HUD USER MANUAL

Public and Indian Housing (PIH)
Real Estate Assessment Center (REAC)
Inventory Management System (IMS)
Executive Summary Module
HA Executive Summary sub Module

U.S. Department of Housing and Urban Development (HUD)

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1 EXECUTIVE SUMMARY
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The Executive Summary module allows the user to get a quick view of the essential data about the PHA (Public Housing Agency). Every PHA has its own data specific for that particular PHA. With thousands of records, it is hard to get up-to-date, customized information on a particular PHA. The Executive Summary module includes the HA Executive Summary sub module. This sub module provides various types of data for PHAs in the form of a report. By generating one of the HA Executive reports, the user can view the following information: HA details, physical address, contact information, performance scores, funding data, and inventory statistics. The user always has an access to generate those reports.

Most of the information in the reports is provided directly by the PHAs through the Housing Inventory module that consists of Housing Agency sub module, Development sub module and Inventory Removals sub module. The PHA’s performance scores are posted by the Real Estate Assessment Center (REAC). Updates occur in a real time mode. Once the PHA entered updated data, the HA Executive Summary sub module will allow users to generate the reports with the new information.
1.1 HA EXECUTIVE SUMMARY

The HA Executive Summary sub module enables users to find information on all Field Office PHA’s including those associated with Troubled Agency Recovery Centers (TARCs). These centers are located in Cleveland, OH and Memphis, TN. They help PHAs designated as “troubled” under the Public Housing Assessment System (PHAS), or Section 8 Management Assessment Program (SEMAP) to improve performance and achieve sustainable recovery.

To obtain information about a particular PHA, the user must select the appropriate PHA. To select the appropriate PHA, the user must select the Field Office HA, or the TARC HA option in the Select View list, and click Select. The program will update the page to reflect the user selection.

If the user selects the Field Office HA option, the program will refresh the page with another three options to select (see Figure 1). So, the user must select a HUB in the HUB list and click Select. The program refreshes the page with the corresponding list of Field Offices in the Field Office list. Then, the user selects the Field Office and clicks Select, the program updates the page again. Now, the user can select the desired PHA from the list of PHAs and click Select. The program will refresh the page to reflect the user selection.

If the user selects the TARC HA option, the program will refresh the page with another two options to select (see Figure 2). So, the user must select the remaining entities in every organization level to access the desired PHA.
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1.1.1 The List Page

To generate an HA Executive Summary report, the user has to select a PHA in the List sub tab of the HA Executive Summary tab. The List sub tab displays the Housing Executive Report Filters section.

The Housing Executive Report Filters section provides the following Category Selection options in form of check boxes: Details, Address, Contacts/Staff, Inventory, Funding Information, Performance, Comments, Demo/Dispo Information and Select All options (see Figure 3).
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The user can select the desired check boxes to include the corresponding data in the report. When the user selects the desired check boxes and runs the report, the program includes the data from the database for the selected PHA and its corresponding developments within the report criteria based on the latest updated information that was submitted by the PHAs through the Housing Inventory module. The PHA’s performance scores are posted by the Real Estate Assessment Center (REAC).

After selecting the desired options for the program to include in the report, the user can click the Generate Report button. The program will run the report including only the information based on the options that the user selected.

1.1.1 HA Executive Summary Report

The HA Executive Summary report provides eight different categories for selection. If the user selects all of them, the report will display eight different sections.

The general information shown at the beginning of the report displays the PHA code, HUB code and name, Filed Office code and name (see Figure 4).

![HA Executive Summary](image)

**HA Details**

- **HA Code:** IL001
- **Hub:** SICHII Chicago Hub
- **Field Office:** SAPH CHICAGO HUB OFFICE

**HA Address**

- **Physical Address:**
  - **Address Line1:** 700 N 20TH Street
  - **City/Locality:** EAST SAINT LOUIS
  - **State:** IL
  - **Zip Code:** 62205

- **Mailing Address:**
  - **Address Line1:**
  - **County Name:** SAINT CLAIR
  - **City/Locality:** EAST SAINT LOUIS
  - **State:** IL
  - **Zip Code:**

**HA Staff/Contacts**

- **Executive Director:** Miss Elizabeth Tolliver
  - **Phone:** (618)646-7163
  - **EMail:** etolliver@esfha.org
  - **Ext:** 0

- **Board Chairperson:** Mr. Elmore Richardson
  - **Phone:** (312)535-6236
  - **EMail:** elmore_richardson@hud.gov
  - **Ext:** 2318

*Figure 4: HA Details, Address and Staff Contacts sections*

The first 3 sections of the report demonstrate the following information (see Figure 4):

- **HA Details** section displays HA code, HA program type (Low-rent, Section 8 or Combined), assigned HUD Office, Formal name of HA, HA Fiscal Year End.
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- **HA Address** section provides the physical and mailing address information.
- **HA Staff/Contacts** section shows the title (such as PHA mayor, PHA board chairperson, and PHA executive director, etc.), name, telephone number, extension and email address of the HA contact personnel.

The following 2 sections of the HA Executive Summary Report display the following data (see Figure 5):

- **The HA Inventory** section provides the statistical information in accordance with the type of program the PHA is involved in. **The Low Rent Information** area consists of two Low Rent Information statuses: In Management and In Development. The section shows the number of developments and the number of units for each status as well as the total number of developments and units applicable to both statuses. **The Section 8 Information** area displays the Grant Name, the Increments number and the Units number for each grant as well as the total number of developments and units for all grants.

![Figure 5: HA Inventory and Demo/Dispo Information sections of the HA Executive Summary Report](image)

- **The Demolition/Disposition and Removal from Inventory Information** section provides the list of all developments for the selected PHA with the following information: development number and name, the number of the units approved for the Demo/Dispo and the number of the units removed from inventory for each listed development. This section also reports the...
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information about units approved for homeownership (if applicable). The system displays the message about whether the PHA has or has not any applications approved for homeownership.

- **The HA Performance** section is the next section of the HA Executive Summary report (see Figure 6). It contains the PHA’s performance information for two different assessment types: PHAS (Public Housing Assessment System) and SEMAP (Section 8 Management Assessment Program).

  **PHAS score**: Individual PHAs are responsible for submitting performance criteria to the Real Estate Assessment Center (REAC) for obtaining the PHAS score. REAC then posts the scores to a database. The module draws the performance scores from this database. The section displays the Assessment Date, Type, Score, Designation, and Temporary Office information for each assessment type.

  The unavailability of PHAS score information in the HA Executive Summary report can be due to several reasons: REAC may not have posted them yet, performance criteria may not have been submitted for the FY end yet, the evaluation may be in process, or the PHA may have requested a waiver.

  **SEMAP score**: The SEMAP score is generated by PIC’s SEMAP certification module.

  ![Figure 6: HA Performance section of the HA Executive Summary Report](image)

- **The HA Funding** section of the HA Executive Summary report allows the user to view the funding data only applicable to Public Housing (Low Rent) or Section 8 program types (see Figure 7). The data is drawn from the Housing Agency sub module funding data. The Housing Agency draws funding data from the HUD Central Accounting and Program System (HUDCAPS) and the Line of Credit Control System (LOCCS). These systems provide a grant code to the IMS.

  In the **Low Rent** program type sub section PHA’s grant data is displayed in the following format: grant code, grant name, the program type code, fiscal years the grants were awarded, amount authorized, amount disbursed, obligated amount and expended amount for each awarded grant. There are different types of Formula Grants and Competitive Grants available.

  **Formula Grants**: Capital Fund Grant (CFP), Comp Grant, HOPE VI, Operating Subsidy, Economic Development and Supportive Service Grant (EDSS), Public Housing Development Grant (PDEV), etc.

  **Competitive Grants**: Operating Subsidy, ARRA CAPFUND Recovery, etc.
For the Section 8 Program Type, the funding information displays the Certificates/Vouchers, fiscal years the grants were awarded, amount authorized, amount disbursed, obligated amount and expended amount for each awarded voucher. There are different Section 8 Program types available: Certificates, Vouchers, Disaster Vouchers, Mod-Rehab, Single-Room Occupancy, etc.

The HA funding section reports the grant information for the last 5 years. The data displayed in this section provides the amount of funds for each year the grant was awarded and the total amount for each grant for the last 5 years.

![Figure 7: HA Funding section of the HA Executive Summary Report](image)

- The Comments section contains any information that PHA deems to be important and appropriate for the HA Executive Summary report, including the last five “executive” comments for the PHA. The comments can be made by PHA staff members or an Executive Director. Based on this distinction, comments can be of General or Executive type.

This report screen contains two options for further use of the data (see Figure 8). Select one of the following:
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- Print: The program prints the report screen as a web page.
- Download in Text Format: The program exports the report contents into a Text File for further data manipulation.

Figure 8: The options for further use of report data