



# Generating a Unit Report

March 2019

A Unit Report is a very useful tool for looking at units in each development in a housing authority at a glance. Depending on which type of report you generate, the report can show you details such as:

- Building, entrance, and unit number
- Unit type (family, elderly, etc)
- Unit status (i.e. initial upload, initial approval completed, Demo Dispo, etc)
- Bedroom count
- Whether it is an ACC unit as well as the Operating Fund and Capital Fund indicators
- Information about Demo/Dispo application and activity

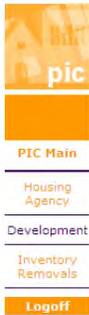
In addition to this information, you can also have this report show you the occupancy information for each unit. You do not have to have this information in the report, but it can be very helpful when reconciling that tenants are in the correct units. The occupancy information is:

- Social Security Number (SSN)—only the last 4 digits will be shown if the user’s tenant data is masked.
- Name (first initial and last name if the tenant data is masked)
- Occupied date (if the system has captured the date, for older 50058s it may not have)

To generate the Unit Report for a development in your housing authority, follow these steps.

1. Log into Secure Systems as you normally would and single click on the PIH Information Center (PIC) link in the Main Menu.
2. Once you see the PIC Main screen, under the Housing Inventory module on the left side of the screen single click on Development sub module link.
3. You will get the Privacy Act page. Once you have read the Privacy Act statement, single click on Agree or Disagree at the bottom of the page. You must read and agree to this page to proceed.
4. Once you are in the Development sub module you will see a row of tabs at the top of the page. The last tab on the right is called Reports, single click on that tab.
5. On the next page you will see a row of links under the tabs at the top of the page. There is one that is titled Unit Reports, single click on that link.
6. You will see a dropdown box for Report Type. By default, “Detailed” is selected. This is the Unit Detail Report you will usually look at. If you are trying to reconcile Unit Tenant Status data (i.e. for Operating Subsidy) you will want to look at the Status Changes Summary Report. Descriptions of the report types in this dropdown box will follow at the end of these instructions. Select the type of report you want to view and single click on the Select button.

Get Help | Logoff / Return to Secure Systems



PIC Main

Housing Agency

Development

Inventory Removals

Logoff

Reports	Maintain Inventory	CAPFUND B&U Certification
Development	Building	Unit
Building Reports	Unit Reports	Upload Task List RASS Report Occ/Aging ReportGeo Coded Addresses
Select View: Development HQ Office: Public and Indian Housing HQ Division: PO Field Operations <span style="float: right;">Select</span> Hub: 7HKNC Kansas City Hub <span style="float: right;">Select</span> Field Office: 7DPH OMAHA PROGRAM CENTER <span style="float: right;">Select</span> Field Office HA: NE003 HALL COUNTY <span style="float: right;">Select</span> <b>Report Type: Detailed <span style="float: right;">Select</span></b>		
Development Code	Development Name	
<input type="checkbox"/> NE003000001	Centennial, Golden, Pletcher, Rainbow, NonDw	
<input type="checkbox"/> NE003000002	Orleans, Western, Stolley, Scatt Sites	
<input type="checkbox"/> NE003006	SCATTERED SITES	
<input type="checkbox"/> Select/Deselect All		

7. You will be presented with a list of the developments that are in your housing authority. Single click on the checkbox to the left of the development you want to see the unit details for. If you want to generate a report for all developments scroll down the page and find the Select All checkbox and single click on it to select all the developments.
8. The options from this point forward depend on the report you want to view. The most common are below; all of the choices are listed at the end of this document. Users should be able to decipher what they need to select for those items not covered here.
  - Detailed report: To view the occupancy information for this development, place a checkmark next to the word Occupancy (see above for what this includes). For Unit Status select **All** from the dropdown box. Leave the rest of the options as they are unless you specifically need to change them.
  - Status Changes Summary report: Enter the date range you want to view data for. For instance, 07/01/2017 to 06/30/2018 for Operating Subsidy (years will be different depending on the year of data you want to view). You can enter any date range you wish. *This is a live report so if using to see the data for Operating Subsidy keep in mind the data will change as 50058s in the effective date range are accepted by the system.*
  - Status Changes Detailed report: Enter the date range you want to view data for. Note that it will only show data that falls within the date range. If someone lives in a unit during the date range but moved into the unit prior to the date range no data or limited data may show up for that unit.
9. Single click on the Generate Report push button. Another window will open up and the report will load. If there are multiple pages you will need to navigate through each page. You can also print the current page of the report or download the entire report to Excel.

You can print the report or download to Excel for further manipulation if you would like. You can also sort this report within the web browser in any number of ways according how you want to view the information. Clicking on the up arrow below a column heading will sort the report according to that column in ascending order. Click on the down arrow below a column heading will sort the report according to that column in descending order.

Types of Unit Reports available from the Report Type dropdown box:

- Detailed—shows detailed information about all of a housing authority's units, including units that have previously been marked as merged units (these will also have 0 bedrooms and an ACC indicator of No).
- Summary by Development—shows the number of units in each selected development for each of the different Unit Designations (elderly, family, etc).
- Summary—shows the number of units for each of the different Unit Designations. If more than one development is selected it shows totals for all developments combined not for individual developments.
- Status Changes Detailed—shows what changes have been made to individual units for the development(s) selected during the time period entered for the report. By default a one year period from today and back one year is set but this can be changed if you need to—does not support future dates. For instance, when a unit is marked Vacant or Otherwise Occupied, when a New Admission is selected it changes to Occupied by Assisted Tenant, etc. This report allows the user to track the changes made to a unit and who made them.
- Status Changes Summary—shows a summary of changes made in the development(s) selected during each month of the date range entered in the report search criteria. You can

select whether you want to see the data as of the first of the month or the last day of the month. It breaks the changes down by the Unit Status types.