IMS/PIC Development Sub Module Merging Two or More Units Job Aid

February 2023

A PHA might want to merge two or more smaller units into one larger unit to better match the demand in the local rental market. For example, two zero-bedroom units might be merged into one 1-bedroom unit. There are two parts to the task, which are outlined in this document as well as other related information.

Update details: The February 2023 update only updates/clarifies wording, including but not limited to references to IMS/PIC, and to add the instructions for submitting building and unit data.

Contents

Before the work is started in IMS/PIC

Some of the work in IMS/PIC can be done by a PHA user, but some of it can only be done by a HUD user. To ensure that the entire process is completed, it could be advisable that a HUD user do all the work up through step 11, however, as much as possible PHAs should do what work they can since building and unit data is the PHA's data. There are two things that should be done before the work in IMS/PIC begins.

1. **Document the "before" picture.** It is a good idea before beginning any work to print a copy of the Unit Detail Report, if you don't already have one, to have a "before" snapshot of the units involved.
2. **Collect the information you will need.** A sample data collection model is included later in this document. It asks for the minimum amount of information that is needed to document the work being done in IMS/PIC and is needed by the HUD user to support the work they will do in the system. The HUD staff person may need to ask the PHA additional questions related to program rules and finances as well, but those are not needed for the IMS/PIC data entry.

Step 1 – Change the Bedroom Count

User type responsible: PHA users is preferred but could be HUD user (see note on page 2)

If there is a change in bedroom count for the unit that will continue to exist, the user will need to change the number of bedrooms for that unit. The user will:
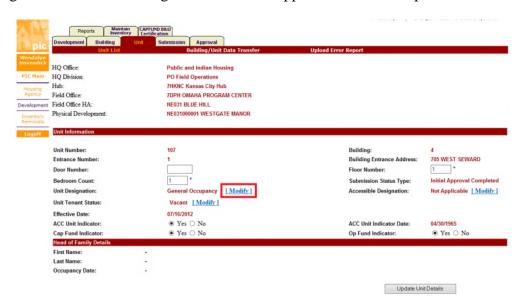
1. In the Development sub module select the PHA and development number, if the PHA has more than one, on the Development Profile page.
2. Single click on the Unit tab to navigate to the Unit List page.
3. Single click on the unit number that needs to have its bedroom count changed on the Unit List page. The Unit Details screen for that unit will appear.
4. Next to the Bedroom Count label, change the number of bedrooms in the text box.
5. Single click on the Update Unit Details button. *If the PHA does this step, it is imperative that the HUD user completing step 2 of this process verify the bedroom count using the data collected.*

Step 2 – Change the Unit Designation

User type responsible: HUD user

To complete the process to change the Unit Designation for the unit(s) where the space is becoming part of the larger unit as a merged unit, a HUD user will complete the following steps. PHA users do not have the rights to do these steps.

1. In the Development sub module select the PHA and development number, if the PHA has more than one, on the Development Profile page.
2. Single click on the Unit tab to navigate to the Unit List page.
3. Single click on the unit number that needs to be marked as merged on the Unit List page. The Unit Details screen for that unit will appear.
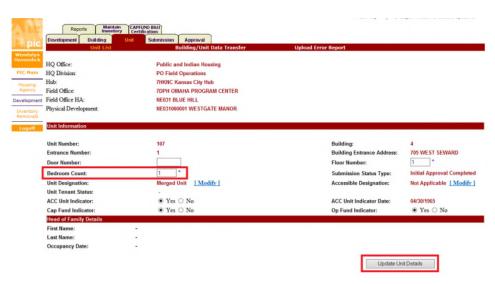4. Single click the "Unit Designation" link that appears in the screen print below.

5. A page will appear where you can select the new unit designation. Select "Merged Unit" from the New Unit Designation drop down box. You can also enter any comments you want that describe this change. For instance, you may state that unit __ is merging with unit __. Since this is not a required field you can also leave it blank. You won't see the comments displayed in the system, but they are saved to the database. You do not need to make a

selection in the reason for change drop down box. Single click on the Save button to save the changes and be taken back to the Unit Details page for the unit.

6. You now can change the bedroom size for the unit to 0. Delete the current bedroom count and enter zero. Single click on the Update Unit Details button to save the change.

7. A page will come up that will ask you for a reason for the change. In the reason for change drop down box select "Bedroom Count – Merged Units". You can enter comments to be saved into the database, similar to what you entered for the Unit Designation change, if you wish but it is not required. Single click on the Save button. You will be taken back to the Unit Details page.

8. You now need to update the ACC indicator. Single click on the No radio button to the right of the ACC Unit Indicator label. A pop-up box will appear to let you know that this will

also change the Op Fund and Cap Fund indicators. Single click on the OK button. The pop-up box will disappear. Single click on the Update Unit Details button to save the change.

9. On the page that appears select "Change In Use" from the reason for change drop down box. Similar to the previous steps, enter any comments you want saved to the database. You will need to enter the date the merge of the units was completed in mm/dd/yyyy format in the ACC Unit Indicator Change Date text box. Single click on the Save button to update the ACC, Op Fund, and Cap Fund indicators and the ACC Indicator Change Date.

10. You will be returned to the Unit Details page. The changes will be reflected on the page. You will also see entries for the changes to unit designation and unit status at the bottom of the page under the Unit Status/Designations Change History heading.

Step 3 – PHA Submits the Building and Unit Data

Once the PHA has determined that all of their building and unit data, including the data associated with the merged unit, is entered correctly they **must** complete the steps below to submit it in IMS/PIC for HUD approval. This process submits the entire set of building and unit data; you cannot choose specific developments, buildings, or units. Because of this, the PHA user should ensure that they have examined the data in all developments for completeness and correctness prior to following these steps.

1. Login to Secure Systems by going to https://www.hud.gov/program_offices/public_indian_housing/reac/online and in your Main Menu single click on PIH Information Center (PIC) link. If you are already logged in to

IMS/PIC, single click on the PIC Main link on the left side of the page to return to the main page.

2. Single click on the Development sub module.
3. Single click on the Submission tab.
4. The Submit Unit Information page appears. There is a Submission Comments box on this page. Enter a brief comment describing why the building and unit data is being submitted for approval.
5. After you are finished typing in your comments, single click the Submit Data for Approval button. This will submit the data and all data will be in read only status until it is approved or rejected by the field office. *Note: The Save button is only for saving comments for a submission that will be done later. You should not use this button to submit your data. Comments are automatically saved when the submission is completed with the Submit Data for Approval button.*

6. Please notify your local field office PIC Coach that you have submitted your building and unit data and provide them any supporting documentation they may need and/or request to verify new data or changes that have been made to existing data.

Step 4 – HUD Reviews and Approves the Building and Unit Data

Once the PHA submits the building and unit data in IMS/PIC, the field office must review all developments, buildings, and units – not just those that are involved in the merge – and decide if the data submitted matches what was provided by the PHA. If the data is approvable, the HUD user will approve all developments under the Approval tab. After the approval occurs, the system will archive the data and it will become part of the official inventory for funding and historical purposes.

Note: The field office should not reject any of the developments unless there is something substantially in error. **If any developments are rejected the data needs to be corrected right away** and the PHA resubmit the building and unit data for approval. Any developments in rejected status are not included in official unit counts and may affect funding.

Sample Merged Unit Data Collection

The format below can be used to request information from PHAs on what units are involved, their characteristics, and effective date. This can be copy and pasted into an email and then once the responses are received back that information can be kept on file for documentation of what changes were made.

1. Unit numbers involved and their bedroom sizes before merging:
   - ✓ Unit ___ was a ___ bedroom
   - ✓ Unit ___ was a ___ bedroom
2. Unit number that will be used for occupancy and its new bedroom size:
   - ✓ The unit that remains that the tenant will enter through is unit ___ and it is now a ___ bedroom.
3. Date the merge was complete (units were considered one unit):
   - ✓ The units were considered one unit as of _____ (in mm/dd/yyyy format).

If the data for the previous configuration as provided above does not match what is in IMS/PIC the field office will work with the PHA to determine why there is a mismatch.

Additional Information
- In situations where more than two units are merged please add the necessary line(s) under #1 keeping the same format.
- If more than two units are merged into two units – for instance 3 units are merged into 2 – please add additional line(s) to #1 and #2 keeping the same format. If this situation occurs and the work is completed on separate dates add another line under #3 keeping the same format.