Chapter 14: Workload Management

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Workload Management

The **Workload Management** pages display Project Action items for a specific property. A Project Action list describes each action and includes the action's start, completed, and closed dates. Project actions and follow-up project actions are created either by assigned users or are system generated. System generated project actions provide **iREMS** users with information updates from other systems or from other **iREMS** pages. Assigned Housing, DEC, and Performance Based Contract Administrator (PBCA) users can view actions that they updated and closed via the **Project Action Detail** pages.

Objectives:

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

- View project action records for a property.
- Follow-up on project actions.
- Review system generated project actions.
- Sort project action records.
- View all assignments for users associated with specific projects.

14.1 Project Action List

The **Project Action List** page displays a list of action items for a specific property. A summary table describes each action and includes the actions start, completed, and closed dates. Project actions and follow-up project actions are created either by assigned users or are system-generated. System-generated project actions provide **iREMS** users with information updates from other systems or from other **iREMS** pages. Assigned Housing, DEC, and Performance Based Contract Administrator (PBCA) users can view all project actions, while PBCA users can only view actions that they create.

The **Project Action List** page displays multiple project actions in a table format. All columns in the **Project Action List** are sortable. The date fields are sortable in ascending or descending order. The non-date fields are sortable in ascending order. New project actions can be added to **iREMS** by assigned Housing and DEC staff. Once a new project action is saved, it cannot be deleted from **iREMS**.

✍ *Note: If there are no prior Project Actions assigned to the property, the following message will display: "There are no Project Actions currently created for this property".*

When a project action is created and saved in **iREMS**, summary information about the action is automatically added to the table on the **Project Action List** page. Each action in the table becomes a link to a corresponding **Project Action Detail** page. Assigned Housing and DEC staff can use the **Project Action Detail** page to update and/or close a project action.

FASS can archive a Financial Statement submission in **iREMS**. When this is done, any related referral is closed and the related project action becomes inactive. However, in the event a submission is un-archived by FASS, the related project action and DEC referral will reopen.

Accessing the Workload Management Page:

To access the **Workload Management** page you must first highlight and select a specific property. Once you have selected a property, the **Property Attributes** page displays. From the **Property Attributes** page you can select *Workload Management* link from the **Asset Management** 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 *and* Troubled 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** page to make the change.*

To view information on the Project Action List page:

1. From the **Asset Management Portfolio/Dashboard** page, highlight and click on a property and the **Property Attributes** page displays.

2. Click on the *Workload Management* sidebar option and the Project Action List page displays.

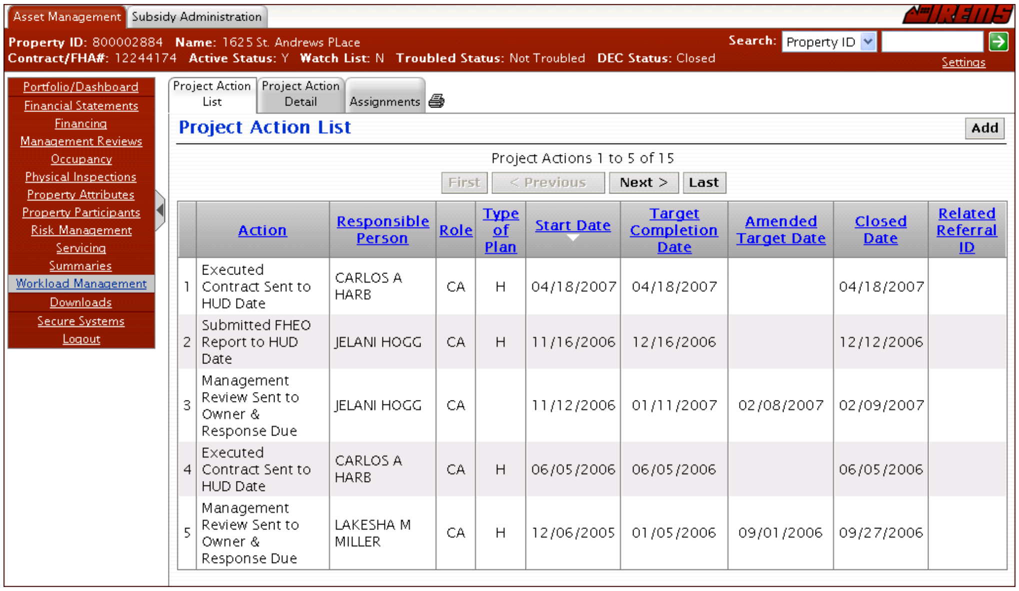

Figure 14-1. Project Action List page

3. View project action information.

14.2 Project Action Detail

The **Project Action Detail** page contains detailed information on a specific Project Action. All project actions can be updated and closed on this page. Some automatic project actions can also be viewed from their related **iREMS** pages. The **Project Action Detail** page allows you to add a new action. This page is used to view details, update or close Project Actions.

When updating a Project Action, a follow up action will not generate when the *Further Action Required* indicator is set to "Y" unless the closed date is being updated from null to a valid date. This ensures each closed action only generates one follow-up action. The subsequent new action may also generate follow-up actions when it is closed if the *Further Action* required indicator is "Y".

To add a project action

1. From the **Project Action List** page, click on Add and the **Project Action Detail** page displays.

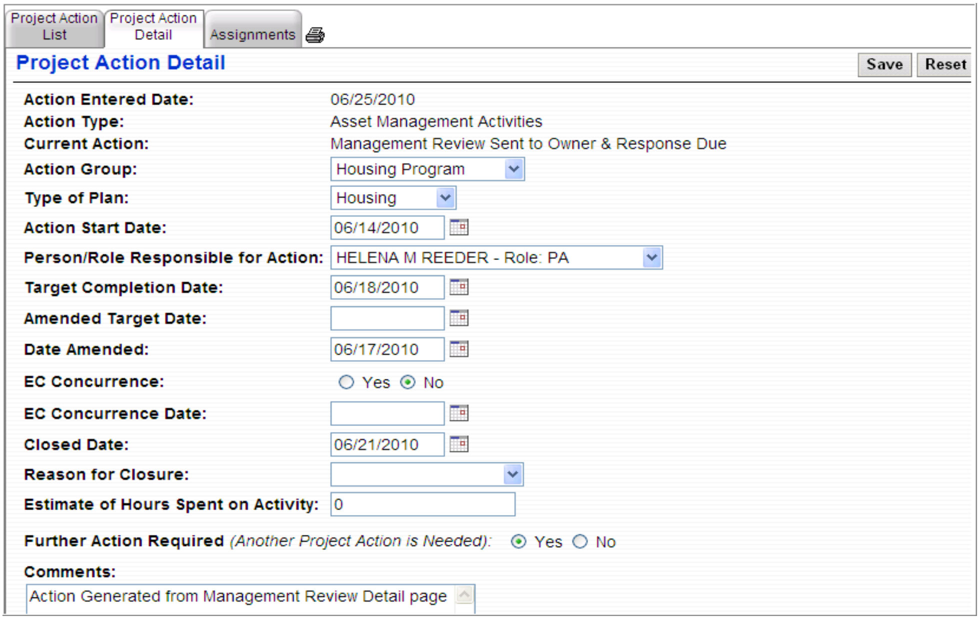

Figure 14-2. Project Action Detail page

✍ *This Action Entered Date is system generated and corresponds to the date the project action was entered into the system.*

2. Enter the following:
    - *Action Type*
    - *Current Action*

✍ *Note: The Current Action drop-down list will change based on the Action Type you select.*

- *Action Group*, drop down
- *Type of Plan*, drop down
- *Action Start Date*
- *Person/ Role Responsible for Action*, select from drop down
- *Target Completion Date*
- *Amended Target Date*
- *Date Amended*
- *EC Concurrence*, radio button
- *EC Concurrence Date*

- *Closed Date*
- *Reason for Closure, from drop down*
- *Estimate of Hours Spent of Activity*
- *Further Action Required*
- *Comments*

3. Click on Save and the save was successful message displays.

Alternative Option

Click on Reset to reset the fields.

4. Click on Project Action List tab to return to the main page. The new project action will display in the list.

To update a project action

1. From the **Project Action List** page, highlight and click on one of the project actions in the list and the **Project Action Detail** page displays.

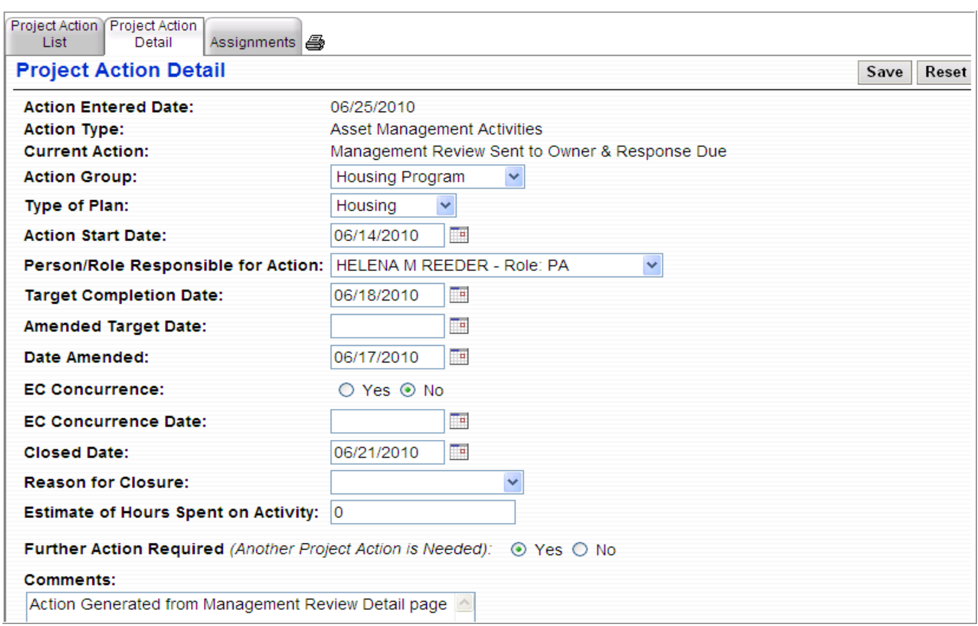

Figure 14-3. Project Action Detail page

✍ *Note: If you do not click on one of the project actions from the list, and you click on the Project Action Detail tab, you will view the most current project action.*

✍ *Note: This Action Entered Date is system generated and corresponds to the date the project action was entered into the system. The Action Type and Current Action fields are view after initial entry.*

2. Update any of the following:

   - *Action Group, drop down*
   - *Type of Plan*, drop down
   - *Action Start Date*
   - *Person/ Role Responsible for Action,* select from drop down
   - *Target Completion Date*
   - *Amended Target Date*
   - *Date Amended*
   - *EC Concurrence,* radio button
   - *EC Concurrence Date*
   - *Closed Date*
   - *Reason for Closure,* radio button
   - *Estimate of Hours Spent of Activity*
   - *Further Action Required*
   - *Comments*

✍ *Note: Further Action Required (Another Project Action is Needed) displays above the Comments text box, for any Project Actions that require anther action. These are the only four actions where this indicator is appropriate:*

Management Review Sent to Owner & Response Due

AFS Letter Sent to Owner & Response Due

AFS Owner Response Received & HUD Follow – Up Required

Management Review Owner Response Received & HUD Follow-Up Required

3. Click on Save and the save was successful message displays.

Alternative Option

Click on Reset to reset the fields.

4. Click on Project Action List tab to return to the main page. The new project action will display in the list.

✍ *When a project action, created by FASS, with a the name of "*AFS Letter Sent to Owner & Response Due*" or "*AFS Submission (Good) Received by FASS & No Response Due*" is closed online, iREMS will also close the related financial.*

14.3 Assignments

The **Assignments** page displays a list of all users assigned to the property along with their role and the automated system with which they are associated. Assigned users can create project actions and follow-up on project actions. This list can be sorted by any column. You can go through the list in order, or you can jump to the end of the list or the top of the list, using the "first", "previous", "next" or "last" buttons.

The **Assignments** page displays the following fields:

- *Role Name,* sortable in ascending or descending order
- *User Name,* sortable in ascending or descending order
- *System ID,* sortable in ascending or descending order

The list on the **Assignments** page is view only.

To access the Assignments page:

From the **Project Action List** page, click on the *Assignments* tab and the **Assignments** page displays.

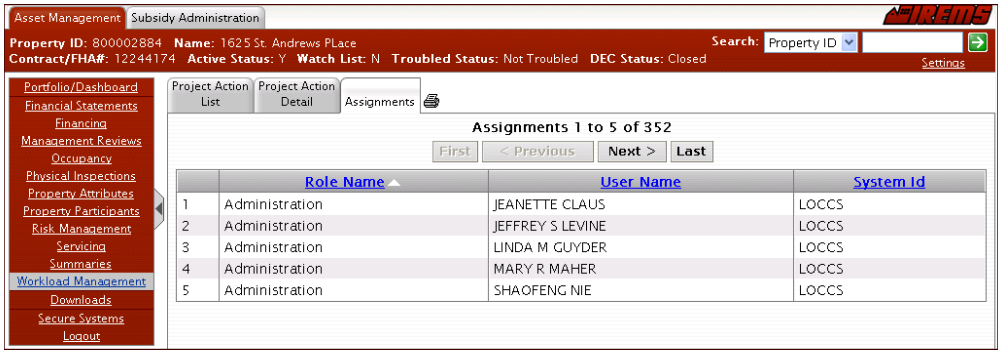

Figure 14-4. Assignments Page