Chapter 6: Management Reviews

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Management Reviews

HUD Multifamily Housing requires that information about the management of a property be maintained in the **iREMS** database for easy access. The management agent contact is responsible for all actions pertaining to properties issues. Assigned HUD and PBCA users can add, update, and delete management reviews. Reviews can be reviewed as a list or from a detail page.

Objectives:

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

- Enter management reviews
- Update and record notes pertaining to the review of properties
- View any related project actions

6.1 Management Review List

A list of management reviews are displayed on the **Management Review List** page. The list is in a table format and displays the *scheduled date, the preformed date, the report date, the Response due date, the closed date* and *the overall rating*. The table can be sorted by either of these columns.

Assigned HUD and PBCA users with rights to the property can add management reviews by adding the details of the review on the **Management Review Detail** page. Once added, the review displays in the list on the **Management Review List** page.

Accessing the Management Review Page:

To access the **Management Review** 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 *Management Review* link from the **Asset Management** sidebar. (See *Chapter 3: Portfolio/Dashboard* or *Chapter 2. Getting Started* for detailed information.)

> ✍ *Note: 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 the Management Review List page:

1. Click on the *Management Review* sidebar option and the **Management Review List** page displays.

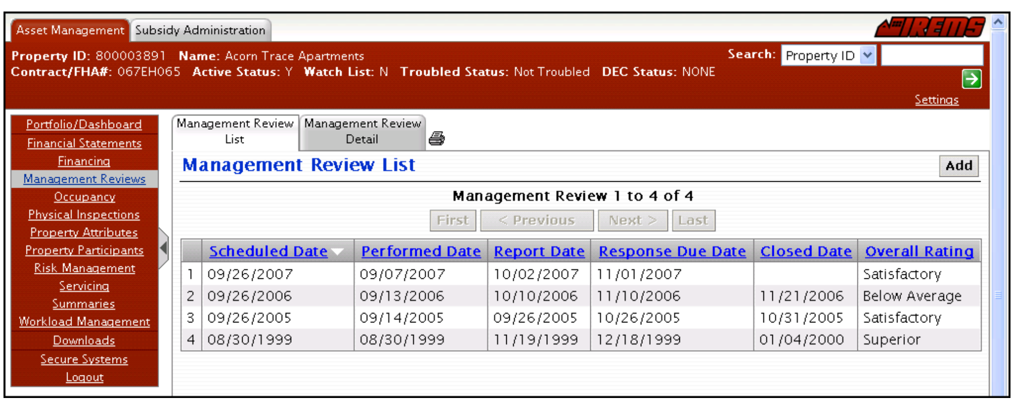


Figure 6-1. Management Review List page

2. View the data.

✍ *Note: To view detailed information on a specific review, the user must select a Management Review listed in the table and the **Management Review Detail** page, for that review, will display.*

6.2 Management Review Detail

The **Management Review Detail** page displays detailed information related to a specific management review. On this page you can enter new information on a management review, edit, delete or view related property actions regarding a specific management review.

To enable MFH users the ability to record and perform just the off-site component of a property review, a new field "*Desk Review Only*" has been added on the **Management Review Detail** screen. The two values displayed for the radio control are "Yes" and "No". "No" indicates that the review had both an off-site and an on-site component. "Yes" indicates the review was conducted as an off-site review only. All existing reviews in the system will be assigned a   default value of "U" to indicate "Unconfirmed" status. (A user cannot select "U" as a value.) The user is able to change the "U" value to "Yes" or "No".

To view the Management Review Detail page:

1. Click on the *Management Review* sidebar link and the **Management Review List** page displays.
2. Click on a specific review from the *Management Review List* table and the **Management Review Detail** page displays.

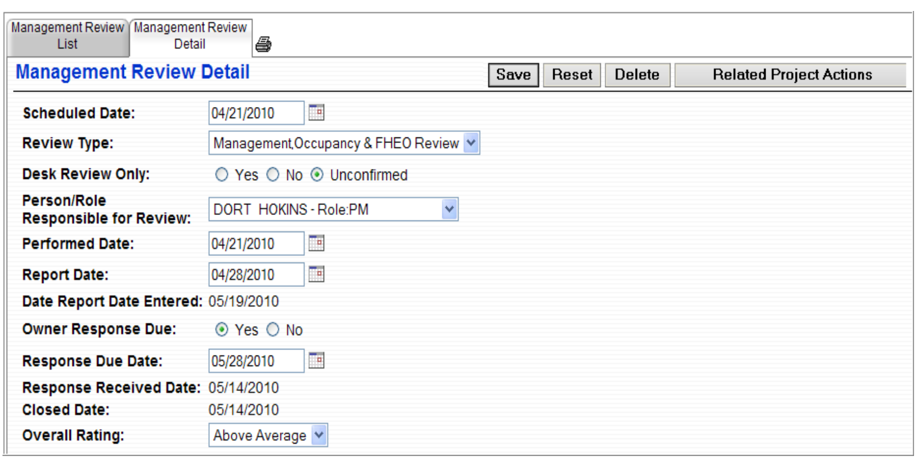


Figure 6-2. Management Review Detail page

3. View detail data.

To Add a Management Review:

1. Click on the Management Review sidebar option and the **Management Review List** page displays.

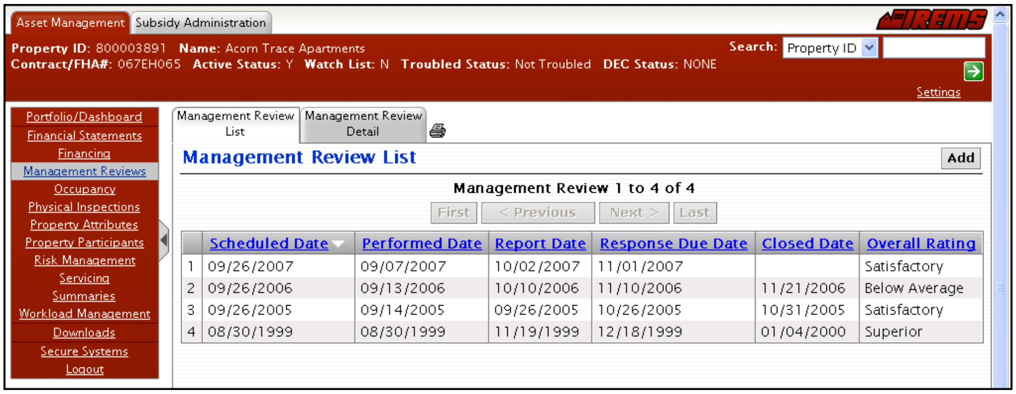


Figure 6-3. Management Review List page

2. Click on Add and the **Management Review Detail** page displays.

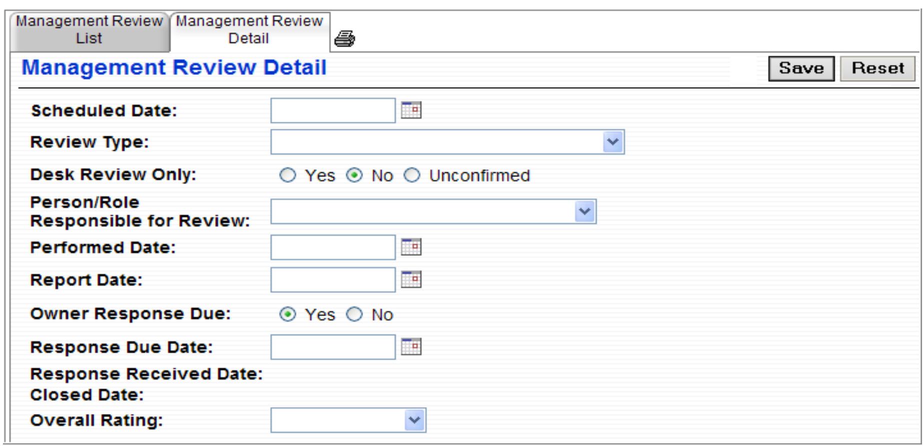


Figure 6-4. Management Review Detail - ADD page

3. Enter the following information:

   - *Schedule Date,* calendar pop-up
   - *Review Type, from drop-down list*
     - *Occupancy Review only*
     - *Management Review only*
     - *Management & Occupancy Review*
     - *FHEO Review only*

  - *Occupancy &FHEO Review*
- *Desk Review Only*
- *Person/Role Responsible for Review*, responsible person and title assigned to a property
- *Perform Date*, calendar pop-up
- *Report Date*, calendar pop-up
- *Date Report Date Entered*
- *Owner Response Due*, radio button
- *Response Due Date*, calendar pop-up
- *Response Received Date*
- *Closed Date*
- *Overall Rating*, drop-down list
  - *Superior*
  - *Satisfactory*
  - *Below average*
  - *Unsatisfactory*
  - *Not Available*
  - *Above Average*

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

To update a Management Review:

1. From the **Management Review List** page, click on a link and the **Management Review Detail** page displays.
2. Enter the new data.
3. Click on Save and the save was successful message displays.

> ✍ *Note: If any of the data on the* ***Management Review Detail*** *page has been newly entered or edited, you must remember to click on* Save *before closing or linking to another section. If you find that you have entered data incorrectly, click on* Reset *to refresh.*
>
> ✍ *Note: If the "Person/Role responsible for Review" is updated or changed, the Person/Role responsible for Action" will be changed on all Related Project Actions.*

To delete a Management Review:

1. From the **Management Review List** page, click on the management review you want to delete and the **Management Review Detail** page displays.
2. Click on Delete and the delete confirmation message displays.

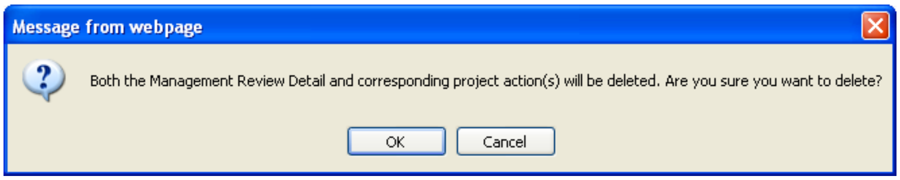
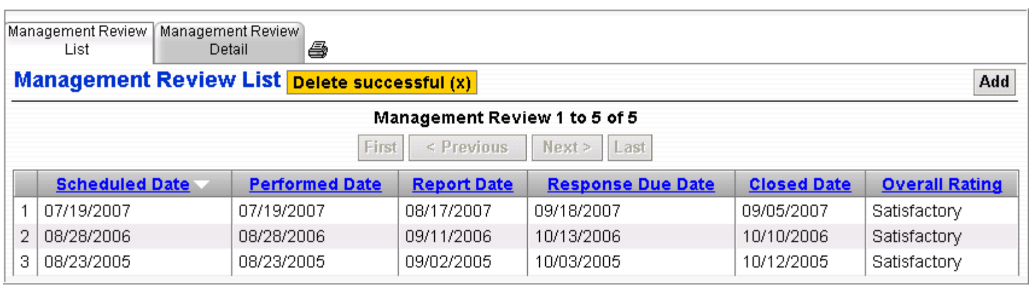


Figure 6-5. Delete confirmation

3. Click on OK and the delete was successful message displays.



	Scheduled Date	Performed Date	Report Date	Response Due Date	Closed Date	Overall Rating
1	07/19/2007	07/19/2007	08/17/2007	09/18/2007	09/05/2007	Satisfactory
2	08/28/2006	08/28/2006	09/11/2006	10/13/2006	10/10/2006	Satisfactory
3	08/23/2005	08/23/2005	09/02/2005	10/03/2005	10/12/2005	Satisfactory

Figure 6-6. Delete Successful

6.2.1 Project Actions

Some project actions related to management reviews will be created automatically and will appear on the user's individual workload reports under the **Workload Management** sidebar option. Once there are project actions related to a review, the Related Project Actions button displays on the **Management Review Detail** page. This button links to a page that displays the project actions specifically related to that management review. The Related Project Actions button does not display if there are no related project actions.

If you enter a *report date* and *a response due date* but not *a closed date* on the **Management Review Detail** page, a project action is automatically created when you save the data. Click on the Related Project Actions button to view the project action. This automatically selects the *Workload Management* sidebar option and displays the **Project Action List** page. All related project actions are displayed in a table.

For additional information on the Workload Management sidebar option, see *Chapter 16: Workload Management.*

To view Project Actions:

1. From the **Management Review List** page, highlight and click on a review. The Management Review Detail page displays with the **Related Project Actions** button active.

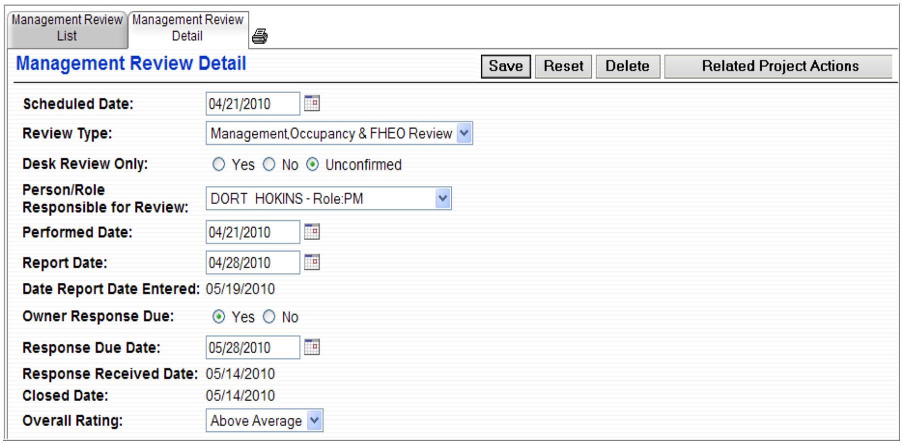


Figure 6-7. Management Review Detail page

2. From the **Management Review Detail** page, click on **Related Project Actions** and the **Project Action List page** displays.

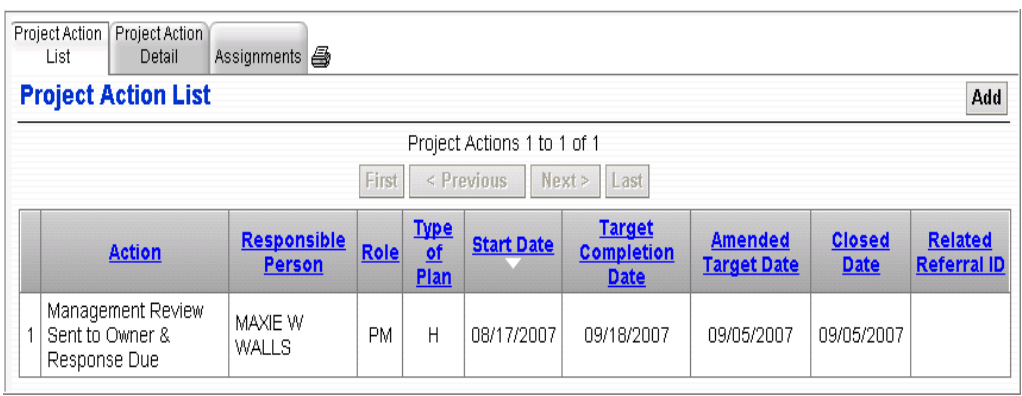


Figure 6-8. Project Action List page

3. Click on the appropriate link in the Action column of the table. The **Project Action Detail** page displays the following data:

   - *Action Entered Date: system-generated current date*
   - *Current Action: Management Review Sent to Owner & Response Due*
   - *Action Group: Housing Program*
   - *Action Start Date: from the Report Date field on the Management Review Detail page*

- *Person/Role Responsible for Action: from the Person/Role Responsible for Review field on the Management Review Detail page*
- *Target Completion Date: from the Date Response Due on the Management Review Detail page*

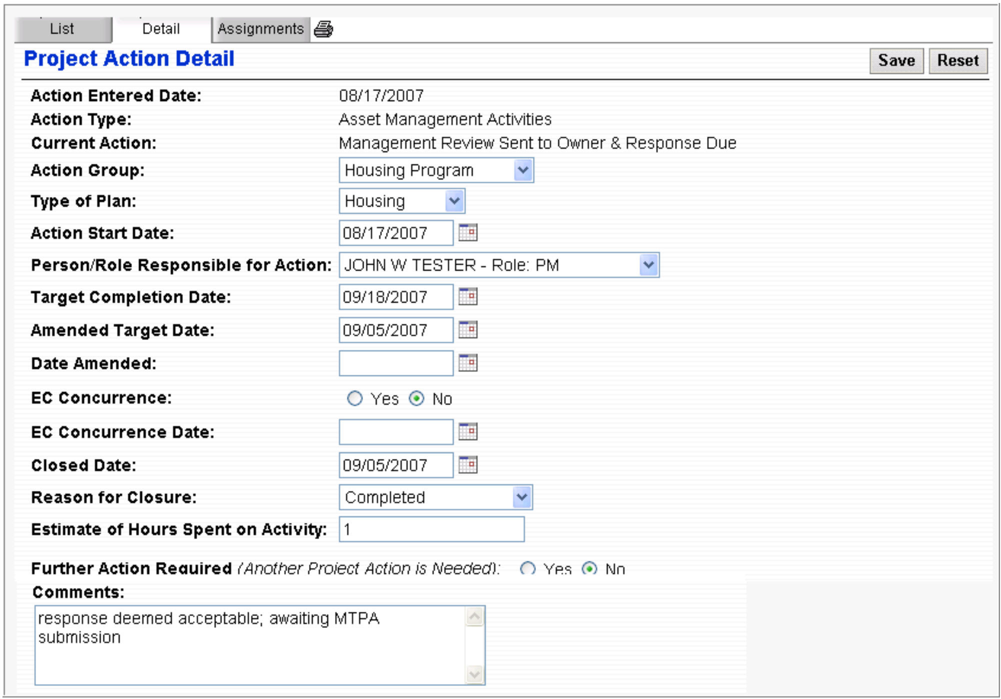


Figure 6-9. Project Action Detail page

As long as the Further Action Required indicator on the **Project Actions** page is not set to *Yes*, once you enter and save the closed date on the **Project Actions Detail** page, the response received date and closed date on the **Management Review Detail** page will be set to the same date.

However, if the Further Action Required indicator on the Management Review Sent to Owner & Response Due project action above is set to *Yes*, then only the response received date will be set and a new project action will be created once the closed date is entered and saved. This new project action's reference ID is the same as that of the previous project action. The following data displays:

- *Action Entered Date: system-generated current date*
- *Current Action: Management Review Owner Response Received & HUD Follow-up Required*
- *Action Group: Housing Program*
- *Action Start Date: automatically set to the closed date of the Management Review Sent to Owner & Response Due action.*
- *Person/Role Responsible for Action: from the Person/Role Responsible for Review field on the Management Review Detail page*
- *Target Completion Date: automatically set to the action start date plus thirty days*

When this Management Review Owner Response Received & HUD Follow-up Required project action is closed, the closed date on the **Management Review Detail** page will be set to the same date.

✍ *Note: For the project action "Management Review Sent to Owner & Response Due," the closed date is a non-editable field that is populated by the system.*