



HOUSING AUTHORITY 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



1.0 Executive Summary

1 EXECUTIVE SUMMARY

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.



1.0 Executive Summary

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.

The screenshot shows the 'HA Executive Summary' interface. At the top, there is a red header with the text 'List'. Below this, there are several search controls:

- Select View:** A dropdown menu set to 'Field Office HA' with a 'Select' button.
- HQ Office:** A dropdown menu set to 'Public and Indian Housing'.
- HQ Division:** A dropdown menu set to 'PO Field Operations' with a 'Select' button.
- Hub:** A dropdown menu set to '10HSEA Seattle Hub' with a 'Select' button.
- Field Office:** A dropdown menu set to '0APH SEATTLE HUB OFFICE' with a 'Select' button.
- Housing Authority:** A dropdown menu set to 'AK001 AHFC' with a 'Select' button.

Below these controls is a section titled 'Housing Executive Report Filters'. It contains two rows of checkboxes:

- Row 1: Details, Address, Contacts/Staff, Inventory, Funding Information
- Row 2: Performance, Comments, Demo/Dispo Information, Select All

At the bottom right of the filters section is a 'Generate Report' button.

Figure 1: HA Executive Summary Search Controls for Field Office HAs

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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The screenshot shows the 'List' sub-tab of the 'HA Executive Summary' report. It features several search filters: 'Select View' (TARC HA), 'HQ Office' (Public and Indian Housing), 'HQ Division' (PB Office of Troubled Agency Recovery), 'TARC' (PB1 Cleveland TARC), and 'Housing Authority' (CT022 New London Housing Authority). Below these is the 'Housing Executive Report Filters' section with checkboxes for 'Details', 'Address', 'Contacts/Staff', 'Inventory', 'Funding Information', 'Performance', 'Comments', 'Demo/Dispo Information', and 'Select All'. A 'Generate Report' button is located at the bottom right.

Figure 2: HA Executive Summary Search Controls for TARC HAs

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 provide 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).

The screenshot shows the 'List' sub-tab of the 'HA Executive Summary' report. It features several search filters: 'Select View' (Field Office HA), 'HQ Division' (Public and Indian Housing), 'HQ Office' (PO Field Operations), 'Hub' (10HSEA Seattle Hub), 'Field Office' (OAPH SEATTLE HUB OFFICE), and 'Housing Authority' (AK001 AHFC). Below these is the 'Housing Executive Report Filters' section with checkboxes for 'Details', 'Address', 'Contacts/Staff', 'Inventory', 'Funding Information', 'Performance', 'Comments', 'Demo/Dispo Information', and 'Select All'. A 'Generate Report' button is located at the bottom right.

Figure 3: Housing Executive Report Filters section



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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.

1.1.1.1 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															
 															
<table border="1"> <tr> <td>HA :</td> <td>IL001</td> <td colspan="2"></td> </tr> <tr> <td>Hub :</td> <td>SHCHI Chicago Hub</td> <td colspan="2"></td> </tr> <tr> <td>Field Office :</td> <td>SAPH CHICAGO HUB OFFICE</td> <td colspan="2"></td> </tr> </table>				HA :	IL001			Hub :	SHCHI Chicago Hub			Field Office :	SAPH CHICAGO HUB OFFICE		
HA :	IL001														
Hub :	SHCHI Chicago Hub														
Field Office :	SAPH CHICAGO HUB OFFICE														
HA Details															
HA Code:	IL001	Formal Name:	The Housing Authority of City of East St. Louis												
HA Program Type:	Combined	HA FY End:	03/31												
Assigned HUD Office:	CHICAGO HUB OFFICE														
HA Address															
Physical Address		Mailing Address													
Address Line1:	700 N 20TH Street	Address Line1:													
Address Line2:		Address Line2:													
County Name:	SAINT CLAIR	County Name:													
City/Locality:	EAST SAINT LOUIS	City/Locality:													
State:	IL	State:													
Zip Code:	62205	Zip Code:													
HA Staff/Contacts															
Executive Director	Miss Elizabeth Tolliver	Phone :	(618)646-7163												
		Ext :	0												
		EEmail :	etolliver@eslha.org												
Board Chairperson	Mr. Elmore Richardson	Phone :	(312)353-6236												
		Ext :	2318												
		EEmail :	elmore_richardson@hud.gov												

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.

HA Inventory		
Low Rent Information		
Status	Developments	Units
In Management	22	2081
In Development	0	0
Total	22	2081
Section 8 Information		
Grant Name	Increments	Units
Vouchers	0	0
Total	0	0

Demolition/Disposition and Removal from Inventory Information			
Demo/Dispo and Removal from Inventory Information (Includes HomeOwnership)			
Development No.	Development Name	# Units Approved for Demo/Dispo	# Units Removed from Inventory
IL001000002	JOHN DESHIELDS HOMES	112	104
IL001000004	EMMET GRIFFIN HOMES	86	82
IL001000006	LANSDOWNE TOWERS	16	16
IL001000007	ORR-WEATHERS APTS	28	28
IL001000008	TURNKEY-SCATTERED SITES	29	16
IL001003	JOHN DESHIELDS HOMES	6	6
IL001004	ROOSEVELT HOMES	32	32
IL001007	ORR-WEATHERS APTS	242	242
IL001011	SCATTERED SITES	6	6
IL001013	AUDUBON TERRACE	16	16
IL001016	TURNKEY III	59	59
IL001017	NORTH PARK TOWERS	199	199
IL001018	TURNKEY III	135	135
IL001020	TURNKEY III	49	49
IL001022	TURNKEY III	13	13
IL001023	TURNKEY III	12	12

This HA does not have any approved HomeOwnership applications.

Figure 5: HA Inventory and Demo/ Dispo Information sections of the HA Executive Summary Report

- 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 PHAS (Public Housing Assessment System) performance information.

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.

HA Performance				
Assessment Date	Assessment Type	Assessment Score	Designation	Temp Office
11/11/2008	PHAS	82.0	Standard Performer	Not Assigned

Figure 6: HA Performance section of the HA Executive Summary Report

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.

- 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



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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.

HA Funding					
Low Rent As Of 03/27/2010					
Competitive Grants	Fiscal Year	Authorized Funds	Disbursed Funds	Obligated Funds	Expended Funds
ARRA CAPFUND Recover	2009	\$4,948,702.00			
Grant Total		\$4,948,702.00			
Operating Subsidy	2009	\$5,862,085.00	\$3,783,413.80		
	2008	\$6,878,132.00	\$6,878,132.00		
	2007	\$7,446,012.00	\$7,446,012.00		
	2006	\$6,329,089.00	\$6,329,089.00		
Grant Total		\$26,515,318.00	\$24,436,646.80		
Formula Grants	Fiscal Year	Authorized Funds	Disbursed Funds	Obligated Funds	Expended Funds
CFP	2008	\$3,909,537.00	\$96,815.46	\$150,740.00	\$93,018.00
	2007	\$3,993,668.00	\$990,092.64	\$1,406,984.00	\$971,623.00
	2006	\$3,892,629.00	\$2,666,899.56	\$3,252,018.00	\$2,562,836.00
Grant Total		\$11,795,834.00	\$3,753,807.66	\$4,809,742.00	\$3,627,477.00
PDEV	2008	\$23,979,602.00			
Grant Total		\$23,979,602.00			
Low Rent Total		\$67,239,456.00	\$28,190,454.46	\$4,809,742.00	\$3,627,477.00
Section 8 As Of 05/30/2009					
Certificate / V	Fiscal Year	Authorized Funds	Disbursed Funds	Obligated Funds	Expended Funds
Vouchers	2010	\$1,080,212.00	\$1,080,212.00		
	2009	\$4,713,585.00	\$4,713,585.00		
	2008	\$4,489,473.00	\$4,489,473.00		
	2007	\$4,129,396.00	\$4,129,396.00		
	2006	\$3,695,237.00	\$3,695,237.00		
Grant Total		\$18,107,903.00	\$18,107,903.00		
Section 8 Total		\$18,107,903.00	\$18,107,903.00		
HA Comments					
No Record Found					

Figure 7: HA Funding section of the HA Executive Summary Report

This report screen contains two options for further use of the data (see Figure 8). Select one of the following:

- 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