Public Housing Portal

Public Housing Agency User Guide for Shortfall Appeal Submission



U.S. Department of Housing and Urban Development

Office of Public and Indian Housing

Financial Management Division

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Public Housing Portal

The Public Housing Portal (portal) is an online platform for Public Housing Authorities (PHAs) and the Office 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 steps to create and submit the Public Housing Shortfall Appeal form.

HUD requires PHAs to complete the Shortfall Appeal form to support HUD's Line of Credit Control System (eLOCCS) vouchers for certain Operating Fund Grants, Public Housing Grants, or supplement grant funds. The HUD Financial Management Division (FMD) review the Shortfall Appeal form before accepting the voucher in eLOCCS. PHAs should follow HUD's instructions for the specific grant to complete the form.

https://www.hud.gov/program_offices/public_indian_housing/programs/ph/am/opfnd2024/sho rtfallfunding

Requesting Access to The Public Housing Portal

PHA staff must request access to the Public Housing 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	Description
Role	
OPD	This user role is for the PHA's Executive Director only. This user can create, edit, upload
	supporting documents, and manually or electronically sign or submit certifications,
	plans, forms, and other types of submissions.
OPE	This user can create, edit, and upload supporting documents for the submission. This
	user cannot sign or submit certifications, plans, forms, and other types of submissions.
OPI	This user can only read completed submissions. This user cannot create, edit, upload
	supporting documents, sign or submit certifications, plans, forms, and other types of
	submissions.
OPL	This user role is for the PHA's Board Chair only. This user can create, edit, manually or
	electronically sign required Board certifications, and upload supporting documents. This
	user cannot sign or submit plans, forms, or other types of submissions.

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: <u>https://hudapps.hud.gov/HUD_Systems/</u>, log in, and click the "Public housing Portal (PIH Operating Fund)" hyperlink.



The system displays the portal home page as shown below.

= 🕘			🕑 User Pro	file Training 🕟 W	ASS Coordinator Training	🗈 New Window 🗧	 Return to Secure Sy 	stems (i) About ?
☆ Home Ver1.4.5.5 S35_4_2.1	Update Profile 🔍				Rol	es Portal U ed 🞗 Communicat	ser ion ⊠‡	User Profile Guide 踊
왕 PHA Reports & Submissions Energy Incentives Document Management		Major Activities Welco	ome FIRST - MOPFO	View use assig	r roles and nments June 2023	us: 🗐 🗤 Dowr Pr	nload the User ofile Guide	list
A Ouisk Links Navigation menu		Sun	Mon	Tue 30	Wed 31	Thu 1	Fri 2	Sat 3
	News and Messages: • The Public Housing Portal will be offling for maintenance	Cale	ender events	6	7	8	9	10
Review the latest	offline for maintenance release/upgrade and resources will not be available from 09:15 AM - 10:30 AM EST August 13 2022.	11	12	13	14	15	16	17
portal news and messages	Youtube video CY 2023 PIC Building/Units updates HUD-50058 and HUD-	18	19	20	21	22	23	24
	50058 MTW submissions due August 30, 2022.	25	26	27	28	29	30	1

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.

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.

					🛅 New Windov	w 🕞 Return to Secure	System (i) About ?
۵	Update Profile & User profile is missing, please u	odate user profile to continue.				Roles	User Profile 오 Guide [1]
D		Major Activities Welcome FIRS	T - MOPE03 LAST - pi	ic Connection	a., B		
5		Major Activities Welcome Tito		ie connectio	Click buttor	to download	
		today	1	November 20	the User P	rofile Guide	onth list
		Sun Mon	Tue	Wad	Thu	Eri	5-+
		1	2 3	4	5	6	7

Consult the User Profile user guide to complete your User Profile. <u>The "User Profile Guide" is</u> 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.

PHA Form 52723/52722										
PHA Reports ▼ Pre-Pop Data Reports ▼ 52723/52722 To	User is not assigned a PHA in the Portal. Click									
Select a Calendar : 2018 🗘	roles and assignments	Missing PHA Assignment								

- 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).

	Actions	~	
PHA Name	Portal Role Assigned	Role Description	PHA Cod
LAKELAND	OPD	Executive Director Role	AL004
LAKELAND	OPD	Executive Director Role	CA002
		the second second	
		Exe .	- Contraction
BIRMINGHAM	OPD	Executive Director Role	PA003
			1 - 50
	without PHA assignm	ent. <u>For any questio</u>	ns, plea
act your F	PHA's WASS coordinat	<u>:or</u> .	
tact your F	PHA's WASS coordinat	: <u>or</u> .	

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 Public Housing 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:

PHA Rep	PHA Reports & Submissions \ View/Download Portal User Communications										
Q~	Q ~ Go 1. Primary Report ~ Actions ~										
View CY Communication Date Type Scope Communication Subject Communication						Communication					
Ø	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					
R	2022	04/19/22 08:10AM	Email	РНА	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					
Ø	2022	10/07/21 04:25PM	Email	РНА	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.

Q~			G	o 1.	Primary Report 🗸 🗸	Actions 🗸	1
View Details	СҮ	Communication Date	Туре	Scope	Communication Subj	🖽 Select Columns	Communication
Ø	2022	07/11/22 06:27AM	Email	РНА	FFY 2022 OpFund Shortfall Fundi Application/Appeal due TOMOR (07/12/2022)	Filter	monitored mailbox. Please do not reply. Contact your local Field Office with ** Public Housing Authority: PHAs eligible for Operating Fund Shortfall
Ø	2022	04/19/22 08:10AM	Email	РНА	Test Add New Communication		Communication Paragraph One Test Add New Communication Paragraph T Communication Paragraph Three Test Add New Communication Paragraph
Ø	2022	10/07/21 04:25PM	Email	РНА	SF-424 for CY 2022 OpFund Grar 11/5/2021	Save Report	monitored mailbox. Please do not reply. Contact your local Field Office with ** Dear Executive Directors: PHAs must submit their SF-424 and, if necessar
Ø	2021	03/08/21 10:20AM	Email	PHA	Test 6 months	 Reset Help 	Click to download all
Ø	2021	09/08/20 10:21AM	Email	PHA	Test 12 months	⊥ Download	ssss
		00/01/00					

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.

munication						
tice PIH 2021-14.	PHAs that implement waivers and alternative requirements may submit t	orms HUD-50058 or HUD-500	58 MTW no later th	an 90 calendar days	; from the e	ffective d
HAs that implement	waivers and alternative requirements					
A	and an and a state of the state			and the data the form		
As that implement	waivers and alternative requirements consistent with Notice PIH 2021-	14 may submit actions rec	for transactions	and 2D in the form	HUD-50058 0	r HUD-5005
en chan ao catello	ar days from the effective date. PhAs may only submit 90 calendar day	s from the effective date	TOP CHARGACCIONS	impacted by the wai	Lvers and at	remarive
auanomonte Such i	estances may be waivens and alternative requirements related to near	minations and inconstions	 Although DTH one 	widos DWAs that ime	Jomont white	and all
quirements. Such i	nstances may be waivers and alternative requirements related to reexa	minations and inspections	 Although PIH pro to continue submit 	vides PHAs that imp	olement waiv within th	ers and al
equirements. Such i equirements up to 9	nstances may be waivers and alternative requirements related to reexa 0 days to submit their forms, PIH encourages PHAs that have the opera	minations and inspections tional capacity to do so	 Although PIH pro to continue submit 	vides PHAs that imp ting HUD-50058 form	olement waiv ns within th	ers and al e normal 6
equirements. Such i equirements up to 9 447 of 4000	nstances may be waivers and alternative requirements related to reexa 0 days to submit their forms, PIH encourages PHAs that have the oper	minations and inspections tional capacity to do so	 Although PIH pro to continue submit 	vides PHAs that imp ting HUD-50058 form	olement waiv ns within th	ers and al e normal 6
equirements. Such i equirements up to 9	nstances may be waivers and alternative requirements related to reexe 0 days to submit their forms, PIH encourages PHAs that have the opera Click here to view & download the message	minations and inspections tional capacity to do so	Although PIH pro to continue submit	vides PHAs that imp ting HUD-50058 form	olement waivons within the	ers and al e normal 6
equirements. Such i equirements up to 9 47 of 4000	nstances may be waivers and alternative requirements related to reexe 0 days to submit their forms, PIH encourages PHAs that have the opera Click here to view & download the message File Name	minations and inspections tional capacity to do so File Description	. Although PIH pro to continue submit	vides PHAs that imp ting HUD-50058 form Last Update	olement waivens within the Attach Id	ers and al e normal 6 Fileld
requirements. Such i requirements up to 9	nstances may be waivers and alternative requirements related to reexe 0 days to submit their forms, PIH encourages PHAs that have the oper Click here to view & download the message File Name	minations and inspections tional capacity to do so File Description	. Although PIH pro to continue submit Last Update User	vides PHAs that imp ting HUD-50058 form Last Update	olement waive ns within the Attach Id	ers and al e normal 6 Fileld
equirements. Such i equirements up to 9 47 of 4000	nstances may be waivers and alternative requirements related to reexe 0 days to submit their forms, PIH encourages PHAs that have the oper Click here to view & download the message File Name hinder for timely HUD-50058 and HUD-50058 MTW submissions 20210827 PHA.pdf	minations and inspections tional capacity to do so File Description Email PDF File format	. Although PIH pro to continue submit Last Update User LIANG ZHOU	vides PHAs that imp ting HUD-50058 form Last Update 09/14/21 04:16PM	olement waive ns within the Attach Id 16089	File Id
equirements. Such 1 equirements up to 9 47 of 4000 Download 2nd Ren	nstances may be waivers and alternative requirements related to reexe 0 days to submit their forms, PIH encourages PHAs that have the opera Click here to view & download the message File Name hinder for timely HUD-50058 and HUD-50058 MTW submissions_20210827_PHA.pdf	minations and inspections tional capacity to do so File Description Email PDF File format	Last Update User	vides PHAs that imp ting HUD-50058 form Last Update 09/14/21 04:16PM	Attach Id	ers and al e normal 6 File Id 35090
equirements. Such i equirements up to 9 47 of 4000 Download 2nd Ren Download 2nd Ren	nstances may be waivers and alternative requirements related to reexe @ days to submit their forms, PIH encourages PHAs that have the opera Click here to view & download the message File Name hinder for timely HUD-50058 and HUD-50058 MTW submissions_20210827_PHA.pdf hinder for timely HUD-50058 and HUD-50058 MTW submissions_20210827_PHA.msg	minations and inspections tional capacity to do so File Description Email PDF File format Email File Outlook Format	Last Update User	vides PHAs that imp ting HUD-50058 form Last Update 09/14/21 04:16PM 09/14/21 04:15PM	Attach Id 16089	File Id 35090

Session Time-Out

Due to HUD-issued security requirements, the portal terminates the user's session after sixty (60) minutes. The system displays 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:

Your session has en	ded	×
	Cancel	Sign In Again

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.

			💽 Us	er Profile Training 💽	WASS Coordinator Trai	ining 🛅 Nev	/ Window 🕒 Retur	n to Secure Systems	(i) Abou
Update Profile & Update; please c	g Portal is o heck syster	ff line fo n messa	or system ma ages on home	intenance/softv e page for syste		Roles signed 오	Portal User Communication 🖂	User Gui	Profile de 💭
	Major Activi	today	ome FIRST - MC	Warning mes the portal is	Connection sage that s offline	Status: 🗎 🛛		month	list
	Sun		Mon	Tue	Wed	Thu	Fri	Sat	
		28	29		31		1	2	3

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 Shortfall Appeal.**"

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 download a report to a CSV file of the data displayed

Click this icon to expand or minimize the tables



Click this icon to read the definition of the data element



Click this icon before the search bar to select a column heading to filter tables



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 module's 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)

Navigate to the Shortfall Appeal Module

If a PHA wishes to receive Shortfall funding and believes that the information utilized by HUD to calculate its eligibility or eligibility amount is inaccurate, or the Financial Data Schedule (FDS) data itself is inaccurate, the PHA may choose to appeal to HUD. Follow these steps from the main page in the Public Housing Portal to find the Shortfall Appeal module.



1. Click "PHA Reports and Submissions" in the left side navigation menu.

PHA Reports &	Submissions						
						OpFund User Communications	PHA Reports
PHA Contact ∨	PHA Submissions $ \checkmark $	HUD-52723/52722 Submission ∨	PHA Reports 🌱 🛛 Pre-F	Pop Data Reports 🗸	HUD-52723/52722 Tool Down	2 Shortfall Submis	isions 🗸
	Select a Calendar :	2023 🗸	Select PHA Code :	XX001 - Public H	lousing Authority Name	 Shortfall App 	olication
First 10 AM	Ps for the PH4	As Eligibility - E1		× II 🔺	First 10 AMPs for th	3 Shortfall App	peals
		Eligibility Prior to Proration (E1)				Shortfall Buo	lget
					4,000	Shortfall Imp	provement Plan

- 2. Click the "Shortfall Submissions" drop-down menu.
- 3. Select "Shortfall Appeals" from the drop-down menu.

Create the Shortfall Appeal Submission

PHAs must submit a single Shortfall Appeal submission for each PHA. Follow these steps to create the Shortfall Appeal.

PHA Reports & Submissions \ PHA Shortfall Appeal		
		Shortfall Application Shortfall Budget
Select Calendar Year 2022 V 1 Select	PHA Code AL005 - PHENIX CITY HOUSING AUTHORITY.	✓ 2 3 Create
Q ~ Go	Actions ~	

- 1. Select Calendar Year: Select the calendar year HUD appropriated the grant funds to the PHA.
- 2. Select PHA Code: Select the PHA code.
- 3. Click the "Create" button.

The Public Housing Portal displays the form to Appeal Published Shortfall Eligibility with certain fields prepopulated.

View/Search/Edit/Upd	View/Search/Edit/Update Public Housing Agency (PHA) Form to Appeal Published Shortfall Eligibility Amount									
	The above referenced agency is applying for Shortfall funds and has submitted accurate and complete financial data to the U.S. Department of Housing and Urban Development (HUD). As specified in the Shortfall Notice, please submit the following items to submit your appeal:									
	* 1) a re-calculation of Operating Reserves assuming the amount of the requested appeal is approved									
	* 2) a copy of the approved FDS that contains the error									
	* 3) an indication of the corrected entries and financial information									
	* 4) for PHAs that will submit a revised financial statement to HUD, a written concurrence from the PHA's auditor									
	* 5) a signed statement (signed pdf is acceptable) by the PHA's Executive Director certifying that the submitted information is accurate									
	6) other documentation to support appeal outside of the above categories									
* Justification for appeal:	Write your justification for appeal here.									
* PHA Contact Name	Gregg Fortner V 5 * Phone Number (502) 123-4567 6									
Created User	Created Date									
Submitted User	Submitted Date									
Last Updated User	Last Updated Date									

- 4. Justification for Appeal: The form requires PHAs to enter a justification for appeal.
- 5. **PHA Contact Name:** Click the drop-down menu to select the correct PHA Contact Name available within your PHA.
- 6. **Phone Number:** Correct any errors in the Phone Number with the corresponding PHA Contact Name.

			🗎 New Wir	ndow 🕞 Return to Secure System 🛈 About ?
Keturn PHA Selection				7 Create Status Log
This page Testing (U	is for demonstr AT) phases).	ration and tes	ting only (Application in Developme	ent/ User Acceptance
Operating Fund Grant	Program - Appeal	for Funds from	Shortfall Funding Set-Aside	
PHA Code	AL005	PHA Name	AL005 - PHENIX CITY HOUSING AUTHORITY	Shortfall Appeal ID
CY	2022	Appeal Status	Version	Active Indicator
Executive Director	Mary Mayrose			

7. Click the "Create" button.

The Shortfall Appeal submission is created.

Completing the Document Upload Section

After clicking the "Create" button, the Appeal Status is now Created.

					🗎 New Windov	Return to Secure Syst	em (i) About
< Return	PHA Selection				Delete Apply Ch	anges Submit Request	Status Log
	This page Testing (U/	is for demons [.] AT) phases). Program - Appe r	tration and tes	ting only (Ap	olication in Developmen	t/ User Acceptan	ce
	PHA Code CY Executive Director	LA001 2022 Gregg Fortner	PHA Name Appeal Status	LA001 - Housing / Created	Authority of New Orleans Version 2	Shortfall Appeal ID Active Indicator	23 False

The form requires PHAs to upload five documents in order to be considered for an appeal.

View/Search/Edit/Updat	te Public Housing Agenc	cy (PHA) Form to App	eal Published Shortfall Eligibility /	Amount						
	The above referenced ager U.S. Department of Housin As specified in the Shortfa	ncy is applying for Shor ng and Urban Developm Il Notice, please submit	tfall funds and has submitted accurat nent (HUD). : the following items to submit your a	e and complete financial data to the ppeal:						
Upload 0 📎	* 1) a re-calculation of O	perating Reserves assuming	g the amount of the requested appeal is ap	proved						
2 Upload 0 📎	* 2) a copy of the approv	ed FDS that contains the e	rror							
3 Upload 0 📎	3 Upload 0 📎 * 3) an indication of the corrected entries and financial information									
4 Upload 0 📎	4 Upload 0 📎 * 4) for PHAs that will submit a revised financial statement to HUD, a written concurrence from the PHA's auditor									
5 Upload 0 📎	* 5) a signed statement (signed pdf is acceptable) b	y the PHA's Executive Director certifying th	at the submitted information is accurate						
6 Upload 0 📎	6) other documentation t	to support appeal outside o	of the above categories							
* Justification for appeal:	Write your justification f	or appeal here.								
4	41 of 400									
* PHA Contact Name	Gregg Fortner 🛛 🗸	* Phone Number	(502) 123-4567							
Created User	Mohsin Shahzad	Created Date	03/18/2022 08:43AM							
Submitted User		Submitted Date								
Last Updated User	Mohsin Shahzad	Last Updated Date	03/18/2022 08:43AM							

- 1. Upload 1 (Required): a re-calculation of Operating Reserves assuming the amount of the requested appeal is accepted.
- 2. Upload 2 (Required): a copy of the approved FDS that contains the error
- 3. Upload 3 (Required): an indication of the corrected entries and financial information
- 4. Upload 4 (Required): for PHAs that will submit a revised financial statement to HUD, a written concurrence from the PHA's auditor
- 5. **Upload 5 (Required):** a signed statement (signed pdf is acceptable) by the PHA's Executive Director certifying that the submitted information is accurate
- 6. Upload 6 (Optional): other documents to support appeal outside of the above categories

For example, click the Upload button (Upload 0) to upload the re-calculation of Operating Reserves.

Document Type		1 nent View	PHA and HUD View $$
Comment		2	11
File browse	۵		
	Drag and Drop		
	Select a file or drop one here. Choose File		
Upload File [4	5	Close & Return 🗲

- 1. Document Type: Select the "Operating Reserve Re-Calculation."
- 2. **Comment**: Enter comments related to the document.
- 3. File browse: Click the folder icon to browse and select the file.
- 4. Click the "**Upload File**" button.

The file appears in a list at the bottom of the browser.

Q.~		Ge	Actions ~						
Document ID	Download	Click to view the file	File Name	File Description	Comment	Upload D	Click to delete the file	Delete File	Document Status (PHA)
1719	Download	4486 7759	Shortfall Appeals File Attachment_1.pdf	Operating Reserve Re- Calculation		03/16/22 04:58PM	2 Mohsin 1 Shahzad		Uploaded

Click the **"Download**" hyperlink to open and download the file. Click the trash can icon (⁽⁾) to delete the file. The PHA can upload additional documents as necessary.

Document ID	Download	Attach id	File ID	File Name	File Description	Comment	Upload Date	Upload User	Delete File	Document Status (PHA)
1725	Download	4492	7765	Shortfall Appeals File Attachment_1.pdf	Operating Reserve Re- Calculation	-	03/17/22 11:02AM	Mohsin Shahzad	Ū	Uploaded
1719	Download	4486	7759	Shortfall Appeals File Attachment_1.pdf	Operating Reserve Re- Calculation	-	03/16/22 04:58PM	Mohsin Shahzad		Uploaded

5. Click the "Close & Return" button.

Continue to upload required documents detailed as **Upload 2** through **Upload 5** as detailed above, and **Upload 6** if applicable.



You cannot submit the Shortfall Appeal without submitting all required documentation, **Upload 1** through **Upload 5**.

Delete the Shortfall Appeal

PHAs may delete the Shortfall Appeal form prior to submission if the PHA decides to not proceed with Shortfall Appeal.

Keturn PHA Selection				1 Delete A	Submit Reques	t Status Log					
This page is f	This page is for demonstration and testing only (Application in Development/ User Acceptance Testing (UAT) phases).										
Operating Fund Grant Pro	gram - Appeal for Fu r	nds from Shortfal	l Funding Set-Aside	1							
PHA Code	MD006	PHA Name	MD006 - Hagerstow	Housing Authority	Shortfall Appeal ID	22					
CY	2022	Appeal Status	Created	Version 1	Active Indicator	False					
Executive Director	Joanne Ballengee										

1. Click the "Delete" button.



2. Click the "**OK**" button in the pop-up window.

View Email Log

To view the email log:

< Retur	rn PHA Selection 🗸 Return FO Report	Delete Refresh ED Info Apply Changes Submit Request Sta
	This page is for demonstration and testing on	y (Application in Development/ User Acceptance Testing (UAT) phases).
		I

1. Click the "Email Log" button.

2~			Go	Actions `	1							
D So	urce Module ID Name	PHA CD	Development No.	Level	Mail Scope	Mail Message	Mail To	Mail From	Mail Subject	Mail CC	Mail BCC	Ma Atta me Cou
90	Click to view email	01	-	РНА	PHA	Enter text here as needed.	NHtrumn @aol.co mAL001 DEV	opfundw ebportal @hud.go v	Follow-up on Shortfall application submission PHA Code - AL001 CY 2023 Application ID - 454	opfundw ebportal @hud.go v	opfundw ebportal @hud.go v	
												1.

The current and previous emails display summary of the email. Click the hyperlink to view more details about the content of those emails.

Submit Shortfall Appeal

To submit the shortfall appeal:

				🗎 New Window	✓ ➡ Return to Secure System	em (i) About ?					
Return PHA Selection Submit Request 2 pg 2 pg 2 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4											
This page is for demonstration and testing only (Application in Development/ User Acceptance Testing (UAT) phases).											
PHA Code	AL005	PHA Name	AL005 - PHENIX	X CITY HOUSING AUTHORITY	Shortfall Appeal ID	17					
CY	2022	Appeal Status	Created	Version 1	Active Indicator	False					
Executive Director	Mary Mayrose										

1. PHAs may continue to make updates and Click "Apply Changes" to reflect any updates.

Return PHA Selection				Can New Windo Sh Dele Apply C	ortfall appeal updat	em () Abo ted! ×
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PHA	Code AL005	PHA Name	AL005 - PHENIX C	ITY HOUSING AUTHORITY	Shortfall Appeal ID	17
PHA (Code AL005 CY 2022	PHA Name Appeal Status	AL005 - PHENIX C Created	ITY HOUSING AUTHORITY Version 1	Shortfall Appeal ID Active Indicator	17 False

In addition, PHA may upload any necessary supporting documents as required.

2. Click "Submit Request" once the Shortfall Appeal form is completed.

Return PHA Selection				Shoi	tfall appeal submitt	ed!
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	AL 005	PHA Name	AL005 - PHENIX CITY	HOUSING AUTHORITY	Shortfall Appeal ID	17
PHA Code	ALOUS					
PHA Code CY	2022	Appeal Status	Submitted	Version 1	Active Indicator	False

The Shortfall Appeal is submitted. The PHA cannot update or delete a submitted form. The PHA cannot resubmit the form until the FMD either completes review processes or returns the form.

Received Submission

The Public Housing Portal notifies the PHA's ED when a Shortfall Appeal form is submitted by email.

HUD received your Shortfall Appeal and your submission can be viewed by selecting the following from the main navigation:
PHA Reports & Submissions → Shortfall Submissions → Shortfall Appeal
If you have any questions, please contact <u>PHFMDShortfallfunding@hud.gov</u> by email.
Sincerely,
Office of Public Housing
US Department of Housing & Urban Development

Accepted Submissions

The Public Housing Portal notifies the PHA's ED when the HUD accepts their Shortfall Appeal by email.

HUD reviewed and accepted your Shortfall appeal. You may submit a Shortfall application within 7 calendar days as required. Your current submission can be viewed by selecting the following from the main navigation:
PHA Reports & Submissions → Shortfall Submissions → Shortfall Appeal
If you have any questions, please contact <u>PHFMDShortfallfunding@hud.gov</u> by email.
Sincerely,
Office of Public Housing
US Department of Housing & Urban Development

Returned Submissions

The FMD may return the PHA's Shortfall Appeal form if the appeal contains errors, omissions, missing or incorrect documentation, or any other reason. The Public Housing Portal notifies the PHA's ED when FMD returns their appeal by email.



The "Return Comments" provides the reason the FMD returned the submissions. PHAs must navigate to the Shortfall Appeal module and correct and resubmit the Shortfall Appeal form.



1. Click "PHA Reports and Submissions" in the left side navigation menu.

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钧 PHA Reports & Submissions	This page is for demonstration and testing only (Application in Development/ User Acceptance Testing (UAT) phases).									
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	Fligibility prior to proration (F1)									

- 2. Click the "Shortfall submissions" drop-down menu.
- 3. Select "Shortfall Appeals" from the drop-down menu.

Select Calendar Year 2022 V 4								PHA Code	LA001 - Hou	ing Authority of	New Orleans		~	5				
Q	Q ~ 60 Actions ~																	
	Appeal ID	PHA Code	Calendar Year	Version	Status	PHA Name	Executive Director	PHA Phone Number	PHA Contact Name	PHA Comment	Active Indicator	Return Comment	Last Updated User	Last Updated Date	Created User	Created Date	Submitted User	Submitted Date
4	6	LA001	2022	1	Created	LA001 - Housing Authority of New Orleans	Gregg Fortner	5046703269	Gregg Fortner	Enter the justification for appeal here.	FALSE	This submission is returned because of documentation issues.	Johnson Abraham	03/17/2022 02:04PM	Mohsin Shahzad	03/16/2022 03:33PM	Mohsin Shahzad	03/17/2022 01:59PM

- 4. Select Calendar Year: Select the calendar year HUD appropriated the grant funds to the PHA.
- 5. Select PHA Code: Select the PHA code.
- 6. Click the pencil icon (\checkmark) to review and update the returned Shortfall Appeal form.

The PHA has seven (7) calendar days form the returned date or Shortfall Appeal due date, whichever is later, to resubmit the form.

Denied Submissions

The FMD may deny the PHA's Shortfall Appeal form if the PHA does not submit its corrected FDS, or the submission cannot be accepted due to other errors. The Public Housing Portal notifies the PHA's ED when FMD denies their forms by email.



The "Return/Denied Comments" section provides the reason the FMD denied the submission. If your PHA can submit a corrected FDS, or fix the other errors, then the PHA may create a new Shortfall Appeal submission.



1. Click "PHA Reports and Submissions" in the left side navigation menu.

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	S	elect a Calendar : 2016 V Select PHA NY005 - New York City Housing Authority. V Code :	Shortfall Application									
		3	Shortfall Appeals									
	First 1	0 AMPs for the PHAs eligibility - E1 🛛 🖬 First 10 AMPs for the PHAs Eligible U	Shortfall Budget									
		Fligibility prior to proration (F1)										

- 2. Click the "Shortfall submissions" drop-down menu.
- 3. Select "Shortfall Appeals" from the drop-down menu.

	Select Calendar Year 2022 V							PHA Code	LA001 - Hou	sing Authority o	f New Orleans		~ 5				7	Create
С	(~				Go	Actions ~												
	Appeal ID	PHA Code	Calendar Year	Version	Status	PHA Name	Executive Director	PHA Phone Number	PHA Contact Name	PHA Comment	Active Indicator	Return Comment	Last Updated User	Last Updated Date	Created User	Created Date	Submitted User	Submitted Date
2	6	LA001	2022	1	Denied	LA001 - Housing Authority of New Orleans	Gregg Fortner	5046703269	Gregg Fortner	Enter the justification for appeal here.	FALSE	This submission is returned because of documentation issues.	Johnson Abraham	03/17/2022 02:23PM	Mohsin Shahzad	03/16/2022 03:33PM	Johnson Abraham	03/17/2022 02:23PM

- 4. Select Calendar Year: Select the calendar year HUD appropriated the grant funds to the PHA.
- 5. Select PHA Code: Select the PHA code.
- 6. Click the pencil icon (🖍) to review the denied return comment reason.
- 7. Click the "Create" button to create a new Shortfall Appeal submission.

Questions

If you have comments, questions, or need help finding information in the Public Housing Portal, we are here to help!

- If you have questions about Operating Fund Grants, calculating or understanding Operating Fund eligibility, PIH regulations or notices, contact your local FO or email <u>PHFMDShortfallfunding@hud.gov</u>.
- If you have questions about Shortfall funding, refer to the latest PIH Notice for guidance and who to contact.

- If you have questions or technical issues regarding your access to the Public Housing Portal, Contact the Real Estate Assessment Center Technical Assistance Center (REAC-TAC) by calling 1-888-245-4860 Option #4 or send an email <u>REAC_TAC@hud.gov</u>.
- For questions regarding technical issues with using the Public Housing Portal, contact <u>publichousingportal@hud.gov</u>.