



Requesting a Unit Designation Change in IMS-PIC

March 2019

Overview

The instructions below outline how to propose Unit Designation changes in IMS-PIC and how to submit them in the system to the field office for approval. Information about unit designations can be found in Notice 2005-2 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. 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 put back in General Occupancy status.

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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?
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	OIBUYQ, 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	Initial Approval Completed	VACANT	E	1	1	029	Edit	
030	Initial Approval Completed	OIZVSYD, B	30	1	1	030	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.

Get Help | Logoff / Return to Secure Systems

Reports	Maintain Inventory	CAPFUND B&U Certification		
Development	Building	Unit	Submission	Approval
Unit List		Building/Unit Data Transfer		Upload Error Report

HQ Office: Public and Indian Housing
 HQ Division: PO Field Operations
 Hub: 7HKNC Kansas City Hub
 Field Office: 7DPH OMAHA PROGRAM CENTER
 Field Office HA: NE004 KEARNEY
 Physical Development: NE004000001 Kearney Manor and Scattered Sites

Unit Information	
Unit Number: 001	Building: A
Entrance Number: 1	Building Entrance Address: 2715 Avenue I
Door Number: <input type="text" value="001"/>	Floor Number: <input type="text" value="1"/> *
Bedroom Count: <input type="text" value="1"/> *	Submission Status Type: Initial Approval Completed
Unit Designation: General Occupancy [Modify]	Accessible Designation: Not Applicable [Modify]
Unit Tenant Status: Occupied - Assisted Tenant	

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.

Development	Building	Unit	Submission	Reports	Maintain Inventory	CAPFUND B&U Certification
Unit List		Building/Unit Data Transfer			Upload Error Report	

Field Office HA: NE004 KEARNEY
 Physical Development: NE004000001 KEARNEY MANOR

Unit Information	
Unit Number: 001	Building - Entrance Number: A
Current Unit Designation	
Current Unit Designation: General Occupancy	
New Unit Designation (No HUD Approval)	
New Unit Designation: <input type="text" value="General Occupancy"/>	New Unit Designation (HUD Approval Required)
Reason for change in Unit Designation: <input type="text" value="Change In Use"/>	Reason for change in Unit Designation: <input type="text" value="Mixed Elderly and Disabled Not HUD Officially Designated"/>
Comments: <input type="text"/>	Comments: <input type="text"/>
<p>The changes will be effective in the system immediately upon clicking "Save".</p> <p>The changes will not be effective in the system upon clicking "Propose Change". PHA must submit all the unit designation changes for HUD approval. The changes will be effective in the system upon approval by field office.</p>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	<input type="button" value="Propose Change"/> <input type="button" value="Cancel"/>

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.

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 Elderly	08/02/2012	Requested (Not Submitted)	08/02/2012	M	User M67761 has changed the Unit Designation from FA to ODE	2012-08-02 16:29:59.967	M		<input type="button" value="Delete"/>

Important things to note before you proceed

- If you need to make changes to other units at this time, repeat steps 3-9. **You must ensure that you have completed all proposals prior to submitting your proposal per the steps below.**
- 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. 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 Changes for HUD Approval

10. 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.



11. 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.



12. On the Submit Unit Status Changes page you will see a listing of all the Unit Tenant Status and/or Unit 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 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. Depending on the type of proposal submitted you may not be able to submit a 50058 for a unit while it has a status of Status Changes Submitted.



13. Notify your local field office that you have submitted Unit Tenant Status and/or Unit Designation changes in IMS-PIC and provide them with any required documentation.
14. 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.

Checking the Status of Unit 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	OIBUY'YQ, Q	28	1	1	028	Edit	
028	Initial Approval Completed	HHYF, O	E	1	1	028	Edit	
029	Initial Approval Completed	UEVV'MF, 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 and 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	OIBUY'YQ, Q	28	1	1	028		
028	Initial Approval Completed	HHYF, O	E	1	1	028		
029	Initial Approval Completed	UEVV'MF, C	29	1	1	029		
029	Status Changes Submitted	VACANT	E	1	1	029		
030	Initial Approval Completed	OIZVSYD, B	30	1	1	030		