow the steps on page 4 of this document to provide this information since these screens are not included on the page where you add the new contact.**

Please Note:

- If this person fills more than one role for your housing authority, you will need to add the additional roles to this HA Contact (see instructions on page 6).

Add the Mailing and Physical Addresses for an HA Contact

By the mailing and physical address information being in IMS-PIC it is easily accessible for anyone who may need it to get into contact with a person associated with a housing authority. Every contact listed for a housing authority must have a mailing and physical address entered for them. A PO Box should not be entered for a physical address. If you absolutely do not have a physical address as least make sure you enter a mailing address.

1. Once you are logged into IMS-PIC, select the Housing Agency sub module under Housing Inventory on the PIC Main page. If you are already on the HA Contacts list page you can skip to step 3.
2. There is a row of tabs at the top of the new page that comes up. Single click on the tab that says HA Contacts.
3. You are now presented with a page with a section titled Housing Authority Contact List. This list includes your Executive Director, board members, local officials, etc. Find the name of the person that you want to add (or edit) the mailing and physical addresses for and single click on that name.
4. The page that comes up is titled Housing Authority Contact Details and shows the name, phone number, email address, and roles assigned to this contact. In the bar below the tabs at the top of the page there is a link that says **Address**, single click on that link.



5. On the next page you will be shown what address information, if any, is already in IMS-PIC for this contact. By default, the mailing address is displayed. If there is no information on this page you need to add it. On the right side of the screen single click on **Modify Address** to enter this information.
6. On this screen you will enter all the mailing address information for this person, required fields are marked with a * and must be filled in. You are encouraged to fill in the county and 4-digit zip extension (called zip+4) – available at https://tools.usps.com/go/ZipLookupAction_input. After you have completed this page single click on the **Save** push button to save this information.
7. You will be taken back to the main address page where you will now see the mailing address filled in. To add/edit the physical address you need to select **Physical** from the drop down box next to the words Select Address Type and single click on the Select button.

A screenshot of the 'Housing Authority Address Information' page. At the top right, there is a red box around the 'Modify Address' link. Below this, the form displays 'First Name: John' and 'Last Name: Jones'. Under 'Select Address Type:', there is a dropdown menu with 'Mailing' selected and a 'Select' button next to it. Below the dropdown, there are fields for 'Address Line 1:' and 'Address Line 2:'. A red box highlights the dropdown menu and the 'Select' button.

8. When the Physical Address screen comes up you will see what information, if any, has been entered previously for the physical address. Single click on **Modify Address** to enter this information.
9. On the next screen you will enter all the physical address information for this person, required fields are marked with a * and must be filled in. You are encouraged to fill in the county and 4-digit zip extension (called zip+4) if available. After you have completed this page single click on the **Save** push button to save this information.
10. You will be taken back to the main address page again, where you can view the mailing and physical addresses for this contact. To go back to the HA Contacts list to edit another contact's address information single click on the **List** link under the tabs at the top of the page.

Modify the Information for an HA Contact

There will be instances where you will need to edit the information that has been previously entered for one of your HA contacts. Changes can be made to the name, title, phone number, fax number, and email all on the same screen. You should only change a name when a contact legally changes their name. You only need to enter a title if they have a title other than the role selected for the contact. To change any other information not mentioned here please refer to the other sections in this document.

1. Once you are logged into IMS-PIC, select the Housing Agency sub module under Housing Inventory on the PIC Main page. If you are already on the HA Contacts list page you can skip to step 3.
2. There is a row of tabs at the top of the new page that comes up. Single click on the tab that says HA Contacts.
3. You are now presented with a page with a section titled Housing Authority Contact List. This list includes your Executive Director, board members, local officials, etc. Find the name of the person that you need to edit the information for and single click on that name.
4. On the page that comes up there is a section titled Housing Authority Contact Details. In that section single click on the Modify Contact Details link on the right side of the screen.
5. On the page that comes up you will see an editable version of the Housing Authority Contact Details; you may edit any of these fields. Please see the notes on this page about changing a contact's name. If you change the email address, you must type it again to confirm it. **Please enter an email address since whenever possible headquarters prefers to contact people via email and it is also beneficial for field offices as well. The information is maintained in this secure system and is not available to the public.**

Housing Authority Contact Details

First Name: John *

Last Name: Doe *

Title:

Salutation: Mr. *

Phone Number: 123 - 456 - 7890 * Ext: 222

Fax Number: 123 - 456 - 7891

TTY Number: - - Ext:

Email Address: jdoe@anytownha.net

Confirm Email Address: jdoe@anytownha.net

* Designates a required field.

Cancel Save

Role	Effective Date	Effective End Date
Executive Director	01/01/2003	

6. After you have finished editing this information single click on the **Save** button. This will take you back to the Housing Authority Contact Details screen.
7. To go back to the HA Contact list, single click on the **List** link below the tabs at the top of the screen.

Please Note:

- As mentioned above, never change the name of a contact to a new contact's name. For instance, if your PHA has a new Executive Director, Board Chairperson, Mayor/Local Official, etc. This alters the history of who has been involved with the PHA during specific time periods and will cause us to not be able to determine who held that role/position prior to the current person. If you have a different person serving in that role you need to make the current contact inactive and create a new contact for that role.

Add a Role to an HA Contact

Sometimes you will need to assign more than one role to an HA Contact. For instance, one person may be both the HA Housing Director and the HA PIC Contact. One of the roles may already be assigned, like HA Housing Director, but the other role may need to be assigned. You also may need to add a new role to an existing contact for someone that previously served in another role.

1. Once you are logged into IMS-PIC, select the Housing Agency sub module under Housing Inventory on the PIC Main page. If you are already on the HA Contacts list page you can skip to step 3.
2. There is a row of tabs at the top of the new page that comes up. Single click on the tab that says HA Contacts.
3. You are now presented with a page with a section titled Housing Authority Contact List. This list includes your Executive Director, board members, local officials, etc. Find the name of the person that you want to add a role to and single click on that name.
4. On the page that comes up there is a section titled Housing Authority Contact Details. In that section single click on the Modify Contact Details link on the right side of the screen.
5. On the next page, toward the bottom, there is a list of roles that are already assigned to this person. Under the list of roles single click on the Add Role link to add a new role to this person.
6. At the bottom of the page in the Housing Authority Contact Details section there is a place where you will add the role. In the Role column there is a drop down box that lists all the possible roles, select the role you want to add from this list. The Effective Date is the date when the person was appointed to role—if you don't know the date either estimate or put today's date. The Effective End Date field is **not** required and should be left blank unless there is a definite end to the term (e.g. person serving in a role temporarily). If you put in an Effective End Date you will have to remember to go back in if the person stays in that position and change it before it passes—failure to do so would result in the contact and/or role becoming inactive. While this can be rectified by adding the role to the contact again it is easier to just leave it blank if you're not sure of the definite end date. Make sure the Effective Date is correct; it cannot be edited once the information is saved.
7. When you are finished filling in this information single click on **Save**. This will add the role for this person.
8. To view your changes, single click on the List link on the bar below the tabs. The role you added to this HA Contact will show up along with their name.

Chief Operating Officer		
Congressional Staff		
Contact		
Executive Director	09/15/2002	
Executive Director (Acting)	09/15/2002	
Federal Official	09/15/2002	09/15/2002
Formula Characteristics		
Accountant	* MM/DD/YYYY	MM/DD/YYYY
	* Designates a required field	

Example of the add role section

Make an HA Contact Inactive/Deactivate the Role(s) of an HA Contact

You can **never** delete a role from a person or delete an HA Contact record. Instead, you will make the contact's role inactive. This means that it will no longer show up as a role for that person in the active HA Contact List but if you view the Housing Authority Contact Details for that person it will show up as a role they had in the past. It will also show on the Housing Authority Contact Details page with the Effective Date and Effective End Date.

1. Once you are logged into IMS-PIC, select the Housing Agency sub module under Housing Inventory on the PIC Main page. If you are already on the HA Contacts list page you can skip to step 3.
2. There is a row of tabs at the top of the new page that comes up. Single click on the tab that says HA Contacts.
3. You are now presented with a page with a section titled Housing Authority Contact List. This list includes your Executive Director, board members, local officials, etc. Find the name of the person that you want to make a role inactive for and single click on that name.
4. On the page that comes up there is a section titled Housing Authority Contact Details. In that section single click on the Modify Contact Details link on the right side of the screen.
5. On the next page, toward the bottom, there is a list of roles that are already assigned to this person (for example, Executive Director). Single click on the title of the role you wish to make inactive (the names of active roles are links you can click on). The page will refresh.
6. At the bottom of the page you will see the list of roles again, only this time the text box for the Effective End Date for the role you clicked on is editable. In this box enter the date that this HA Contact stopped serving in this role (i.e. Executive Director).
7. When you are finished filling in the new Effective End Date single click on **Save**. This will tell the system that this HA Contact no longer is filling this role. Once saved, it **cannot** be edited.
8. To view your changes, single click on List link on the bar below the tabs. The role you made inactive will no longer show up next to the name of this HA Contact. If all roles for a contact are inactive, the person will no longer show up in the HA Contacts list.

Please Note:

- If the role you just made inactive is the only role that this contact has served in, their name will no longer appear under the list of active HA Contacts. If you need to make a contact completely inactive and they have more than one active role assigned to them when you start this process, you will need to repeat the steps 4 to 9 above to make all roles inactive until they no longer show up under the list of active HA Contacts.
- If you think that someone has been listed as an HA Contact in the past or you entered an Effective End Date prior to the contact no longer serving in that role, you can make them active again by adding a new role representing the role they currently hold. You can do this by navigating to the list of inactive contacts using the Contact Status drop down box on the Housing Authority Contact List page and select the Inactive option and single click the Select button. Once on this page you can follow steps 3-7 on page 6 to add a role.