

Chapter 13: Summaries

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Summaries

The **Summary** pages provide an overview of information for each property in **iREMS** and also contain the **Consolidated Screen Print** page. The *Summary* and *Summary Narrative* tabs are accessed once you have selected **Summaries** from the sidebar. All information displayed on the summary pages are view only. You would need to access the appropriate **iREMS** page to add, update, or delete information.

The **Summary** page provides an overview of property information (e.g., property address, owner, finances, and physical inspection information), and also displays the person assigned to the property. The **Property Summary Narratives** page displays narratives that were entered on various **iREMS** pages for a property. The last tab is the *Consolidated Screen Print* tab. The **Consolidated Screen Print** page allows you to select several pages from **iREMS** to be printed as one document.

Objectives:

By the end of this chapter, you will be able to:

- Verify current user assignments and roles
- View pertinent property data in one location
- Create a consolidated screen print document
- Review summary narratives entered throughout **iREMS** in one location

13.1 Property Summary

The **Property Summary** page displays cumulative information about the selected property to give you an overview of the status of the property. You can view a variety of information specific to a property, such as property address and status, building and inspection data from PASS, and annual financial statement information from FASS. All information displayed on this page is view-only; you would need to return to the original screen where the data was entered to update the information.

Accessing the Summary Page:

To access the **Summary** page you must first select a specific property. Once you have selected a property, the **Property Attributes** page displays. From the **Property Attributes** page you can select the *Summaries* link from the **iREMS** sidebar. (See Chapter 3: Portfolio/Dashboard or Chapter 2. Getting Started for detailed information.)

✍ The Property Header located at the top of the page, displays the Property ID, Name, Contract/FHA#, Active Status, Watch List, Troubled Status and DEC Status. This Header will appear on most of the pages in iREMS. There is also a search feature in the header that allows the user to select a different property without having to return to the Portfolio/Dashboard to make the change.

To view Summary information:

Select a property and click on Summaries from the sidebar. The **Summary** page displays.

Property Summary
 Assigned Project Manager
 Project Manager: MARTHA G PICASSO

Primary Address

Street: 1059 REED AVE
 City: SUNNYVALE
 U.S. State or Territory: CA
 Foreign State or Territory:
 Country: USA
 U.S. Zip Code: 94086 - 6805
 Foreign Postal Code:
 Standardization Status: 100% Overall probable correctness
 Scattered Sites: No
 Servicing Site: San Francisco
 HUB: San Francisco

Geocode Information:(Automated)

County Code: 085
 County Name: Santa Clara
 Census Tract: 508703
 MSA Code: 7400
 MSA Name: San Jose, CA MSA
 CBSA Code: 41940
 CBSA Name: San Jose-Sunnyvale-Santa Clara, CA Metropolit
 County Subdivision Code: 92830
 County Subdivision Name:
 Congressional District: 17
 State House District: 00
 State Senate District: 00
 Place Based City: Sunnyvale
 Longitude/Latitude: -122.001753 / 37.366965

Building & Unit Information

Building Type Descriptions:

Row
 Townhouse
 Detached
 Semi-Detached
 Walk-Up
 2-5 Story Elevator
 High-Rise/ Elevator

Building Count: 13
 Initial Occupancy Date : 09/01/1975

Unit Type	# Total Units
0	0
1	12
2	42
3	33
4	8
5	0
6	0
7	0
8	0
9	0
Unknown	0
Total Units	95

Grand Totals(HUD and Other Agencies)
 Grand Total of Assisted Units: 38

Client Group Information
 Client Group: Family - indiv. families - not eid/ handicap

Property Status

Active Status: Y
 Troubled Status: Not Troubled
 OPIIS Risk Category: Low
 Action Plan Approved: No
 DEC Status: Closed
 Demo Program Closing Date:
 OAHAR Mark Down to Market Restructure Date:
 OAHMP Green Flag: No
 OAHMP Green Retrofit Flag: No

Open Root Problem Cause(s)

Entered Date	Underlying Problem
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Open Mitigation Strategies

Entered Date	Recommended Mitigation Strategy
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Figure 13-1. Summary page (display 1 of 3)

Owner Annual Financial Statements from FASS										
Due Date	TIN	Non-Filer Email Sent	Date Received	Number of Compliance Flags - Assessed	Performance Value/Color	Date FASS Letter Sent	Response Due Date	Referred To	Response Received Date	Closed Date
04/30/2014	Unknown									
Submission Status: Active							Submission Type:		Submission FYE:	
03/31/2013	Unknown								04/11/2014	04/11/2014
Submission Status: Active							Submission Type:		Submission FYE:	
03/31/2012	Unknown									10/11/2012
Submission Status: Active							Submission Type:		Submission FYE:	
03/31/2011	770288393		02/28/2011	1	34,000 Red	03/11/2011	04/01/2011	None		03/02/2011
Submission Status: Active							Submission Type: AUD-2008.04 (Non-coop)		Submission FYE: 12/31/2010	
03/31/2010	770288393		03/13/2010	1	42,000 Red	03/24/2010	04/22/2010	MFH	04/06/2010	04/06/2010

Lessee Annual Financial Statement from FASS										
Due Date	TIN	Non-Filer Email Sent	Date Received	Number of Compliance Flags - Assessed	Performance Value/Color	Date FASS Letter Sent	Response Due Date	Referred To	Response Received Date	Closed Date

Released Physical Inspections from PASS					
Inspection Number	Inspection Date	EH&S Items?	Released Date	Score	
1	346765	04/05/2012	Y	04/11/2012	96. c
2	329696	05/07/2010	Y	05/12/2010	80. c*
3	241727	05/22/2009	Y	06/03/2009	73. c*
4	222190	05/02/2006	Y	05/17/2006	82. c*

On-Site Visits and Physical Inspection History						
Performed Date	Overall Rating	Report Date	Response Due Date	Response Received Date	Closed Date	Type of Reviewer
04/17/1998	Satisfactory					Mortgagee
06/06/1997	Satisfactory					Mortgagee
06/11/1996	Satisfactory					Mortgagee
06/28/1993	Satisfactory					Mortgagee

Management Review						
Scheduled Date	Performed Date	Report Date	Response Due Date	Closed Date	Overall Rating	
1	12/01/2010	12/06/2010	12/20/2010	01/19/2011	01/27/2011	Satisfactory
2	12/01/2009	12/09/2009	12/16/2009	01/17/2010	03/01/2010	Satisfactory
3	12/01/2008	12/04/2008	12/04/2008	01/23/2009	06/11/2009	Satisfactory
4	12/01/2007	12/11/2007	01/07/2008	02/06/2008	02/04/2008	Above Average
5	11/01/2006	11/20/2006	12/11/2006	01/19/2007	02/02/2007	Satisfactory
6	11/01/2005	11/02/2005	11/16/2005	12/16/2005	01/24/2006	Satisfactory
7	11/08/2000	11/09/2000	12/05/2000		12/05/2000	Satisfactory

Financing								
FHA Number	SOA Description/Group Type	Field Office Status	Active	Business Phase	Under Management	Pipeline	Primary Financing Instrument	In Delinquency or Default
1211195	HR - 223(5) Refi Purchase Apis	Under Management - Active	Y	Under Management	Y	N	1	N
12144373	VAR - 236(1) Lower Income Families	Terminated - inactive	N	Terminated	N	N	0	N

Contract Rent											
Rent Effective Date	Contract Effective Date	Contract Expiration Date	Contract/Project#	Contract Status	Unit Type	#Units	Contract Rent	Utility Allow. Effective Date	Utility Allow.	Gross Rent	FMR
03/01/2014	03/01/2006	02/28/2026	CA39.000093	Active	1	2	1364	03/01/2014	24	1408	1293
					2	6	1364	03/01/2014	24	1408	1293
					3	15	1650	03/01/2014	26	1676	1649
					4	11	2235	03/01/2014	38	2273	2325
02/01/1995	03/26/1975	03/01/2015	12144373SUP	Terminated	1	4	2874	03/01/2014	51	2923	2636
					2	4	404	02/01/1995	26	430	1293
					3	6	483	02/01/1995	38	521	1649
					4	5	531	02/01/1995	49	580	2325
					4	4	564	02/01/1995	62	626	2636

Project/Contract Rents								
Rent Effective Date	FHA #	Unit Type	Total TRACS Project # Units	Basic Rent	Market Rent	Utility Allow.	Gross Rent	
03/01/2008	12144373	1	6	626	730	26	652	
		2	21	0	0	0	0	
		2	42	736	945	38	774	

Figure 13-2. Summary page (display 2 of 3)

Current Owner					
Name: CLIFFORD MANOR, INC. TIN: 942167919					
Title:		Phone: (408) 724-4193			
Street: 240 CLIFFORD AVE		Fax:			
City: WATSONVILLE		E-Mail: need_email@hud.gov			
U.S. State or Territory: CA					
Foreign State or Territory:					
Country: USA					
U.S. Zip Code: 95076 - 0000					
Foreign Postal Code:					
Standardization Status: Not Standardized					
DUNS #:					
Owner Financial Statement Required: Yes					
Current Lessee					
Name: Professional Property Management, LLC TIN: 364259240					
Title:		Phone: (815) 397-3755			
Street: 973 Featherstone Road		Fax: (815) 397-3931			
City: Rockford		E-Mail: GerryWalters@ppmil.com			
U.S. State or Territory: IL					
Foreign State or Territory:					
Country: USA					
U.S. Zip Code: 61107 -					
Foreign Postal Code:					
Standardization Status: 100% Overall probable correctness					
Lessee Financial Statement Required: No					
Management Agent					
Name: Willowbrook Housing Partners TIN: 460496338					
Title:		Phone: 619-260-5562			
Street: P.O. Box 880367		Fax: 619-260-5563			
City: San Diego		E-Mail: martha@loganpm.com			
U.S. State or Territory: CALIFORNIA					
Foreign State or Territory:					
Country: USA					
U.S. Zip Code: 92116					
Foreign Postal Code:					
Standardization Status: Not Standardized					
Servicing Mortgagee					
Name: FNMA CAPMARK FINANCE INC					
Street: ATTN GMAC COMMERCIAL MTG CORP					
P O BOX 809					
City: HORSHAM					
State: PA					
Zip Code: 19044					
Lender ID: 9407700001					
Property Disposition					
Date of 21 Day Hearing Letter:					
Date Foreclosure Sale Held:					
Mortgagee In Possession Date:					
Use Restriction / Lock-out					
Effective Date	Reason(s) for Restriction	Use Restriction Status	Date of Recordation	End Date	Quantity of Units Restricted

Figure 13-3. Summary page (display 3 of 3)

 Note: All fields in the Property Summary page are view-only.

13.2 Summary Narrative

The **Summary Narrative** page displays all *summary narratives* written throughout **iREMS** in one location. You can read all *summary narratives* written for the management of a specific property. All

data displayed on this page is view-only, and you would need to return to the original page where the data was entered to update information.

To view Summary Narratives page:

1. From the **Summary** page, click on the *Summary Narrative* tab and the **Summary Narrative** page displays.

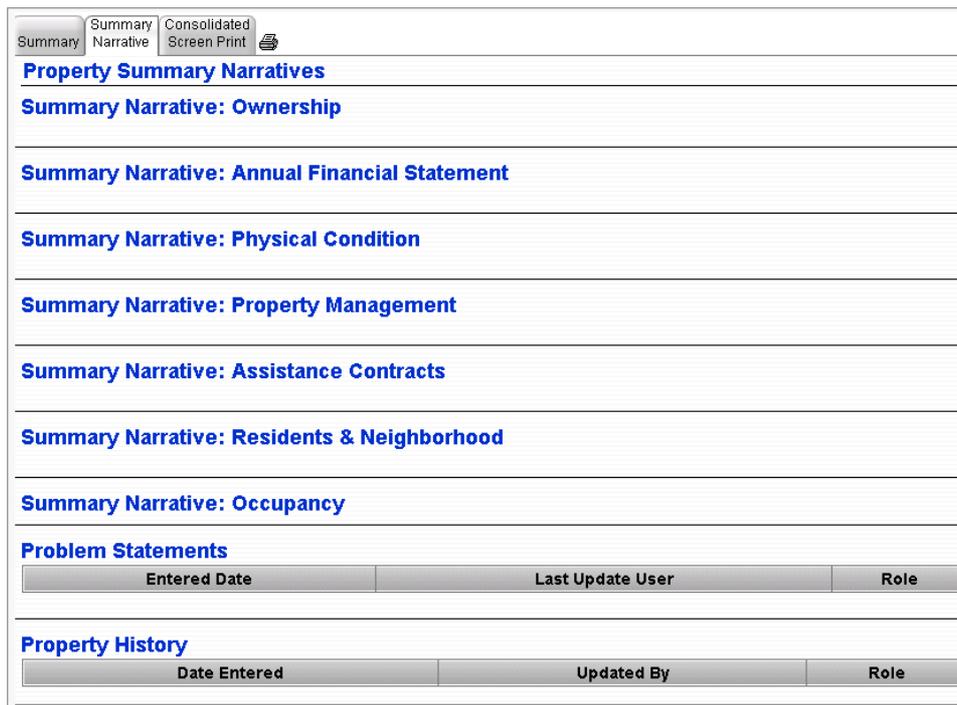


Figure 13-4. Summary Narrative page

2. View the information.
3. Click on one of the other *Page* tabs or a *Side-bar* link to change to exit this page..

13.3 Consolidated Screen Print

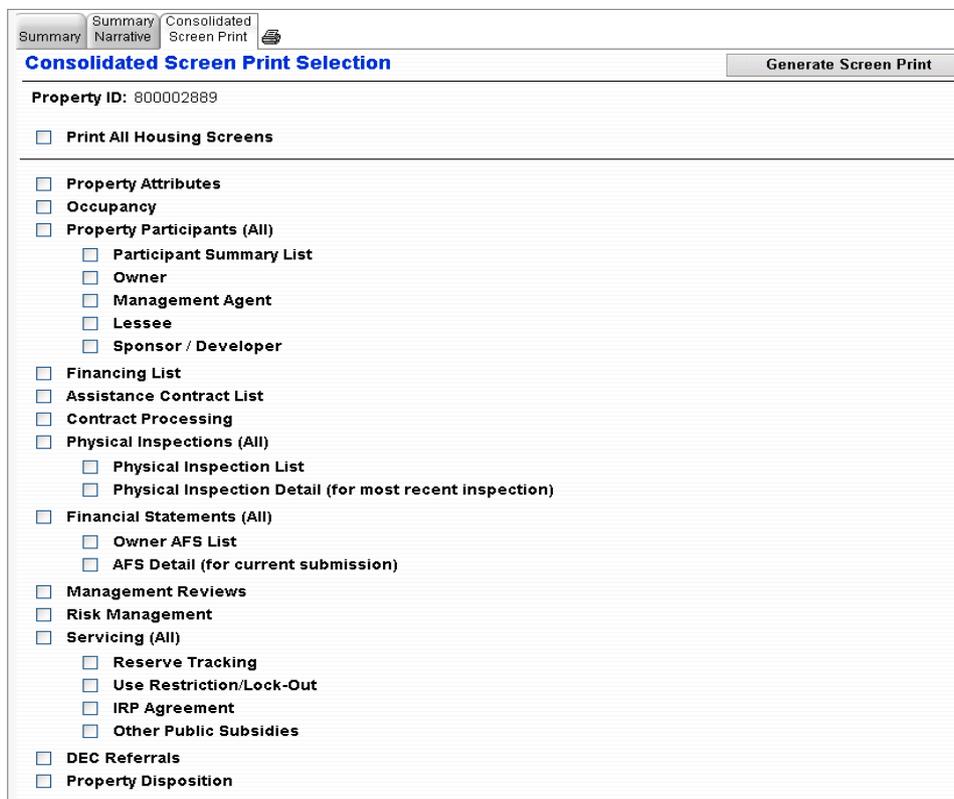
The *Consolidated Screen Print* tab allows you to select multiple Housing pages in **iREMS** for a property and print as a single document. This function simplifies the printing process when consolidated information is needed from several pages in **iREMS**. The **Consolidated Screen Print Selection** page allows the user to select all Housing or specified DEC pages for a property.

Once a *Consolidated Screen Print* document is generated, it displays on the page, formatted for printing. The cover page displays the *Property Name and Property ID, the Referral ID*, and the selection criteria for the document. The pages are separated by page breaks, with the *Property Name and Property ID* displayed at the top of each page.

 *Note: Only users with at least “view” rights to the pages are allowed to print them. Access level is determined by user ID and role.*

To generate a Consolidated Screen Print document for “All Housing Screens”:

1. From the **Summary** page, click on the *Consolidated Screen Print* tab and the **Consolidated Screen Print Selection** page displays.



Summary | Summary Narrative | Consolidated Screen Print

Consolidated Screen Print Selection Generate Screen Print

Property ID: 800002889

- Print All Housing Screens**

- Property Attributes**
- Occupancy**
- Property Participants (All)**
 - Participant Summary List
 - Owner
 - Management Agent
 - Lessee
 - Sponsor / Developer
- Financing List**
- Assistance Contract List**
- Contract Processing**
- Physical Inspections (All)**
 - Physical Inspection List
 - Physical Inspection Detail (for most recent inspection)
- Financial Statements (All)**
 - Owner AFS List
 - AFS Detail (for current submission)
- Management Reviews**
- Risk Management**
- Servicing (All)**
 - Reserve Tracking
 - Use Restriction/Lock-Out
 - IRP Agreement
 - Other Public Subsidies
- DEC Referrals**
- Property Disposition**

Figure 13-5. Consolidated Screen Print page

2. Click in the checkbox for “*Print All Housing Screens*”.

 *Note: Selecting “Print All Housing Screens” will print most pages in the system for a property. This feature will produce a large document that may take several minutes to complete.*

3. Click on and the following message displays:



Figure 13-6. Print Time Warning message

4. Click on and a loading message displays on the **Consolidated Screen Print Selection** page.

 *Note: Once the requested document is complete, the report displays on the bottom half of the page*

5. Click on the **Print** icon in the browser toolbar to print the report.
6. Click on to return to the **Consolidated Screen Print Selection** page.

To generate a Consolidated Screen Print document for specific pages:

1. From the **Summary** page, click on the *Consolidated Screen Print* tab and the **Consolidated Screen Print Selection** page displays.

Figure 13-7. Consolidated Screen Print page

2. Click in the checkbox for specific pages you want to generate.
3. Click on .

 *Note: Once the requested document is complete, the report displays on the bottom half of the page.*

Management Review List						
Management Review 1 to 5 of 5						
	Scheduled Date ▼	Performed Date	Report Date	Response Due Date	Closed Date	Overall Rating
1	07/19/2007	07/23/2007	08/07/2007	09/06/2007		Below Average
2	07/19/2006	07/20/2006	08/10/2006	09/09/2006	12/18/2006	Satisfactory
3	07/19/2005	07/28/2005	08/10/2005	09/10/2005	04/14/2006	Satisfactory
4	06/07/2002	06/07/2002	07/07/2002	12/01/2002	05/28/2003	Satisfactory
5	05/03/2001	05/03/2001	06/01/2001	07/01/2001	11/02/2001	Satisfactory

Figure 13-8. Sample Report displayed at bottom of the Consolidated Screen Print page

4. Click on the *Print* icon in the browser toolbar to print the report. .
5. Click on  to return to the **Consolidated Screen Print Selection** page.