Requesting a Unit Designation or Accessible Designation Changes in IMS/PIC

February 2022

Overview

The instructions below outline how to propose Unit Designation and Accessible Designation changes in IMS/PIC and how to submit them in the system to the field office for approval. Information about unit designation and accessible designation categories can be found in Notice PIH 2022-03 and 24 CFR 945. You must follow this guidance and provide any required documentation so that the field office can take action in the system. For unit designation changes other than General Occupancy, it is suggested that you do not perform these actions in IMS/PIC until you have submitted your official Designated Housing Plan (DHP) to your local field office.

These steps can also be used to reflect that units that were in an approved DHP that is not being renewed are being returned to the General Occupancy Unit Designation category or to update a unit's Accessible Designation to Not Accessible.

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Changes since March 2019 posting:

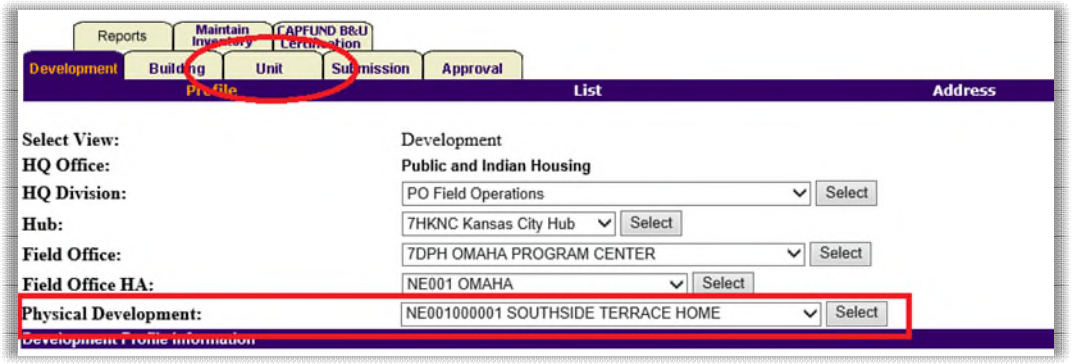
- Previous document only included information on updating unit designations. This updated document includes information about the Accessible Designation change process as well due to the Notice PIH 2022-03 being published.
- Other updates were made throughout the document including adding references to Accessible Designation changes to other sections as appropriate.
- Added steps 6-9 to the section about submitting changes for HUD approval to reflect that the full set of building and unit data should be submitted once unit designation and/or accessible designation changes are approved. To be included in the Capital Fund formula and available for other items, the changes must be saved to the official inventory, which is not done with a unit status change approval.

Requesting Unit Designation Changes in IMS/PIC

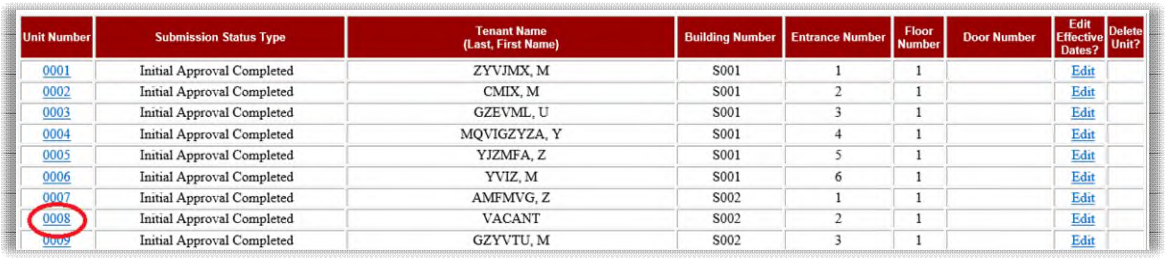
The instructions below outline how to request Unit Designation changes in IMS/PIC and, if necessary, how to submit them in the system to the local field office for approval. Please ensure that you follow each step carefully to prevent unnecessary work by PHA and/or local field office staff and delays in showing the correct Unit Designation in IMS/PIC.

Proposing a Unit Designation change

1. Log into Secure Systems and access IMS/PIC from your Main Menu. The website address for the Secure Systems login page is http://portal.hud.gov/hudportal/HUD/program_offices/public_indian_housing/reac/online and single click on Login here.
2. After you are in IMS/PIC, on the left side of the screen there are some modules, single click on the Development sub module under the Housing Inventory module. Note: if you are already in IMS/PIC but in another sub module you can get the PIC Main page to access Development by single clicking on the PIC Main link on the left side of page you're on.
3. You will need to read and agree to the Privacy Act statement before you proceed if you have not already done so in this IMS/PIC session. Once you are in the Development sub module you will see a row of tabs at the top of the page. Single click on the Unit tab. See the screen print below. Note: if you have more than one development, you will need to select the development you want to work in from the Physical Development drop down box **BEFORE** single clicking on the Unit tab.



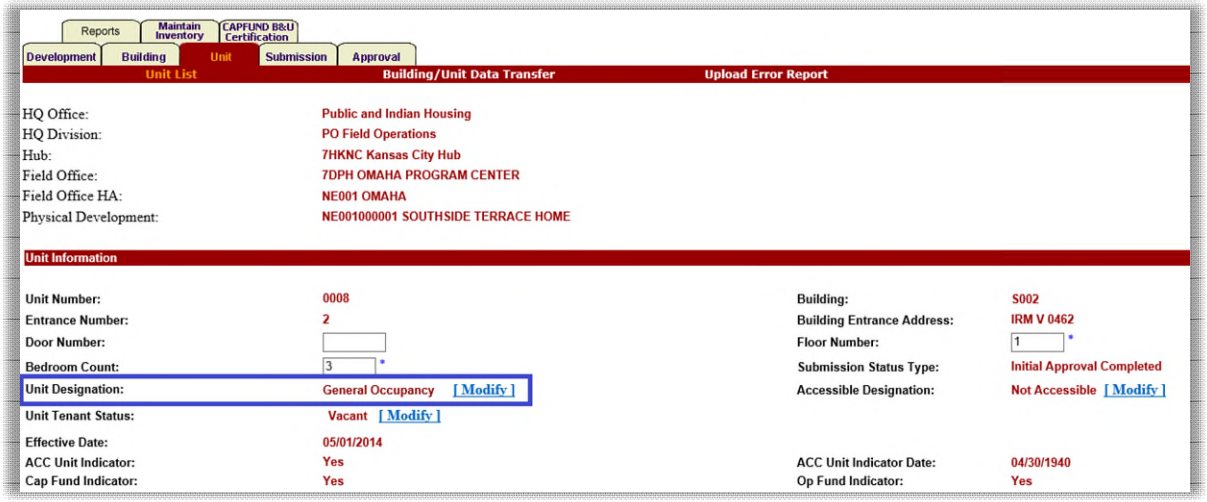
4. The Unit List page is presented to you. In the unit list find the unit number you want to edit the Unit Designation for. Single click on the link for the unit number you wish to edit.



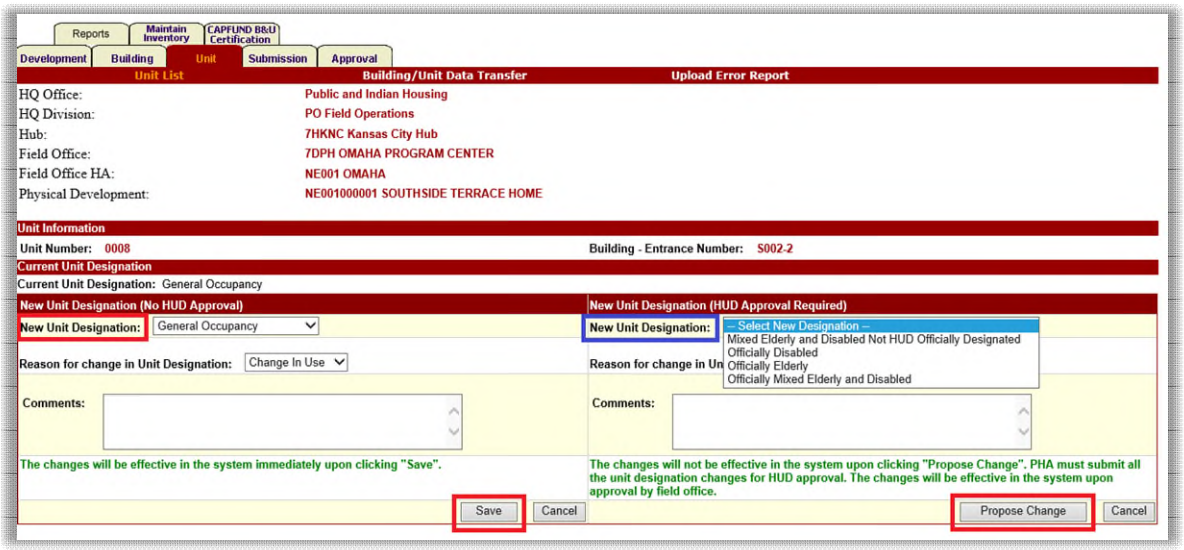
Unit Number	Submission Status Type	Tenant Name (Last, First Name)	Building Number	Entrance Number	Floor Number	Door Number	Edit Effective Dates?	Delete Unit?
0001	Initial Approval Completed	ZYVJMX, M	S001	1	1		Edit	
0002	Initial Approval Completed	CMIX, M	S001	2	1		Edit	
0003	Initial Approval Completed	GZEVML, U	S001	3	1		Edit	
0004	Initial Approval Completed	MQVIGZYZA, Y	S001	4	1		Edit	
0005	Initial Approval Completed	YJZMFA, Z	S001	5	1		Edit	
0006	Initial Approval Completed	YVIZ, M	S001	6	1		Edit	
0007	Initial Approval Completed	AMFMVG, Z	S002	1	1		Edit	
0008	Initial Approval Completed	VACANT	S002	2	1		Edit	
0009	Initial Approval Completed	GZYVTU, M	S002	3	1		Edit	

5. On the Unit Details page for the unit number you clicked on, you will see many details about that unit. On the left side of the page you will see the Unit Designation area. The current Unit Designation will appear next to this. If a unit has not previously had an approved designation it will

say General Occupancy. To change the Unit Designation, single click on the Modify link to the right of the current Unit Designation. See the following screen print for an example of this screen.



6. You are presented with the Unit Designation Change screen. There are two types of changes that can be made – changes where no HUD approval is required and changes where HUD approval is required. The screen print below illustrates the layout of this page as well as the selections that can be made.
   - Changes not requiring HUD approval – the only choice on this side of the page is General Occupancy. This would be selected if a PHA was changing the Unit Designation from an approved unit designation to the default designation for all units. General Occupancy means that anyone can live in a unit regardless of age, disability, size of household, etc.
   - Changes requiring HUD approval – these include HUD approved unit designations such as Mixed Elderly and Disabled Not HUD Officially Designated, Officially Disabled, Officially Elderly, and Officially Mixed Elderly and Disabled.



7. Select the applicable Unit Designation. If you are proposing a change to the Unit Designation that requires HUD approval, you will make a selection on the right side of the screen. If you are changing a unit's designation back to General Occupancy you will do this on the left side of the

page. You do not need to select the reason for the change. If you wish you may enter comments but it is not required. If you do not enter comments a default comment will be inserted into the database. This is **not** the place to enter your documentation.

8. Once you have made your selection you will single click on the appropriate button for the type of change you are making. Single click on Save for selections not requiring HUD approval. Single click on Propose Change for selections that require HUD approval. See screen print above.
9. You will be taken back to the Unit Details screen. To make sure the changes are saved you should scroll down the page and single click on the Update Unit Details button on the right side of the page. Once this is done the page will refresh and will say that the data was saved successfully.
    - If you scroll to the bottom of the Unit Details screen you will see a record of the changes that have made to this unit. IMS/PIC will keep a history of the changes that are made for this unit from the time of the September 2010 IMS/PIC release onward. If you proposed a change that requires HUD approval you will see a Delete button on the right side of the screen. If you change your mind or made a mistake in your proposed change, you can use this button to delete the proposed change prior to submission.

Update Unit Details

Unit Status/Designations Change History

Change Type	Old Unit Characteristics	New Unit Characteristics	Unit Status Effective Date/ Unit Designation Change Date	Request Status	Request Date	Requesting User	Requester Comments	Review Date	Review User	Reviewer Comments	Edit
Unit Designation	General Occupancy	Officially Disabled	02/17/2022	Requested (Not Submitted)	02/17/2022	M	User M has changed the Unit Designation from FA to ODD	2022-02-17 11:39:32.727	M		Delete

Important things to note before you proceed

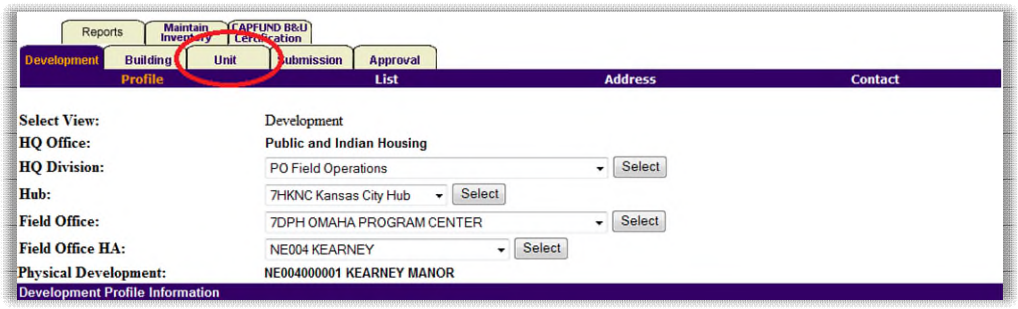
- If you need to make changes to other units, repeat steps 3-9. **You must ensure that you have completed all proposals prior to submitting your proposal per the steps later in this document.**
- If you made a change that does not require HUD approval, like changing a unit back to General Occupancy, you do not have to proceed any further (e.g. there is no proposed request to submit to HUD). The change took affect once it was saved.
- You will not be able to submit a 50058 for a unit while it has a status of Status Changes Proposed.

Requesting Accessible Designation Changes in IMS/PIC

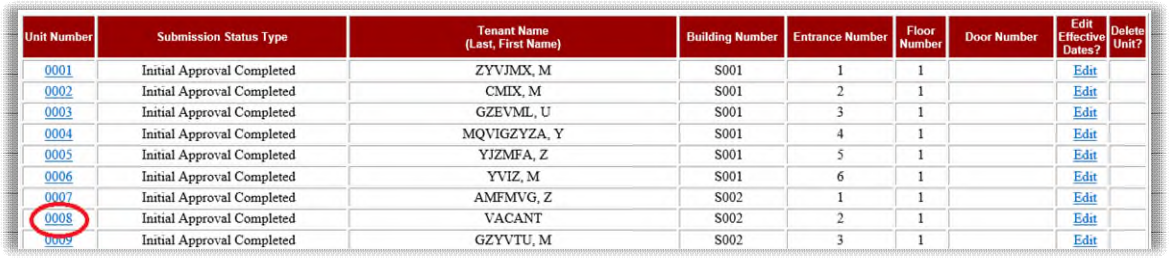
The instructions below outline how to request Accessible Designation changes in IMS/PIC and, if necessary, how to submit them in the system to the local field office for approval. Please ensure that you follow each step carefully to prevent unnecessary work by PHA and/or local field office staff and delays in showing the correct Accessible Designation in IMS/PIC.

Proposing an Accessible Designation change

1. Log into Secure Systems and access IMS/PIC from your Main Menu. The website address for the Secure Systems login page is http://portal.hud.gov/hudportal/HUD/program_offices/public_indian_housing/reac/online and single click on Login here.
2. After you are in IMS/PIC, on the left side of the screen there are some modules, single click on the Development sub module under the Housing Inventory module. Note: if you are already in IMS/PIC but in another sub module you can get the PIC Main page to access Development by single clicking on the PIC Main link on the left side of page you're on.
3. You will need to read and agree to the Privacy Act statement before you proceed if you have not already done so in this IMS/PIC session. Once you are in the Development sub module you will see a row of tabs at the top of the page. Single click on the Unit tab. See the screen print below. Note: if you have more than one development, you will need to select the development you want to work in from the Physical Development drop down box **BEFORE** single clicking on the Unit tab.



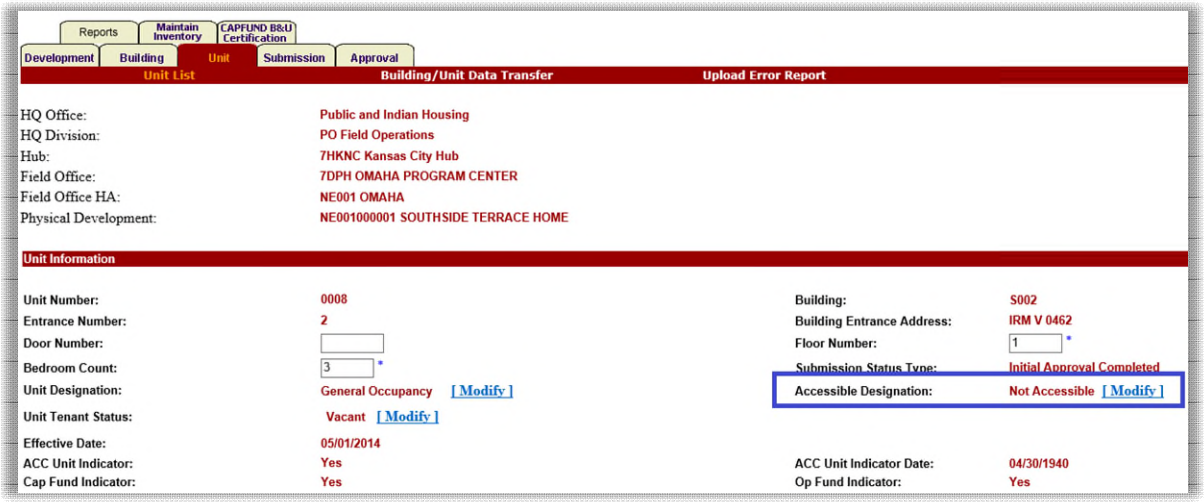
4. The Unit List page is presented to you. In the unit list find the unit number you want to edit the Accessible Designation for. Single click on the link for the unit number you wish to edit.



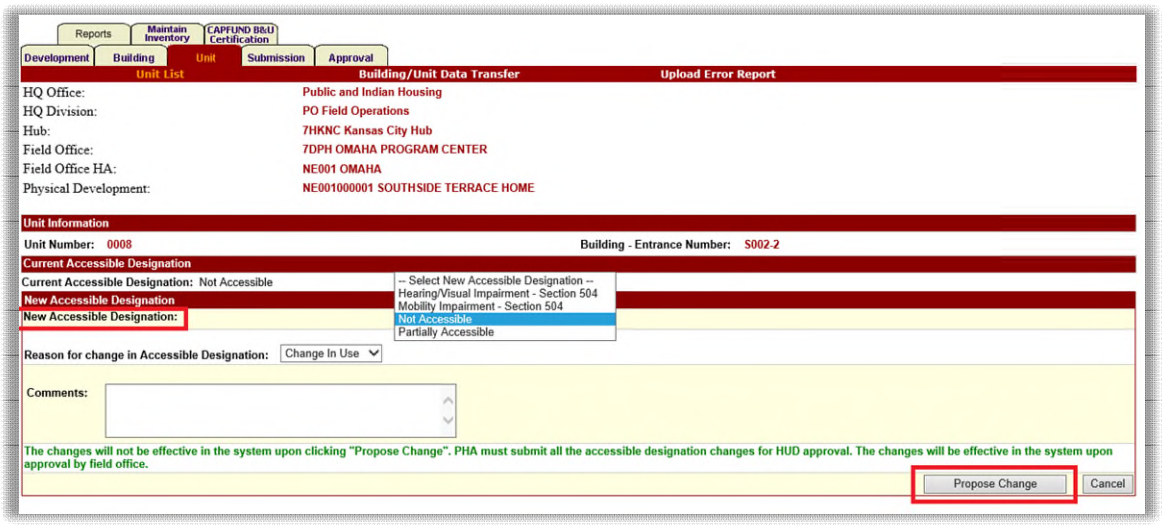
Unit Number	Submission Status Type	Tenant Name (Last, First Name)	Building Number	Entrance Number	Floor Number	Door Number	Edit Effective Dates?	Delete Unit?
0001	Initial Approval Completed	ZYVJMX, M	S001	1	1		Edit	
0002	Initial Approval Completed	CMIX, M	S001	2	1		Edit	
0003	Initial Approval Completed	GZEVML, U	S001	3	1		Edit	
0004	Initial Approval Completed	MQVIGZYZA, Y	S001	4	1		Edit	
0005	Initial Approval Completed	YJZMFA, Z	S001	5	1		Edit	
0006	Initial Approval Completed	YVIZ, M	S001	6	1		Edit	
0007	Initial Approval Completed	AMFMVG, Z	S002	1	1		Edit	
0008	Initial Approval Completed	VACANT	S002	2	1		Edit	
0009	Initial Approval Completed	GZYVTU, M	S002	3	1		Edit	

5. On the Unit Details page for the unit number you clicked on, you will see many details about that unit. On the left side of the page you will see the Accessible Designation area. The current Accessible Designation will appear next to this. If a unit has not previously had an Accessible Designation entered it will say Not Accessible. To change the Accessible Designation, single click

on the Modify link to the right of the current Accessible Designation. See the following screen print for an example of this screen.



6. You are presented with the Accessible Designation Change screen. Select the applicable Accessible Designation from the New Accessible Designation drop down box. Then select the reason for the change. It will either be a change in use (e.g. work was done to make a unit accessible) or Data Correction (e.g. you are correcting data that was previously included in a building and unit submission). You can enter a short comment if desired but it is not required – this is not where you enter documentation that the field office may ask for. If you do not enter a comment a default comment will be inserted into the database.



7. Once you have made your selection, you will single click on the Propose Change button. See screen print above.
8. You will be taken back to the Unit Details screen. To make sure the changes are saved you should scroll down the page and single click on the Update Unit Details button on the right side of the page. Once this is done the page will refresh and will say that the data was saved successfully.
    - If you scroll to the bottom of the Unit Details screen you will see a record of the changes that have made to this unit. IMS/PIC will keep a history of the changes that are made for this unit

from the time of the September 2010 IMS/PIC release onward. If you proposed a change that requires HUD approval you will see a Delete button on the right side of the screen. If you change your mind or made a mistake in your proposed change, you can use this button to delete the proposed change prior to submission.

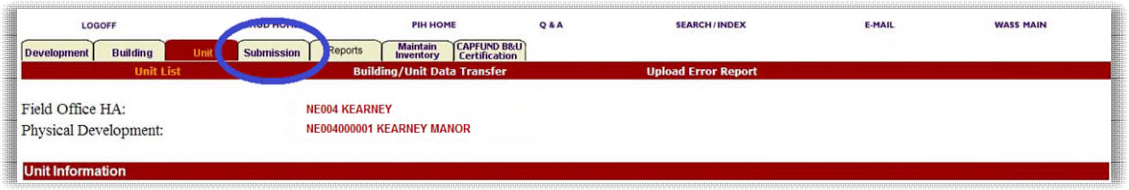
Change Type	Old Unit Characteristics	New Unit Characteristics	Unit Status Effective Date/ Unit Designation Change Date	Request Status	Request Date	Requesting User	Requester Comments	Review Date	Review User	Reviewer Comments	Edit
Unit Accessible Designation Change	Not Applicable	Partially Accessible	02/17/2022	Requested (Not Submitted)	02/17/2022	M	User M has changed the Unit Designation from NA to STD	2022-02-17 11:44:59.567	M		Delete

Important things to note before you proceed

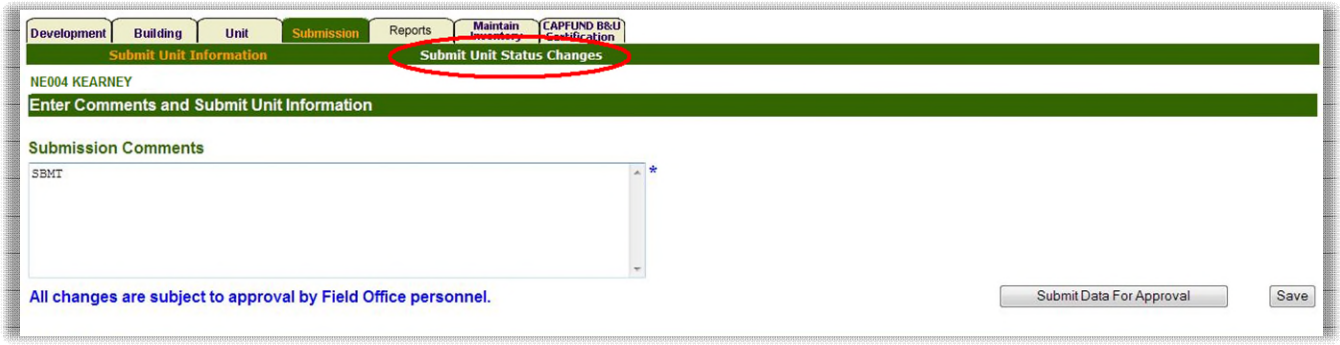
- If you need to make changes to other units, repeat steps 3-9. **You must ensure that you have completed all proposals prior to submitting your proposal per the steps later in this document.**
- If you made a change that does not require HUD approval, like changing a unit back to General Occupancy, you do not have to proceed any further (e.g. there is no proposed request to submit to HUD). The change took affect once it was saved.
- You will not be able to submit a 50058 for a unit while it has a status of Status Changes Proposed.

Submitting Unit Designation and Accessible Designation Changes for HUD Approval

1. If you made a change that requires HUD approval, you must submit that proposed change to the field office for approval. To submit your proposed change(s) single click on the Submission tab at the top of the page.
    - Only users with the submit role are allowed to perform this function. If you cannot see the Submission tab or cannot do the steps below, please discuss this with your Executive Director or other staff person who has been assigned this role.



2. On the Submission page single click on the **SUBMIT UNIT STATUS CHANGES** link to go to the page where you will submit your request. Please see the screen print following this step for where the link is located.

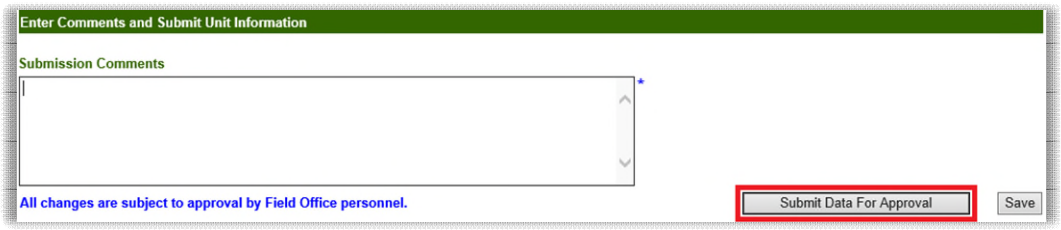


3. On the Submit Unit Status Changes page you will see a listing of all the Unit Tenant Status, Unit Designation, and/or Accessible Designation proposed changes you have made. To submit the proposed changes, single click the Submit Data For Approval button.
    - You will only see Unit Tenant Status proposals in addition to Unit Designation or Accessible Designation proposals if you have created them.
    - You cannot choose just a portion of the listed proposals to submit. When you submit the data for approval all proposals will be submitted.
    - The building and unit data will be in read only status until the field office takes action on the submission. You also will not be able to submit a 50058 for a unit while it has a status of Status Changes Submitted.

4. Notify your local field office that you have submitted Unit Tenant Status, Unit Designation and/or Accessible Designation changes in IMS/PIC and provide them with any required documentation.
5. When you are finished you can either log out of IMS/PIC using the Logoff link or navigate to other areas of IMS/PIC by using the PIC Main link to do other tasks.

For this information to be populated in the official inventory in the database and make it available for the Capital Fund formula and other items, the PHA must submit the entire set of building and unit data for HUD approval after the Unit Status Changes are approved by the local field office. Information on how to do this can be found below.

6. The PHA should go back into the Development sub module – steps 1 and 2 above – and single click on the Submission tab.
7. The Submit Unit Information page appears. There is a Submission Comments box on this page. Enter a <u>brief</u> comment describing why the building and unit data is being submitted for approval.
8. After you are finished typing in your comment, single click the Submit Data for Approval button. This will submit the data for approval. All building and unit 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.*



9. 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 request to verify any changes to the data since the last full building and unit data approval.

Checking the Status of Unit Designation or Accessible Designation Changes

If you want to check to see if your proposed Unit Designation change has taken affect you can return to the Unit List page (see step 3 for how to get to the Unit List).

If the status for the unit says "Status Changes Proposed" (see screen print below) then you have not submitted your proposed change for field office approval. To do this follow steps 10-13 above.

Unit Number	Submission Status Type	Tenant Name (Last, First Name)	Building Number	Entrance Number	Floor Number	Door Number	Edit Effective Dates?	Delete Unit?
026	Initial Approval Completed	BBEIZ'Y, O	26	1	1	026	Edit	
026	Initial Approval Completed	VIBBIC-IUSVC, M	E	1	1	026	Edit	
027	Initial Approval Completed	ZYUBIZ, I	27	1	1	027	Edit	
027	Initial Approval Completed	FKEVZEIF, M	E	1	1	027	Edit	
028	Initial Approval Completed	OIBUYYQ, Q	28	1	1	028	Edit	
028	Initial Approval Completed	HHYF, O	E	1	1	028	Edit	
029	Initial Approval Completed	UEVVMF, C	29	1	1	029	Edit	
029	Status Changes Proposed	VACANT	E	1	1	029	Edit	
030	Initial Approval Completed	OIZVSYD, B	30	1	1	030	Edit	

If the status for the unit says "Status Changes Submitted" the change you proposed and submitted is awaiting field office review. You should ensure that you have notified your local field office that you submitted proposed changes in IMS/PIC <u>and</u> that you have provided them with your DHP request for that change. If you have not done one or both these things you should do so at this time, otherwise the field office will not be able to review your request.

Unit Number	Submission Status Type	Tenant Name (Last, First Name)	Building Number	Entrance Number	Floor Number	Door Number	Edit Effective Dates?	Delete Unit?
026	Initial Approval Completed	BBEIZ'Y, O	26	1	1	026		
026	Initial Approval Completed	VIBBIC-IUSVC, M	E	1	1	026		
027	Initial Approval Completed	ZYUBIZ, I	27	1	1	027		
027	Initial Approval Completed	FKEVZEIF, M	E	1	1	027		
028	Initial Approval Completed	OIBUYYQ, Q	28	1	1	028		
028	Initial Approval Completed	HHYF, O	E	1	1	028		
029	Initial Approval Completed	UEVVMF, C	29	1	1	029		
029	Status Changes Submitted	VACANT	E	1	1	029		
030	Initial Approval Completed	OIZVSYD, B	30	1	1	030		