Guidance for Moving to Work Agencies on Transferring Records from the Form HUD-50058 Module into the Form HUD-50058 MTW Module

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Instructions

This document is for MTW agencies that will report into the Public and Indian Housing Information Center (PIC) MTW module. This document does not apply to MTW agencies that will continue to report into the standard PIC Form 50058 module.

All records to be transferred from the HUD-50058 module to the HUD-50058 MTW module will be transferred by PIH. Under the previous process, an End of Participation (EOP) would be submitted for each resident and a New Admission (NA) would be initiated in the Form HUD-50058 MTW. In an effort to streamline and minimize errors, PIH will now handle all the record transfers from the Form HUD-50058 to the Form HUD-50058 MTW.

In an effort to create better historical records, PIH will discontinue the process of creating an End of Participation of these records in the Form HUD-50058 and creating a New Admission in the Form HUD-50058 MTW. Under the new process, PIH will transfer the current and the historical records from the HUD-50058 module to the HUD-50058 MTW module. This new process will eliminate the false churn in public housing residents that is generated through the End of Participation / New Admission process. Agencies will not be able to access and submit information into PIC during the period that PIH is conducting the transfer of records.

The process to transfer records from the HUD-50058 module to the HUD-50058 MTW module involves two steps. During Step 1, the MTW agency will request either all records or a subset of records (designated by the Agency) be transferred from the HUD-50058 module to the HUD-50058 MTW module through the Records Transfer Process (RTP). During Step 2, PIH will create baselines and historical records in the HUD-50058 MTW module during the transfer process from the HUD-50058 module to the HUD-50058 MTW module.

MTW agencies have the ability to choose whether or not to do a complete conversion that includes their Special Purpose Vouchers or a partial conversion from the HUD-50058 to the HUD-50058 MTW module. The HUD-50058 and the HUD-50058 MTW both have the ability capture Special Purpose Voucher codes. Regardless of whether the MTW Agency chooses to covert or not, Special Purpose Vouchers are restricted to the flexibilities as detailed in the MTW Special Purpose Voucher Q&A. This Q&A, which can be found on the MTW website under Policy Guidance for MTW Sites, explains the flexibilities that can be applied to different types of Special Purpose Vouchers.

Appendix A contains a link to the MTW Upload Template that will be used to transmit from the HUD-50058 to the HUD-50058 MTW. Appendix B provides guidance on reporting requirements for households exercising portability.

<u>**Step 1: Remove Records from the HUD-50058 module**</u>

MTW agencies have two options for transferring records from the HUD-50058 module into the HUD-50058 MTW module:

> **Option 1:** Request PIH transfer <u>**all records**</u> from the Form HUD-50058 to the Form HUD-50058 MTW through the RTP.

> **Option 2:** Request PIH transfer <u>**select records**</u> from the Form HUD-50058 to the Form HUD-50058 MTW through the RTP by submitting a list of records to transfer.

<u>**Step 2: Populate the HUD-50058 MTW module**</u>

PIH will perform the following tasks to populate the MTW module:

1. Create baseline and historical records through the RTP.
   - After the transfer is completed, the most current record for the tenant in the Form HUD-50058 module will be the most current record in the Form HUD-50058 MTW module.

2. PHAs should review the transferred records and then submit the current action type record for tenants, as necessary.

MTW agencies should review the process as stated above and work with PIH to identify any issues in the HUD-50058 module that need to be addressed before the transfer process commences. PIH will coordinate with each MTW agency to ensure that the proper records are transferred from the HUD-50058 module to the HUD-50058 MTW module.

Transferring Records from the Form HUD-50058 Module into the Form HUD-50058 MTW Module

Step 1: Transfer Records from the HUD-50058 module to the HUD-50058 MTW module	Step 2: Populate the MTW module
Submit request to PIH to transfer all or a subset of records in the HUD-50058 module to the HUD-50058 MTW module through the RTP.	**Approach:** Create baseline and historical records through the RTP.
	Baseline Record Instructions
	Submit a list of SSNs to PIH to transfer from the Form 50058 module to the MTW module. PIH-IT will transfer each household's original baseline record and all historical records in the Form 50058 module to the MTW module.
	How PIH-IT populates the date fields: 2b= actual date (accessed from existing record in the Form 50058 module) 2h= actual date (accessed from existing record in the Form 50058 module)
	Current action type record instructions: After PIH completes the RTP, transmit the current action type for the households to the MTW module with current data. *How to complete the date fields:* 2b=current date 2h=actual date the household entered the program
	Complete submissions within 120 days after PIH-IT completes the RTP.

Appendix A: MTW Template

The MTW Upload Template file can be found at the following webpage:

http://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/systems/pic/mtw/pubs

Appendix B: Guidance on Reporting Requirements for Households Exercising Portability

Households Porting Out

The following table provides instructions on when and how MTW agencies should report on households that ported from their agency.

Scenario	Reporting Requirements
MTW agency never submitted any record to the regular Form 50058 module on the household that ported from the agency.	No action is required. Do not submit any record to the regular Form 50058 module or the MTW module on this household.
MTW agency previously submitted records on the household to the regular Form 50058 module (this can include records reported before it became an MTW site or before it implemented an alternative rent structure) but never submitted a Portability Move-out record for the household that ported from the agency.	Determine if the household has a record in the regular Form 50058 database through the Ad Hoc function, HA Query Report or Viewer sub-module (all available through the regular Form 50058 module). If a record exists in the regular Form 50058 module, either: Submit a Portability Move-out record to the regular Form 50058 module; or Follow Steps 1 and 2 of this document to remove the household from the regular Form 50058 module and transmit the Portability move-out record to the MTW module. If the MTW agency does not find a record for the household in the regular Form 50058 database, then no action is required. Do not submit any record to the regular Form 50058 module or the MTW module on this household.
MTW agency previously submitted a Portability Move-out record to the regular Form 50058 module for the household that ported from the agency.	No action is required. Do not submit any record to the regular Form 50058 module or the MTW module on this household.

Households Porting In

The following table provides instructions on how MTW agencies should report on households that ported into their agency.

Scenario	Reporting Requirements
MTW agency previously submitted a Portability Move-in record for the household in the regular Form 50058 module for the household that ported into the agency.	Follow Steps 1 and 2 of this document to remove the household from the regular Form 50058 module and transmit the household to the MTW module.
MTW agency never submitted a Portability Move-in record to the regular Form 50058 module for the household that ported into the agency.	Follow Step 2 of this document to transmit the household to the MTW module.