U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

DISASTER INFORMATION SYSTEM (DIS) APPLICATION

SEPTEMBER 2010

USER GUIDE
## Revision Table

<table>
<thead>
<tr>
<th>Release No.</th>
<th>Date</th>
<th>Revision Description</th>
<th>Revision by</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>2/07/2006</td>
<td>Initial draft</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>1.1</td>
<td>02/10/2006</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>2.0</td>
<td>03/07/2006</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>2.1</td>
<td>04/01/2006</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>3.0</td>
<td>05/25/2007</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>3.0.1</td>
<td>11/06/2007</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>3.1</td>
<td>12/07/2007</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>3.5</td>
<td>02/26/2008</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>4.0</td>
<td>04/22/2008</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>4.1</td>
<td>06/24/2008</td>
<td>New format</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>4.1.1</td>
<td>12/23/2008</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>4.3</td>
<td>09/11/2009</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>5.0</td>
<td>04/16/2010</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
<tr>
<td>5.1</td>
<td>09/01/2010</td>
<td>Revision</td>
<td>Visionary Integration Professionals Inc.</td>
</tr>
</tbody>
</table>
# DISASTER INFORMATION SYSTEM (DIS) APPLICATION USER GUIDE

## Table of Contents

### Introduction
1. Overview .............................................................................................................. 1
2. Types of Users .................................................................................................... 1
3. What you need to Use the System .................................................................... 2

### Using the DIS System
1. Logon ................................................................................................................ 3
2. Update User Profile – New Users Only ................................................................. 5
3. Navigate to DIS Application ................................................................................ 5
4. Privacy Act Warning and Acceptance ................................................................. 6
5. Searching For Household Assistance Records .................................................... 7
6. Select the Correct Household Record .................................................................. 8
7. Eligibility Questionnaire ..................................................................................... 9
8. Searching for Changed Households ...................................................................... 10
9. Viewing/Editing Household Assistance Details ................................................... 10
10. Updating Family Members Information .............................................................. 13
11. PHA Assignment ............................................................................................... 14
12. Searching for PHA by Name ............................................................................. 15
13. Entering Lease Information (Not for Guest Users) ............................................ 16
14. Creating New Lease Records/Viewing Previous Lease Records ....................... 23
15. Viewing Lease History and Historical Comment Records ................................. 24
16. Fixing Input Errors in the Assistance Details Form .......................................... 26
17. Rolling back Lease/Assistance Record (HUD Super Users Only) ...................... 26
18. Port Out ............................................................................................................ 27
19. Viewing Records Already Assigned to a PHA .................................................. 28
20. Adding/Approving New Households ................................................................. 29
21. Entering New Household ................................................................................... 30
22. Entering Data for HL-CPD (Homeless) Households (HA/HUD/Super Users) .... 32
23. Approving or Rejecting New Household Record (HUD Super Users) ............... 33
24. Reset Rejected Households Status (Only for HUD and Super Users) ............... 34
25. Modifying PHA Verifications Results for HL-CPD Households ....................... 35
26. DIS Reports ..................................................................................................... 37
27. Running All Transaction Report ...................................................................... 37
28. Running New Households Status Report ......................................................... 39

### System Admin Functionality
29. Data Corrections (DIS Administrators or Super Users Only) ............................ 41
30. Activate/Inactivate Household Record ............................................................. 42
31. Correct Household Information ....................................................................... 44
32. Correct Household SSN ................................................................................... 45
33. Replace Head of Household ............................................................................ 47
34. Modify Eligibility Questionnaire ..................................................................... 49
35. Change Pre Disaster/New Program Types to Non-HUD .................................. 50
36. Add or Change FEMA Information .................................................................. 51
### Table of Contents

37. Bulk Inserts/Updates .......................................................................................................................... 51
38. Bulk Upload – Download File Templates ............................................................................................ 52
39. Bulk Upload – Bulk Data Add/Update Options ................................................................................... 54
40. Bulk Upload – Check Status of Uploaded Files .................................................................................. 54
41. Business Rules Template .................................................................................................................... 56
42. Add New Disaster ................................................................................................................................. 57
43. Add Pre or New Program Type ........................................................................................................... 58
44. Associate Pre and New Program Types ............................................................................................... 59
45. Set Business Rules for Pre and New Program Types ....................................................................... 59
46. Edit Business Rules for Pre and New Program Types .................................................................... 66
47. Add Dynamic Data fields .................................................................................................................... 69
48. Modify Dynamic Data fields .............................................................................................................. 73
49. Associate New Fields with Program Types ...................................................................................... 75
50. Delete Dynamic Data fields ............................................................................................................... 76
51. Remove Dynamic Data field Associations ...................................................................................... 77
52. Bulk Upload Dynamic Field Data Values .......................................................................................... 79
53. Bulk Upload Dynamic Field Data Values – Download File Templates ............................................. 79
54. Bulk Upload Dynamic Field Data Values – Add/Update Dynamic Field Values Options ............... 81
55. Bulk Upload Dynamic Field Data Values – Check Status of Uploaded Files .................................. 82

Appendix A – Eligibility Questionnaire .................................................................................................. 85
Appendix B – Bulk Uploads and Updates ................................................................................................. 86
  1. Bulk Inserts/Updates: ......................................................................................................................... 86
  1.1 Steps to Download File Templates ................................................................................................. 87
  1.2 Steps to Upload Files ...................................................................................................................... 88
  2. Bulk Upload – Bulk Data Add / Update Options ............................................................................... 88
  2.1 Bulk Data Add ................................................................................................................................. 89
  2.2 Bulk Data Update ............................................................................................................................ 90
  2.3 Bulk Upload – Check Status of Uploaded Files .............................................................................. 91

Appendix C – Bulk Upload Dynamic Field Data Values .......................................................................... 93
  1. Dynamic Data Field Values Bulk Adds/Updates ............................................................................. 93
  1.1 Steps to Download File Templates ................................................................................................. 93
  1.2. Steps to Upload Files ................................................................................................................... 95
  2. Bulk Dynamic Data Field Values Additions .................................................................................... 96
  3. Bulk Dynamic Data Field Values Updates ....................................................................................... 96
  4. Bulk Dynamic Data Field Values – Check Status of Uploaded Files .......................................... 97
Table of Contents

Tables and Figures

Table 1 – User Access Rights ................................................................. 1
Figure 1 – User Logon ................................................................................ 3
Figure 2 – Subsystem List ......................................................................... 4
Figure 3 – Updating Profile for New Users .................................................. 5
Figure 4 - Select PIH Information then DIS ................................................ 6
Figure 5 - Read Before Accepting ............................................................. 6
Figure 6 - Search for Household Details .................................................... 7
Figure 7 - Click on the SSN to view/edit the record ..................................... 8
Figure 8 - Inactivate Household records cannot be modified ......................... 9
Figure 9 - Eligibility Questionnaire .......................................................... 9
Figure 10 - Modify Lease Assistance Details link ......................................... 10
Figure 11 - Searching for Changed Households ......................................... 10
Figure 12 - Edit Lease Assistance Details for HUD Families ....................... 11
Figure 13 - Edit Lease Assistance Details for Non-HUD Families ................ 13
Figure 14 - Edit Family Members Details .................................................. 14
Figure 15 - Select "Assign PHA Now!" to save record with a PHA ................... 14
Figure 16 - Select “Assign PHA Now!” to save record with a PHA ................. 14
Figure 17 - Search for PHA ....................................................................... 15
Figure 18 - A List of PHAs with Names Matching the Search Text ................ 15
Figure 19 - PHA details populated back in the Assistance Details page ............ 16
Figure 20 - HA Determine Eligibility Indicator .......................................... 16
Figure 21 - Typical Lease Information Section for HUD Families ................. 17
Figure 22 - Lease information Section for Non-HUD families (First Lease) ...... 17
Figure 23 - Lease Information Section for Non-HUD Families (Second Lease) . 18
Figure 24 - Top of Typical 1st Lease Page for DHAP-IKE Family .................. 18
Figure 25 - End of Typical 1st Lease Page for DHAP-IKE Family ................. 18
Figure 26 - After 1st Lease for DHAP-IKE (top) ............................................. 19
Figure 27 - After 1st Lease for DHAP-IKE (bottom) ..................................... 20
Figure 28 - Family Eligibility Indicators, Landlord Signed Indicators, HQS Inspection Date & Type and Quarterly Eligibility Dates ........................................ 22
Figure 29 - End of Participation Date and Reasons ....................................... 23
Table 2 - Program End Dates .................................................................. 23
Figure 30 - Saving New Lease record ......................................................... 24
Figure 31 - Viewing Previous Lease Record ............................................... 24
Figure 32 - Lease History ......................................................................... 24
Figure 33 - Viewing Lease History (Archive records) ..................................... 25
Figure 34 - Historical Comments (Comment History) ................................. 25
Figure 35 - Viewing Historical Comments (Comment History) ...................... 25
Figure 36 - Review the Errors at the Top of the Form ................................... 26
Figure 37 - Review and fix listed Errors in the Form .................................... 26
Figure 38 - Rollback Lease and Assistance Records ..................................... 27
Figure 39 - Rollback Record Screen ......................................................... 27
Figure 40 – Port Out Button ................................................................. 27
Figure 41 - Port Out Process Message Box ........................................ 28
Figure 42- Port Out Option Box ............................................................ 28
Figure 43 - Click on One of the SSN Links to View Records Assigned to PHA 29
Figure 44 - Click on “Add Households” link to view the options ............. 29
Figure 45 - Add/Approve Households – Options .................................. 30
Figure 46 - Add New Household Screen .............................................. 30
Figure 47 - Pre Disaster Program Types ................................................. 31
Figure 48 - PHA Verification and Screening results fields for HL-CPD households .............................................................. 31
Figure 49 - HL-CPD Options ................................................................. 32
Figure 50 - Update PHA Verification Details’ Option .............................. 33
Figure 51 - Approve/Reject Households Option .................................... 33
Figure 52 - Pending Households List .................................................... 34
Figure 53 - Approve/Reject Households Option .................................... 35
Figure 54 - Rejected Households List .................................................... 35
Figure 55 - Modify PHA Verification Details Option ............................... 36
Figure 56 - HL-CPD Households List .................................................... 36
Figure 57 - PHA Verification and Screening Details Changes ............... 37
Figure 58 - Click on Report tab to Open Report Page ............................ 37
Figure 59 - Transaction Report Filters ................................................ 38
Figure 60 - The New Report opened in a new browser window ............... 39
Figure 61 - The Report as an excel spreadsheet .................................... 39
Figure 62 - New Households Status Report .......................................... 40
Figure 63 - DIS Admin Data Correction Options ................................ 41
Figure 64 - Activate/Inactivate Household Screen ................................ 42
Figure 65 - Activate/Inactivate Comment History .................................. 43
Figure 66 - Viewing Activate/Inactivate Historical Comments ............... 43
Figure 67 - Correct Household Information Screen ............................... 44
Figure 68 - Correct Household SSN Screen ........................................ 45
Figure 69 - Correct Household SSN Comment History ....................... 46
Figure 70 - Viewing Correct Household SSN Historical Comments ........ 46
Figure 71 - Replace Head of Household .............................................. 47
Figure 72 - Replace Head of Household Comment History .................. 48
Figure 73 - Viewing Replace Head of Household Historical Comments .... 48
Figure 74 - Correct Eligibility Questionnaire Form ............................... 49
Figure 75 - Change Pre Disaster Program Type .................................... 50
Figure 76 - Add or Update FEMA ID, HUD LOAD & FEMA Referral Dates 51
Figure 77 - Bulk Inserts/Updates .......................................................... 52
Figure 78 - Bulk Upload Add/Update Household Excel Template ........... 53
Figure 79 - Bulk Data File Upload ........................................................ 54
Figure 80 - Different Types of File Status ............................................ 55
Figure 81 - Bulk Addition/Updates ........................................................ 56
Figure 82 - Main page for Business Rules Template ............................. 57
Table of Contents

Figure 126 - Bulk Upload File Status Page ..............................................................92
Figure 127 - Dynamic Data Field Values Bulk Upload Main Page .........................93
Figure 128 - Dynamic Data Field Values Bulk Upload Error ................................94
Figure 129 - Dynamic Data Field Values Bulk Upload Main page .......................95
Figure 130 - Blind Update logic ..........................................................................96
Figure 131 - Status of Dynamic Field Data Values Uploads .................................97
Figure 132 - Dynamic Field Data Values Detail Report .......................................98
Figure 133 - Dynamic Field Data Values File Detail Report Download ...............98
Introduction

1. Overview

This document is designed to assist users of the Disaster Information System (DIS) Application. DIS is designed to streamline the processing of families who lost their housing because of hurricanes or any types of disasters and to relocate families already in the HUD rental assistance programs. The application provides verification of family eligibility and allows data entry for their new or temporary housing assistance details.

2. Types of Users

The broad categories of users of the system include:

a. Housing Authority Users (HA Users).
b. HUD Users and HUD relocation assistance contractors
c. Guest Users (Usually non-HUD and non-HA contract staff)
d. Super Users – Users with special privileges.
e. Administrators

When using the system, different users will be able to perform actions based on their assigned roles in the system. Access rights for each user type are described below:

<table>
<thead>
<tr>
<th>Actions</th>
<th>HA User</th>
<th>HUD User</th>
<th>Guest User</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Search for a family</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>2. Establish Eligibility</td>
<td>Yes</td>
<td>Yes</td>
<td>(No access)</td>
</tr>
<tr>
<td>(see note)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Update family information</td>
<td>Submit/Modify</td>
<td>Submit/Modify</td>
<td>Read only</td>
</tr>
<tr>
<td>4. Record/Modify a family’s</td>
<td>Submit/Modify</td>
<td>Submit/Modify</td>
<td>(No access)</td>
</tr>
<tr>
<td>Lease</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. View DIS Reports</td>
<td>Read only</td>
<td>Read only</td>
<td>Read only</td>
</tr>
<tr>
<td>6. Rollback records</td>
<td>(No access)</td>
<td>Submit/Modify</td>
<td>(No access)</td>
</tr>
<tr>
<td>7. View Archives</td>
<td>Read only</td>
<td>Read only</td>
<td>Read only</td>
</tr>
<tr>
<td>8. Add New Households</td>
<td>Yes</td>
<td>Yes</td>
<td>Read only</td>
</tr>
<tr>
<td>9. Add HL-CPD Households</td>
<td>Yes</td>
<td>Yes</td>
<td>(No access)</td>
</tr>
<tr>
<td>10. Approve New Households</td>
<td>(No access)</td>
<td>Yes</td>
<td>(Super Users Only)</td>
</tr>
<tr>
<td>(Super Users Only)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Super Admin Functionality</td>
<td>(No access)</td>
<td>Yes</td>
<td>(No access)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Super Users Only)</td>
<td></td>
</tr>
</tbody>
</table>

Table 1 – User Access Rights

Note: HA and HUD Users may determine eligibility depending on the IAA (Inter-Agency Agreement).
3. **What you need to Use the System**
   - A valid User Id and password to the IMS system.
   - Access to the DIS Application.
   - An understanding of Disaster Information System.
Using the DIS System

1. **Logon**
   a) Open an Internet Explorer browser window and go to one of the following URLs:
   - [https://hudapps.hud.gov/ssmaster](https://hudapps.hud.gov/ssmaster) (users with “H” IDs (e.g.H1234)
   - [https://hudapps.hud.gov/HUD_Systems](https://hudapps.hud.gov/HUD_Systems) (users with “M” or “C” IDs (e.g. M1234)
   
   **Note:** Bookmark the applicable link for future use

   b) Type in your User ID and Password and Click on ‘Login’.

   ![User Login](image)

   **Figure 1 – User Logon**

   c) The Legal warning page is displayed.  
   **Note:** Users must click the ‘Accept’ button on this page to continue using this system.

   d) Upon successful logon, you will be presented with a Sub-System list with links.

   e) Select “PIH Information Center (PIC)” by clicking on the link with the same name.
Figure 2 – Subsystem List
2. Update User Profile – New Users Only

When a new User logs onto the PIC system, the User Profile screen is displayed. New Users are required to update their account information as described below (see the figure below).

a) In the User Contact Information Section, enter first name, last name and select a Salutation from drop-down list.
b) In the Mailing Address Section, enter mailing information in required fields (marked in asterisks).
c) Click on the Save button at the bottom right of the screen. The Public and Indian Housing Information Center Screen is displayed.

![Figure 3 – Updating Profile for New Users](image)

3. Navigate to DIS Application

a) Once user is logged into the Public and Indian Housing Information Center Screen displayed (see the adjacent figure)

   **Note:** Available options on the left menu are dependent on User access rights.
b) On the left menu bar as shown in adjacent figure, Click on ‘DIS’ link under “PIH Information” title.

![Figure 4 - Select PIH Information then DIS](image)

4. **Privacy Act Warning and Acceptance**
   a) When user clicks on the DIS Submenu, the “Privacy Act (See the figure below) Statement and Compliance Notice” page is displayed.
   b) Click “Agree” to launch DIS Application.

*Note: Users MUST click the ‘Agree’ button on the Privacy Notice page to access the DIS System.*

![Figure 5 - Read Before Accepting](image)
5. Searching For Household Assistance Records

After accepting the Privacy Act Notice, the Search for Household Assistance Details page opens as shown in the adjacent figure.

This screen can be used to search for Household Assistance Details using any one of the two choices listed below:

1. By Social Security Number (SSN)
2. By Information

When Searching By Information, Last Name and any of the following are required:

- First Name
- Date of Birth
- Sex

System Access – System security is role based so some functions may not be available to you. For a detailed explanation, please see Section 1.2 Page 1 – “Types of Users”

Figure 6 - Search for Household Details
6. **Select the Correct Household Record**
   
a) Search results appear in a table at the bottom of the screen (see figure below).

![Figure 7 - Click on the SSN to view/edit the record](image)

b) Review the list to find the correct record.

c) Then click on the SSN link (the first field on the left side of the table) of the record to review or edit Assistance details.

d) Search results will display the Disaster Number for each Household. This allows all records in multiple disasters to be displayed.

e) Search results will distinctly mark Non-HUD families with text “Non-HUD” under the column “Info.”

f) Search results will also display the status (Active/Inactive) of the household record under the column “Status”. Inactive household records cannot be modified.

g) An asterisk next to an SSN indicates that the Household is already assigned to a Receiving PHA for assistance.

If a family does not appear in the search results, please verify that the search information is correct for the Head of Household. Only the Head of Household information can be used to retrieve Household Assistance details.
7. Eligibility Questionnaire

a) Eligibility questionnaire may be displayed before the lease or assistance page if the eligibility for the selected household is not already established.

b) See the Appendix section to learn how the DIS system determines the eligibility based on the answers provided. You may also click the link “How does Eligibility Questionnaire work?” displayed at the bottom of the Questionnaire page.

c) Fill in the questionnaire and click “Submit Answers”.

d) If the family is determined eligible, a link is provided to navigate to the “Lease Assistance” page as shown in the adjacent figure. Click on the link to bring up lease/assistance details page.

If the family is determined ineligible for assistance, the household record is also marked as inactive, it remains locked in its current state.
8. **Searching for Changed Households**

If an household record has been changed for any reason and no longer exists in its original state, it may not be found when searching and an error message will be displayed indicating the same.

9. **Viewing/Editing Household Assistance Details**

1) HA Determined Eligibility:
   ‘Yes’ option must have been selected in Eligibility Questionnaire for the lease Details section to be displayed and modified.

2) Pre Disaster Program Types:
   a. CE – Certification
   b. DHAPK - DHAP-KATRINA
   c. DHP-K - DHAP-KATRINA
   d. HL - CPD: Continuum of Care (Homeless)
   e. IKE01 - IKE – GUSTAV
   f. IKEPH - IKE PUBLIC HOUSING
   g. IKEVO - IKE VOUCHER FAMILY
   h. MF - Multifamily
   i. MR - Mod Rehab
   j. NH - New Housing
   k. OH - Displaced Other Federally Assisted Housing Family
1 – Introduction

I. PH - Displaced Public Housing Resident
m. PHIKE – PUBLIC HOUSING IKE
n. VO - Displaced Voucher Family
o. VOIKE - VOUCHER IKE

In Addition to the New Program Types listed above, DIS system has 10 more special program types for listed below for Non-HUD Families. These special program types cannot be selected in the View/Edit Household mode.

p. FE - Non-HUD Family
q. FT - Non-HUD Families (Phase 2)
r. F3 - Non-HUD Families (Phase 3)
s. F4 - Non-HUD Families (Phase 2B)
t. F5 - Non-HUD Families (Phase 2C)
u. F6 - Non-HUD Families (Phase 2D)
v. F7 - Non-HUD Families (Phase 2E)
w. F8 - Non-HUD Families (Phase 2F)
x. F9 - Non-HUD Families (Phase 2G)
y. F10 – Non-HUD Families (Phase 2H)
3) Receiving PHA:
   This information is required for the lease information to be displayed and modified

4) New Program Type (required if a ‘Receiving PHA’ is selected):
   a. NV - DIS Voucher
   b. PH - Public Housing
   c. PI - Voucher Port in
   d. VA - Voucher Absorbed
   e. MF - Multi Family
   f. HL - CPD Assistance
   g. OT - Other Assistance
   h. IKE01 – IKE-GUSTAV
   i. NH – New Housing

   In Addition to the New Program Types listed above, DIS system has 1 more HUD and 10 Non-HUD special program types. These special program types cannot be selected in the View/Edit Household mode:

   j. AH-Affected Public Housing
   k. DH-Non-HUD Family Assistance
   l. DT-Non-HUD Family Assistance (Phase 2)
   m. D3-Non-HUD Family (Phase 3)
   n. D4-Non-HUD Family (Phase 4)
   o. D5-Non-HUD Family (Phase 5)
   p. D6-Non-HUD Family (Phase 6)
   q. D7-Non-HUD Family (Phase 7)
   r. D8-Non-HUD Family (Phase 8)
   s. D9-Non-HUD Family (Phase 9)
   t. D10-Non-HUD Family (Phase 10)

5) Bedroom Size (Prior and Requested):
6) Family Members (if applicable):
7) Total Number of Family Members:
10. **Updating Family Members Information**

a) Missing family members may be added to the system through the family member details section.

b) Each valid entry must have First Name, Last Name, Date of Birth, Gender, and Citizenship status populated.

c) First entry, reserved for Head of Household, cannot be modified.

*Total number of family members includes the head of household.*
11. **PHA Assignment**

a) Users may opt to assign PHA later. To do so, leave the record in its default state.
   - Or -
   a) Select “Assign PHA Now!” to fill out all PHA information. (See the figure below)

b) To search for the PHA codes and organization details, click on the Link “Click here to Search PHA Information”

---

**Figure 14 - Edit Family Members Details**

<table>
<thead>
<tr>
<th>#</th>
<th>First Name</th>
<th>MI</th>
<th>Last Name</th>
<th>SSN</th>
<th>Date of Birth</th>
<th>Sex</th>
<th>Displ Ind</th>
<th>Citizenship</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>zivnqg</td>
<td>n</td>
<td>mwvit</td>
<td>XXXX-XXX-3138</td>
<td>09/12/1974</td>
<td>F</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>2</td>
<td>meer</td>
<td>g</td>
<td>mwvit</td>
<td>XXXXX9717</td>
<td>02/06/1997</td>
<td>M</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>3</td>
<td>zivnqg</td>
<td>z</td>
<td>mwvit</td>
<td>XXXXX7196</td>
<td>07/03/1993</td>
<td>F</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>4</td>
<td>wivuwz</td>
<td>v</td>
<td>mwvit</td>
<td>XXXXXX4937</td>
<td>06/14/1996</td>
<td>M</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>5</td>
<td>zhvlnu</td>
<td>u</td>
<td>bmrp</td>
<td>XXXXX9135</td>
<td>05/27/2000</td>
<td>F</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Total Number of Family Members: 5 (count includes head of household)

**Figure 15 - Select Assign PHA Later to Save Record without a PHA**

**Figure 16 - Select “Assign PHA Now!” to save record with a PHA**
12. **Searching for PHA by Name**

a) To search for **PHA by Name** type in the first few characters of PHA name and click "Search PHA" button (See the adjacent figure). (At least 3 characters are required for successful search.)

![Search PHA](image1.png)

Figure 17 - Search for PHA

b) Choose the appropriate match from the displayed list, and click "Select this PHA" button located next to it (see the adjacent figure).

When the "Select this PHA" button has been clicked, the PHA information is automatically populated in the main Household Assistance Details screen.

![List of PHAs](image2.png)

Figure 18 - A List of PHAs with Names Matching the Search Text
13. **Entering Lease Information (Not for Guest Users)**

The figures below shows the Lease Information Section located at the bottom of the form. Use this to record the lease assistance details.

The Lease information Section of the form is **NOT** available to Guest users and will not display for Program types PH - Public Housing, MF - Multifamily, or OT - Other Assistance.

**HA Determined Eligible indicator must be set to ‘Yes’ before a User can enter Lease information for a Household receiving HUD Assistance.**

The Lease Details section is **not displayed** to a user when one or more of the following conditions are true:

- User does not have enough privileges to modify the lease details.
- User is of type “Guest User”.

![Figure 19 - PHA details populated back in the Assistance Details page](image)

![Figure 20 - HA Determine Eligibility Indicator](image)
Figure 21 - Typical Lease Information Section for HUD Families

Figure 22 - Lease information Section for Non-HUD families (First Lease)
1 – Introduction

Figure 23 - Lease Information Section for Non-HUD Families (Second Lease)

Figure 24 - Top of Typical 1st Lease Page for DHAP-IKE Family
Figure 25 - End of Typical 1st Lease Page for DHAP-IKE Family

Figure 26 - After 1st Lease for DHAP-IKE (top)
Following fields on the Lease information section are applicable only to the Non-HUD New Program Types (DH, DT, D3 through D10):
- IRT Exception, Date and Amount
- Finder’s Fee
- Mover Fee
- Security Deposit
- Utility Deposit
- Vacancy Payment
- Vacancy Payment Date

Following fields on the Lease information section will not appear for the New Program Type: “AH – Affected Public Housing”
- Monthly Lease
- EOP Date and Reasons.
- Early Release Fee.
- IRT Exception, Date and Amount
- Finder’s Fee And Mover Fee
- Family Contacted Indicator
- Family Agreed to Case Management Indicator
- Landlord Signed HAP Contract Indicator
- HQS Inspection Date

The following fields and indicators are only available on a Non-HUD Family Lease page.

Incremental Rent transition (IRT) Exception Indicator:
- Applicable only to the Non-HUD families.
- Select this checkbox to mark the household as an exception to the Incremental Rent transition.
- Corresponding date and amount must be provided if this indicator is selected.
- IRT Exception information can be carried over to the next lease if required.
- For DHAP-IKE families, the IRT exception date shall be greater than or equal to 05/01/2009 and must always be the first day of the month.
Finder’s Fee Indicator:
- Applicable only to the very first lease for Non-HUD families.
- Select this checkbox to indicate that the PHA has assisted the Non-HUD family to find a suitable housing unit.

Mover Fee Indicator:
- Applicable only to the Non-HUD families.
- Select this checkbox to indicate that the PHA has helped household find a new unit due to the problem with the first housing unit.
- Indicator appears on 2nd or subsequent leases after family has moved to new location.
- Mover Fee indicator cannot be selected if any one of the following is true:
  1. Finder’s fee is already applied for the selected Household on the first lease.
  2. Mover Fee is already applied for the selected household on one of the old leases.
  3. The current lease has the same unit address as on the last lease.

Vacancy Payment Amount:
- The PHA enter a vacancy payment amount;
- The numeric $ value shall not exceed 2 times the lease rent amount if there is >=2 months difference between vacancy payment date and program end date; and
- Or the numeric value shall not exceed 1 month of the lease rent amount if the difference between the vacancy payment date and program end date is < 2 months.

Vacancy Payment Date:
- The PHA must enter a value in this field if the vacancy payment amount has a value.
- When the PHA enters date in this field, it must be equal to both the EOP and Lease Termination date.
- When the PHA enters valid values in both the vacancy payment amount and date field, the household status is set to ‘Inactive’ when the household details is saved.

Family Contacted Indicator:
- The PHA will check this box to indicate that the PHA has contacted the family.
- Once indicator is checked, it can only be changed by the System Administrator.

Family Agreed to Case Management Indicator:
- The PHA checks this box when the Family has agreed to Case Management.
- Once this indicator is check, it can only be changed by the System Administrator.

Landlord Signed HAP Contract Indicator:
- The PHA selects this box once the Landlord has signed and returned the HAP Contract. Once this indicator is checked, it can only be changed by the System Administrator.
HQS Inspection Date:
• The PHA enters date that the HQS Inspection was completed.
• Once this indicator is checked, it can only be changed by the System Administrator.

<table>
<thead>
<tr>
<th>Family Eligible for Continued Assistance</th>
<th>Continued Assistance Initial Eligibility Determination Date: 07/14/2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Contacted</td>
<td>Family Agreed to Case Management</td>
</tr>
<tr>
<td>HQS Inspection Date:</td>
<td>HQS Inspection Type: -- Select Type --</td>
</tr>
<tr>
<td>Last Quarterly Eligibility Determination Date: 07/14/2010</td>
<td>Next Quarterly Eligibility Determination Due Date: 10/12/2010</td>
</tr>
</tbody>
</table>

Figure 28 - Family Eligibility Indicators, Landlord Signed Indicators, HQS Inspection Date & Type and Quarterly Eligibility Dates

HQS Inspection Type:
• This field is only applicable to DHAP-IKE Households.
• When the PHA enters a HQS Inspection Date, the Inspection Type must be selected.

Family Eligible for Continued Assistance Indicator:
• This field is only applicable to DHAP-IKE Household
• PHA selects this field once they have determined that the family is eligible for continued assistance.

Continued Assistance Initial Eligibility Determination Date Field:
• This date field is only applicable to DHAP-IKE Household
• This field is displayed only when the Family Eligible for Continued Assistance Indicator is checked.

Last Quarterly Eligibility Determination Date:
• This date field is only applicable to DHAP-IKE Household
• This field is displayed only when the Family Eligible for Continued Assistance Indicator is checked.

Next Quarterly Eligibility Determination Due Date:
• This field is displayed only when the Family Eligible for Continued Assistance Indicator is checked.
• This field is automatically generated by the system is the Higher of [Continued Assistance Initial Eligibility Determination Date, Last Quarterly Eligibility Determination Date] + 90 days.

End of Participation (EOP):
• To end the family’s participation in the Disaster Assistance Program, the PHA enters the End of Participation date when the family leaves the program, and must select a reason in the EOP Reason field. If PHA selects ‘Other’, an explanation must be provided in the comments section. No new leases are allowed after the family has been EOP’ed.
1 – Introduction

Program End Dates:
- Program End Dates are determined by the combination of Disaster, Pre-Disaster Program Type and New Program as given in the adjacent table. All the leases must end on or before this date. Program End Dates are managed by the Business Rules.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Program End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Disaster Program Type: MF, MR, PH, OH and HL</td>
<td>06/30/2008</td>
</tr>
<tr>
<td>Pre-Disaster Program Type: VO</td>
<td>12/31/2007</td>
</tr>
<tr>
<td>New Program Type: DH</td>
<td>02/28/2009</td>
</tr>
<tr>
<td>New Program Type: DT</td>
<td>02/28/2009</td>
</tr>
<tr>
<td>New Program Type: D3</td>
<td>02/28/2009</td>
</tr>
<tr>
<td>New Program Type: D4</td>
<td>02/28/2009</td>
</tr>
<tr>
<td>New Program Type: D5</td>
<td>02/28/2009</td>
</tr>
<tr>
<td>New Program Type: D6</td>
<td>02/28/2009</td>
</tr>
<tr>
<td>New Program Type: D7</td>
<td>02/28/2009</td>
</tr>
<tr>
<td>New Program Type: D8</td>
<td>02/28/2009</td>
</tr>
<tr>
<td>New Program Type: D9</td>
<td>02/28/2009</td>
</tr>
<tr>
<td>New Program Type: D10</td>
<td>02/28/2009</td>
</tr>
<tr>
<td>New Program Type: AH</td>
<td>12/31/2006</td>
</tr>
</tbody>
</table>

Table 2 - Program End Dates

14. Creating New Lease Records/Viewing Previous Lease Records

a) DIS will not allow any HAP Contract Effective Date prior to 2/1/2006.
b) Make sure current Lease information is completely entered and is valid.
c) In the Lease information section, enter information about new lease. Make sure the New HAP Contract Effective Date is greater than previous HAP Contract Termination Date.
d) When all new lease details have been filled in, click on “Save as New Lease” button to save new information as next Lease record.
e) To verify that the new lease was created bring up the assistance details screen again.
1 – Introduction

f) At the bottom of the screen, an extra button with label “View Previous Lease Record” will be displayed.
g) Click on “View Previous Lease Record” button to view previous lease records.

15. Viewing Lease History and Historical Comment Records

a) At the bottom of the screen, an extra button labeled “Lease History” will be displayed.
b) Click on the “Lease History” button to view household, member and transaction data, for the selected lease, by archive dates
   i. On the new pop-up window, select an archive date via the “History Date” dropdown and click the “View” button
   ii. Click the red “X” to close window
c) At the bottom of the screen, a button labeled “Comment History” will be displayed.
   i. Click the “Comment History” button and a pop-up window will open displaying all historical comments in chronological order
   ii. Click the red “X” to close the window

Figure 30 - Saving New Lease record

Figure 31 - Viewing Previous Lease Record

Figure 32 - Lease History
1 – Introduction

Figure 33 - Viewing Lease History (Archive records)

Figure 34 - Historical Comments (Comment History)

Figure 35 - Viewing Historical Comments (Comment History)
16. **Fixing Input Errors in the Assistance Details Form**

a) When you press “**Update Current Lease**” or “**Save as New Lease**” on the main Assistance Details form, you may receive an error message “**Please correct x error(s) listed at the top of the page**” similar to adjacent figure.

b) To fix this, scroll to the top of the page to view the list of errors. Fix all the errors and click the “**Update Current Lease**” or “**Save As New Lease**” again. Repeat until there are no further errors.

![Figure 36 - Review the Errors at the Top of the Form](image)

17. **Rolling back Lease/Assistance Record (HUD Super Users Only)**

a) Rollback functionality can be used to clear erroneous assistance details or lease details.

b) For Users with Rollback privileges, the Household Lease/Assistance details page will display “**Rollback**” button at the bottom of the page.

c) Click this button to navigate to Rollback options.

d) Rollback options page will display all the lease records available for the selected household.

e) Users may choose to rollback either the most recent lease record or all of them. (The most recent lease record is displayed as the top row of the table with light brown background.)

f) Click one of the Rollback buttons to rollback appropriate record. The status of rollback will be displayed at the bottom of the page.
18. **Port Out**

a) Port out functionality is used to move a household from one Receiving PHA to Another.

b) Only a HA user that belongs to the current Receiving PHA can perform Port Out.

c) Port Out process involves following steps:
   1. Enter the lease termination date.
   2. Select the Port Out button.
      - Click “**OK**” to accept message on the pop-up “Are you sure you want to perform Port Out for this Household?”
   3. Reassign to a new PHA and enter appropriate comments in the comments section.
   4. Click on the **Port Out** button to complete the process.

d) Port out process essentially creates additional blank lease with the new PHA.
19. **Viewing Records Already Assigned to a PHA**

a) To search for a record already updated and assigned to a PHA, click on the view and update details link at the bottom of the screen. Alternately, you can also select the link “Assistance Details” located at the top to view list of Households assisted by a PHA.

b) The PHA Search screen displayed will be empty. Search and select for a PHA by clicking on the “Search for PHA Information” button.

c) Select SSN link for the required record from the list displayed to view/edit the details of assistance.
20. Adding/Approving New Households

DIS provides a functionality to add new households to the system. Every new household added to the system needs to be approved by a HUD User with Super user rights.

a) Click on the “Add Households” tab to access the Add/Approve New Household option.

b) Guest users will be directly taken to the “Add Households” form. However, Guest users will not have privileges to add households.

c) HA users would typically see the top two buttons as indicated in the above figure.

d) SUPER users and HUD users would see all the options as displayed in the figure below.

The following pages describe the New Households Addition and Approval processes in details.
1 – Introduction

21. Entering New Household

a) Click the “Add New Household” button from the previous screen to navigate to the new household data entry screen.

Guest users are directly taken to this screen when they click the page link “Add New Households”. However, Guest users will have “Read-Only” access on this page.
b) Pre Disaster Program Type field has 24 options to choose from as shown in the figure below:

![Pre Disaster Program Types](image)

**Figure 47 - Pre Disaster Program Types**

c) **Guest users** cannot add “HL-CPD (Homeless)”, so this option will not be displayed in the guest users’ screen.

d) The Initial PHA is required when Program Types “PH” and “VO” are selected.

e) The verifying PHA and the PHA verification and Screening Results are required when Program Type “HL–CPD” is selected. PHA verification options will appear on the screen as shown in adjacent figure when “HL-CPD” is selected.

![PHA Verification and Screening results](image)

**Figure 48 - PHA Verification and Screening results fields for HL-CPD households.**
The process to add “HL-CPD” households is described in details on following pages.

f) To add households with the other pre-disaster program types listed, enter the required data and click “Add Household” button. Correct any validation errors displayed at the top of the page and submit the data again.

g) Household data submitted will be put into an approval queue and added to the system after HUD Super user approves it.

22. Entering Data for HL-CPD (Homeless) Households (HA/HUD/Super Users)

Only PHA users are authorized to add households with pre-disaster program type “HL-CPD”.

a) HL-CPD household data entry requires three additional fields as shown in the adjacent figures along with Verifying PHA.

b) Users must indicate the status of PHA Verification and Screening process.

c) HL-CPD households DO NOT follow the formal approval process required for all other Pre Disaster Program types.

d) If the PHA verification and Screening results indicate that the household is eligible, the household is implicitly approved, the household data is immediately available for assistance.

e) If the PHA verification and Screening results indicate that the household is ineligible, the household is implicitly rejected.

f) Users can choose to enter the PHA verification results later. Those records would be held in pending status.

g) The approval queue will display the pending HL-CPD records but would not allow the select them.

h) The PHA verification details for pending HL-CPD households can be modified using the button “Update PHA Verification Details” available.
on the main Add Households options page as shown in the adjacent figure.

**Figure 50 - Update PHA Verification Details’ Option**

### 23. Approving or Rejecting New Household Record (HUD Super Users)

Approve/Reject Household functionality is only available to HUD Super users granted the authority to approve or reject the family addition.

a) Select “Approve/Reject Households” from Main Add household options pages to navigate to the approval page.

b) Approval/Rejection page provides search functionality to search for pending households by SSN, First Name or Last Name.

c) At least one of the following fields is required while searching the records:
   - SSN
   - Last Name
   - First Name.

Users can view all the pending households using button “Show All Households Pending Approval”. Retrieving all the pending records may take long time depending on the total number of pending records.
d) If an SSN is entered, it must be 9-digit numeric value. For faster results enter at least 3 characters of First Name or last Name.

![Approve or Reject a Household](image)

To approve or reject a household, select the checkbox displayed next to the SSN number column in the search results and click appropriate button (“Approve” or “Reject”).

f) Pending “HL-CPD” records do not require formal approval. These records will have crossed out checkboxes, which cannot be selected.

g) Press “Cancel” button to go back to the main options page.

24. **Reset Rejected Households Status (Only for HUD and Super Users)**

*Only HUD Super users who have been granted the authority to approve or reject households can reset the status of the Add Household record.*

a) This functionality is used to reset the status of the rejected households back into the approval queue.

b) Select “Reset Rejected Households’ Status” from Main Add household options pages to navigate to the “Reset status’ page.
c) Search for rejected households by the 9-digit SSN or at least 3 characters of the First Name or Last Name. Click “Search Rejected Households”.

d) Users can also view all the rejected households by clicking the “Show All Rejected Households” button.

Retrieving all the records may take long time depending on the total number of rejected records.

e) To reset a household, select a/the record returned in the search results and click “Reset Status to [Pending]”.

f) Press “Cancel” button to go back to the main options page.

25. Modifying PHA Verifications Results for HL-CPD Households

Only HUD Super Users who have been granted the authority to approve or reject households can update the status of PHA Verification Details.
a) This functionality allows users to modify the PHA verification results of the newly added HL-CPD (Homeless) households.

b) Click on “Update PHA Verification Details” button on the main page to navigate to HL-CPD households’ list page.

c) Select “Reset rejected households’ Status” from the Main Add household options pages to navigate to the ‘Reset status’ page.

d) To search for the HL-CPD record, enter 9 digits SSN or least 3 characters of the Last Name or First Name. Click ‘Search “HL-CPD’ Household’.

e) Users can also view all the rejected households using button “Show All HL-CPD Households”. 

*Retrieving all the records may take long time depending on the total number of records.*

f) This page displays only those “HL-CPD” records for which the PHA Verification and Screening details are incomplete.

g) Select a record using radio button provided within search results and click on “Modify PHA Verification Details”.

h) The Actual modification page allows changes in following three fields:

- Verification Status
- Verified By
- Case Management By

The remaining household data will be presented as read-only.

i) Press the “Cancel” button to abort the request and go back to the previous page.
26. **DIS Reports**

   a) Click on the Report tab to open the Report Screen.
   
   b) There are two types of Reports available:

      - New Households Report
      - All Transaction Report

27. **Running All Transaction Report**

   a) Click on the Report tab.
   
   b) Click on the All Transaction Report at the top of the page.
   
   c) Click on “**Click here to Search and Select PHA**” to select the PHA to report on.
   
   d) Once the PHA is selected, select Disaster, Pre Disaster Program Type and New Program Type, with at least one of the dropdown options set to “All”.
   
   e) Check the desired boxes of the fields to view on the report.
f) When all the fields that should be in the report are added, click the “Show Report” button. The generated report will open in a new Browser window.

g) Print, Save, or Copy the report as required.

h) To go back to the DIS system, close the Report Window.

i) The report can also be viewed as an excel spreadsheet. Click the “Download into Excel” button.
28. **Running New Households Status Report**

a) To view the status of Newly Added Households click on the Reports tab.

b) Then select the ‘New Household Report’ link.

c) Under “Select View” user has the options to view any of the following reports:
   - Approved Records
   - Rejected Records
   - Pending Records

d) Then click “View Report” button.
e) Report can also be downloaded into Excel by clicking on “Download into Excel” button.

![Figure 62 - New Households Status Report](image.png)
System Admin Functionality

29. **Data Corrections (DIS Administrators or Super Users Only)**

a) Select “Admin” tab from the top of the list to access the DIS Admin options page.

b) The page lists various data correction options:

- **Activate/Inactivate Household Record**: This functionality allows you to activate or inactivate a household record.

- **Correct Household Information**: This functionality allows you to modify the following household fields: Name, Gender, Date of Birth, Disaster program Code, Pre-Disaster Address, Initial PHA and Old Program Type. To correct the SSN please use the action provided below.

- **Correct Household SSN**: Use this action to correct the erroneous Social Security Number of a household.

- **Replace head of household**: Use this action to replace head of household (for a leased up family) by selecting existing family member.

- **Modify Eligibility Questionnaire**.

- **Change Pre Disaster Program Type**: This functionality allows Admin users to change the HUD Family or Household to a Non-HUD Family with New Program Type “FE” and “FT”.

- **Add or Change FEMA Information**: Use this function to Add or Update the FEMA ID, HUD Load and FEMA Referral Dates.

![Figure 63 - DIS Admin Data Correction Options](image-url)
30. **Activate/Inactivate Household Record**

a) Select “**Activate/Inactivate Household Record**” function from the Admin page.
b) Search a household for status modification on the Search page.
c) Select a household.
d) Modify the household record status and Click “Submit”.
e) To view historical comments, click the “**Comment History**” button.

![Activate/Inactivate Household Screen](image)

**Figure 64 - Activate/Inactivate Household Screen**
### 3 – System Admin Functionality

**Figure 65 - Activate/Inactivate Comment History**

**Figure 66 - Viewing Activate/Inactivate Historical Comments**

**Note:** For a household that was inactivated through the eligibility questionnaire, record activation is a two-step process.

f) Activate the household record through “Activate/Inactivate Household Record” Admin function.

  g) Reset the eligibility questionnaire through “Modify Eligibility Questionnaire” Admin function.
31. **Correct Household Information**

a) Select “Correct Household Information” function from the Admin page.
b) Search a household for information correction on the search page.
c) Select a household to modify the information.
d) Modify the household data and Click “Save Updated Household Information”.
e) If validation errors are displayed correct the errors with valid inputs and save again.

**Note:** The following fields cannot be corrected or changed using this functionality:
- Pre Disaster Program Type
- Disaster Program Code

There is limited Change Pre Disaster Program Type functionality using “Change Pre Disaster Program Type” in Section 3.37 Page 41: Change Pre –Disaster Program Types to Non-HUD.

![Figure 67 - Correct Household Information Screen](image)
32. **Correct Household SSN**

a) Select “Correct Household SSN” function from the Admin page.
b) Search a household for SSN correction on the search page.
c) Select a household to modify the SSN.
d) Enter the new SSN value and click “Submit Corrected SSN”.
e) If validation errors are displayed correct the errors with valid inputs and save again.
f) To view historical comments, click the “Comment History” button.

![Correct Household SSN Screen](image)

Figure 68 - Correct Household SSN Screen
Figure 69 - Correct Household SSN Comment History

Figure 70 - Viewing Correct Household SSN Historical Comments
33. **Replace Head of Household**

a) Select “**Replace Head of Household**” function from main Admin page.
b) Search a household of a family for which to replace the Head of the family.
c) Select a household.
d) Select a new Head of household from existing family members and click “Submit New Head of Household”.
e) If validation errors are displayed, correct the errors and save again.
f) To view historical comments, click the “**Comment History**” button.

---

**Figure 71 - Replace Head of Household**

![Replace Head of Household](image-url)
Figure 72 - Replace Head of Household Comment History

Figure 73 - Viewing Replace Head of Household Historical Comments
34. **Modify Eligibility Questionnaire**

a) Select “Modify Eligibility Questionnaire” function from the Admin page.
b) Search a household for Eligibility Questionnaire correction on the Search page.
c) Select a household to modify the information.
d) Select “Reset Eligibility Questionnaire” to open the questionnaire for PHA users.
e) Select “Correct Eligibility Questionnaire” to correct eligibility status.
f) Click “Submit Corrected Questionnaire” button to save the changes.
g) If validation errors are displayed correct the errors with valid inputs and save again.

![Correct Eligibility Questionnaire Form](image-url)

Figure 74 - Correct Eligibility Questionnaire Form
35. **Change Pre Disaster/New Program Types to Non-HUD**

*NOTE: The Change Pre Disaster/Program Type functionality can also be accomplished using the Bulk Upload Insert/Update function.*

a) Select “Change Pre Disaster Program Type” function from the admin page.
b) Search for a HUD household to change Pre Disaster Program Type.
c) Select a household to modify the information.
d) Click on the “New Pre Disaster Program Type” dropdown.
e) Select one of the following options:
   1. FE – Non-HUD Families
   2. FT – Non-HUD Families (Phase 2)
   3. F3 – Non-HUD Families (Phase 3)
   4. F4 – Non-HUD Families (Phase 2B)
   5. F5 – Non-HUD Families (Phase 2C)
   6. F6 – Non-HUD Families (Phase 2D)
   7. F7 – Non-HUD Families (Phase 2E)
   8. F8 – Non-HUD Families (Phase 2F)
   9. F9 – Non-HUD Families (Phase 2G)
  10. F10 – Non-HUD Families (Phase 2H)

f) Click “Submit” to save the changes.
g) If validation errors are displayed correct the errors with valid inputs and save again.

![Figure 75 - Change Pre Disaster Program Type](image)
36. **Add or Change FEMA Information**

**NOTE:** The FEMA ID is the only REQUIRED item on this screen. It will be pre-populated if it currently exists on the household record in the database.

- a) Select “Add or Change FEMA Information” function from main Admin page.
- b) Search a head of household to add or update FEMA related information
- c) Enter FEMA Referral Date and/or HUD DIS Load Date in mm/dd/yyyy format
- d) Enter valid FEMA ID
- e) Click on the “Submit Updated Household Information” button

![Figure 76 - Add or Update FEMA ID, HUD LOAD & FEMA Referral Dates](image)

37. **Bulk Inserts/Updates**

- a) Select the Admin Tab then click on the “Bulk Inserts/Updates” link on the top of the page.
- b) The page has 3 sections:
  - **Bulk Data Add/Update Options**: This functionality allows you to upload excel or CSV files to insert new records or update existing data in the DIS Household, Member or Transaction tables.
  - **Check Status of Uploaded files**: This functionality allows you to see the status of uploaded files.
  - **Download File Templates**: Use this action to download excel or CSV Templates to enter data to insert new or update existing DIS Household, Member or Transaction records.
38. **Bulk Upload – Download File Templates**

a) To download an excel or CSV template, go down to the “Download File Template” section, under “Template Name” choose the type of file template needed from the list:

1. Update Household Information
2. Update Member Information
3. Update Transaction Information
4. Add New Household records
5. Add New Member records
6. Add New Transaction records

b) Select corresponding Excel or CSV “Template Type” for the Template Name selected.

c) Save the Template to the local C: drive.

d) Enter all necessary information for the Household, Member or Transaction records being updated or inserted.
Note: For all Bulk Adds and Updates the following columns in are yellow and are required in the respective templates:

1. Add New/Update Household Records:
   - ssn_head (HOH SSN)
   - dstr_num (Disaster Number)
   - old_family_category (Pre Disaster Program Type)
   - fema_id (FEMA ID)
2. Add New/Update Member Records:
   - ssn_head (HOH SSN)
   - mbr_number (Member Number)
   - dstr_num (Disaster Number)
3. Add New/Update Transaction Records
   - ssn_head (HOH SSN)
   - dstr_num (Disaster Number)
   - rec_pha_ind (Receiving PHA Indicator)
   - new_program_type (New Program Type)
   - transaction_id (Transaction ID)

Figure 78 - Bulk Upload Add/Update Household Excel Template
39. **Bulk Upload – Bulk Data Add/Update Options**

a) To upload an excel or CSV template, go to the “**Bulk Data Add/Update Options**” Select one of the following:

1. Update Household Information  
2. Update Member Information  
3. Update Transaction Information  
4. Add New Household records  
5. Add New Member records  
6. Add New Transaction records  

b) The Data file uploads pages opens.

c) Click on “**Browse**” button to select the file to be uploaded.

**Note:** This type of upload will only update values that are “NULL”. To overwrite existing values check the “**Blind Updates?**” box.

d) Click on “**Upload File**” button.

![Bulk Data File Upload](Image)

**Figure 79 - Bulk Data File Upload**

*For more detailed instruction on Bulk Upload/Update Functionality, please refer to Appendix B on page 85 of this User Guide*

40. **Bulk Upload – Check Status of Uploaded Files**

a) To check the status of uploaded files go to the “**Check Status of Uploaded Files**” section.

b) Click on the “**Status of Uploaded Files >>**” button, the File upload Status page opens up.
c) The Status page displays the status of all uploaded files in the following Columns:

- **File Name**: Click on this link to download or view the original file uploaded.
- **Admin Task**: Informs users the type of task requested.
- **File Status**: Informs users about the file status:

  1. File is pending further processing
  2. File has been uploaded and processed successfully
  3. Invalid file uploaded

![Figure 80 - Different Types of File Status](image-url)
• **Detail Report View**: Click on this link to view detailed status report. This opens up the File Details screen which the following columns:
  1. Record Num.
  2. Record Status which will be ‘Processed’ or ‘Exception’.
  3. Error Description which gives the description of the Exception error.

• **Detail Report Download**: Click on this link to download the Detailed Status Report for a particular file in an excel spreadsheet format.

![Figure 81 - Bulk Addition/Updates](image)

For more detailed instruction on Bulk Upload/Update Functionality, please refer to Appendix B on page 85 of this User Guide

41. **Business Rules Template**

   a) Select the Admin Tab, click on the “**Business Rules Template**” link on the top of the page.
   
   b) The page list 4 options:

   1. **Add New Disaster**: This action is used to add a new disaster to the DIS System.
   2. **Add Pre or New Program Type**: This action is used to add a Pre Disaster or New Program Type.
   3. **Associate Pre or New Program Type**: This action is used to map or associate a Pre Disaster Program Type with a New Program Type.
   4. **Set/Edit Business Rules for Pre and New Program Types**: This action is used to set the business rules or options for a Pre Disaster and New Program Type combination.
42. **Add New Disaster**

   a) Select the Admin Tab, click on the ‘**Business Rules Template**’ business link on the top of the page.
   b) Click on the ‘**Add Pre or New Program Type**’ button on the Business Rules Template page.
   c) Click on the ‘**Add New Disaster**’ link on the top right corner of the page.
   d) Enter all necessary information:

   **Note:** You cannot use a Disaster Name that already exists on the Disaster List page.
   e) If the value entered in the “No. of States Affected” field is more than 1, a pop-up box is displayed, “Do you want to proceed?” Click “OK” button to continue.
   f) Enter the states affected and the desired Disaster code for each state.
3 – System Admin Functionality

a) Select the Admin Tab, click on the “Business Rules Template” business link on the top of the page.
b) Click on the “Add Pre or New Program Type” button on the Business Rules Template page.
c) Enter a Program Type code and Program Type Name.
d) Select one of the two applicable Program Types:
   • **Pre Disaster Program Type**: Click on the “Pre Disaster Program Type” radio button to create a Pre Disaster Program Type.
   • **New Program Type**: If this program type is selected, the ‘Select Family Type’ and the ‘Select PHA Type Code’ options are disabled.

e) Select Family Type: Family types can be as follows:
3 – System Admin Functionality

- **FEMA**: The Pre Disaster Program Type for this family type will set as FEMA.
- **HUD**: The Pre Disaster Program Type for this family type will set as HUD.
- **NONE**: There are no pre-defined formulas for the NONE family type.

f) Select a PHA Type Code: This option is only available if Family type is “HUD” or “NONE”. This option will be grayed out for FEMA Family Type.
g) Click “Save” to create a new Pre Disaster or New Program Type.

### 44. Associate Pre and New Program Types

a) Select the Admin Tab, click on the “**Business Rules Template**” business link on the top of the page.
b) Click on the “**Associate Pre and New Types**” button on the “**Business Rules Template**” business link on the top of the page.
c) From the dropdown list the select the following:
   i. The Disaster to associate the Pre Disaster and New Program Type to.
   ii. The Pre Disaster Program Type to be associated.
   iii. The New Program Type to be associated.
d) Click “Save” to associate the Disaster, Pre Disaster and New Program Types selected above.

![Figure 86 - Associate Pre and New Program Type](image)

### 45. Set Business Rules for Pre and New Program Types

a) Select the Admin tab, and then click on the “**Business Rules Templates**” business Link at the top of the page.
b) Click on the “**Set/Edit Business Rules for Pre and New Program Types**” on the on the “**Business Rules Template**” page.
c) From the dropdown list select the Disaster, Pre Disaster and New Program combination to set the Business Rules for.
d) **Lease Information Required Indicator:**
   - If this option is **checked**, the Disaster, Pre Disaster and New Program Type combination selected above will display Lease information section on the Household Details page.
• If the option is **unchecked**, the Disaster, Pre and New Program Type combination selected above will **NOT** display lease information on the Household details page. The Remaining options on the Set Business Rules page will be grayed out.

![Figure 87 - Lease Information is NOT checked (Top view)](image1)

![Figure 88 - Lease Information is NOT checked (Bottom view)](image2)
3 – System Admin Functionality

e) **Is Eligibility Questionnaire Required?:** This field determines if the Disaster, Pre Disaster and New Program Combination would go through the Eligibility Questionnaire to determine Household eligibility.
   - If “Yes” is selected, all households assigned to this combination need to go through the eligibility questionnaire to determine eligibility.
   - If “No” is selected, all households assigned to this combination would NOT need to go through the eligibility questionnaire to determine eligibility.

f) **Available for Selection on Screen:** This field determines if the Pre Disaster or New Program Type selected for combination would be available for selection on the Household Details page.
   - If “Yes” is selected, the Pre Disaster and New Program Types would be available for selection on the Household Details pages in the program type dropdown list.
   - If “No” is selected, the Pre Disaster and new Program Types fields will only display these program types selection above, fields be locked and grayed out.

g) **Select Family Type (HAP Formula):** This field determines what family type the Disaster, Pre Disaster and New Program Type combination will be set to and which HAP formula would apply for to this Family Type:
   - **HUD:** If this option is selected, the fields applicable to calculate the HUD HAP formula are automatically checked. The user can also select other fields that not automatically checked. All selected fields would be displayed on the Household Lease page.

![Figure 89 - HUD (Family Type) HAP Formula](image-url)
• **FEMA**: If this option is selected, the fields applicable to calculate the FEMA HAP formula are automatically checked. The user can also select other fields that are not automatically checked. All selected fields would be displayed on the Household Lease page.

![Figure 90 - FEMA (Family Type) HAP Formula](image)

• **NONE**: There are no pre-defined HAP formulas for this option or family type. All the fields are available for the user to define and select and would be displayed on the Household Lease page.

![Figure 91 - NONE Family Type](image)

- **h) Keep Lease Date fields locked?**: This field determines if the Lease Date fields will be locked on the Household lease page.
• If “Yes” is selected, the Lease date fields will be locked or grayed out and will NOT be available for edit on the Household lease page.
• If “No” is selected, the Lease date fields will be available for edit on the Household lease page.

i) **Keep Lease Unit Address fields locked?** This field determines if the Unit Address fields will be locked on the Household lease page:
• If “Yes” is selected, the Unit Address fields will be locked or grayed out and will NOT be available for edit on the Household lease page.
• If “No” is selected, the Unit Address fields will be available for edit on the Household lease page.
• Program Begin Date: Enter the Program Begin Date in **mm/dd/yyyy** format for the Disaster and Program association selected above. The HAP Contract Effective date for this association cannot be less than the Program Begin Date.

j) **Program End Date**: Enter the Program End Date in **mm/dd/yyyy** format for the Disaster and Program association selected above. The HAP Contract Termination Date for this association cannot be greater than the Program End Date. The Program End Date will also be displayed on the Household Lease page.

k) **End of Participation fields applicable?** This field determines if the Disaster and Program Types association will show the End of Participation fields on the Household Lease page.
• If “Yes” is selected, The End of Participation Fields **will be** displayed on the Household Lease page for the Disaster/Program Types association.
• If “No” is selected, the End of Participation Fields **will NOT** be displayed on the Household Lease page for this Disaster/Program Types association.

l) **Port-out allowed?**: This field determines if the Disaster/Program Types association will display the Port out option on the Household Lease page.
• If “Yes” is selected, the Port-out button will be displayed on the Household Details page.
• If “No” is selected, the Port-out button will NOT be displayed on the Household Details page.

<table>
<thead>
<tr>
<th>Keep Lease Date fields locked?</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keep Lease Unit Address fields locked?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Program Begin Date:</td>
<td>(mm/dd/yyyy)</td>
<td></td>
</tr>
<tr>
<td>Program End Date:</td>
<td>(mm/dd/yyyy)</td>
<td></td>
</tr>
<tr>
<td>End of Participation fields applicable?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Port-out allowed?</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

**Figure 92 - Business Rules Options**
m) **Other applicable data entry fields**: This option determines which fields in this section will be displayed on the Household Lease page for the Disaster/Program Types association. The fields selected in the section is also affected by the Family Type (HAP Formula) selected above.

i. **FEMA**: If FEMA HAP formula is selected above, the same options are automatically checked as they required for this Family Type.
   - Family Contacted Indicator
   - Family Agreed to Case Management Indicator
   - Landlord Signed HAP Contract Indicator

```
Select Family Type (HAP Formula): [ ] HUD [ ] FEMA [ ] None

HUD formula includes Payment Standard, Tenant Rent, Utility Allowance, Actual Rent to Owner, Title Tenant Payment and Utility Reimbursement and FEMA formula includes Payment Standard, FEMA, FEMA Payment, Lease Rent
```

Figure 93 - Other applicable data entry fields for FEMA Family Type

ii. **HUD and NONE**: If the HUD or NONE Family type is selected above, no fields are pre-defined for the family type. However, ‘Family Contacted Indicator’ has to be checked to select either the ‘Family Agreed to Case Management Indicator’ or ‘Landlord Signed HAP Contract Indicator’ or both.

```
Select Family Type (HAP Formula): [ ] HUD [ ] FEMA [ ] None

HUD formula includes Payment Standard, Tenant Rent, Utility Allowance, Actual Rent to Owner, Title Tenant Payment and Utility Reimbursement and FEMA formula includes Payment Standard, FEMA, FEMA Payment, Lease Rent
```
n) Click "Save" to set the business rules for the selected Disaster/Program Types association.
46. **Edit Business Rules for Pre and New Program Types**

a) Select the Admin Tab, click on the “Business Rules Template” business link on the top of the page.

b) Click on the “Set/Edit Business Rules for Pre and New Program Types” on the “Business Rules Template” page.

c) From the dropdown list select the Disaster, Pre Disaster and New Program Type association to edit the Business Rules. Once the selection is made, the page displays the current settings for the Disaster-Program Types association. Most of the options maybe unavailable for edit based on the following:

- If no data exists for the selected Disaster-Program Types association (i.e. if no household has been added to this Disaster-Program Types association), then all the fields will be available for edits. Make the necessary edits and click “Save” to submit the corrections.
If data exists for the selected Disaster-Program Types association (i.e. if one or more households have been added using this Disaster Program Types association), then all the fields will be grayed out except the Program Begin and End Date fields. Make the necessary edits to the Program Dates and then click “Save” to submit the corrections.
**Figure 96 - Edit Business Rules (Most fields grayed out)**
47. **Add Dynamic Data fields**

a) Select the Admin tab and then click on the “Dynamic Data Fields” business link at the top of the page to open the Dynamic Data entry page.

![Figure 97 - Dynamic Field Data Entry Fields](image)

b) Click on the “Add / Modify / Delete New Dynamic Fields” button to display the “New Dynamic Fields list” page.

c) Click on the ‘Add New Dynamic Field’ link at the top right corner of the page to display the New Dynamic Field Definition page.

![Figure 98 - New Dynamic Fields list page](image)

d) There are seven (7) types of Dynamic fields that can be created:

1. **Date**: To create a dynamic Date field, select the “Date” radio button. Enter the following information:
   - **New Field Name**.
   - **Default Date** (Optional): Enter in mm/dd/yyyy format. This value will be automatically pre-populated into the dynamic fields on the Household Lease page.
   - **Min Allowed Date**: Enter the minimum allowed date in mm/dd/yyyy format.
   - **Max Allowed Date**: Enter the maximum allowed date in mm/dd/yyyy or this field can be set to current date by selecting the ‘Current Date’ checkbox.
   - Click “Save New Field Definition” button to save the new dynamic field.
2. **Numeric**: To create a dynamic Numeric field, select the “**Numeric**” radio button. Enter the following information:
   - **New Field Name**.
   - **Default Value** (Optional): Enter a rounded value e.g. 999999. This value will be automatically pre-populated into the dynamic field on the Household Lease page.
   - **Min Allowed Value**: Enter the rounded maximum value allowed.
   - **Max Allowed Value**: Enter the rounded maximum value allowed.
   - Click “**Save New Field Definition**” button to save the new dynamic field.

3. **Text**: To create a dynamic Text field, select the “**Text**” radio button. Enter the following information:
   - **New Field Name**.
   - **Default Text**: (Optional) Enter a text would be automatically pre-populated into the dynamic field on the Household Lease page.
   - **Max Text Length**: The length of the text can be 1-255 characters.
   - Click “**Save New Field Definition**” button to save the new dynamic field.
4. **Indicator**: To create a dynamic Indicator field, select the “Indicator” radio button. Enter the following information:
   - **New Field Name**.
   - **Default Value**: Check ‘Selected’ field if you want this dynamic field automatically checked on the Household Lease page. If uncheck, this field will appear uncheck by default on the Household Lease page.
   - Click “Save New Field Definition” button to save the new dynamic field.

5. **Memo**: To create a dynamic Memo field, select the “Memo” radio button. Enter the following information:
   - **New Field Name**.
   - **Default Text**: Enter the text that you want displayed as the dynamic field.
   - Click “Save New Field Definition” button to save the new dynamic field.
6. **Dropdown**: To create a dynamic Dropdown field, select the “Dropdown” radio button. Enter the following information:
   - **New Field Name**.
   - **Dropdown Value**: Enter the 1st value that you want displayed in the dropdown box. (e.g.: Female).
   - **Code**: Enter the 1st code/value you want to associate the 1st dropdown value with. (e.g.: 1).
   - **Default Selected** checkbox: Check this box ONLY if this is the value you want displayed on the Lease page as the default when the Dropdown field is displayed.
   - Click “Save Dropdown Value” button to save the new dynamic field with the code and value combinations. This will be displayed in the vertical box.

   **NOTE**: To add additional dropdown values, continue to enter the Dropdown Value and its associated Code and click the “Save Dropdown Value” button. When finished, click the “Close” button.

7. **Radio Button**: To create a dynamic Radio Button field, select the “Radio Button” radio button. Enter the following information:
   - **New Field Name**.
   - **Radio Button Description**.
   - **Code**: Enter the code to be associated with the radio button.
   - **Default Selected** checkbox: Check this box ONLY if this is the value you want displayed on the Lease page as the default when the Radio Button field is displayed.
   - Click the “Save Radio Button” button to save the new dynamic field.
48. **Modify Dynamic Data fields**

a) Select the Admin tab, and then click on the ‘Dynamic Data Fields’ business link at the top of the page to open the Dynamic Data entry page.

b) Click on the “Add / Modify / Delete New Dynamic Fields” button to display the “New Dynamic Fields list” page.

c) Search for the dynamic field to be edited. The “Edit” should be displayed on the Edit / Delete / Remove Association column. If not displayed, it is based on the following:
   - **No data exists** for the selected Dynamic Field (i.e. this dynamic field has NOT been saved for any household on the Lease page) and then the dynamic field **will be** available for edits.
   - **Data exists** for the selected Dynamic Field (i.e. this dynamic field has been saved for any household on the Lease page) and then the dynamic field **will NOT** be available for edits.

<table>
<thead>
<tr>
<th>Field ID</th>
<th>Field Name</th>
<th>Field Type Code</th>
<th>Min Value</th>
<th>Max Value</th>
<th>Default Value</th>
<th>Current Date Indr</th>
<th>Edit/Delete/Remove Association</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PREV_CNTY</td>
<td>Text</td>
<td></td>
<td>50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>CURR_CNTY</td>
<td>Text</td>
<td></td>
<td>50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>FEMA_CLC_LAST_RENTAL_AWARO_DATE</td>
<td>DATE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>NEW_UNIT_CNTY</td>
<td>Text</td>
<td></td>
<td>50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55</td>
<td>Family Contribd Eligibility Assessed</td>
<td>Indicator</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>56</td>
<td>30 Day Termination Payment Issued</td>
<td>Indicator</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:**
- Click on the Edit link to modify the Dynamic Field properties
- Click on the Delete link to remove the Dynamic Field permanently from DIS System
- Click on the Remove Association link to remove the Dynamic Field association with Disaster and Program Types

Figure 106 – Edit Dynamic Fields

d) If the “Edit” link is available, select it to display the “Edit Dynamic Field Definition” page. Note that the data type of a dynamic field cannot be changed.
(e.g. a dynamic date field type cannot be change to a dynamic numeric field type). The “Field Type” option will always be locked.

Figure 107 - Edit Dynamic field Definition

e) Make the necessary changes to the dynamic field values and click the “Update Dynamic Field values” button to submit the corrections.

f) To edit the values for the Dropdown and Radio Button dynamic fields, follow the instructions on the page.

Figure 108 - Edit Dropdown and Radio Button Dynamic field Values
49. **Associate New Fields with Program Types**

a) Select the Admin tab and then click on the “**Dynamic Data Fields**” business link at the top of the page to open the Dynamic Data entry page.

b) Click on the “**Associate New Fields with Program Type**” button.

c) Select the Disaster from the dropdown list.

d) Select the Program (PRE-NEW) to associate the dynamic data fields to from the dropdown list. Once this selection is made, all dynamic fields available for association are displayed below in the “Select applicable (new) dynamic data fields and their options” section of the screen. Dynamic fields can be linked to as many Disaster/Program Types associations as possible. Simply select the Program (Pre New) to be linked to.

e) Click on the Dynamic field to be associated to the Program Types and the options for that dynamic field are displayed.

f) Select the applicable options. There are three options to select:

1. **Field must be valued?**: If this option is checked, then on the Household Lease page, this field must have a value to save the Lease.

2. **Permanently lock this field**: If this option is checked, then this field will be locked or grayed out on the Household Lease page. Note that if the both the
“Permanently lock this field” and the “Field must be valued?” options are selected, then a default value must already exist for this field.

3. **This Field is applicable to:** There are three choices for this option:
   - **First Lease Only:** When this option is selected, then the dynamic field will be display on the first lease.
   - **All leases EXCEPT the first lease:** When this option is selected, then the dynamic field will only be displayed from the second lease.
   - **All leases (No exceptions):** When this option is selected, then the dynamic field will show up for all leases.

g) Click on the “Save New Dynamic field” button to save the dynamic field to the Program Types association.

![Figure 110 - Select Dynamic field options](image)

### 50. **Delete Dynamic Data fields**

a) Select the Admin tab and then click on the “Dynamic Data fields” business link at the top of the page to open the Dynamic Data entry page.

b) Click on the “Add / Modify / Delete New Dynamic Fields” button to display the “New Dynamic Fields list” page.

c) Search for the dynamic field to be edited. The “Delete” should be displayed on the Edit / Delete / Remove Association column. If not displayed, it is based on the following:

- **No data exists** for the selected Dynamic Field (i.e. this dynamic field has NOT been saved for any household for the specific Disaster/Program Types association) and then the dynamic field will be available to delete.

- **Data exists** for the selected Dynamic Field (i.e. this dynamic field does HAS any saved records the specific Disaster/Program Types association), then the dynamic field will NOT be available delete.
3 – System Admin Functionality

- To delete a dynamic field permanently, select the “Delete” link and respond to the pop-up window question.

<table>
<thead>
<tr>
<th>Field ID</th>
<th>Field Name</th>
<th>Field Type Code</th>
<th>Min Value</th>
<th>Max Value</th>
<th>Default Value</th>
<th>Current Date Indr</th>
<th>Edit/Delete/Remove Association</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PREV_CNTY</td>
<td>Text</td>
<td></td>
<td></td>
<td>50</td>
<td></td>
<td>Edit / Delete / Remove Association</td>
</tr>
<tr>
<td>2</td>
<td>CURR_CNTY</td>
<td>Text</td>
<td></td>
<td></td>
<td>50</td>
<td></td>
<td>Edit / Delete / Remove Association</td>
</tr>
<tr>
<td>5</td>
<td>FEMA_CLC_LAST_RENTAL_AWARD_DATE</td>
<td>DATE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Edit / Delete / Remove Association</td>
</tr>
<tr>
<td>6</td>
<td>NEW_UNIT_CNTY</td>
<td>Text</td>
<td></td>
<td></td>
<td>50</td>
<td></td>
<td>Edit / Delete / Remove Association</td>
</tr>
<tr>
<td>55</td>
<td>Family Continued Eligibility Assessed</td>
<td>Indicator</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Edit / Delete / Remove Association</td>
</tr>
<tr>
<td>56</td>
<td>30 Day Termination Payment Issued</td>
<td>Indicator</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Edit / Delete / Remove Association</td>
</tr>
</tbody>
</table>

**Note:**
- Click on the Edit link to modify the Dynamic Field properties.
- Click on the Delete link to remove the Dynamic Field permanently from DIS System.
- Click on the Remove Association link to remove the Dynamic Field association with Disaster and Program Types.

**Figure 111 - Delete Dynamic Field List**

**Figure 112 - Deleting a Dynamic field**

51. **Remove Dynamic Data field Associations**

a) Select the Admin tab and then click on the “Dynamic Data fields” business link at the top of the page to open the Dynamic Data entry page.

b) Click on the “Add / Modify / Delete New Dynamic Fields” button to display the “New Dynamic Fields list” page.

c) Search for the dynamic field whose association is to be removed. The “Remove Association” link should be displayed on the Edit / Delete / Remove Association column.

d) To remove a dynamic field from association with a specific disaster and program type, click the “Remove Association” link and then select the disaster and program type combination.
Figure 113 – Deleting Dynamic Field Association
52. **Bulk Upload Dynamic Field Data Values**

a) Select the Admin Tab and then click on the “**Bulk Upload Dynamic Data**” business link on the top of the page.

b) The page has 3 sections:
   - **Bulk Data Add/Update Dynamic Field Values Options**: This functionality allows you to upload Excel files to add new values or update existing data values in the Dynamic Fields.
   - **Check Status of Uploaded files**: This functionality allows you to see the status of uploaded files.
   - **Download File Templates**: Use this action to download excel templates to enter data to add new or update existing dynamic field data values.

![Bulk Data Add/Update Dynamic Field Values Options](image1)

- **Check Status of Uploaded Files**: Status of Uploaded Files

![Image 2]

**Figure 114 – Dynamic Data Field Values Bulk Adds/Updates**

53. **Bulk Upload Dynamic Field Data Values – Download File Templates**

a) To download an excel template, go down to the “**Download File Templates**” section, under “**Template Name**” choose the type of template required from the list:
   - Add New Dynamic Field Values
   - Update Dynamic Field Values Information

b) Select corresponding excel “**Template Type**” for the “**Template Name**” selected.

   The “**Download Dynamic Field Values Template**” page opens with additional instructions that must be precisely followed for the upload to work.
NOTE: The excel templates are generated based on the dynamic fields that are pre-associated with the Disaster, Pre-Disaster Program and New Program Type combinations.

For additional detailed instructions on the Dynamic Data Field Values Bulk Upload Functionality, please refer to Appendix C on page 92 of this User Guide.

c) Select Disaster / Pre Disaster Program / New Program Type

d) If no dynamic fields are selected to be associated with the combination selected, the template will not be downloaded or opened.

e) If there are existing dynamic fields pre-associated with the combination selected, select the “Download Dynamic Fields Template” button and follow the SPECIAL INSTRUCTIONS.
NOTE: The excel templates are generated based on the dynamic fields that are pre-associated with the Disaster, Pre-Disaster Program, and New Program Type combinations.

Figure 118 - Dynamic Field Excel Template

54. **Bulk Upload Dynamic Field Data Values – Add/Update Dynamic Field Values Options**

a) To upload an excel template, go to the “Bulk Data Add/Update Dynamic Field Values Options” and select one of the following options:
   - Add New Dynamic Field Values
   - Update Dynamic Field Values Information

b) Click on the “Proceed to File Upload” button.

c) The File Upload page opens.

d) Click on the “Browse” button to select the file to be uploaded.
3 – System Admin Functionality

**Note:** This type of upload will only update values that are “NULL”. To overwrite existing values check the “Blind Updates?” box.

e) Click on “Upload File” button.

***Please note the Excel Template Instructions that must be followed for the add and/or update of the dynamic data field values to work.***

For additional detailed instructions on the Dynamic Data Field Values Bulk Upload Functionality, please refer to Appendix C on page 92 of this User Guide

55. **Bulk Upload Dynamic Field Data Values – Check Status of Uploaded Files**

a) To check the status of uploaded files go to the “Check Status of Uploaded Files” section.

b) Click on the “Status of Uploaded Files >>” button, the File Upload Status page opens up.

c) The Status page displays the status of all uploaded files in the following columns:
   - **File Name**: Click on this link to download or view the original file uploaded.
   - **Admin Task**: Informs users the type of task requested.
   - **File Status**: Informs users about the file status:
     1. File is pending further processing
     2. File has been uploaded and processed successfully
     3. Invalid file uploaded
   - **Upload Date Time**: Displays date and time the upload took place.
   - **Upload User**: ID of the person that uploaded the file.
   - **Percent Completed**: File processing percentage.
   - **Detailed Report View**: Click on this link to view a detailed status report.
3 – System Admin Functionality

- **Detail Report View**: This opens up the “File Details” screen which has the following columns:
  1. **Record Num**: this is the record number in the upload file
  2. **SSN**
  3. **Dynamic Field**: this is the dynamic field being processed
  4. **Record Status**: this will be “Processed” or “Exception”
  5. **Error Description**: the long description of the “Exception” error
• **Detail Report Download**: Click on this link to download the Detailed Status Report in an excel spreadsheet format.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Record #</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>6987289933</td>
<td>Processed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>6987289933</td>
<td>Processed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>3</td>
<td>6987289933</td>
<td>Processed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>4</td>
<td>6987289933</td>
<td>Processed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>5</td>
<td>6987289933</td>
<td>Exception</td>
<td>Dynamic field value does not match with the List item! Enter a valid Dynamic Field list item!</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>6</td>
<td>6987289933</td>
<td>Exception</td>
<td>Cannot update dynamic field value for this lease. We can update only for first lease.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>7</td>
<td>6987289933</td>
<td>Exception</td>
<td>Dynamic field value does not match with the List item! Enter a valid Dynamic Field list item!</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>8</td>
<td>6987289933</td>
<td>Processed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>9</td>
<td>6987289933</td>
<td>Exception</td>
<td>Dynamic field value does not match with the List item! Enter a valid Dynamic Field list item!</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>10</td>
<td>6987289933</td>
<td>Exception</td>
<td>Cannot update dynamic field value for this lease. We can update only for first lease.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>11</td>
<td>6987289933</td>
<td>Exception</td>
<td>Cannot update dynamic field value for this lease. We can update only for first lease.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>12</td>
<td>6987289933</td>
<td>Exception</td>
<td>Dynamic field value does not match with the List item! Enter a valid Dynamic Field list item!</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 122 - Dynamic Bulk Data Field Values File Download**

*For additional detailed instructions on the Dynamic Data Field Values Bulk Upload Functionality, please refer to Appendix C on page 92 of this User Guide*
Appendix A – Eligibility Questionnaire

Is the pre-disaster project available for occupancy?

YES

Does the family want to return to the unit previously occupied by them?

YES

Is the family currently under lease through one of HUD's Disaster Housing Programs?

NO

Is the Tenant Certification, giving up right to return to old unit, executed?

YES

Can the current lease under such program be terminated?

NO

Certification must be completed

NO

Enter Certification Date.

YES

ELIGIBLE for DVP assistance

NOT ELIGIBLE for DVP assistance

Figure 123 - Eligibility Questionnaire
Appendix B – Bulk Uploads and Updates

1. Bulk Inserts/Updates:

The Bulk Inserts/Updates page group functionality includes the following three functionalities:

- **Bulk Data Add/Update Options:**
  This functionality allows you to upload Excel or CSV files to insert new or correct existing data into DIS Head of Household, Member and Transaction tables.

- **Check Status of Uploaded Files:**
  This functionality allows you to see the status of all uploaded files. A detailed report containing the status of each record from the uploaded files will be generated for each uploaded file. The user can view or download the detailed status report.

- **Download File Templates:**
  This functionality will allow you to download Excel or CSV templates to enter data to add new or correct existing DIS Head of Household, Member and Transaction records.
1.1. Steps to Download File Templates:

- To download an Excel or CSV template, go down to the “Download File Template” section.
- Under “Template Name” choose the type of template from the list:
  1. Add New Household Records
  2. Add New Member Records
  3. Add Transaction Records
  4. Update Household Information
  5. Update Member Information
  6. Update Transaction Information
- Select corresponding Excel or CSV “Template Type” for the Template Name selected.
- Save the file template in local C: drive.
1.2. Steps to Upload Files:
  - To upload an Excel or CSV template, go to the “Bulk Data Insertion/Correction options”.
  - Select one following options:
    1. Add New Household Records
    2. Add New Member Records
    3. Add New Transaction Records
    4. Update Household Information
    5. Update Member Information
    6. Update Transaction Information
  - The Data file upload page opens.
  - Click on ‘Browse’ button to select the file to be uploaded.
  - Click on “Upload File” button.

  **Note:** This type of upload will only update values that are “NULL”. To overwrite existing values check the ‘Blind Updates?’ checkbox.

2. **Bulk Upload – Bulk Data Add / Update Options**

Below are the general instructions for Bulk Upload Add / Update process:

  - The data **must** be entered in consecutive rows in either the Excel or CSV file templates.
  - Any data following the first blank row will be ignored by the bulk upload process.
  - All dates must be entered in **mm/dd/yyyy** format. Do not forget to change the format of the date value cells from Text format into Date format.
  - Columns marked in **light yellow** background are required and must be entered for each valid row.
• Do not enter any data into the gray area of the worksheet (i.e. far right of the worksheet). It will be ignored by the bulk upload process and may cause unintended results after processing.
• The data worksheet is formatted with different colors to provide guidance to users. Color formatting of the worksheet has no significance for data processing.
• User may choose to keep or delete the Instructions worksheet. It is ignored by the upload process.

2.1 Bulk Data Add:

The users must follow the requirements below to upload the files into the DIS using Bulk Upload process:

a. **Add New Household records:**
Enter all the necessary information in the “Add New Household” template.
- The Social Security Number of Head of Household must be a 9-digit SSN.
- The Disaster Number is mandatory and must exist as valid disaster.
- The Old Family Category is mandatory and must exist as associated with the disaster.
- The FEMA ID is mandatory and must NOT be an existing FEMA ID on a household record.
- All the indicator cell values such as active indicator, disability indicator, citizenship indicator etc., must be valued either “Y” or “N” in the template.

b. **Add New Member records:**
Enter all the necessary information in the “Add New Member” template.
- The Social Security Number of Head of Household must be a 9-digit SSN.
- The Member number is a mandatory field. The Head of Household must have member number value is equal to “1” and followed by the members in the family. The range of member number should not exceed the number 15.
- The Disaster Number is mandatory and must exist as valid disaster.

c. **Add New Transaction records:**
Enter all the necessary information in the “Add New Transaction” template.
- The Social Security Number of Head of Household must be a 9-digit SSN.
- The Disaster Number is mandatory and must exist as valid disaster.
- The Transaction Id is a mandatory field. The value must be numeric and should be greater than “0”.
- The receiving PHA indicator is a mandatory field. The value must be numeric and should be either “0” or “1”. When there is a receiving PHA assigned to the family the value of this indicator should be “1” else the value should be “0”.
- All the other indicator cell values such as ported_out_ind, early_release_ind, pha_asst_indr, moved_fee_indr, intake_ind etc., in the Transaction template must be valued either “Y” or “N”.

### 2.2 Bulk Data Update:

The table below illustrates the business logic behind the “Blind Update” corrections while uploading the template into the DIS System:

<table>
<thead>
<tr>
<th>Spreadsheet</th>
<th>Production Database</th>
<th>Blind Update Flag</th>
<th>Update Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Null/Blank</td>
<td>Null/Blank/Valued</td>
<td>Not checked</td>
<td>No Update</td>
</tr>
<tr>
<td>Valued</td>
<td>Null/Blank</td>
<td>Not checked</td>
<td>Update</td>
</tr>
<tr>
<td>Valued</td>
<td>Valued</td>
<td>Checked</td>
<td>Update</td>
</tr>
<tr>
<td>Valued</td>
<td>Valued</td>
<td>Not checked</td>
<td>No Update</td>
</tr>
</tbody>
</table>

The following fields cannot be updated using the Bulk-upload functionality:

- Disaster Number
- Pre-Disaster Program Type
- New Program Type

The users must follow the requirements below to upload the Update files into the DIS using Bulk Upload process:

a. **Update Household Information:**

Enter all the necessary values in the “Update Household Information” template to correct or update the existing values in DIS:

- The Social Security Number of Head of Household must be a 9-digit SSN.
- The Disaster Number is mandatory and must exist as valid disaster.
- The Old Family Category is mandatory and must exist as associated with the disaster.
- The FEMA ID is mandatory and should not be an existing FEMA ID on a household record.
b. **Update Member Information:**
Enter all the necessary values in the “**Update Member Information**” template to correct or update the existing values in DIS:

- The Social Security Number of Head of Household must be a 9-digit SSN.
- The Member number is a mandatory field. The Head of Household must have member number value is equal to “1” and followed by the members in the family. The range of member number should not exceed the number 15.
- The Disaster Number is mandatory and must exist as valid disaster.

c. **Update Transaction Information:**
Enter all the necessary values in the “**Update Transaction Information**” template to correct or update the existing values in DIS:

- The Social Security Number of Head of Household must be a 9-digit SSN.
- The Disaster Number is mandatory and must exist as valid disaster.
- The Transaction Id is a mandatory field. The value must be numeric and should be greater than “0”.
- The receiving PHA indicator is a mandatory field. The value must be numeric and should be either “0” or “1”. When there is a receiving PHA assigned to the family the value of this indicator should be “1” else the value should be “0”.

### 2.3 Bulk Upload – Check Status of Uploaded Files

To check the status of uploaded files go to the “**Check Status of Uploaded Files**” section.

a. Click on the “**Status of Uploaded Files >>**” button, the File upload Status page opens up.
b. The Status page displays the status of all uploaded files in the following Columns:

- **File Name:** Click on this link to download or view the original file uploaded.
- **Admin Task:** Informs users the type of task requested.
- **File Status:** Informs users about the file status:
  1. File is pending further processing
  2. File has been uploaded and processed successfully
  3. Invalid file uploaded
- **Detail Report View:** Click on this link to view detailed status report. This opens up the File Details screen which the following columns:
  1. Record Num
  2. Record Status which will be ‘Processed’ or ‘Exception’.
Appendix

3. Error Description which gives the description of the Exception error

- **Detail Report Download**: Click on this link to download the Detailed Status Report for a particular file in an excel spreadsheet format.

---

**Figure 126 - Bulk Upload File Status Page**
Appendix C – Bulk Upload Dynamic Field Data Values

1. Dynamic Data Field Values Bulk Adds/Updates

The Dynamic Field Data Values Bulk Upload page includes the following three functionalities:

- **Bulk Data Add/Update Dynamic Field Values Options**
  This functionality allows you to upload Excel files to insert new or correct existing data values into the pre-established and pre-associated dynamic fields.

- **Check Status of Uploaded Files**
  This functionality allows you to see the status of uploaded files. A detailed report contains the status of each record from the uploaded files will be generated for each uploaded file. The user can view or download the detailed status report.

- **Download File Templates**
  This functionality will allow you to download Excel templates for data entry into the dynamic fields.

![Figure 127 - Dynamic Data Field Values Bulk Upload Main page](image)

**1.1 Steps to Download File Templates**

- To download an Excel template, go down to the “**Download File Template**” section.
- Under “**Template Name**” choose the type of template from the list:
  1. Add New Dynamic Field Values
2. Update Dynamic Field Values

- Select corresponding Excel “Template Type” for the Template Name
- The “Download Dynamic Field Values Template” page opens with additional instructions that must be followed for the upload to work successfully.
- Select Disaster / Pre Disaster Program / New Program Type combination.

**NOTE:** The Excel templates are generated based on the dynamic fields that are pre-associated with the Disaster/Pre-Disaster Program/New Program Type combinations.

- If no dynamic fields have been associated with the Disaster/Pre Disaster Program/New Program Type combination selected, an error will be presented and the template will not be downloaded or opened.

- Open the template spreadsheet.
- Using the “Save As” option from the File menu option, select Save As Type: “Microsoft Excel 97-Excel 2003 & 5.0/95 Workbook”.
- Enter the data values into the corresponding columns following the rules:
  1. The Household must have at least one (1) Lease/Transaction in DIS;
  2. Upload information for the latest (current) Lease/Transaction Number;
  3. The current Lease must be for the Disaster / Pre-Disaster / New Program Type combination; and
4. If adding or updating values to Dropdown or Radio Button dynamic fields, the entered value must match one already in the list.

- Save the file with the data, and again choose the “Save As Type”: “Microsoft Excel 97-Excel 2003 & 5.0/95 Workbook”.
- Close the file.

1.2. Steps to Upload Files

- To upload the excel file template, go to the “Bulk Data Add/Update Dynamic Field Values Options”.
- Select one following:
  1. Add New Dynamic Field Values
  2. Update Dynamic Field Values Information
- Select/Click the “Proceed to File Upload” button
- The Data file upload page opens.
- Click on ‘Browse’ button to locate and select the file to be uploaded.
- Click on ‘Upload File’ button.

Below are the general instructions for the Dynamic Data Bulk Upload Add/Update process:

- Enter the data in consecutive rows in the excel template file template.
- Any data following the first blank row will be ignored by the bulk upload process.
- All dates must be entered in **mm/dd/yyyy** format.
The data worksheet is formatted with different colors to provide guidance to users. Color formatting of the worksheet has no significance for data processing. Do not enter any data into the yellow areas of the worksheet. It will be ignored by the bulk upload process and may cause unintended results during processing.

Users may choose to keep or delete columns not needing update. (See the Dynamic Data Field Update rules below for using the Blind Update option.)

2. Bulk Dynamic Data Field Values Additions
The users must follow the hierarchy below to upload the files into the DIS using Bulk Upload process:

Add New Dynamic Field Values: Enter all the necessary information in the Dynamic Field Values template:

1. The Household must have at least one (1) Lease/Transaction existing in DIS;
2. The Social Security Number of Head of Household must be valued and should be a valid existing 9 digits SSN;
3. Upload information for the latest (current) Lease/Transaction Number;
4. The current Lease must be for the Disaster / Pre-Disaster / New Program Type combination;
5. The Disaster Number must correspond to the Disaster in the Dynamic Field Values template page; and
6. If adding or updating values to Dropdown or Radio Button dynamic fields, the entered value must match one already in the list.

3. Bulk Dynamic Data Field Values Updates
The table below illustrates the business logic behind the “Blind Update” corrections while uploading the template into the DIS System:

<table>
<thead>
<tr>
<th>Spreadsheet</th>
<th>Production Database</th>
<th>Blind Update Flag</th>
<th>Update Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Null/Blank</td>
<td>Null/Blank/Valued</td>
<td>Not checked</td>
<td>No Update</td>
</tr>
<tr>
<td>Valued</td>
<td>Null/Blank</td>
<td>Not checked</td>
<td>Update</td>
</tr>
<tr>
<td>Valued</td>
<td>Valued</td>
<td>Checked</td>
<td>Update</td>
</tr>
<tr>
<td>Valued</td>
<td>Valued</td>
<td>Not checked</td>
<td>No Update</td>
</tr>
</tbody>
</table>

Figure 130 - Blind Update logic
The following fields cannot be added or updated using the Dynamic Data Field Values Bulk Upload functionality:

- Disaster Number
- Pre-Disaster Program Type
- New Program Type

4. **Bulk Dynamic Data Field Values – Check Status of Uploaded Files**

   - To check the status of uploaded files go to the “Check Status of Uploaded Files” section.
   - Click on the “Status of Uploaded Files >>” button, the “Bulk Data Dynamic Field Values Add/Update File Upload Status” page opens up.

   ![Figure 131 - Status of Dynamic Field Data Values Uploads](image)

   The Status page displays information on all uploaded files in the following columns:

   1. **File Name**: Click on this link to download or view the original uploaded file.
   2. **Admin Task**: Informs users of the type of task requested.
   3. **File Status**: Informs users about the file status:
      - **File is pending further processing**
      - **File has been uploaded and processed successfully**
      - **Invalid file uploaded**
   4. **Upload Date Time**: Displays date and time file was uploaded.
   5. **Upload User**: ID of the person that uploaded the file.
   6. **Percent Complete**: Displays the file processing percentage complete.
   7. **Detail Report View**: This opens a processing results screen with the following columns of information:
      - Record Num
b. SSN

c. Dynamic Field

d. Record Status - will be “Processed” or “Exception”

e. Error Description which gives the complete description of the Exception error

Figure 132 - Dynamic Field Data Values Detail Report

8. **Detail Report Download:** Click on this link to download the Detailed Report for a particular file into an excel spreadsheet format.

Figure 133 - Dynamic Field Data Values File Detail Report Download