



IMS/PIC Building and Unit Upload Template and Building and Unit Submission Instructions

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The purpose of this document is to help you better understand the data fields required by the Building and Unit Data Collection template, how to obtain the template from the IMS/PIC Development sub module, and how to upload that template to the IMS/PIC system.

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Building and Unit Upload Template

The information in this section will assist PHA staff with obtaining, completing, and uploading the building and unit upload template. This template is used to add new buildings and units to a new development number after the development number has been created in IMS/PIC by HUD.

Important Notes

There are several items that users must ensure that they follow when working with the building and unit upload template.

- While this template may be used to document characteristics of buildings and units in other situations, it cannot be used to add buildings and units into a development that is in management status. A development is in management status when the DOFA Actual Date has been entered on the Development Profile page by the HUD field office.
- Do not leave blank rows between lines of data.
- Do not change the formatting of the cells.
- Ensure that the participant code and development number match what can be found in IMS/PIC.
- Ensure that the building numbers and building entrance numbers entered in the unit_data tab match what was input in the bldg._data tab.

Downloading the Template

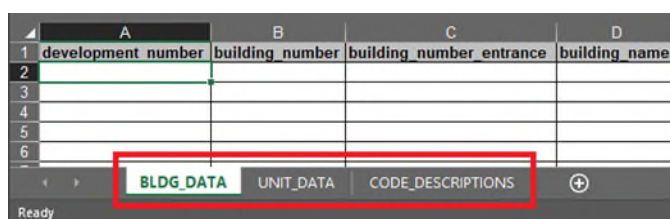
1. Login to Secure Systems by going to https://www.hud.gov/program_offices/public_indian_housing/reac/online and in your Main Menu single click on PIH Information Center (PIC) link.
2. Single click on the Development sub module.
3. Single click on the Unit tab.
4. Single click on the Building/Unit Data Transfer link.
5. Single click on the Download Excel Template link. (See Figure 1 below.) **Choose the option to save the file to your computer – do not open the file!** Limit the number of characters in the file name and do not use spaces. Once you have saved the file, you should logout of IMS/PIC.



Figure 1: Building/Unit Data Transfer page – download template

Completing and Validating the Template

6. Open the saved file to your computer. *If provided a prompt about enabling macros, accept it. You'll need to run the macro later.*
7. Enter the details about each individual building entrance under the BLDG_DATA tab and each individual unit under the UNIT_DATA tab. (See Figure 2 below.) The development number will be the new development number that HUD has already created in IMS/PIC.
Make sure to use the codes provided for buildings and units in the CODE_DESCRIPTIONS tab or your upload will fail! Information about the fields in the template can be found [later in this document](#). Please ensure you read the notes in the [Unit Data tab definitions](#) about non-dwelling and officially designed unit designations in case either of these are included in the inventory you are adding.



	A	B	C	D
1	development number	building number	building number entrance	building name
2				
3				
4				
5				
6				

Ready

BLDG_DATA UNIT_DATA CODE_DESCRIPTIONS

Figure 2: Building and Unit Upload Template example

8. After you have entered all data, find the Add-ins tab at the top of your screen and single click on it. Single click on the IMS/PIC Tools button and then Validate Building\Unit Upload Data. (See Figure 3 below.) The Format Columns for Upload buttons are older buttons that will do the same thing.

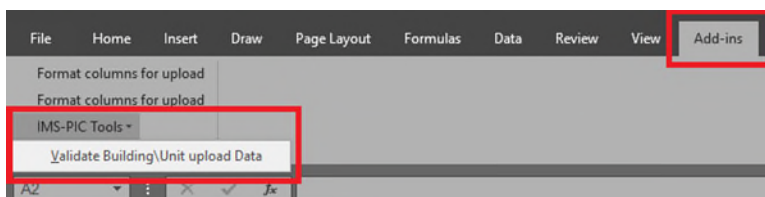


Figure 3: Validating the Building and Unit Upload Template

9. In the validate window, single click the Validate Data button. The macro will run and will let you know if anything needs to be fixed (i.e. incorrect codes). If you have errors, an ERRORS tab is created, otherwise it will tell you it is ready for upload. Single click OK in the window you were presented.
 - If there are errors correct those and repeat steps 6 and 7. **Do not delete the ERRORS tab after making corrections. The macro will do that when the data is all fixed or will populate it with a different set of errors if you didn't fix them all.**
10. Once all data in the template is correct and you have received the message that it is ready for upload, save the changes to the file to your computer (CTRL+S, Save button, etc.).

Uploading the Template

11. Log back into IMS/PIC and navigate to the Development sub module.

12. In the Development sub module, single click on the Unit tab.
13. Single click on the Building/Unit Data Transfer link.
14. Under the heading Upload Building and Unit Data, single click on the Browse button to find the file that you saved on your computer. (See Figure 4 below.) Navigate, if needed, to where you saved it and single click on the file name to select it and then single click the Open button. Text should appear in the box to the right of the words Select File. **Do not attempt to type anything in this box.**
15. Ignore the Select Data Type selection, it is only for csv files, we're using an Excel file. Single click the Upload File button. You will receive message that the file was successfully uploaded.
16. You will need to wait at least 15 minutes before continuing to the next step.

Figure 4: Building/Unit Data Transfer page – upload file

Checking for Errors in the Uploaded Template

17. After you have waited at least 15 minutes, find the Upload Error Report link under the row of tabs at the top of the page and single click on it. (See Figure 5 below.) If you had to log out (or were automatically logged out), navigate back to the Development sub module using steps 1-2 above.
18. The file you just uploaded will show in the File Name drop down box. Below this, one of the following will be displayed:
 - No processing errors found for this file – this means that there were no validation errors when processing the template and the building and unit data has been added to IMS/PIC. Proceed to the [Viewing the Uploaded Building and Units](#) section.
 - It will display any errors that were found – you will need to open the file on your computer, make any needed changes and repeat steps 6-14.
 - File is waiting to be processed – this means that the job that processes the file has not run yet. Certain times of day it may not run every 15 minutes or if there are a lot of files/data to be processed for your files or others it could take longer. If it takes more than 8 hours report this to your local field office PIC Coach.
 - **Note:** If you need to view the error report for a previously submitted file, select it from the File Name drop down box and single click on Retrieve Error Report.

Figure 5: Upload Error Report page

Next Steps

There are a few more things that you need to do to consider this process completed. While the template has been uploaded and processed, you still need to complete the items listed below.

Viewing the Uploaded Building and Units

Once it states that no errors were found, you may view the data in IMS/PIC using the one or more of the following methods. (See figure 6 below for navigating to these items.)

- Single click on the Building tab to view the Building List. From here you can search for a specific building number, if needed. To see the details for a specific building, single click on the building number.
- Single click on the Unit tab to view the Unit List. From here you can search for a specific unit number, if needed. To see the details for a specific unit, single click on the unit number.
- Single click on the Reports tab. By default, you are taken to the Building Reports link so that you can generate the Building Detail Report. Depending on the number of buildings in the development, there may be multiple pages in the report. You can view the report on your screen or download to Excel.
- Also, under the Reports tab, you can single click on the Unit Reports link. It will default to the Unit Detail Report – referred to as “Detailed” in the Report Type drop down box. This will allow you to generate the Unit Detail Report. Depending on the number of units in the development, there may be multiple pages in the report. You can view the report on your screen or download to Excel.



Figure 6: Navigating to the locations to verify buildings and units

Establish and Enter the DOFA Date

Once all buildings and units are added under a development number in IMS/PIC, the PHA should work with the field office to establish the DOFA Actual Date that the field office will enter into the Development Profile page. Only HUD users can edit the Development Profile

page. Date of Full Availability (DOFA) is the last day of the month in which substantially all (95 percent or more) of the units in a public housing project are available for occupancy ([24 CFR 905.108](#)). The PHA should submit a request to the field office with documentation to support the requested date. Once the field office enters the DOFA Actual Date, the development is in management status and no additional buildings or units can be entered.

If a development is being completed in phases, this step will not be completed until the buildings and units from the last phase are entered into IMS/PIC.

Submitting the Building and Unit Data for Approval

Once you have determined that all data is entered correctly 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. Because of this, ensure that you examine the data in your other 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.*

Enter Comments and Submit Unit Information

Submission Comments

All changes are subject to approval by Field Office personnel.

Submit Data For Approval Save

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.

Building and Unit Upload Template – Building Data tab definitions

The information below is provided to help PHAs understand the fields in the building tab of the Building and Unit Upload Template.

Building Field	Description	Instructions	Data Type / Field Length
Development Number	The code that HUD uses to uniquely identify developments managed by a Housing Authority. A development number can only be created in IMS/PIC by a HUD user.	<ul style="list-style-type: none"> May not be blank. Must be a valid development number in IMS/PIC. Character position 1- 5 is the Participant Code, character position 6 - 11 Development Number. 	Alphanumeric Max 11
Building Number	The code that uniquely identifies a building structure.	May not be blank.	Alphanumeric Max 6
Building Entrance Number	The code that uniquely identifies a building entrance within a development/building.	<ul style="list-style-type: none"> May not be blank. If only a single Building Entrance enter “1”. The particular entrance corresponds to a unique physical street address. For structure types “RW” and “SD”, the number of entrances must equal the number of units. 	Alphanumeric Max 3
Building Name	The name of the building.	Optional.	Max 50
Building Type Code	Provides a description of the architecture of a building or building entrance.	<ul style="list-style-type: none"> May not be blank. The allowable values are: <ul style="list-style-type: none"> ES - Elevator Structure RW - Row or Townhouse Style SD - Semi-Detached SF - Single Family/Detached WU - Walk-Up or Multifamily Apt. NDS – non-dwelling structure Definitions and information about each structure type is available in the Configuring Buildings and Units Job Aid. 	Max 5
Floor Count	How many floors are in the building where units exist that can be occupied.	May not be blank.	Integer
Total Unit Count	Number of units reached through a building entrance. This total includes non-dwelling, and merged units. This total does not include fully demolished or disposed units.	<ul style="list-style-type: none"> May not be blank. In the units tab of the template, the number of units assigned to this particular building cannot exceed this count. For structure types “RW”, “SD”, and “SF”, unit count must be 1 for each entrance. 	Integer
Construction Date	The completion date of the development. For developments with multiple buildings, this is the completion date of the last building that was complete.	<ul style="list-style-type: none"> A valid date in the format MM/DD/YYYY. The date may not be greater than the current date. 	Date

Building Field	Description	Instructions	Data Type / Field Length
Comment Text	General comments about the building or building entrance.	<ul style="list-style-type: none"> Optional. General comments about the building or building entrance. 	Max 2000
Address Line1 Text	Number and Street (Physical address of the Building Entrance)	May not be blank. (Physical address is the address given to emergency services: fire/police).	Alphanumeric Max 255
Address Line2 Text	Additional physical address if needed (Building Entrance)	Optional. (Use for supplemental address data, if needed)	Max 255
City Name	City (of the Building Entrance)	May not be blank.	Max 50
County Name	County (of the Building Entrance)	May not be blank.	Max 50
State Code	State (of the Building Entrance)	<ul style="list-style-type: none"> May not be blank. A valid two-character code to identify the state or territory (US Postal Service). 	Max 2
Basic Zip	Zip code (of the Building Entrance)	May not be blank.	Numeric Max 5
Zip Extension Code	Zip code suffix (of the Building Entrance)	Optional.	Numeric Max 4

Building and Unit Upload Template – Unit Data tab definitions

The information below is provided to help PHAs understand the fields in the unit tab of the Building and Unit Upload Template.

Unit Field	Description	Instructions	Data Type / Field Length
Participant Code	The code that HUD uses to uniquely identify individual Housing Authorities.	<ul style="list-style-type: none"> May not be blank. Must be a valid Participant Code. 	Alphanumeric, Max 5
Development Number	The code that HUD uses to uniquely identify developments managed by a Housing Authority. A development number can only be created in IMS/PIC by a HUD user.	<ul style="list-style-type: none"> May not be blank. Must be a valid development number in IMS/PIC. Character position 1- 5 is the Participant Code, character position 6 - 11 Development Number. 	Alphanumeric, Max 11
Building Number	The code that uniquely identifies a building structure within a development.	May not be blank.	Alphanumeric, Max 6
Building Entrance Number	The code that uniquely identifies a building entrance within a development/building.	<ul style="list-style-type: none"> May not be blank. If only a single Building Entrance enter "1". The particular entrance corresponds to a unique physical and postal address. 	Alphanumeric, Max 3
Unit Number	Unit number within a building.	May not be blank.	Alphanumeric, Max 10
Door Number (Apartment Number)	The code that is used as part of the physical address to uniquely identify each unit within a specific building.	<ul style="list-style-type: none"> May not be blank for multiple units for a single building entrance (For example, elevator structure or multifamily apt. It becomes part of the address for these building types.) Must be blank for a single building entrance with one unit (For example, a Rowhouse, Townhouse, Semi-Detached or Single Family). 	Alphanumeric, Max 5
Floor Number	Refers to the primary floor on which each unit is located within a building (entry way floor if multi-story unit).	<ul style="list-style-type: none"> May not be blank. This value should be (1) for the following building types: <ul style="list-style-type: none"> RW - Row or Townhouse Style SD - Semi-Detached SF - Single Family/Detached 	Alphanumeric, Max 3
Bedroom Count	Number of bedrooms in a unit.	<ul style="list-style-type: none"> May not be blank. Values can be 0, 1, 2, 3, 4, 5, 6, 7, 8, 9 	Integer
ACC Unit Indicator (acc_unit_ind)	Indicates whether a unit qualifies under the Annual Contribution Contract (ACC).	<ul style="list-style-type: none"> May not be blank. Must be either Y or N. 	Max 1

Unit Field	Description	Instructions	Data Type / Field Length
Unit Designation	Indicates the type of unit that is being uploaded.	<p>The allowable values are:</p> <ul style="list-style-type: none"> • FA – General Occupancy • MED - Mixed Elderly and Disabled Not HUD Officially Designated • MU - Merged Unit • NA - Non-Dwelling * • ODD - Officially Disabled ** • ODE - Officially Elderly ** • ODM - Officially Mixed Elderly and Disabled ** <p>* Non-dwelling units cannot be included in the template at this time. You will need to mark these units as FA (General Occupancy) and go through the normal Unit Tenant Status request and approval process for these units.</p> <p>** These units should be in an approved Designated Housing Plan (DHP). Additional information about the process for officially designating units can be found on the Designated Housing Plan (DHP) FAQs page.</p>	Max 5
ACC Unit Indicator Effective Date (acc_unit_ind_effective_date)	Indicates the effective date the unit qualifies under the Annual Contribution Contract (ACC).	<ul style="list-style-type: none"> • A valid date in the format MM/DD/YYYY. • The date may not be greater than the current date. 	Date
Accessible Designation (acsbl_dsgtn_type_cd)	The "Tier 1 Accessible Unit Designation" provides information on the physical characteristics of a unit related to special features to accommodate disabled tenants.	<p>The allowable values are:</p> <ul style="list-style-type: none"> • HVIMP - Hearing/Visual Impairment • NA - Not Applicable • STD – Standard • UFAS - UFAS barrier free accessible 	Max 5