

# HUD User Manual for the Development Sub-Module of IMS/PIC

Public and Indian Housing (PIH) Real Estate Assessment Center (REAC) Inventory Management System (IMS/PIC)

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



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**1.0 HOUSING INVENTORY** 



## **1 HOUSING INVENTORY**

The **Housing Inventory** sub module allows the user to view PHA data, inventory of buildings and units that the PHA has at its disposal, and allows the user to propose buildings or units for removal. The **Housing Inventory** module includes three sub modules: **Housing Agency** sub module, **Development** sub module and the **Inventory Removals** sub module.

The **Housing Agency** sub module provides various types of data for PHAs. PHAs can use this sub module to enter, update and maintain their information. This sub module also allows the users to create new PHAs.

The **Development** sub module includes information about the inventory of units and buildings that PHAs manage. This sub module allows the users to view the current unit and building inventory, add new inventory items and delete inventory items that are no longer needed. The inventory information is provided at the development level, building level and unit level. Users can group any inventory items in the database based on various characteristics. For example, units can be grouped by unit tenant status, submission status type, or unit designation.

The **Inventory Removals** sub module allows PHAs to remove certain items from their inventory by proposing those items for demolition/disposition. This sub module allows PHAs to fill the demolition/disposition application Form HUD-52860, submit it with accompanying documentation, review the application and approve it. After the demolition/disposition application is approved, inventory items that are subject to that application no longer are part of the PHA's inventory.



## **1.1 DEVELOPMENT**

The **Development** sub module of the **Housing Inventory** module allows users to view, access, and modify the physical inventory data. The physical inventory includes developments, buildings, and units managed by PHAs. The inventory database contains data for all the inventory items from the moment when a building, unit, or land becomes part of the assisted housing stock till the moment when the inventory item is disposed of and is no longer a part of assisted housing stock (removed from inventory).

The **Development** sub module includes eight tabs.

- The **Development**, tab allows users to manage development data.
- The **Building** tab allows users to manage building data by development. That is, the **Building** tab displays only buildings associated with the selected development.
- The **Unit** tab allows users to manage unit data by development. That is, the **Unit** tab displays only units associated with the selected development.

These tabs contain addresses, property characteristics, and various other types of data. Using these tabs, the user can add inventory items, edit inventory item information, and view the information about existing inventory items.

- The **Submission** tab allows users to submit any proposed inventory item property changes to be approved by HUD Field Office staff. The HUD approval is mandatory for certain item properties since they may affect PHA funding allocation and thus must be controlled by HUD personnel to avoid misuse.
- The Approval tab allows HUD users to approve the proposed inventory item information.
- The **Reports** tab allows the user to run various reports to view inventory unit and tenant data.
- The **Maintain Inventory** tab allows the user to edit various development, building, or unit numbers/re-assign units to different building with in the same development, or delete inventory item records, edit unit status effective dates and development regroupings.

The **CAPFUND B&U Certification** tab allows PHA users to certify their housing inventory for capital funding as of a specific date. After certification, PHAs can view the inventory that they are certified to receive funding for.

## **1.1.1 Development Tab**

The **Development** tab contains the inventory data for developments that are managed by PHAs. A development can be one or more building(s) that form a community and are treated in IMS/PIC as one entity. The **Development** tab allows users to view, modify, or delete development data.

## 1.1.1.1 Profile sub Tab

The **Development** tab (see Figure 1) consists of four sub tabs:

- The **Profile** sub tab provides a summary of a development's program, structure, and inventory.
- The **List** sub tab presents a list of all developments in the selected HA.
- The **Address** sub tab presents the mailing and physical addresses (if available) for a development's management office.
- The **Contact** sub tab presents contact names, telephone numbers, email addresses, and other details for a selected development.



The **Profile** sub tab presents a specific development's vital housing information (program type, construction date, inventory, and so forth).

The following table includes all data presented in the Development Profile Information section and short description of each data category:

Profile Page Data Category	Description
Development Name	The name an HA assigns a development.
Program Type	One of the following program types is displayed:
	HOPE VI: Any program involving HOPE VI funds
	Low Income Rental: Regular public housing program
	Low Income/Fair Market Rent: Mixed Income programs unrelated to HOPE VI
	Mixed Finance: Mixed Finance programs unrelated to HOPE VI
	Section 23 Bond Financed: An obsolete program
	Section 23 Leased: An obsolete program
	Turnkey III: An obsolete Public Housing Homeownership program
Development Method	One of the following development methods is displayed:
	Acquisition w/out Rehab: The development is purchased and no rehabilitation is necessary.
	<b>Major Reconstruction of Obsolete Public Housing Projects (MROP)</b> : An obsolete development method.
	<b>New Construction</b> : A new development is built. Most developments fall into this category.
	New Construction – Conventional: Same as the New Construction method.
	<b>New Construction</b> – <b>Turnkey</b> : A method where the developer builds the development but "turns the keys over" when it's ready for the HA.
	<b>Rehabilitation</b> – <b>Conventional</b> : An old development is rehabilitated for HA use.
	<b>Rehabilitation</b> – <b>Turnkey</b> : A method where the developer rehabilitates the development and "turns the keys over" when it's ready for the HA.
	<b>Note:</b> The obsolete development methods will be removed in a future IMS/PIC release.
Structure Type	One of the following structure types is displayed:
	Elevator Structure
	Mixed Type
	Row or Townhouse Style (Sep. Entrances)
	Semi-Detached



Profile Page Data Category	Description
	Single-Family/Detached
	Walkup/Multifamily Apt (Shared Entrances)
Acquisition/Construction Date (if known)	Either the date the HA acquired the development, or the date construction began on the development.
Date of Full Availability (DOFA)	The DOFA occurs when at least 95% of the units in a development are ready to be occupied (i.e., have certificates of occupancy). The DOFA is especially important for management of a mixed-finance development because it starts the development's initial operating period.
End of Initial Operating Period (EIOP) Date	EIOP is the last day of the first calendar quarter after DOFA provided that 95% of the units are actually occupied (vs. ready to be occupied). If 95% of the units are not occupied, EIOP is automatically established as the last day of the second calendar quarter after DOFA. EIOP marks the point at which the construction period for a development ends and management begins.
Dwelling Structures	Number of structures in the development containing inhabitable units.
Non Dwelling Structures	Number of structures in the development with Non Dwelling buildings only.
"Scattered Site?"	Yes: Units are located in different parts of the city. (They are separated by more than one street.)
	No: Units exist in the same city location.
Total Acres	Available acres for development
Total removed acres	Available acres for development after its removed from inventory
Mixed finance except from FASS PH	Projects developed under the use of combination of private financing, public housing and other funds to develop public housing units except from FASS PH.

Many of the following structure types are displayed in other parts of this development sub module. Here are the definitions for each structure type listed.

Structure Type	Description
Elevator Structure	Any high-rise structure requiring an elevator under the Minimum Property Standards or local building codes.
Mixed Type	A development that consists of more than one structure type.



Structure Type	Description
Row or Townhouse (Sep. Entrances)	A structure containing three or more living units. Each unit is separated by vertical walls. These building types have their own entrances and interior stairs.
	Note: Units in this structure type should not have door numbers.
Semi-Detached	A structure containing two living units separated by a common vertical wall.
Single-Family/Detached	A structure consisting of a single-living unit surrounded by permanent, open spaces.
Walkup/Multifamily Apartment (Shared Entrances)	Any multilevel, low-rise structure containing two or more living units. Each unit is separated horizontally (ceiling/floor) and by vertical walls. This category includes row houses where the units share the same physical address and are identified by a door number only.

The **Development Summary Information** section includes an **Approved as of** date. This date refers to the date of the last approved building/unit data submission.

This section also displays the summarized unit counts by the unit designation types, dwelling information, and bedroom count.

				Ge	et Help   Logoff / Return to Secure Systems
Reports Maintain CAPFUND B&U					
Development Building Unit Submission Approval					
Profile	List		Address		Contact
Select View:	Development				
HQ Office:	Public and Indian Housing				
HQ Division:	PO Field Operations	✓ Select			
Hub:	4HJAC Jacksonville Hub V Select				
Field Office:	4HPH JACKSONVILLE HUB OFFICE				
Field Office HA:	FL004 Orlando 🖌 Select				
Physical Development:	FL004000001 GRIFFIN PARK	▼ Select			
Development Profile Information					
					Add Development Edit Development
Development Name:	GRIFFIN PARK				
Program Type:	Low Income Rental				
Development Method:	New Construction - Conventional				
Structure Type:	Mixed Type				
Acquisition Construction Date:	08/29/1939				
DOFA Date Actual	08/31/1941				
EIOP Date Actual:	12/31/1941				
DOFA Target Date:					
EIOP Target Date:					
Dwelling Structures:	22				
Non-Dwelling Structures:	1				
Scattered Site?	No				
Total Acres	0				
Total Removed Acres:	0				
Mixed Finance Exempt from FASS ph?	No				
Approved as of :	12/28/2010				
	ACC Units				
General Occupancy Elderly/Disab	led Non-Dwelling	Other	Total ACC Units	Non ACC Units	Total Units
171	U	1	U I	1/2	0 172
Unit Designation	0 Bedroom 1 Bedroom	2 Bedrooms	3 Bedrooms	Bedrooms 5+ Bedro	poms Total
Elderly/Disabled Units	0	0 0	0	0	0 0
General Occupancy	9	53 58	48	3	0 171
Total	9	53 58	48	3	0 171
	- 1			31	

Figure 1: Development Profile page

## 1.1.1.1.1 Adding a Development

If the user clicks the **Add Development** link, the program will allow the user to add a new development to the development inventory of the selected PHA (see Figure 2).



When the user is adding new development records, the program requires the user to fill certain options in order to save the development record. The required options are marked with an asterisk (\*). If there is no data entered for any of the designated fields, the user cannot save the information. The description of all the options is presented in the **Development Tab** section of this document.

After all the data has been entered, the user must click the **Add Development** button to add the new development record to the PHA housing inventory.

	Terminated Developments
*	
*	
(None Selected) • *	
(None Selected) •	
(None Selected)  *	
MM/DD/YYYY	
MM/DD/YYYY	
MM/DD/YYYY	
* MM/DD/YYYY	
* MM/DD/YYYY	
•	
•	
Y 💿 N 🔘	
#	
0.00	
Y 💿 N 💿 *	
<ul> <li>Designates a required field.</li> </ul>	
# Total Acres in Development must be entered if this development will be proposed as land remo	val from inventory.
	Add Development
	*         (None Selected)         *         *         *         *         *         *         *         *         *         *         *         *         * <td< td=""></td<>

Figure 2: Add Development Section

## 1.1.1.1.2 Terminating Developments

This page also lists the **Terminated Developments** link. When a user clicks the **Terminated Developments** link, the system opens the **Terminated Developments** report (see Figure 3). The report displays information about Hub, Field Office and Field Office HA in the header of the report and displays the development data in rows with the following columns: **Development Number**, **Development Name**, and **Termination Date**. The report also displays the **Print** and **Download in Excel** links in the right most top corner of the page. The report lists the development numbers that have been terminated from inventory for that PHA.



		Download in Excel Print
	TERMINATED DEVELOPMENTS As of 7/27/2010	
Hub Field Office Field Office HA	<ul> <li>6HNWO New Orleans Hub</li> <li>6HPH NEW ORLEANS HUB OFFICE</li> <li>LA001 New Orleans HA</li> </ul>	
Developments : 1 to 20 of 38 Page No: 1 of 2		Page: 1 <u>2</u> <u>Next</u>
Development Number	Development Name	Termination Date
LA001001	ST. THOMAS	04/15/2008
LA001002	C. J. PEETE	04/15/2008
LA001003	IBERVILLE	04/15/2008
LA001004	FLORIDA	04/15/2008
LA001005	LAFITTE	04/15/2008
LA001007	B. W. COOPER	04/15/2008
LA001009	SAINT THOMAS EXTENSION	04/15/2008
LA001012	B. W. COOPER EXTENSION	04/15/2008
LA001013	SAINT BERNARD EXTENSION	04/15/2008
LA001015	GUSTE HOMES	04/15/2008
LA001017		08/31/1983
LA001018	DELERY HOMES	04/15/2008
LA001021	PAINTERS & LESSEPS STREET	04/15/2008
LA001024	COMMUNITY BUILDING	01/31/1978

Figure 3: Terminated Developments report

## 1.1.1.1.3 Editing the Development

Users can add new developments or edit the existing developments. If a user clicks the **Edit Development** link, the program will display all the options as editable allowing the user to modify the development information (see Figure 5).

When the user is editing development records, the program requires the user to fill certain options in order to save the development record. The required options are marked with an asterisk (\*). If there is no data entered for any of the designated fields, the user cannot save the information. The program will display a waning message prompting the user to enter missing data (see Figure 4).



Figure 4: Sample warning message

The description of all the options is presented in the **Development Tab** section of this document.

After all the data has been entered, the user must click the **Save** button to save the edits of the development record to the PHA housing inventory.





Figure 5: Editing Development Information

## 1.1.1.2 List sub Tab

The **List** sub tab (see Figure 6) displays a summary listing of all the developments associated with the Housing Authority that the user selected on the **Development Profile** page. Users can view all the developments associated with the PHA record, or narrow the report criteria by using the **Status** list. The **Status** list allows users to set the program to display only the developments of the selected status. To apply the selected search criteria, users must click **Retrieve**.

System retrieves the development list based on the user selection; user can click the **Development Number** link from the list to view more details about that particular development. When the user clicks the **Development Number** link the system navigates to the **Unit List** sub tab of the **Unit** tab.

											Get Help   Logoff / Reti	Irn to Secure Systems
Repor	ts Maint	tain CAPFL	IND B&U									
Development	Building	Unit	Submission	Approval								
b of otophilon	Dunung	Profile	Castillooidi	ripprora		List		Address			Contact	
HO Office:					Public and Indian Housing							
HO Division:					PO Eield Operations							
HQ Division.					AH IAC Jacksonville Hub							
Hub.					4HJAC Jacksonvine Hub							
Field Office:					4HPH JACKSONVILLE HUB OF	FICE						
Field Office HA	6				FL004 Orlando							
Development	Status Filter											
Status:					Management M							
						Retrieve						
							ACC Units					
Develo	opment Num	ber		Develo	pment Name	General Occupancy	Elderly/Disabled	Non Dwelling	Other	Total ACC Units	Non ACC Units	Total Units
E	.004000001			GRIF	FIN PARK	171	0	1	0	172	0	172
E	_004000002			REEVE	S TERRACE	219	0	5	0	224	0	224
E	L004000004			LAKE M	IANN HOMES	207	0	3	0	210	0	210
<u> </u>	L004000006			MURCHIS	SON TERRACE	188	0	2	0	190	0	190
E	1004000009			IVEY L	ANE HOMES	181	0	3	0	184	0	184
E	L004000010			LORNA I	DOONE APTS	104	0	0	0	104	0	104
E	L004000011			MEADO\	V LAKE APTS	87	0	0	0	87	0	87
E	1004000012			CITRUS SQ/J	IOHNSON MANOR	127	0	0	0	127	0	127
E	1004000013			OME	GA APTS	118	0	1	0	119	0	119
<u> </u>	004000014			CVMX VIRVM	K IM UMBBER IFT	64	0	0	0	64	0	64
E	1004000015			CVMX VIRVMH	TM UGZEJZMB IFT	30	0	0	0	30	26	56
	FL004003			CA	RVER CI	0	0	0	0	0	0	0
	FL004007			ORA	VGE VILLA	0	0	0	0	0	0	0
<u>E</u>	1004009999			CA	RVER CI	U	1 0	0	0	0	0	0

Figure 6: List sub tab



The development listing table of the **List** sub tab displays the following information for each development based on the user selected filter options from the status filter. IMS/PIC draws the information from the **Development**, **Building**, and **Unit** tabs in this sub module. The program displays the following information:

- The **Development Number** column displays the development number in IMS/PIC as a link to the **Unit** tab.
- The **Development Name** column displays the development name.
- The **General Occupancy** column displays the total number of units with unit designation as 'General Occupancy' and ACC unit indicator value as '**Yes**'.
- The **Elderly/Disabled** column displays the total number of units with unit designation as 'Officially Disabled' (ODD), 'Officially Elderly' (ODE), and 'Officially Mixed' (ODM) and 'Mixed Elderly and Disabled Not HUD Officially Designation' (MED) and ACC unit indicator value as '**Yes**'.
- The 'Non Dwelling' column displays the total number of units with Unit Designation 'Non Dwelling' and ACC unit indicator value as 'Yes'.
- The '**Other**' column displays the total number of units with Unit Designation not in 'Non Dwelling', 'General Occupancy', 'Officially Disabled' (ODD), 'Officially Elderly' (ODE), and 'Officially Mixed' (ODM) and 'Mixed Elderly and Disabled Not HUD Officially Designation' (MED) and ACC unit indicator value as '**Yes**'.
- The 'Total ACC Units' column displays the total number of ACC Units.
- The 'Non ACC Units' column displays the total number of non-ACC Units.
- The '**Total Units**' column displays the sum of total number of ACC Units and total number of non-ACC units.

**NOTE:** The above calculations shall exclude the units with Submission Status Type - "Removed from Inventory" (RMI), "Removed from Inventory – Without HUD Approval" (RMINOA), "Removed from Inventory" (RMIPRP") and "Initial Upload" (INUPLD) and units with Unit Designation as "Merged".

## 1.1.1.3 Address sub Tab

The **Address** sub tab (see Figure 7) displays the development address. IMS/PIC allows users to enter two types of addresses – the physical and the mailing address. The **Select Address Type** list allows users to select the type of address to view. After the user clicks **Select**, the program refreshes the page and displays the appropriate type of address selected, if applicable.



Reports Main	tory Certification						
Development Building	Unit Submission Approval						
Profile	List	Address	Contact				
HQ Division:	Public and Indian Housir	g					
HQ Office:	PO Field Operations						
Hub:	6HSNA San Antonio Hub						
Field Office:	6JPH SAN ANTONIO HUE	OFFICE					
Field Office HA:	TX001 Austin						
Physical Development:	TX001000001 CHALMERS	COURTS					
Address Information							
			Modify Address				
Select Address Type:	Physical - Select						
Address Line 1:	sg0						
Address Line 2:							
County Name:	TRAVIS						
City/Locality:	mrghfz						
State:	ТХ						
Zip Code:	24767 - 6200						
Additional Address Informa	Additional Address Information						
Additional address information is not available for this address.							

Figure 7: Address sub tab

The **Modify Address** link allows users to edit the development address. The program displays the address boxes for the user to modify. The boxes marked with the asterisk (\*) are mandatory.

Reports Maintain CAPFUND B	&U on		
Development Building Unit Su	bmission Approval		
Profile	List	Address	Contact
HQ Division:	Public and Indian Housing		
HQ Office:	PO Field Operations		
Hub:	6HSNA San Antonio Hub		
Field Office:	6JPH SAN ANTONIO HUB OFFICE		
Field Office HA:	TX001 Austin		
Physical Development:	TX001000001 CHALMERS COURTS		
Address Information			
Address Type:	Physical		
Address Line 1:	sg0	]*	
Address Line 2:			
County Name:	TRAVIS		
City/Locality:	mrghfz *		
State:	Texas 🔹		
Zip Code:	24767 * _ 6200		
* Designates a required field.			Cancel

Figure 8: Modifying Development Address

To save the changes, the user must click **Save**. If the user clicks **Cancel**, then the program will not retain any user modifications.

## 1.1.1.4 Contact sub Tab

The **Contact** sub tab (see Figure 9) displays the information about the development manager. If any issues arise concerning the development, this person would be the point of contact for their resolution.



The user can select the contact status using the **Contact Status** list to filter the contacts. The options available are **Active**, **Inactive**, and **All**.

Reports Maintain CAPFUND B Inventory Certification	&U on		
Development Building Unit Su	bmission Approval		
Profile	List	Address	Contact
HQ Division:	Public and Indian Housing		
HQ Office:	PO Field Operations		
Hub:	6HSNA San Antonio Hub		
Field Office:	6JPH SAN ANTONIO HUB OFFICE		
Field Office HA:	TX001 Austin		
Physical Development:	TX001000001 CHALMERS COURTS		
Contacts List			
			Add Cont
Contact Status:	Active - Select		
0 Records Returned			
Contact	Role	Phone Number	Email State
CAMPBELL SABRINA	Resident Manager	(512) 477-7475	Inacti
CAMPBELL SABRINA	Resident Manager	(512) 477-7475	Active
CAMPBELL SABRINA	Resident Manager	(512) 477-7475	Active
CHAVEZ LINDA	Resident Manager	(512) 477-7475	Active
SELLERS MOLLIE	Resident Manager	(512) 477-7475	Inacti

Figure 9: Contact sub tab

The **Contacts List** table displays the contact name, role, phone number, email, and activity status.

## **1.1.2 The Building Tab**

The **Building** tab contains the official inventory of buildings for the development selected on the **Profile** page.

Two different pages are accessible via the Building Tab.

- **The Building List** sub tab presents summary information for every building in the selected development. It also enables users with the proper security access role to delete building records from the development. If the building status is **Initial Upload**, any user type can delete it except for Guest user. If the building status is **Initial Approval Completed**, than only HUD/Super user can delete those buildings on condition that they do not have any units associated with them.
- **The Building Detail** sub tab provides information about a specific building. It also enables users to edit building details or add a new building record.

Additional information on how to perform certain actions in this tab can be found in Job Aids on IMS/PIC website. IMS/PIC Job Aids provide users with additional support to help navigate through the IMS/PIC sub modules. They are intended as informal, technical guidance to help users successfully complete the activities specified in the Job Aid. The Job Aids can be found at this link: http://www.hud.gov/offices/pih/systems/pic/ts/

## 1.1.2.1 The Building List sub Tab

The **Building List** sub tab (see Figure 10) presents a list of all buildings in the development selected on the **Profile** sub tab of the **Development** tab. It also provides summary data for each of those buildings.



	Maintain	CADELIND R941								
Re	ports Inventory	Certification								
Development	t Building U	Init Submise	sion Approval							
	Building List									
HQ Office:		Pub	lic and Indian Hous	ing						
HQ Division:		PO	Field Operations							
Hub:		6HL	RK Little Rock Hub							
Field Office:		6FP	H LITTLE ROCK HUI	B OFFICE						
Field Office I	HA:	AR0	02 North Little Rock	Housing Aut	hority					
Physical Dev	elopment:	AR0	02000001 SILVER C	ITY COURTS						
Building Sea	arch									
Building Nu	mber:									
Entrance Nu	imber:									
	Search									
Building Infe	ormation									
Dunning mit	onnution								٨d	ld Buildings
Buildings 1	to 50 of 151								Ad	ia Duilaitigs
Building	Building						Eleor	Unit	Construction	Doloto
No.	Entrance No.	Building Name	Building T	уре	Building Status Type	Address Line 1	Count	Count	Date	Building?
001001	1	hgiflx bgrx	Row or Townhouse	e (Sep. I	Initial Approval	mariah sa63 abud 347	1	1	03/31/1941	
001001	1	iveorh	entrances)		Completed	gvvign sgob gnvd 547	·	<b>•</b>	05/51/1541	
<u>001001</u>	2	hgiflx bgrx iveorh	Row or Townhouse entrances)	e (Sep. I	Initial Approval Completed	sg63 ghvd 347	1	1	03/31/1941	
001001	3	hgiflx bgrx iveorh	Row or Townhouse entrances)	e (Sep. I	Initial Approval Completed	gvvigh sg63 ghvd 347	1	1	03/31/1941	

Figure 10: Building List sub tab Building tab

## 1.1.2.1.1 Searching the Building Information Table

Developments can have hundreds of buildings. IMS/PIC provides two different methods for searching for a specific building in the building list: a search by building number and a search by entrance number (see Figure 10). The search filters can be found in the **Building Search** section.

These two search methods can be used independently or together. Type the desired building number in the **Building Number** box or the building entrance number in the **Entrance Number** box. Click the **Search** button. The system will display the data pertaining to the specified building or entrance number.

## **1.1.2.1.2** Information Presented on the Building List Page

The **Building List** sub tab consists of the development identification information, **Building Search** section and the **Building Information** section. The **Building Information** section displays a table containing summarized building information.

The development identification information includes the following:

- HQ Division
- HQ Office
- Hub
- Field Office
- Field Office HA
- Physical Development

The **Building Information** table (see Figure 11) displays several categories of information.



Building Inf	ormation								
D., 11, 1 1	4- 50 -6151							Ac	<u>ld Buildings</u>
Building	Building	Dedition Name	Dull line Trees	Dull de c. Ctatus Tura		Floor	Unit	Construction	Delete
No.	Entrance No.	Building Name	Building Type	Building Status Type	Address Line 1	Count	Count	Date	<b>Building</b> ?
<u>001001</u>	1	hgiflx bgrx iveorh	Row or Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg63 ghvd 347	1	1	03/31/1941	
<u>001001</u>	2	hgiflx bgrx iveorh	Row or Townhouse (Sep. entrances)	Initial Approval Completed	sg63 ghvd 347	1	1	03/31/1941	
<u>001001</u>	3	hgiflx bgrx iveorh	Row or Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg63 ghvd 347	1	1	03/31/1941	
<u>001001</u>	4	hgiflx bgrx iveorh	Row or Townhouse (Sep. entrances)	Initial Approval Completed	sg63 d 347	1	1	03/31/1941	

Figure 11: An example of a Building List.

The following table lists and provides descriptions for the **Building Information** table data categories.

Data Category	Description			
Building No	The unique identification number for the selected building.			
Building Entrance No	The specific entrance number for the selected building record. One building structure can have several entrances. Each entrance number has its own physical address and its own building record.			
Building Name	If entries in this category are blank, the HA has not entered a name for the building.			
Building Type	<ul> <li>One of the following structure types is displayed:</li> <li>Elevator Structure</li> <li>Walkup/Multifamily Apartment (Shared Entrances)</li> <li>Non Dwelling Structure</li> <li>Row or Townhouse (Sep. Entrances)</li> <li>Semi-Detached (Sep. Entrances)</li> <li>Single-Family/Detached</li> </ul>			



Data Category	Description		
Building Status Type	The status of the building entrance record in IMS/PIC. One of the following statuses is displayed:		
	<ul> <li>Initial Upload: The building record has been entered but not approved by the Field Office.</li> <li>Initial Approval Completed: The building record has been approved by the Field Office.</li> <li>Demo/Dispo – Approved: The building in question has been approved for either demolition or disposition. Source: Demo/Dispo sub module.</li> <li>Demo/Dispo – Proposed: The building in question has been proposed for either demolition or disposition. Source: Demo/Dispo sub module.</li> <li>Demo/Dispo sub module.</li> <li>Premo/Dispo sub module.</li> <li>Removed from Inventory: HUD HQ has completed the HA request to remove this building from the HA's inventory. Source: Demo/Dispo sub module.</li> <li>Proposed Removed from Inventory: The HA has submitted a request to HUD HQ to remove this building from its inventory. Source: Demo/Dispo sub module.</li> <li>Removed without HUD Approval: Buildings removed from the HA's official inventory without formal approval from a HUD Field Office. This entry may switch to Removed without Formal Approval in the future.</li> </ul>		
Address Line 1	The physical address for the selected building entrance. Physical address is an address an emergency services unit (e.g., police or rescue squad) would respond to.		
Floor Count	The number of floors accessible via the specified building entrance where units that can be occupied exist.		
Unit Count	Number of units accessible via the building entrance. This number includes units of all types.		
Construction Date	The date the building entrance finished construction.		
Delete Building?	This column displays the check box that allows users to delete selected buildings. In most instances, this column is blank.		

The building numbers displayed in the **Building No.** column are links. Each link allows the user to view the details for the particular building in the **Building Detail** sub tab. Click a **Building Number** link to view additional building details for that building.

**Note:** If you click a link for a building record with a Remove from Inventory status, IMS/PIC displays the following message: *No buildings were found in this development, please add a building.* 



The **Building Information** table displays 50 building entrance records at a time. The total number of records is displayed at the top of the table.

If there are more than 50 buildings in a development, the user may click the **Next** link at the bottom of the table to view the remainder. After clicking the **Next** link, the user can click the **Previous 50 Buildings** link to return to the previous page.

## 1.1.2.2 The Building Detail sub Tab

To access the **Building Detail** sub tab (see Figure 12), click a **Building Number** link from the Building Information table.

This page presents the information for every building entrance number associated with the building. It also displays the summary of the entire unit data associated with the building entrance number.

Reports Maintain CAPFUND B&U							
Development Building Unit Submission	Approval						
Building List	Buil	ding Detail					
HQ Office:	Public and Indian Housing						
HQ Division:	PO Field Operations						
Hub:	6HLRK Little Rock Hub						
Field Office:	6FPH LITTLE ROCK HUB OF	FICE					
Field Office HA:	AR002 North Little Rock Hou	ising Authority					
Physical Development:	AR002000001 SILVER CITY C	OURTS					
Building Entrance Identification							
							Add Buildings
Select Building:	001001 - 1 - gvvigh sg63 g	hvd 347 -	Select				
Building Name:	hgfix bgrx iveorh						
DOFA Date Actual:	01/31/1942 MM/DD/177	n					
Building Entrance Address							
Address Line 1:	gvvigh sg63 ghvd 347		A	ddress Line 2:			
City:	NORTH LITTLE ROCK	•	с	ounty:		PULASKI COUNTY	<b>_</b> •
State:	Arkansas	-	Z	ip Code:		72114 .	
Building Entrance Details							
Building Type:	Row or Townhouse (Sep.	entrances)	- Select				
Building Status Type:	Initial Approval Completed						
AMP Group Number:	AR00200001P						
Floor Count:	1						
Total Units Count:	1						
Construction Data:	02/21/1941	~					
Construction Date.	00/01/1041 2000011		12				
Comments.			Â				
			÷				[ Cours
		2.35	- F-t B				3879
		DC=01	ing circlarice oclimary				
Unit Designation	0 Bedroom	1 Bedroom	2 Bedrooms	2 Bedrooms	4 Bedrooms	54 Ecdrooms	Total
General Occupancy	0	1	0		0	0	0 1
Elderly/Disabled Units	0	0	0		0	0	0 0
Tatal	0	1	0		0	0	0 1
Nen-Dwelling Unit Count :	a						
Approved as of :	01/04/2010						
Approved as of :	01/04/2010						

Figure 12: Building Detail sub tab

## 1.1.2.2.1 Information Presented on the Building Detail Page

The **Building Detail** page consists of the following sections:

- Development identification information displays the HQ Division, HQ Office, Hub, and Field Office, PHA and development name and number.
- **Building Entrance Identification** section allows the user to select the building entrance number (if the building has multiple entrance numbers) to view the details for the selected entrance number.



- **Building Entrance Address** section displays the physical address associated with the entrance number.
- **Building Entrance Details** section displays the building details of the building that is associated with the entrance number selected.
- **Building Entrance Summary** section displays the unit data for the selected building entrance number.

The **Building Entrance Identification** section includes the following building identifiers (see Figure 13):

- The Select Building list containing a list of building entrance number for the user to select.
- The **Building Name** box contains the name of the building (if applicable)
- The **DOFA Date Actual** box displays the date in the MM/DD/YYYY format.

Building Entrance Identification	
	Add Buildings
Select Building:	5202 - 2 - voovybizn 1177 💌 *
Building Name:	hvgzghv hgiftx cmvlsk
DOFA Date Actual:	05/30/2008 MM/DD/YYYY

Figure 13: Building Entrance Identification section of Building Detail page.

Additionally, the user can add new buildings to the selected development by clicking the **Add Buildings** link.

The **Building Entrance Address** (see Figure 14) section displays the following physical entrance address details:

- Address Line 1
- Address Line 2
- City
- County
- State
- Zip Code

The **Building Entrance Details** (see Figure 14) section provides the following structural and status details. Many of these data categories are also presented in the **Building Information** table.

- Building Type
- Building Status Type
- AMP Group Number
- Floor Count
- Total Unit Count (this data category is the same as the Unit Count category on the Building List)
- Construction Date
- Comments (general comments about the building or development)



Building Entrance Address			
Address Line 1:	voovybizn 1177 *	Address Line 2:	
City:	voorevigmvx *	County:	ST. CLAIR *
State:	Illinois 🗸 *	Zip Code:	62203 * -
Building Entrance Details			
Building Type:	Semi Detached (Sep. entrances)	*	
Building Status Type:	Initial Approval Completed		
AMP Group Number:			
Floor Count:	1 *		
Total Units Count:	1		
Construction Date:	04/28/2008 MM/DD/YYYY		
Comments:		~	
		×	
			Save

Figure 14: Building Details - Building Entrance Address & Details sections

The **Building Entrance Summary** section (see Figure 15) provides the following information about the units accessible via the selected entrance:

- Number of Units by Unit Designation
  - Family Units
  - Elderly Units
  - o Total
- Number of Units by Bedroom Size
  - 0 Bedroom
  - o 1 Bedroom
  - o 2 Bedrooms
  - o 3 Bedrooms
  - 4 Bedrooms
  - $\circ$  5+ Bedrooms
  - o Total

Unit Designation	0 Bedroom	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms	5+ Bedrooms	Total
Family Units	0	0	0	0	0	0	0
Elderly Units	0	1	0	0	0	0	1
Total	0	1	0	0	0	0	1
Non-Dwelling Unit Count : Approved as of :	0 06/05	2009					

Figure 15: The Building Entrance Summary section of the Building Detail page.

This section also displays the following building entrance information:

- **Non-Dwelling Unit Count**: The number of Non Dwelling units accessible via the building entrance.
- Approved as of: The date of the last building data approval for the selected building.
- The following building types can be selected in the **Building Type** list:

Building Type	Description
Elevator structure	Any high-rise structure requiring an elevator under the Minimum Property Standards or local building codes. For the Elevator Structure the minimum unit



	count must be 5.
Multifamily/Walkup Apts (Shared Entrance)	Any multilevel, low-rise structure containing two
	or more living units. Each unit is separated
	horizontally (ceiling/floor) and by vertical walls.
	This category includes row houses where the units
	share the same physical address and are identified
	by a door number only. For the
	Multifamily/Walkup Apts (Shared Entrance) may
	have more than one entrance, one entrance must
	have at least two units, and all other entrances must
	have at least one unit.
Non Dwelling Structure	Non dwelling structure will not have any units
	associated with the structure since the building will
	not have any residents. So the total unit count for
	this building type must equal zero.
Row or Townhouse (Sep. entrances)	A structure containing three or more living units.
	Each unit is separated by vertical walls. These
	building types have their own entrances and
	interior stairs. This type of buildings must have
	only one entrance / unit.
	<b>Note:</b> Units in this structure type should not have
	door numbers.
Semi Detached (Sep. entrances)	A structure containing two living units separated by
	a common vertical wall. This type of buildings
	must have only one entrance / unit.
Single Family / Detached	A structure consisting of a single-living unit
	surrounded by permanent, open spaces. This type
	of buildings must have only one entrance / unit.

## 1.1.2.2.2 Adding New Buildings

The user can add additional building(s) to the development. To add new buildings, the user should click the **Add Buildings** link.

The **Building Detail** sub tab will be refreshed and all the options will be displayed as editable (see Figure 16). The development which was pre-selected on the **Development** tab will be active. In order to add a new building, the user need to specify the structure type in the **Building Type** list along with **Total Units Count, Building Number, Building Name** and **Building Entrance Address** information. For more information about these options, please refer to section 1.1.2.2.



Development Build	ling	Unit	Suhmissi		)		
Building Li	ist	Unik	Buildin	g Detail			
HQ Division:		Public	and India	n Housing			
HQ Office:		PO Fi	eld Operat	ions			
Hub:		2HNW	K Newark	Hub			
Field Office:		2FPH	NEWARK F	UB OFFICE			
Field Office HA:		NJ002	Newark H	Α			
Physical Developmen	it:	bornz	u dvre bgi	rx 774244244qm			
		-					
Building Entrance Ide	entificat	ion					
Building Type:		Eleva	ator Structure	1	*		
Total Units Count:		1	280				
Building Number:			*				
Building Name:							
Ruilding Entrance A	ddroce			1			
Building Entrance A	uuress	Entra	nce Numb	er: '		1	
Address Line 1: *	A	ddress Lii	ne 2:	City: <sup>*</sup>	County: <sup>*</sup>	State:*	Zip Code: <sup>*</sup>
	-  -					Aleeka	- I
						Alaska	
Floor Count:* C	Construc Date:	tion C	omments:				
	IM/DD/YY						< >
							Save

Figure 16: The Add Buildings Page

## **1.1.3** The Unit Tab

The **Unit** tab (see Figure 17) contains the official inventory of units for the development selected on the **Profile** sub tab. It also provides the functionality to upload large amounts of building and unit data for submission in IMS/PIC and to view histories of upload error reports.

**Note:** Uploading data is not the same as submitting data. After you perform an upload, you still need to submit building/unit data via the **Submission** tab.

The **Unit** tab is composed of three sub tabs:

- The Unit List sub tab displays a list of all units in a development and enables the user to view specific unit details. It also enables users with the proper security access to add unit records to a development, delete unit records from a development (during the initial upload stage only), or edit specific unit information.
- **The Building/Unit Data Transfer** sub tab enables users to download a file template for a mass submission of building and unit data. It also enables HA users to upload a Comma Separated Values (CSV) or Microsoft® Excel file into IMS/PIC.
- **The Upload Error Report** sub tab enables HA users to view any errors that occurred during the report upload process.

The Unit List sub tab is the default page for the Unit tab.



Maintain (CADELIND R841)						
Reports Inventory Certification						
Development Building Unit Submission Approval						
Unit List	Building/Unit Data Transfer	Jpload Error Report				
HO Office: Public a	nd Indian Housing					
HO Division: PO Field	Operations					
Hub: 6HI BK I	ittle Rock Hub					
Field Office: 6EPH LI	TLE ROCK HUB OFFICE					
Field Office HA: AR002 N	orth Little Rock Housing Authority					
Physical Development: AR00200	0001 SILVER CITY COURTS					
5						
Unit Search						
Building Number:	Door Number:					
Entrance Number:	First Name:					
Unit Number:	Last Name:					
Floor Number:						Search
Unit Information						
Units 1 to 50 of 148						Add Units
Page No: 1 of 3					P	age: 1 2 3
Unit Number Submission Status Type	Tenant Name (Last, First Name)	Building Number	Entrance Number	Floor Number	Door Number	Delete Unit?
SC-001 Initial Approval Completed	wmzopxrigh, z	001001	1	1	1	
SC-002 Initial Approval Completed	mzwilq, z	001001	2	1	2	
SC-003 Initial Approval Completed	hmrpxli, v	001001	3	1	3	
SC-004 Initial Approval Completed	ivmmzw, i	001001	4	1	4	
SC-005 Initial Approval Completed	hmrpizo, z	001002	1	1	5	
SC-006 Initial Approval Completed	biivk, z	001002	2	1	6	
SC-007 Initial Approval Completed	byir, v	001002	3	1	7	

Figure 17: Unit tab and Unit List sub tab

Additional information on how to perform certain actions in this tab can be found in job aids on HUD website. IMS/PIC job aids provide users with additional support to help navigate through the IMS/PIC sub modules. They are intended as informal, technical guidance to help users successfully complete the activities specified in the job aid. The job aids can be found following the link: http://www.hud.gov/offices/pih/systems/pic/ts/

## 1.1.3.1 The Unit List sub Tab

Click the **Unit** tab to access the **Unit List** sub tab. The **Unit List** sub tab presents a searchable list of every unit in the development selected on the **Profile** page. The list contains summary details for every unit displayed. It also allows users to edit existing unit data, add new unit records, or delete invalid unit records (during the initial upload stage only).

## 1.1.3.1.1 Using the Unit Search Functions

Developments can include hundreds, sometimes thousands of units. While all units in a development can be presented on the **Unit List** sub tab, IMS/PIC also supplies the following tools for filtering the list:

- Building Number
- Entrance Number
- Unit Number
- Floor Number
- Door Number
- HOH First Name
- HOH Last Name

In order to use the filter, the user should type the data into the appropriate boxes (**Building Number**, **Entrance Number**, **Unit Number**, **Floor Number**, **Door Number**, **First Name**, and **Last Name**) and click the **Search** button (see Figure 18). The user can use any combination of these tools for one search.



Unit Search		
Building Number:	Door Number:	
Entrance Number:	First Name:	
Unit Number:	Last Name:	
Floor Number:		Search

Figure 18: Unit Search

## 1.1.3.1.2 Information Presented on the Unit List sub Tab

The **Unit List** sub tab presents a table that lists all the units associated with the development identified in the first tier of the page.

The first tier contains the following development identification information:

- HQ Division
- HQ Office
- Hub
- Field Office
- Field Office HA
- Physical Development

This information is not modifiable. If the user wants to select another development, the user would have to return to the **Profile** sub tab of the **Development** tab and select a different development.

The **Unit Information** section (Figure 19) is features a table displaying data for each unit that meets the applied search criteria. If the user does not search for a particular unit or unit type, IMS/PIC displays a record for every unit in the development.

Unit Infor	mation								
Units 1 to	Units 1 to 10 of 10								
Page No:	1 of 1								
Unit Number	Submission Status Type	Tenant Name (Last, First Name)	Building Number	Entrance Number	Floor Number	Door Number	Delete Unit?		
<u>527721</u>	Initial Approval Completed	ivknfq, v	5201	1	1				
<u>527725</u>	Initial Approval Completed	mlhriizs, z	5201	2	1				
<u>527729</u>	Initial Approval Completed	ilobzg, z	5202	1	1				
<u>527733</u>	Initial Approval Completed	hpmzysxizn-bvmmrpxn, v	5202	2	1				

Figure 19: An example of a Unit List.

IMS/PIC presents the number of unit records just above the table. The table displays 50 records at a time.

IMS/PIC displays the units in ascending alphanumeric unit number order. If there are more than 50 units in a development, click the **Page Number** hyperlink at the top and bottom of the table to view the following unit records..

The following table presents and describes the unit list data categories:

Data Category	Description
---------------	-------------



Data Category	Description					
Unit Number	The unique identifier for a unit. This number is the same as the HA's inventory number for the unit.					
Submission Status Type	<ul> <li>The status of the unit in IMS/PIC. One of the following statuses is displayed:</li> <li>Initial Upload: The unit record has been entered into IMS/PIC but not approved by a Field Office.</li> <li>Initial Approval Completed: The unit record has been approved by the Field Office.</li> <li>Demo/Dispo – Approved: The building the unit is in has been approved for either demolition or disposition. Source: Inventory Removals sub module.</li> <li>Demo/Dispo – Proposed: The building the unit is in has been proposed for either demolition or disposition. Source: Inventory Removals sub module.</li> <li>Demo/Dispo Draft: A draft application has been created to propose either demolition or disposition for the building this unit is in. Source: Inventory Removals sub module.</li> <li>Demo/Dispo Draft: A draft application has been created to propose either demolition or disposition for the building this unit is in. Source: Inventory Removals sub module.</li> <li>Removals sub module.</li> <li>Removed from Inventory: HUD HQ has completed the HA request to remove this unit from the HA's inventory. Source: Inventory Removals sub module.</li> <li>Proposed Removed from Inventory: The HA has submitted a request to HUD HQ to remove this unit from its inventory. Source: Inventory Removals sub module.</li> <li>Removals sub module.</li> <li>Removed without HUD Approval: Units removed from the HA's official inventory without formal approval from a HUD Field Office. This entry may switch to "Removed without Formal Approval" in the future.</li> <li>Proposed Unit Information – PHAs proposed unit status/designation changes.</li> <li>Submit Unit Information – PHA submitted the unit status/designation changes to the field office for approval.</li> </ul>					
Tenant Name - Last Name, First Name	If the unit is unoccupied, the column will state VACANT. IMS/PIC draws this head of household information from the <b>Form-50058</b> module.					
Building Number	The unique identifier for the building containing the selected unit.					
Entrance Number	The unique identifier for the building entrance used to access the unit. One building structure can have several entrances. Each entrance number has its own physical address and its own building record.					
Floor Number	The floor in the building where the selected unit is located.					



Data Category	Description
Door Number	The unique number for each unit within an elevator structure or walkup/multifamily apartment. Typically, door numbers are optional for row houses, town homes, semidetached, and single-family units.
Delete Unit?	If this functionality is available, the program will display a check box allowing to remove the unit from IMS/PIC inventory.

## 1.1.3.1.3 Deleting Units

If a user deletes a unit record, it cannot be retrieved. Only delete a unit record that is an erroneous entry. Make sure the unit has never been part of the official inventory before deciding to erase it permanently.

IMS/PIC enables users to perform this deletion only in certain circumstances. Unit records can only be deleted before they are submitted to the Field Office or after that initial upload data is rejected by the Field Office.

If the user is uploading a second set of new unit data after the first set of unit data has received Field Office approval, units can only be deleted from the second set of data.

If none of the above situations apply, the user must submit a formal request through a "REAC-TAC Incident" to HUD HQ to delete a unit record.

In order to delete a unit, navigate to the **Unit List** page and when the functionality to delete units is available, check boxes are displayed in the **Delete Unit?** column of the **Unit Information** section. Select desired units and click the **Delete** button at the bottom of the table to erase the unit records. Please note that this is a non-reversible action. After you delete a unit, all of the data associated with it is deleted.

## 1.1.3.2 Unit Details Page

The unit number displayed in the **Unit Number** column is a link that allows the user to access additional details about the selected unit.

IMS/PIC displays unit details in two sections:

- The Unit Information section
- The **Head of Family Details** section



Unit List	Building/Unit Data Transfe	r Upload Error Report	
HQ Division:	Public and Indian Housing		
HQ Office:	PO Field Operations		
Hub:	4HATL Atlanta Hub		
Field Office:	4APH ATLANTA HUB OFFICE		
Field Office HA:	GA069 DUBLIN		
Physical Development:	GA069000100 CLAXTON HOME	S	
Unit Information			
Unit Number:	0019B	Building:	019
Entrance Number:	2	Building Entrance Address:	hvnis migczox y53
Door Number:	0019B	Floor Number:	1 *
Bedroom Count:	2 *	Submission Status Type:	Initial Approval Completed
Unit Designation:	General Occupancy [Modify]	Accessible Designation:	Not Applicable [ Modify ]
Unit Tenant Status:	Vacant [ Modify ]		
Effective Date:	01/05/2009		
ACC Unit Indicator:	⊙Yes ○No	ACC Indicator Change Date:	07/31/1962
Cap Fund Indicator:	⊙ Yes ○ No	Op Fund Indicator:	⊙ Yes ○ No
Head of Family Details			
First Name:			
Last Name:			
Occupancy Date:			
			Update Unit Details

Figure 20: Unit Details

Additional information on how to perform certain actions in this tab can be found in job aids on HUD website. IMS/PIC job aids provide users with additional support to help navigate through the IMS/PIC sub modules. They are intended as informal, technical guidance to help users successfully complete the activities specified in the job aid. The job aids can be found following the link: http://www.hud.gov/offices/pih/systems/pic/ts/

## 1.1.3.2.1 The Unit Information Section

In addition to the data in the Unit List, the Unit Information section includes the following details:

- Unit Number
- Entrance Number
- Door Number
- Bedroom Count
- Unit Designation
- Unit Tenant Status
- Effective Date

- Building
- Building Entrance Address
- Floor Number
- Submission Status Type
- Accessible Designation
- ACC Indicator Change Date
- Op Fund Indicator



- ACC Unit Indicator
- Cap Fund Indicator

## 1.1.3.2.2 The Head of Family Details Section

The **Head of Family Details** section (see Figure 20) displays the following head of household information:

- First Name
- Last Name
- Occupancy Date

## 1.1.3.2.3 The ACC Unit Indicator

At the start of the public housing process, HUD and a PHA enter into an ACC agreement to establish what units get subsidized and the amount of HUD subsidies that will be provided. The ACC Unit Indicator in IMS/PIC is used to identify units included in this contract.

All public housing dwelling units are "ACC Yes" units. That means that these units are subject to the ACC agreement between HUD and a PHA and receive subsidy. However, there are four situations where the ACC status of a unit can be brought into question:

- Permanent Conversions to Non Dwelling Units
- Temporary Conversions to Non Dwelling Units
- Merged Units
- Floating Units in Mixed Finance Developments

## 1.1.3.2.4 Editing Unit Details

The information in the following fields can be changed:

- Door Number
- Bedroom Count
- Unit Designation
- Floor Number
- Accessible Designation

The user can easily change/add information by typing data into the boxes and clicking the **Update Unit Details** button. However, upon clicking the "Modify link" for **Unit Tenant Status**, **Unit Designation** and **Accessible Designation** options, the user is taken to a new page, where the PHA can make the necessary



- 1		
C	nan	ges.

Unit Information			
Unit Number:	0084	Building:	15
Entrance Number:	1	Building Entrance Address:	gvvigh sg23 z 0433
Door Number:	1104A	Floor Number:	1 *
Bedroom Count:	2 *	Submission Status Type:	Initial Approval Completed
Unit Designation:	General Occupancy [ Modify ]	Accessible Designation:	Not Applicable [ Modify ]
Unit Tenant Status:	Occupied - Assisted Tenant		
Effective Date:	02/09/2007		
ACC Unit Indicator:	Yes	ACC Indicator Change Date:	04/30/1970
Cap Fund Indicator:	Yes	Op Fund Indicator:	Yes
Head of Family Details			
First Name:	Z		
Last Name:	nzszit		
Occupancy Date:	02/09/2007		
			Update Unit Details

Figure 21: Update Unit Detail

To edit the **Unit Designation** option the user should click the **Modify** link as shown on the screenshot (see Figure 22).

Unit List	Building/Unit Data Transfer Uplo	ad Error Report	
HQ Office:	Public and Indian Housing		
HQ Division:	PO Field Operations		
Hub:	4HBIR Birmingham Hub		
Field Office:	4CPH BIRMINGHAM HUB OFFICE		
Field Office HA:	AL001 BIRMINGHAM		
PhysicalDevelopment:	AL001000001 ELYTON VILLAGE		
Unit Information			
Unit Number:	009	Building:	000002
Entrance Number:	1	Building Entrance Address:	ghvd vfmvez wi1 032
Door Number:		Floor Number:	1 *
Bedroom Count:	2 *	Submission Status Type:	Initial Approval Completed
Unit Designation:	General Occupancy [Modify]	Accessible Designation:	Not Applicable [Modify]
Unit Tenant Status:	Vacant HUD Approved - Undergoing Modernization [Modify]		
Effective Date:	01/24/2006		
ACC Unit Indicator:	📀 Yes NQ	ACC Indicator Change Date:	10/01/1940
Cap Fund Indicator:	⊙ Yes I⊃	Op Fund Indicator:	🕑 Yes 💭
Head of Family Details			
First Name: -			
Last Name: -			
Occupancy Date: -			
		Update Unit I	Details

Figure 22: Modify Unit Designation



The following page will be displayed (see Figure 23), the user will have an option to select appropriate designation, reason for change in unit designation and enter comments.

Unit List	Building/Unit Data Transfer	Upload Error Report	
HQ Division:	Public and Indian Housing		
HQ Office:	PO Field Operations		
Hub:	4HMEM Memphis Hub		
Field Office:	4KPH MEMPHIS HUB OFFICE		
Field Office HA:	TN025 Trenton		
Physical Development:	TN025000001 GREEN ACRES		
Unit Information			
Unit Number: 114	B	Building - Entrance Number: LT5-	3
Current Unit Designation			
Current Unit Designation: Generation	al Occupancy		
New Unit Designation			
New Unit Designation:	General Occupancy	*	
Reason for change in Unit Desig	nation: Change In Use 💌		
Comments:			
The changes will be effective in	the system immediately upon clicki	ing "Save".	
			Save Cancel

Figure 23: Unit Designation

In the **New Unit Designations** list the user can select the designation (see Figure 24)



Figure 24: New Unit Designation

Additionally, the user needs to select the **Reason for change in Unit Designation** from the respective list. There are three available options: **Change In Use, Data Correction, and Other**. Also, if necessary, before proceeding to the final step, the user can enter additional comments.

Click **Save** button in the lower right corner to save the changed, they will become effective in the system immediately.

To edit the **Accessible Designation** option the user should click the **Modify** link as shown on the screenshot (see Figure 22) above. The page that is responsible for editing accessible designations will be displayed (see Figure 25).



Unit List	Building/Unit Data Transfer	Upload Error Report						
HQ Division:	Public and Indian Housing							
HQ Office:	PO Field Operations							
Hub:	4HMEM Memphis Hub							
Field Office:	4KPH MEMPHIS HUB OFFICE							
Field Office HA:	TN025 Trenton							
Physical Development:	TN025000001 GREEN ACRES							
Unit Information								
Unit Number: 113	Br	uilding - Entrance Number:	LT5-2					
Current Accessible Designation								
Current Accessible Designation: Not Applicable								
New Accessible Designation								
New Accessible Designation:	Select New Accessible	Designation 💌						
Reason for change in Accessible Designation: Change In Use								
Comments:		~						
The changes will be effective in the system immediately upon clicking "Save".								
			Save Cancel					

Figure 25: Accessible Designation

The user can assign a new designation to the unit by one of the following from the New Accessible Designation list:

- Hearing/Visual Impairment
- Not Applicable
- Standard
- UFAS barrier free accessible

Additionally, the user needs to select the **Reason for change in Accessible Designation** from the list. There are three available choices: **Change In Use, Data Correction, and Other**. Also, before proceeding to the final step, the user can enter additional comments.

Click the **Save** button to save the changes, they will become effective in the system immediately.

To edit the **Unit Tenant Status** field the user should click on **Modify** link as shown on the screenshot (see Figure 22) above. The page that is responsible for editing Accessible Designations will be displayed (see Figure 26).

Note: users cannot edit the unit tenant status of the units occupied by assisted tenants and merged units.



Unit Li	st Buildin	g/Unit Data Tr	ansfer U	Ipload Error R	eport			
HQ Division:	Public	and Indian Hous	ing					
HQ Office:	PO Fi	Field Operations						
Hub:	2HNY	INYC New York City Hub						
Field Office:	2APH	2APH NEW YORK CITY HUB OFFICE						
Field Office HA	A: NY04:	'042 White Plains HA						
Physical Devel	opment: NY042	042000001 LAKEVIEW						
Unit Information								
Unit Number:	2D Building - Entrance Number: 120-120							
Current Unit Tenant Status								
Current Unit Tenant Status: Vacant								
New Unit Tenant Status								
New Unit Tenant Status: O Occupied - Select Subcategory -								
	○ Vacant HUD Approved - Select Subcategory - 🗸							
	○ Vacant							
	Non-Dwelling - Select Subcategory			ubcategory -	~			
			-					
New Status Effective Date:								
Reason for change in Unit Tenant Status: Change In Use 💌								
Comments:								
				~				
The changes will be effective in the system immediately upon clicking "Save".								
						Save	Cancel	

Figure 26: Unit Tenant Status

As shown on the screenshot (see Figure 26), the user will be presented with an option with select unit tenant status and a subcategory.

This type of user doesn't require submitting information for the HUD approval first as all changes will be effective in the system immediately.

Below are the available subcategories:

- Occupied
  - Employee
  - Non-assisted Tenant Over-Income
  - Police Officer
  - o Unauthorized
- Vacant HUD Approved
  - Casualty Loss
  - Court Litigation
  - Market Conditions
  - Natural Disaster
  - Undergoing Modernization



- Non-Dwelling
  - Administrative uses
  - MTW Neighborhood Services
  - Resident Amenities
  - Special Use: Anti Drug/Crime
  - Special Use: Other Resident Activities
  - Special Use: Self Sufficiency Activities
  - Unauthorized

In both cases before proceeding to the final step, the user needs to:

- 1) Enter the **New Status Effective Date** into the respective box.
- 2) Select the **Reason for change in Accessible Designation** from the respective list. There are two available choices: **Change In Use, Data Correction** and **Other**.
- 3) If necessary, enter comments into the **Comments** box.

The changes will be effective in the system upon clicking the **Save** button.

## 1.1.4 The Building/Unit Data Transfer sub Tab

Click the **Building/Unit Data Transfer** sub tab in the **Unit** tab to access the Building/Unit Data Transfer page.

Situations may arise when you need to submit large amounts of data. Examples include:

- Adding a new 50-unit building.
- Editing 20 units or more.

The **Building/Unit Data Transfer** page (see Figure 27) provides a venue to upload this information into the IMS/PIC database and prepare it for submission to the Field Office in one bulk transaction.



Figure 27: Building/Unit Data Transfers

The upload can be performed using an Excel file or a CSV file. These are the only acceptable formats for the data transfer in IMS/PIC.

This page enables you to:

- Download a preformatted Excel spreadsheet, which you can use to enter the data.
- Download directions for preparing a text file submission.


• Upload the spreadsheet or a text file into IMS/PIC for Field Office approval.

# 1.1.4.1 Uploading Microsoft Excel Spreadsheet

To download a Microsoft Excel template, select Excel from the **Select Template Type** list in the **Template Download** section. Click **Save**, when prompted by the message and save in the desired location on your computer.

Save As						? 🛛
Save in:	🞯 Desktop		~	GØ	• 🖽 🍽	
My Recent Documents Desktop	My Documents My Computer My Network Pi Unused Deskto	aces ip Shortcuts				
My Documents						
	File name:	pic_unit~dddispo.xls			<b>~</b> [	Save
My Network	Save as type:	Microsoft Excel Works	neet		▼	Cancel

Figure 28: The Save As dialog box.

The template contains a macro which needs to be executed upon entering the data. To execute the macro when the spreadsheet is open, click **Tools** and then click the **Format Columns for Upload** menu option. Close the file after the data is entered completely.

To upload a completed spreadsheet into IMS/PIC for Field Office review, select the **Excel** option in the **Select File Type to Upload** list in the **Upload Building and Unit Data** section. Click the **Browse** button and navigate to the file's location. Click the **Upload** button to upload the file in IMS/PIC. The file is saved to the system's server where it undergoes a validation process to ensure the form was properly completed.

## 1.1.4.2 The Text File Method

The user can generate a CSV file using third-party vendor software. However, it is the user's responsibility to make sure this software-generated text file is in the correct format when submitted for Field Office approval.

The **Building/Unit Data Transfer** page enables users to download instructions for verifying the text file format. Select the **Pipe Delimited CSV File** option in the **Select Template Type** list in the **template Download** section. Save file to the local drive when prompted by the message.

To upload the text file into IMS/PIC for Field Office review, select the **Pipe Delimited CSV File** option in the **Select File Type to Upload** list in the **Upload Building and Unit Data** section. Click the **Browse** button and navigate to the file's location. Click the **Upload** button to upload the file in IMS/PIC. The file



is saved to the system's server where it undergoes a validation process to ensure the form was properly completed.



# 1.1.5 The Upload Error Report sub Tab

Click the Upload Error Report sub tab on the Unit tab to access the Upload Error Report page.

Many errors can occur during the submission process because it relies heavily on data entry. An Upload Error Report records the results of a submission and displays any errors found during the upload verification.

This information allows users to go back and fix the errors so the next submission can be processed without errors. It also enables users to view the error records by error type, submitter, or historical file.

## 1.1.5.1 Information Presented on the Upload Error Report Page

This page contains first tier section, a Search section, and an Upload Errors table.

Ur	nit List	Building/Unit Data T	Building/Unit Data Transfer Upload Error Report									
HQ Division	ı:	Public and Indian Hous	ing									
HQ Office:		PO Field Operations										
Hub:												
Field Office: 3APH PHILADELPHIA HUB OFFICE												
Field Office HA: PA002 Philadelphia HA												
Search												
Error Type:		Invalid Tier 1: Accesible U	nit Designation (	code 🗸 🗸								
User ID:												
Sheet Type:		All Sheet Type										
File Name :		budfinal1219-12/20/2001	4-02-21 PM	~								
r ne rvanie .		11001101213 12/20/2001	4.02.211.01			Detrieve						
						Retneve						
Upload Error	S											
Records 1	to 7 of 7											
Date	Submitted By	Status	Worksheet	Exception	Row	Field						
12/20/2001	rtwillia	Completed - File successfully processed.	bldg	The Development Number is invalid or it does not belong to this HA.	9629	1						
12/20/2001	rtwillia	Completed - File successfully processed.	unit	The Development Number is invalid or it does not belong to this HA.	16377	2						
12/20/2001	rtwillia	Completed - File successfully processed.	unit	The Development Number is invalid or it does not belong to this HA.	16378	2						
12/20/2001	rtwillia	Completed - File successfully processed.	unit	The Development Number is invalid or it does not belong to this HA	16379	2						

Figure 29: Upload Error Report page

The first-tier section contains all identifier information for the HA that has received the submissions:

- HQ Division
- HQ Office
- Hub
- Field Office
- Field Office HA

The Search section contains tools to filter the results included in the Upload Errors table.



By Default the table displays all error messages that occurred in the submission in question. To search for a particular error, select the desired option from the **Error Type** list and click the **Retrieve** button to display the records containing only the error specified.

The user can also narrow the search result by specifying the ID of the user that reported the error in the **User ID** box. This option allows searching for the error reported by a particular user.

The table includes errors for both buildings and units by default. However, the user can select to search for building or unit errors only by selecting the appropriate option in the **Sheet Type** list.

The table also displays results from the most recent submission by default. To search for a specific report submission, use the **File Name** list to select the desired file name from the list of building/unit data files submitted by the selected HA.

The user can use any combination of these tools for one search. Simply enter the data into the appropriate controls before clicking the **Retrieve** button.

If the search returns no matches, IMS/PIC displays the following message: No upload errors were found.

The **Upload Error** section (see Figure 30) contains a table displaying details about the errors found in the specified file upload. The default display for the table is the most recent submission.

Upload Errors Records 1 to 25 of 734											
Date	Submitted By	Status	Worksheet	Exception	Row	Field					
03/19/2003	axclark	Completed - File successfully processed.	bldg	Updates to approved building information cannot be uploaded. They must be entered manually.	1	0					
03/19/2003	axclark	Completed - File successfully processed.	bldg	Updates to approved building information cannot be uploaded. They must be entered manually.	2	0					

Figure 30: An Upload Errors table on the Upload Error Report page.

The table presents the following data categories for each report selected:

Data Category	Description
Date	The date the HA submitted the file.
Submitted By	Name of person who submitted the file.
Status	The status of the file submission.
Worksheet	The worksheet where the error occurred:
	Building
	Unit
Exception	The actual error that occurred (if available).
Row	The row on the spreadsheet where the error occurred.
Field	The field on the Job Aid explaining how to enter the errant data correctly.



If no errors occurred, IMS/PIC displays the following message in the **Upload Errors** section: *No upload errors were found*. This means that the building and unit data is ready for submission.

# 1.1.6 Submission Tab

The **Submission** tab of the **Development** sub module enables users with proper security access role to submit unit information relevant to a development for the Field Office review.

Additional information on how to perform certain actions in this tab can be found in job aids on HUD website. IMS/PIC job aids provide users with additional support to help navigate through the IMS/PIC sub modules. They are intended as informal, technical guidance to help users successfully complete the activities specified in the job aid. The job aids can be found following the link: <a href="http://www.hud.gov/offices/pih/systems/pic/ts/">http://www.hud.gov/offices/pih/systems/pic/ts/</a>

# 1.1.6.1 Submit Unit Information sub Tab

To submit the unit information for a desired development, user must navigate to the **Profile** page of the **Development** tab to select the development. The user can use the following first tier options to enter appropriate data: **Hub**, **Field Office**, **Field Office HA**, and the **Physical Development** lists (see Figure 31).

Reports Maintain Inventory	CAPFUND B&U Certification		
Development Building Ur	it Submission Approval		
Profile	List	Address	Contact
Select View:	Development V Select		
HQ Division:	Public and Indian Housing		
HQ Office:	PO Field Operations	Select	
Hub:	5HCLV Cleveland Hub 🛛 🖌 Sele	ect	
Field Office:	5HPH INDIANAPOLIS PROGRAM CE	NTER V Select	
Field Office HA:	IN020 Mishawaka Housing Authority	✓ Select	
Physical Development:	IN020000001 BARBEE CREEK VILLA	GE 🖌 Select	
Development Profile Information			
			Add Development Edit Development
Development Name:	BARBEE CREEK VILLAGE		
Program Type:	Low Income Rental		
Development Method:	New Construction - Conventional		
Structure Type:	Row or Townhouse Style (Sep. E	ntrances)	
Acquisition Construction Date:			
DOFA Date Actual:	01/01/1963		
EIOP Date Actual:	09/30/1963		
DOFA Target Date:			
EIOP Target Date:			

Figure 31: The Profile Page of the Development Sub module

Once the development is selected, the user can navigate to the **Submission** tab to submit unit and other information relevant to a development.

When the user selects the **Submission** tab of the **Development** sub module, the **Submit Unit Information** sub tab is displayed (see Figure 31). In this page, user can submit unit information to be approved by a member of the Field Office.



Reports Maintain CAI Inventory Ce	PFUND B&U rtification										
Development Building Unit	Submission Approval										
Submit Unit Information Submit Unit Status Changes											
IN020 Mishawaka Housing Authority											
Enter Comments and Submit Unit Information											
Submission Comments		*									
All changes are subject to approval t	by Field Office personnel.	Submit Data For Approval Save									
MTCS Data Transfer											
All applicable tenant certification records	have been extracted from the old MTCS	S system and transferred to the new Form 50058 Module in PIC.									
Status History											
Date	Status	Author									
03/27/2008	Approved	vmrivsgzp mlhivsxgfs									
03/27/2008	Submitted	vmrivsgzp mlhivsxgfs									

Figure 32: The Submit Unit Information page of the Development sub module.

In the **Submit Unit Information** sub tab, any comments relevant to the submission of the unit information must be entered in the **Submission Comments** section of the **Submit Unit Information** sub tab. A default text **SBMT** is displayed in this box. When user clicks the **Submit Data For Approval** button, a message is displayed to the user saying **Unit data for this HA has been submitted for Approval** (See Figure 32). The following details are displayed in form of a table in the **Status History** section of the page:

- Date: The date unit information was submitted to the Field Office
- **Status**: The status of the submitted unit information. A list of all the possible statuses are displayed below:
  - **Submitted**: The unit information is submitted and is pending for approval/rejection by the Field Office personnel.
  - Approved: The unit information is approved by the Field Office personnel.
  - **Rejected**: The unit information is rejected by the Field Office personnel.
  - **RMI Approved**: The units which are RMI approved as part of Demo-Dispo application.
- Author: The name of the user who submitted the unit information.



Reports         Maintain Inventory         CAPFUND B&U Certification           Development         Building         Unit         Submission         Approval           Submit Unit Information         Submit Unit Status Changes         N020 Misbawaka Housing Authority         Notes										
IN020 Mishawaka Housing Authority Unit data for this HA has been submitted for approval.										
Unit data for this HA has been submitted for approval. MTCS Data Transfer All applicable tenant certification records have been extracted from the old MTCS system and transferred to the new Form 50058 Module in PIC. Status History										
Date	Status	Author								
07/21/2010	Submitted	HPIC20 X HPIC20								
03/27/2008	Approved	vmrivsgzp mlhivsxgfs								
03/27/2008	Submitted	vmrivsgzp mlhivsxgfs								
08/27/2001	Approved	givyfs g hmroolx								
08/14/2001	Approved	givyfs g hmroolx								
08/03/2001	Submitted	mbisgzp ivmgiztnfzy								
05/31/2001	Rejected	ovzsxrn q mzomzxh								
02/27/2001	Submitted	mvvoolx wmfol								

Figure 33: The Submit Unit Information page after unit data has been submitted

The **Status History** table displays the list of users who have submitted the unit information changes. The Super User can select any of these records and generate the Development Approval Status Report (see Figure 35) by clicking the **Generate Report** button at the bottom of the page.



	Deve	lopment	Approval Sta	atus Report	alosd in Excel Print					
HQ Division: Public and Indian Housing										
HQ O	Office: POF	ield Operations								
Hub:	3HPI	T Pittsburgh Hu	ıb							
Field	Office: 3EPF	I PITTSBURGH	HUB OFFICE							
Field	Office HA: PA0	01 Pittsburgh H	A							
rieid		-								
Field		_								
Reco	rds 1 - 25 of 44 <u>(View All)</u> Development Number	Status	Approver Name	<< Prev page 1 Approver Action Date	2 <u>Next Page &gt;&gt;</u> Comments					
Record #	rds 1 - 25 of 44 <u>(View All)</u> Development Number ▼▲ PA001000001	Status Approved	Approver Name	<< Prev page 1 Approver Action Date 08-14-2009	2 <u>Next Page &gt;&gt;</u> Comments					
Recol # 1 2	rds 1 - 25 of 44 <u>(View All)</u> Development Number ▼▲ PA001000001 PA001000002	Status Approved Approved	Approver Name value roz wzhz roz wzhz	<< Prev page 1 Approver Action Date VA 08-14-2009 08-14-2009	2 <u>Next Page &gt;&gt;</u> Comments					
<b>Record</b> # 1 2 3	PA001000004	Status Approved Approved Approved	Approver Name roz wzhz roz wzhz roz wzhz	<< Prev page 1 Approver Action Date 08-14-2009 08-14-2009 08-14-2009	2 Next Page >> Comments					
Recol # 1 2 3 4	rds 1 - 25 of 44 (View All) Development Number PA001000001 PA001000002 PA001000004 PA001000005	Status Approved Approved Approved Approved	Approver Name value roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz	<< Prev page 1 Approver Action Date 08-14-2009 08-14-2009 08-14-2009 08-14-2009 08-14-2009	2 Next Page >> Comments					
Record # 1 2 3 4 5	rds 1 - 25 of 44 <u>(View All)</u> Development Number ▼▲ PA001000001 PA001000002 PA001000004 PA001000005 PA001000007	Status         Approved         Approved         Approved         Approved         Approved         Approved	Approver Name roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz	<< Prev page 1 Approver Action Date () 08-14-2009 08-14-2009 08-14-2009 08-14-2009 08-14-2009 08-14-2009	2 Next Page >> Comments					
Recol # 1 2 3 4 5 6	rds 1 - 25 of 44 (View All) Development Number PA001000001 PA001000002 PA001000004 PA001000005 PA001000007 PA001000008	Status         Approved         Approved         Approved         Approved         Approved         Approved         Approved         Approved	Approver Name roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz	<< Prev page 1	2 Next Page >> Comments					
<b>Record</b> # 1 2 3 4 5 6 7	rds 1 - 25 of 44 (View All) Development Number ▼▲ PA001000001 PA001000002 PA001000004 PA001000005 PA001000007 PA001000008 PA001000009	Status         Approved	Approver Name roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz	<< Prev page 1 Approver Action Date	2 Next Page >> Comments					
<b>Reco</b> <i>#</i> 1 2 3 4 5 6 7 8	rds 1 - 25 of 44 (View All)	Status         Approved         Approved	Approver Name roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz roz wzhz	<< Prev page 1 Approver Action Date () 08-14-2009 08-14-2009 08-14-2009 08-14-2009 08-14-2009 08-14-2009 08-14-2009 08-14-2009 08-14-2009 08-14-2009	2 Next Page >> Comments					

Figure 34: The Development Approval Status report

This report displays the approval details for a development. The approver name and the date this development was approved are displayed as columns in the report. Any comments entered by the personnel are displayed in the **Comments** column of the report.



# 1.1.6.2 Submit Unit Status Changes sub Tab

The status of a unit in a development can be modified in the **Unit List** sub tab of the **Unit** tab in the **Development** sub module (see Figure 35).

Unit Number:		136					Building:		B_0083			
Entrance Numb	er:	2					Building E Address:	ntrance	vizfjh ivhrviw 0113			
Door Number:		1334					Floor Num	ber:	1	*		
Bedroom Coun	t:	0 *					Submissio	n Status Type	Initial A Comple	Approval eted		
Unit Designatio	in:	General O	ccupancy	[ Modif	<u>v 1</u>		Accessible	Designation:	Not Applica	ible <u>[ Mod</u>	lify ]	
Unit Tenant Sta	atus:	Occupied	- Police O	fficer	[ Modify ]							
Effective Date:		07/26/2010										
ACC Unit Indica	ator:	⊙Yes ○	No				ACC Indica Date:	ator Change	10/01/1970			
Cap Fund Indic	ator:	💿 Yes 🔘	No				Op Fund Ir	ndicator:	icator: 💿 Yes 🔘 No			
Head of Family	Details											
First Name:	-											
Last Name:	-											
Occupancy Dat	e: -											
								Ipdate Unit De	tails	)		
Unit Status/Des	ignations Chan	ige History										
Change Type	Old Unit Characteristics	New Unit Characteristics	Effective Date	Request Status	Request Date	Requesting User	Requester Comments	Review Date	Review User	Reviewer Comments	Edit	
Unit Status/Reason Change	Vacant	Occupied - Police Officer	07/26/2010	Modified by HUD user	07/26/2010	HPIC20	Comment1	2010-07-26 11:17:34.557	HPIC20			

Figure 35: The Unit tab of the Development sub module

Once the user modifies the status, changes can be submitted in the Submission tab and Submit Unit Tenant Status Changes sub-tab by clicking the **Submit Data For Approval** button (see Figure 32).

Upon clicking the Submit Data for Approval button, a message is displayed informing the user that inventory data for the PHA has been submitted for HUD Approval (see Figure 36).



Reports Maintain Inventory CAPFUND B&U Certification									
Development Building Unit Submission Approval									
Submit Unit Information Submit Unit Status Changes									
HQ Division: Public and Indian Housing									
HQ Office: PO Field Operations									
Hub: 5HCLV Cleveland Hub									
Field Office: 5HPH INDIANAPOLIS PROGRAM CENTER									
Field Office HA: IN021 Terre Haute Housing Authority									
Unit Information Changes Ready for Submission:									
Read Only. The inventory data for this PHA has been submitted for HUD approval.									
No records available for submission.									

Figure 36: The Submit Unit Status Changes page of Development sub module

# 1.1.7 Approval Tab

Once the unit data has been submitted by the PHA users, the Field Office personnel can review and approve or reject the unit data using the **Approval** tab of the **Development** sub module.

Additional information on how to perform certain actions in this tab can be found in job aids on HUD website. IMS/PIC job aids provide users with additional support to help navigate through the IMS/PIC sub modules. They are intended as informal, technical guidance to help users successfully complete the activities specified in the job aid. The job aids can be found following the link: http://www.hud.gov/offices/pih/systems/pic/ts/

# 1.1.7.1 HA Approval sub Tab

Repo	Reports Maintain CAPFUND B&U Inventory Certification														
Development	Building	Un	it Si	Ibmission	Approv	al									
H	A Approval				Reports		1	Approve Un	it Status (	Chang	es				
N021 Terre Haute Housing Authority															
Review Comments and Approve Unit Information															
Unit data for th	is HA has be	en sub	mitted for	approval											
Page No: 1 of 1															Page: 1
					Buildi	ng Structu	re Count				Unit	Count			
Development Number	Developn Name	nent	Total Building Structure Count	Elevator Structure Count	Row Town House Structure Count	Semi Detached Structure Count	Single Family Detached Structure Count	Walkup Multifamily Structure Count	Non Dwelling Structure Count	Total Units	Vacant Units	Employee Units	ACC Units	Reviewed	Approved / Rejected
IN021000001	DREISE SQUARE	ER 1 - 2	52	0	50	0	0	0	2	256	2	0	256		
IN021000002	MARGA AVE -	RET 1	43	0	42	0	0	0	1	144	22	0	144		
IN021000003	LOCKPO	ORT	26	0	25	0	0	0	1	100	30	0	100		
IN021000004	MCMILI SQUAF	.AN E	16	0	14	0	0	0	2	50	6	0	50		
IN021000005	GARFIE TOWER	LD RS	1	1	0	0	0	0	0	152	1	0	152		

Figure 37: The HA Approval page of the Development sub module



The details of a development are displayed in the **HA Approval** sub tab of the **Approval** tab (see Figure 37). The name of the housing authority is displayed at the top of the **HA Approval** sub tab. Any comments made by the Field Office personnel are displayed in the **Review Comments and Approve Unit Information** section. The **HA Approval** sub tab also displays the development details and facilitates approval and rejection of the development units.

## 1.1.7.1.1 Reviewing a Development Number

In the **Development Number** column, certain developments may have a **#** sign beside them indicating these developments are recently modified. The program will not allow approval of the changes affecting the developments that are in the **'Development'** status. To be able to modify the developments and approve these modifications, the development status must be **'Management'**. To move the development from the **'Development'** status, the user must enter the actual DOFA date.

The **Development Name** column with the name of the development, as well as other development information is also displayed in this page. The **Reviewed** column of the page consists of check boxes, where a user can select the development to perform a **Review** action. The user can select one development number or all development numbers by selecting the check box in the **Reviewed** column, or by clicking the **Select All** link and clicking the **Review** button at the bottom of the **HA Approval** sub tab (see Figure 38).



НА	Approval			Reports		I	Approve Uni	it Status (	Chang	es				
N021 Terre Hau Review Commo	te Housing Author	rity Unit Inform	ation											
Unit data for this HA has been submitted for approval.														
Page No: 1 of 1 Page: 1														
				Build	ng Structu	re Count Single				Uni	t Count	<u> </u>		
Development Number	Development Name	Total Building Structure Count	Elevator Structure Count	Town House Structure Count	Semi Detached Structure Count	Family Detached Structure Count	Walkup Multifamily Structure Count	Non Dwelling Structure Count	Total Units	Vacant Units	Employee Units	ACC Units	Reviewed	Approved / Rejected
IN021000001	DREISER SQUARE - 2	52	0	50	0	0	0	2	256	2	0	256		
IN021000002	MARGARET AVE - 1	43	0	42	0	0	0	1	144	22	0	144		
IN021000003	LOCKPORT	26	0	25	0	0	0	1	100	30	0	100		
IN021000004	MCMILLAN SQUARE	16	0	14	0	0	0	2	50	6	0	50		
IN021000005	GARFIELD TOWERS	1	1	0	0	0	0	0	152	1	0	152		
Page No: 1 of 1 Submission Com SBMT	iments												<u>Select A</u> Deselect A	Page: 1
By clicking Appr not inconsistent	ove, you are cert with field office k	ifying that nowledge	the numb of the Ho	er of unit using Aut	s by projec hority's pu	t, bedroor blic housi	m distributio ng inventory	on by proje y.	ect, ai	nd num	ber of non	dwell	ing units b	y project, i
Enter Rejection	Comments*							100						
								M		Re	view	Appr	ove	Reject
												Su	bmit Final A	pproval

Figure 38: Reviewing a Development in HA Approval page

The status of the selected developments is now changed to **Reviewed** (see Figure 39).



Report	s Maintain Inventory	CAPFUND I Certificati	8&U ion											
Development	Building U	nit ∫S	ubmission	Approv	al									
HA	Approval			Reports		1	Approve Uni	it Status (	Chang	es				
IN021 Terre Hau	te Housing Autho	rity												
Review Comme	nts and Approve	Unit Inforn	nation											
Unit data for thi	s HA has been sul	bmitted for	r approval.											
Page No: 1 of 1														Page: 1
				Buildi	ng Structu	re Count				Uni	t Count			
Development Number	Development Name	Total Building Structure Count	Elevator Structure Count	Row Town House Structure Count	Semi Detached Structure Count	Single Family Detached Structure Count	Walkup Multifamily Structure Count	Non Dwelling Structure Count	Total Units	Vacant Units	Employee Units	ACC Units	Reviewed	Approved / Rejected
IN021000001	DREISER SQUARE - 2	52	0	50	0	0	0	2	256	2	0	256	Reviewed	
IN021000002	MARGARET AVE - 1	43	0	42	0	0	0	1	144	22	0	144	Reviewed	
IN021000003	LOCKPORT	26	0	25	0	0	0	1	100	30	0	100	Reviewed	
IN021000004	MCMILLAN SOUARE	16	0	14	0	0	0	2	50	6	0	50	Reviewed	
IN021000005	GARFIELD TOWERS	1	1	0	0	0	0	0	152	1	0	152	Reviewed	
IN021000006	TURNKEY- 1982	165	0	0	0	165	0	0	166	5	0	166	Reviewed	

Figure 39: HA Approval page displaying the reviewed developments

The user will now be able to approve or reject the reviewed development.

# 1.1.7.1.2 Approving a Development

To approve a development, user must check mark the desired development and click the **Approve** button of the **HA Approval** sub tab (see Figure 40).



					1									
IN021000005	GARFIELD TOWERS	1	1	0	0	0	0	0	152	1	0	152	Reviewed	
IN021000006	TURNKEY- 1982	165	0	0	0	165	0	0	166	5	0	166	Reviewed	
IN021000099	ACQUISITION-	1	0	0	0	0	0	1	0	0	0	0	Reviewed	
IN021006	HOPLIF	0	0	0	0	0	0	0	0	0	0	0	Reviewed	<b>V</b>
Page No: 1 of 1 Submission Cor SBMT By clicking App not inconsistent Enter Rejection	nments rove, you are certi with field office k Comments*	fying that nowledge	the numb of the Ho	er of units using Autl	s by projec hority's pul	t, bedroon blic housir	distribution g inventory	n by proje	ect, and	I numb	er of non-c	lwellin	ng units by	Deselect All Page: 1
										Revi	ew	Appro Sub	we mit Final App	Reject proval

Figure 40: The HA Approval page displaying the options to Approve the development

Once the **Approve** button is clicked, the selected and reviewed developments have a status of **Approved** in the **Approved** / **Rejected** column (see Figure 41).

Number	Name	Structure Count	Structure Count	House Structure Count	Structure Count	Detached Structure Count	Structure Count	Structure Count	Units	Units	Units	Units	Reviewed	Rejected
IN021000001	DREISER SQUARE - 2	52	0	50	0	0	0	2	256	2	0	256	Reviewed	
IN021000002	MARGARET AVE - 1	43	0	42	0	0	0	1	144	22	0	144	Reviewed	
IN021000003	LOCKPORT	26	0	25	0	0	0	1	100	30	0	100	Reviewed	
IN021000004	MCMILLAN SQUARE	16	0	14	0	0	0	2	50	6	0	50	Reviewed	
IN021000005	GARFIELD TOWERS	1	1	0	0	0	0	0	152	1	0	152	Reviewed	
IN021000006	TURNKEY- 1982	165	0	0	0	165	0	0	166	5	0	166	Reviewed	
IN021000099	ACQUISITION- 1993	1	0	0	0	0	0	1	0	0	0	0	Reviewed	Approved
IN021006	HOPLIF	0	0	0	0	0	0	0	0	0	0	0	Reviewed	Approved

Figure 41: HA Approval page displaying the Approved/Rejected status

## 1.1.7.1.3 Rejecting a Development

To reject a development, a user must select the reviewed development (see Figure 42), and click the **Reject** button. The user must provide comments for rejecting the selected development in the **Enter Rejection Comments** box. If the user failed to provide any comment, the program displays a warning message. (see Figure 43).



IN021000005	GARFIELD TOWERS	1	1	0	0	0	0	0	152	1	0	152	Reviewed	
IN021000006	TURNKEY- 1982	165	0	0	0	165	0	0	166	5	0	166	Reviewed	
IN021000099	ACQUISITION- 1993	1	0	0	0	0	0	1	0	0	0	0	Reviewed	Approved
IN021006	HOPLIF	0	0	0	0	0	0	0	0	0	0	0	Reviewed	Approved
														Select All
														Deselect All
Page No: 1 of 1														Page: 1
Submission Cor	nments													
SBMT														
By clicking App not inconsistent	rove, you are certi with field office kr	fying that nowledge	the numb of the Ho	er of units using Auth	by projec ority's pul	t, bedroon olic housin	n distributio ng inventory	n by proje	ect, and	d numb	er of non-	dwelli	ng units by	project, is
Enter Rejection	Comments*													
								~						
								~						
										Revi	ew	Appro	ve	Reject
												Sub	mit Final Ap	proval

Figure 42: The HA Approval page displaying reviewed developments for rejection.

IN021006	HOPLIF	0	0	0	0	0	0	0	0	0	0	0	Reviewed	Approved
														Select All
				w	indows Int	ernet Explo	orer 🜓	<u> </u>						Deselect All
Page No: 1 of 1					<u> </u>									Page: 1
Submission Cor	nments				Plea	se Enter Reje	ction Comments	s!						
SBMT					_									
						OK	1							
By clicking App	rove, you are cert	ifying that	the numb	er of u				y proje	ct, and	l numb	er of non-	dwelli	ng units by	project, is
not inconsistent	with field office k	nowledge	of the Ho	using Aut	hority's pu	olic housir	ng inventory							
Enter Rejection	Comments*													
								~						
								~						
										Revi	iew	Appro	ve	Reject

Figure 43: HA Approval page displaying warning message

Once the rejection comments are entered in the **Enter Rejection Comments** box, the user can click the **Reject** button (see Figure 44). If the user rejects the submitted development data, all changes are removed for the system and the development data returns to the initial state.



IN021000099	ACQUISITION- 1993	1	0	0	0	0	0	1	0	0	0	0	Reviewed	Approved
IN021006	HOPLIF	0	0	0	0	0	0	0	0	0	0	0	Reviewed	Approved
														Select All
														Deselect All
Page No: 1 of 1														Page: 1
Submission Cor	nments													
SBMT														
By clicking App not inconsistent	rove, you are certi with field office k	fying that nowledge	the numb of the Ho	er of units using Auth	by projec hority's pul	t, bedroon blic housir	n distribution Ig inventory	n by proje	ct, an	d numb	er of non-d	welli	ng units by	project, is
Enter Rejection	Comments*													
Rejecting								~						
								$\sim$						
										Rev	iew 🛛	Appro	ve	Reject

Figure 44: HA Approval page displaying the Enter Rejection Comments box

A **Rejected** link is displayed for the development that was rejected (see Figure 45). When user clicks on this link, the rejected comments can be viewed.

Jnit data for thi	is HA has been sub	omitted for	approval											
age No: 1 of 1														Page: 1
				Buildi	ng Structu	re Count				Unit	Count			
Development Number	Development Name	Total Building Structure Count	Elevator Structure Count	Row Town House Structure Count	Semi Detached Structure Count	Single Family Detached Structure Count	Walkup Multifamily Structure Count	Non Dwelling Structure Count	Total Units	Vacant Units	Employee Units	ACC Units	Reviewed	Approved / Rejected
IN021000001	DREISER SQUARE - 2	52	0	50	0	0	0	2	256	2	0	256	Reviewed	
IN021000002	MARGARET AVE - 1	43	0	42	0	0	0	1	144	22	0	144	Reviewed	
IN021000003	LOCKPORT	26	0	25	0	0	0	1	100	30	0	100	Reviewed	
IN021000004	MCMILLAN SQUARE	16	0	14	0	0	0	2	50	6	0	50	Reviewed	
IN021000005	GARFIELD TOWERS	1	1	0	0	0	0	0	152	1	0	152	Reviewed	
IN021000006	TURNKEY- 1982	165	0	0	0	165	0	0	166	5	0	166	Reviewed	<u>Rejected</u>
IN021000099	ACQUISITION- 1993	1	0	0	0	0	0	1	0	0	0	0	Reviewed	Approved
IN021006	HOPLIF	0	0	0	0	0	0	0	0	0	0	0	Reviewed	Approved

Figure 45: The HA Approval page displaying the Rejected developments

## 1.1.7.1.4 Submitting Development Details for Final Approval

When user tries to click the **Submit Final Approval** button in the HA Approval page without approving or rejecting all the developments, a message is displayed to the user **Not all developments have been approved/rejected for final approval**.

When the user submits the final approval after approving or rejecting all developments, the **HA Approval** sub tab refreshes and is displayed as below (see Figure 46).



Reports	6 Maintain Inventory	CAPFUND B	&U in									
Development	Building Un	it Su	bmission	Approva								
HA A	pproval		Repor	ts	App	orove Unit	Status Chan	iges				
IN021 Terre Hau	te Housing Author	ity										
Review Comme	nts and Approve l	Init Inform	ation									
Approval has be has been approv Page No: 1 of 1	een completed. Bu ved.	ilding and	unit recor	ds for this	PHA have	been queu	ed and will	be archive	d shoi	rtly. Unit	data for th	is HA age: 1
				Buildi	ing Structu	re Count				Unit	Count	
Development Number	Development Name	Total Building Structure Count	Elevator Structure Count	Row Town House Structure Count	Semi Detached Structure Count	Single Family Detached Structure Count	Walkup Multifamily Structure Count	Non Dwelling Structure Count	Total Units	Vacant Units	Employee Units	ACC Units
IN021000001	DREISER SQUARE - 2	52	0	50	0	0	0	2	256	2	0	256
IN021000002	MARGARET AVE - 1	43	0	42	0	0	0	1	144	22	0	144
IN021000003	LOCKPORT	26	0	25	0	0	0	1	100	30	0	100

Figure 46: The HA Approval page displaying a message that approval has been completed

When user selects the **Approve Unit Status Changes** tab, the following message is displayed (see Figure 47).

Repo	rts Main Inver	tain tory CAPFUI Certifi	ND B&U cation		
Development	Building	Unit	Submission	Approval	
HA	Approval		Repo	rts	Approve Unit Status Changes
HQ Division:		Publ	ic and Indian	Housing	
HQ Office:		PO F	ield Operatio	ns	
Hub:		5HCL	V Cleveland	Hub	
Field Office:		5HPF	I INDIANAPOL	IS PROGRAM	I CENTER
Field Office HA	A:	IN021	I Terre Haute	Housing Aut	nority
Unit Tenant S	tatus Chang	es Submitted	for Review:		
Review Optio	ns: Unit Leve	el Review	<b>v</b>	Select	
🤍 Read On	ly. The inve	ntory data for	r this PHA ha	is been subn	nitted for HUD approval.
				No records	available for review.

Figure 47: The Approve Unit Status Changes page of the Approval tab

## 1.1.7.2 Reports sub Tab

The **Reports** page of the **Approval** tab allows user to display the following details for the selected development:

- Building Data Change
- Unit Data Change

### 1.1.7.2.1 Displaying the Building and Unit Data Change Details

A user can view if any building or unit data changes have been made since last approval using the **Reports** sub tab of the **Approval** tab. To display the **Building Data Change** report, the user must first



select the development associated with a PHA. The user must first select the Hub and then select the Field Office and the Field Office HA to select the desired PHA. A list of developments belonging to the PHA is displayed after the selection is made (see Figure 48).

Development B	Building Unit	t Submission Approval
НА Арр	proval	Reports Approve Unit Status Changes
Select View:		Development V Select
HO Division:		Public and Indian Housing
HQ DIVISION.		
HQ Office:		PO Field Operations
Hub:		5HCLV Cleveland Hub Select
Field Office:		5HPH INDIANAPOLIS PROGRAM CENTER Select
Field Office HA:		IN021 Terre Haute Housing Authority Select
Dev	elopment Code	e Development Name
IN02	1000001	DREISER SQUARE - 2
IN02	1000002	MARGARET AVE - 1
IN02	1000003	LOCKPORT
IN02	1000004	MCMILLAN SQUARE
IN02	1000005	GARFIELD TOWERS
IN02	1000006	TURNKEY-1982
IN02	1000099	ACQUISITION-1993
IN02	1006	HOPLIF
Selection	ct/Deselect All	
Select Report Type	e 💿 Building Data	a Change Report 🔘 Unit Data Change Report
Display Filters for [	Data Change Rep	ort
No of rows to disp	lav:	50 Rows per page
in or ions to disp		Constate Depart
		Generate Report

Figure 48: The Reports tab of the Development sub module

User has the option to either select all the developments or any particular development to generate the report. To select one or more developments, the user must select the check boxes next to the appropriate development numbers in the **Development Code** column. Then, the user must select the report to run in the **Select Report Type** area. By default, the **Report Type** selected is the **Building Data Change Report**. To change the number of rows to display per page, a user must select the appropriate option in the **No of rows to display** list. The user can then click the **Generate Report** button and the Building Data Change report is displayed (see Figure 49).



X	pic				Buil	ding	Data C	hang	e Re	eport		Dow	nload in Er	<u>tcel</u>
но	Division:		1	Public and I	ndian Ho	ousing								
HQ	Office:		1	PO Field Op	erations	5								
Hu	b:		:	5HCLV Cle	veland H	ub								
Fie	ld Office:		:	5HPH INDL	ANAPO	LIS PROC	GRAM CENT	TER						
Fie	ld Office HA:		I	N021 Terr	e Haute I	Housing A	Authority							
Re	cords 1 - 50 of	165 <u>(View</u>	<u>All)</u>								<<	Prev page 1 2	34	<u>Next</u>
#	Development Number	Building No. ▼▲	Entrance No.	Building Status Type		Bldg. Name	Address Line 1	Address Line 2	City	County	Zip Code	Bldg. Type	Floor Count	Con I
1	IN021000006	1	1	Initial Approval	Prev	2653- bvpmifg	sg93 lm 5352		Terre Haute	Vigo	478041413	Single Family/Detached	1	12-
Completed Current 2653- sg93 lm vgfzs viivg Vig											478041413	Single Family/Detached	1	12-
2	TN021000006	10	1	Initial	Prev	2653- bvpmifg	sg02 .lm 4393		Terre Haute	Vigo	478039143	Single Family/Detached	1	12-
2	11102100000	10	1	Completed	Current	2653- bypmifg	sg02.lm 4393		vgfzs viivg	Vigo	478039143	Single Family/Detached	1	12-

Figure 49: The Building Data Change Report

The report displays all the change details for a development since last approval of the development. **Prev** and **Current** are the indicators to display the latest changes.

To display the report consisting of any unit data changes, a user must select the **Unit Data Changes Report** option in the **Reports** sub tab and click the **Generate Report** button. The report displays the name of the current and previous approver and also the dates they were approved (see Figure 50).



X	pic			U	nit Dat	a Ch	ang	e Re	eport		Dow	vnload in Exc	el <u>Print</u>
HQ	Division:		Publi	c and In	dian Housing								
HQ	Office:		PO Fi	ield Ope	rations								
Hul	b:		5HCL	N Cleve	eland Hub								
Fiel	ld Office:		5HPH	INDIA	NAPOLIS PR	OGRAM	I CENT	ER					
Fiel	ld Office HA:		IN020	) Misha	waka Housing	Author	ity						
Red	cords 1 - 50 of	295 <u>(View</u> /	AII)	8					<< Pr	ev page 1	234	<u>5 6 Ne</u> z	t Page >>
#	Development Number	Building No. ▼▲	Entrance No.	Unit No.	Submission Status Type		Door No.	Floor No.	Bedroom Count	Unit Type	Unit Tenant Status	Unit Tenant Status Effective Date	Exception Reason
1	TNI020000001	02001	1	0444T	Initial Approval	Prev		1	3	General Occupancy		08-01- 2009	
1	11102000001	02001	1	V+++1	Completed	Current		1	3	General Occupancy	Occupied	08-01- 2007	Assisted Tenant
2	IN02000001	02001	2	0446T	Initial Approval	Prev		1	3	General Occupancy		06-01- 2009	
1	11402000001	02001	2	04401	Completed	Current		1	3	General	Occupied	07-01-	Assisted

Figure 50: The Unit Data Change Report

## 1.1.7.3 Approve Unit Status Changes sub Tab

The **Approve Unit Status Changes** sub tab of the **Approval** tab allows users with sufficient access privileges to approve unit status changes for a HA. The **Approve Unit Status Changes** page displays a message that the inventory data has been submitted for HUD Approval (see Figure 51).

Repor	Reports Maintain CAPFUND B&U Inventory Certification											
Development	Building	Unit	Submission	Approval								
HA	Approval		Repo	rts	Approve Unit Status Changes							
HQ Division:		Pub	lic and Indian	Housing								
HQ Office:		PO	Field Operatio	ns								
Hub:		2HN	YC New York (	City Hub								
Field Office:		2AP	H NEW YORK	CITY HUB OFF	FICE							
Field Office HA	Ľ	NY0	03 Yonkers HA	, City of								
Unit Tenant St	atus Change	s Submitte	d for Review:									
Review Option	ns: Unit Leve	Review	<b>~</b>	Select								
🔗 Read Only. The inventory data for this PHA has been submitted for HUD approval.												
	No records available for review.											

Figure 51: The Approve Unit Status Changes page of the Approval tab



## 1.1.7.3.1 Approving Unit Status Changes

When a PHA user makes a unit tenant status change and submits the changes in the **Submit Unit Status Changes** page of the **Development** sub module, the development details are displayed in the **Approval Unit Status Changes** sub tab for the HUD user (see Figure 52) to review and approve.

The **Unit Tenant Status Changes Submitted for Review** section of the page lists the units submitted for review. The **Review Options** list allows the user to select the level of review. The available options are the **Unit Level Review**, **Building Entrance Level Review** and **Development Level Review**. Based on the number of units to review, the user can select the desired review level.

Based on the selected review level, the program lists the units for approval, or displays the summarized unit approval information for every building entrance or development that has unit status changes submitted for the Field Office approval.

Reports		Maintain CA nventory Ce	PFUND B&U rtification									
Development	Buildin	g Unit	Submissio	n Approv	al							
	НА Арр	oroval			Reports		Ар	prove Unit Statı	is Changes	5		
HQ Division:			Publi	c and Indiar	n Housing							
HQ Office:			PO Fi	eld Operation	ons							
Hub:			7HKN	C Kansas Ci	ity Hub							
Field Office:			7APH	KANSAS CI	TY HUB OFFI	CE						
Field Office HA:			IA004	OTTUMWA								
Unit Tenant Sta	tus Ch	anges Submi	tted for Revie	w:								
Review Options	: Unit	Level Review	•	Select								
# Dev Num	Unit Num	Change Type	Old Value	New Value	Effective Date	Request Date	Requesting User	Requester Comments	Approve	Reject	Approval Date	Approval/Rejection Comments
1 IA004000001	3015	Unit Accessible Designation Change	Not Applicable	UFAS barrier free accessible	08/31/2010	8/31/2010 2:42:56 PM	M00500	User M00500 has changed the Unit Designation from NA to UFAS	©	Ø	8/31/2010	
2 IA004000001	025	Unit Designation	Mixed Elderly and Disabled Not HUD Officially Designated	Officially Disabled	08/31/2010	8/31/2010 2:42:56 PM	M00500	User M00500 has changed the Unit Designation from MED to ODD	O	O	8/31/2010	
							1	Mark all displaye	d records a	s: 🔘 Aj	oproved 🔘 Re	jected Save Review Results
	Submit Final Review Results											

Figure 52: The Approve Unit Status Changes tab when HA user submits tenant status changes

To approve or reject the unit status changes, the user must click either the **Rejected** or **Approved** option. If the user uses the **Mark all displayed records** as option, then the user can approve or reject all the submitted records at once. The user can enter the Approval/Rejection comments and click the **Save Review Results** button to save the comments.

Once all the records are marked as either approved or rejected, the user can click the **Save Review Results** button. Once the review results are saved, the user can click the **Submit Final Review Results** button and complete the approval process. Once final review results are submitted, the program will archive the data and update the appropriate unit details.



	Reports	Ť	Maintain CA	PFUND B&U									
Dev	/elopment	Buildin	g Unit	Submissio	n Approv	al							
	l l	ІА Арр	proval			Reports		Ар	prove Unit Statu	is Changes			
HQ	Division:			Publi	c and Indiar	n Housing							
HQ	Office:			PO Fi	eld Operatio	ons							
Hul	b:			7HKN	C Kansas Ci	ty Hub							
Fiel	eld Office: 7APH KANSAS CITY HUB OFFICE												
Fiel	eld Office HA: IA004 OTTUMWA												
Uni	nit Tenant Status Changes Submitted for Review:												
Rev	view Options	: Unit	Level Review	•	Select								
0	Successfuly	upda	ted review sta	atus for all rec	ords.								
#	Dev Num	Unit Num	Change Type	Old Value	New Value	Effective Date	Request Date	Requesting User	Requester Comments	Approve	Reject	Approval Date	Approval/Rejection Comments
1 1	A004000001	301S	Unit Accessible Designation Change	Not Applicable	UFAS barrier free accessible	08/31/2010	8/31/2010 3:01:29 PM	HPIC32	User M00500 has changed the Unit Designation from NA to UFAS	۲	0	8/31/2010	
2 1	A00400001	025	Unit Designation	Mixed Elderly and Disabled Not HUD Officially Designated	Officially Disabled	08/31/2010	8/31/2010 3:01:29 PM	HPIC32	User M00500 has changed the Unit Designation from MED to ODD	۲	O	8/31/2010	
								1	vlark all displaye	d records a	s: 🔘 Aj	pproved 🔘 Re	jected Save Review Results
	Submit Final Review Results												

Figure 53: Submitting Final Approval

# 1.1.8 Reports Tab

The **Reports** tab of the **Development** sub module (see Figure 54) allows the user to run various reports to view the building data, unit data, vacancy / occupancy data, etc. When users run the reports, they can further organize the report data for more convenient presentation.

Repor	ts Mair Inver	ntain CAPFU ntory Certifi	ND B&U ication					
Development	Building	Unit	Submission	Approval				
Building I	Reports	Uni	t Reports	Uplo	ad Task List	RASS Report	Vac/Occ Report	Geo Coded Addresses
Select View:			Develop	ment <del>-</del>	Select			
HQ Division:			Public ar	d Indian Hou	sing			
HQ Office:			PO Field	Operations		- Select		
Hub:			6HLRK L	ittle Rock Hub	- Select			
Field Office:			6FPH LIT	TLE ROCK HU	B OFFICE			
Field Office H	A:		AR002 N	orth Little Rock	Housing Authority	- Select		
	Develop	oment Code		Dev	elopment Name			
	AR002000	001		SILVE	R CITY COURTS			
	AR002000	002		HEML	DCK COURTS			
	AR002000	003		EASTO	SATE TERRACE			
	AR002000	004		WIND	EMERE HILLS			
	AR002000	005		HERIT	AGE HOUSE			
	AR002000	006		CAMP	US TOWERS			
	AR002000	007		WILLO	OW HOUSE			
	AR002002	1		HEMLO	DCK COURTS			
	AR002009	999		HERIT	AGE HOUSE			
	Select/De	select All						
Building Status	In Inventory	/		•				
Select Report T	ype 🔘 Sum	umary 🔘 Sum	imary by Devel	opment 💿 D	etailed			
								Generate Report

Figure 54: The Building Reports sub tab of the Reports tab



# 1.1.8.1 Building Reports sub Tab

The **Building Reports** sub tab allows users to run building inventory reports (see Figure 54). Building reports present a range of up-to-date building data for any development (or group of developments) in an HA. Users can run three types of building reports that display various building data: the number of buildings and units for selected development(s), as well as more detailed building and unit data. Users can run building reports based on the building statuses.

IMS/PIC draws the data for these reports from the Building Detail and Unit Detail pages in the **Development** sub module and the **Demo/Dispo** sub module.

To run a report, user must select the appropriate Hub in the **Hub** list and click **Select**. Then, the user must select the appropriate Field Office in the **Field Office** list and then click **Select**. If there is only one field Office associated with a Hub, then the user must select the appropriate PHA in the **Field Office HA** list and then click **Select**.

The program displays the list of developments that are associated with the selected PHA. User must select the desired development(s) by clicking the check boxes for the development records in the **Development Code** column. The program also displays the **Select / Deselect All** button to select all the developments, or to clear the selected check boxes.

Then, the user must select the desired building status option in the **Building Status** list. The report count will only include the buildings associated with the selected building status within the selected development(s). Using the **Building Status** list, the user can get counts for buildings and units that are part of the current inventory, buildings participating in the demo / dispo process or removal from inventory process.

To run the report, the user must click the **Generate Report** button. The report will be displayed in a separate browser window.

### 1.1.8.1.1 Building Summary Report

The Building Summary report (see Figure 55) displays the summarized building and unit counts grouped by building types. The report includes only the buildings that have the same status that the user selected in the **Building Status** list when running the report.



	Building Summar	y Report		<u>e</u> 83
	As of 6/21/2010			
Hub	: 5HCHI Chicago Hub			
FieldOffice	: 5APH CHICAGO HUB OF	FICE		
Field Office HA	: IL001 E. St. Louis Housing A	Authority		
Developments Selected	: IL001000001, IL001000002,	, IL001000003, IL001000004	4, IL001000005	
Search Criteria				
Status	: In Inventory			
Bu	ilding Type	No.of Bldgs.	No.of Units Reported in Bldg.	No.of Units Uploaded
Eleva	tor Structure	2	222	222
Mi	xed Type	0	0	0
Non Dw	elling Structure	8	0	0
Row or Townho	ouse (Sep. entrances)	145	953	953
Semi Detach	ed (Sep. entrances)	48	94	94
Single F	amily/Detached	19	19	19
Multifamily/Walku	p Apts (Shared Entrance)	0	0	0
Total for All Se	lected Developments	222	1288	1288

#### Figure 55: Building Summary Report

The Building Summary report displays the report date, the Hub, Field Office, and PHA selected. Then, the report displays the development(s) associated with the PHA and selected for the report. In the **Search Criteria** section, the report displays the option that the user selected in the **Building Status** list when running the report.

The report data presents the number of buildings and units within the selected developments. The **No. of Bldgs.** column displays the total number of buildings of each building type. The **No. of Units Reported in Bldg.** column displays the total number of units associated with the buildings included in the report. The **No. of Units Uploaded** column displays the actual number of units uploaded by the PHA.

The report also presents the **Total for All Selected Developments** section that summarizes the counts for all the building types.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

### 1.1.8.1.2 Building Summary by Development Report

The Building Summary by Development report (see Figure 56) displays the summarized building and unit counts grouped by development and building types. The report includes only the buildings that have the same status that the user selected in the **Building Status** list when running the report.



Bui	lding Summary By Develo	pment Report	<u></u>									
	As of 6/21/2010											
Hub FieldOffice Field Office HA Developments Selected	<ul> <li>SHCHI Chicago Hub</li> <li>SAPH CHICAGO HUB OFFICE</li> <li>IL001 E. St. Louis Housing Authority</li> <li>IL001000001, IL001000002, IL00100000</li> </ul>	13, IL001000004, IL001000005										
Search Criteria												
Status	Status : In Inventory											
Select Page Set : 1-2 -												
Bldg. Type	Ent. No.	No.of Units Reported in Bldg.	No.of Units Uploaded									
Elevator Structure	0	0	0									
Mixed Type	0	0	0									
Non Dwelling Structure	1	0	0									
Row or Townhouse (Sep. entrances)	30	240	240									
Semi Detached (Sep. entrances)	0	0	0									
Single Family/Detached	0	0	0									
Multifamily/Walkup Apts (Shared Entrance)	0	0	0									
Total for IL001000001	31	240	240									
<b>Development :</b> IL001000002												
Bldg. Type	Ent. No.	No.of Units Reported in Bldg.	No.of Units Uploaded									
Elevator Structure	0	0	0									
Mixed Type	0	0	0									
Non Dwelling Structure	2	0	0									
Row or Townhouse (Sep. entrances)	39	314	314									
Semi Detached (Sep. entrances)	0	0	0									
Single Family/Detached	U	U	U									
Entrance)	0	0	0									
Total for IL001000002	41	314	314									

#### Figure 56: Building Summary by Development Report

The Building Summary by Development report displays the report date, the Hub, Field Office, and PHA selected. Then, the report displays the development(s) associated with the PHA and selected for the report. In the **Search Criteria** section, the report displays the option that the user selected in the **Building Status** list when running the report.

The report data presents the number of buildings and units within the selected developments grouped by building type for every individual development. The **Ent. No.** column displays the total number of entrances for buildings of each building type associated with each development. The **No. of Units Reported in Bldg.** column displays the total number of units associated with the buildings included in the report. The **No. of Units Uploaded** column displays the number of units that the PHA submitted using the **Development** sub module.

The report also presents the **Total for [development number]** section that summarizes the counts for all the building types.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.



## 1.1.8.1.3 Building Detail Report

The Building Detail report (see Figure 57) displays the detailed building data for all the buildings associated with the selected development.

The Building Summary by Development report displays the report date, the Hub, Field Office, and PHA selected. Then, the report displays the development(s) associated with the PHA and selected for the report. In the **Search Criteria** section, the report displays the option that the user selected in the **Building Status** list when running the report.

		Buildi	ing Detail I	Report				<u>-</u>				
		As	of 6/21/2010									
Hub       : 5HCHI Chicago Hub         FieldOffice       : 5APH CHICAGO HUB OFFICE         Field Office HA       : IL001 E. St. Louis Housing Authority         Developments Selected       : IL001000006												
Status		: In l	Inventory									
Select Page Set : 1-1 ▼												
Bldg. No.	Ent. No. ▲ ▼	Loc.	Status	Bldg. Type A 🔻	Const. Date ▲ ▼	Floor Count	No. Of Units Reported In Bldg.	No. of Units Uploaded				
0800	1	boivezd 1452,hrflo .gh ghzv	Initial Approval Completed	Non Dwelling Structure		1	0	0				
0801	1	.vez boivezd 3452,pizk mlgtmrshzd	Initial Approval Completed	Elevator Structure	12/30/1967	11	95	95				
0802	1	.vez boivezd 2452,pizk mlgtmrshzd	Initial Approval Completed	Elevator Structure	12/30/1967	11	93	93				
0803 1 .vez boivezd Initial Elevator 1452,pizk Approval Completed Structure 12/30/1967 11 93												
0901	0901 1 .vez boivezd Initial Elevator mlgtmrshzd Completed Structure 12/30/1969 11 84											
	Page No : 1											

Figure 57: Building Detail Report

The report data displays all building records providing the following details: number of entrances in the building, location of the building (address), building status, building type, the construction date (the date when the construction of the building was finished), floor count, the number of units reported and number of units uploaded.

Users can sort the report in ascending or descending order by clicking the up or down arrow in any report column.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

# 1.1.8.2 Unit Reports sub Tab

The **Unit Reports** sub tab (see Figure 58) allows users to run unit inventory reports for all buildings within individual developments. Unit reports present a range of up-to-date unit data for any development (or group of developments) in an HA.



Users can run one of the following five types of unit reports:

- Detailed
- Summary by Development
- Summary
- Status Changes Detailed
- Status Changes Summary

These reports display various unit data like: unit details from the **Unit** tab, ACC Status, occupied and vacant unit counts grouped by unit designation, bedroom count, or development number, unit status changes, and current unit tenant statuses for every unit. Every report by default display all units, reports can also be generated for additional report criteria explained below.

IMS/PIC draws the data for these reports from the Building Detail and Unit Detail pages in the **Development** sub module and the **Inventory Removals** sub module.

To run a report, user must select the appropriate Hub in the **Hub** list and click **Select**. Then, the user must select the appropriate Field Office in the **Field Office** list and click **Select**. If there is only one field Office associated with a Hub, then the user must select the appropriate PHA in the **Field Office HA** list and then click **Select**.

Then the user must select the report in the **Report Type** list. Depending on the option selected in the **Report Type** list, the program allows the user to run the following reports: the Unit Detail report, Unit Summary report, Unit Status Changes report, and Unit Status Summary report.

The program displays the list of developments that are associated with the selected PHA. A user must select the desired development(s) by clicking the check boxes for the development records in the **Development Code** column. The program also displays the **Select / Deselect All** button to select all the developments, or to clear the selected check boxes.

Depending on the report type, the user will have to edit various additional report criteria.

- For the **Detailed** option of the **Report Type** list, the user will have to select whether the report will display occupancy data.
  - To display the occupancy data, the user must select the **Occupancy** check box. If the user clears the **Occupancy** check box, then the program will not include the occupancy information in the report.
  - Also the user must select the desired option in the **Unit Status** list. The units will be included (or excluded) based on the user's selection.
  - The **Unit Detail Complete** list allows the user to set the report to include only units with all the details, units with incomplete details or both types of units.
  - The **ACC Indicator** list allows the user to set the report to include only units with ACC indicator "Yes", units with ACC indicator "No" or both types of units.
- The **Summary** and **Summary by Development** option of the **Report Type** list requires the user to edit the same report criteria as for the **Detailed** option except for the **ACC Indicator** list. The **ACC Indicator** list will be inactive.
- The **Status Changes Detailed** and **Status Changes Summary** option of the **Report Type** list requires the user to select the report period using the **Start Date** and **End Date** boxes. The dates must be entered in the MM/DD/YYYY format.

To run the report, the user must click the **Generate Report** button. The report will be displayed in a separate browser window.



Reports Maintain CAPFUND	B&U			
Development Building Unit S	Submission Approval			
Building Reports Unit Re	eports Upload Task List	RASS Report	Vac/Occ Report	Geo Coded Addresses
Select View:	Development - Select			
HO Division	Bublic and Indian Unwing			
	Public and Indian Housing	Colort		
HQ Office:	PO Field Operations	▼ Select		
Hub:	5HCHI Chicago Hub 🗸 Select			
Field Office:	5APH CHICAGO HUB OFFICE			
Field Office HA:	IL003 Peoria Housing Authority	✓ Select		
Report Type:	Detailed -			
1 51				
Development Code	Development Name			
1L003000001	PENNSYLVANIA TERRACE/STERLI	ING TOWERS EAS		
L003000002	HARRISON HOMES SOUTH			
1L003000003	HOPE VI Phase 2			
1L003000004	TAFT HOMES			
1L003000005	PENNSYLVANIA TERRACE/STERLI	ING TOWERS EAS		
IL003000006	HOMEOWNERSHIP PROGRAM			
1L003000007	HOPE VI Phase 2			
1L00300008	Riverwest South			
1,003001	WARNER HOMES			
1,003002	HARRISON HOMES SOUTH			
1,003004	HARRISON HOMES NORTH			
1 0000000	TAFT HOMES			
Select/Deselect All	TAFT HOMES			
Occupancy :				
1 2 -				
Unit Status	In Inventory			
Unit Datail Complete		•		
Unit Detail Complete	ALL V			
ACC Indicator	ALL 🔻			
				Generate Report

Figure 58: Unit Reports sub Tab

### 1.1.8.2.1 Unit Detail Report

The Unit Detail report (see Figure 59) displays the detailed data for every unit that matched the report criteria.

The Unit Detail report displays the report date, the Hub, Field Office, and PHA selected. In the **Search Criteria** section, the report displays the option that the user selected in the **Unit Status** list when running the report. The report also displays the **Details Complete**, **ACC Indicator** selections as well as the **Occupancy** option (if selected).

The report lists all units that match the report criteria. Based on whether the user selected or cleared the **Occupancy** check box when running the report, the program will display the following data:

If the user selected the **Occupancy** option (see Figure 59), the report will display the following information: the building number, entrance number and the unit number, unit designation, unit status type, bedroom count, SSN of the head of household that lives in the unit, his/her first name and last name, date when the head of household started living in the unit (occupancy date), unit tenant status, accessibility designation, whether the unit details are complete and the ACC indicator.





				Unit As o	Detail of 6/21	<b>Report</b> /2010							
Hub FieldOff Field Of	fice ffice H	A		: 5HCHI Chia : 5APH CHIO : IL003 Peoria	5HCHI Chicago Hub 5APH CHICAGO HUB OFFICE IL003 Peoria Housing Authority								
Search (	Criteri	ia											
Status Details ( ACC Ind Occupan	Compl licator 1cy	ete Selected	: In Inventory : ALL : ALL : Selected										
Bidg No.	Ent. No.	Unit No.	Unit Designation	Unit Status Type	Bdrm Cnt ▲ ▼	SSN ▲ ▼	First Name	Last Name	Occ. Date	Unit Tenant Status Code	Accessible Designation	Dtls Comp.	ACC Unit
H037	1	600037	General Occupancy	Proposed for Removed from Inventory	з					Vacant - Vacant	Not Applicable	Yes	Yes
H016	1	600016	General Occupancy	Initial Approval Completed	3					Vacant - Vacant	Not Applicable	Yes	Yes
H007	1	600007	General Occupancy	Initial Approval Completed	3	429982285	vxroz	hylxzq	09/01/2001	Occupied - Assisted Tenant	Not Applicable	Yes	Yes
H004	1	600004	General Occupancy	Initial Approval Completed	3					Vacant - Vacant	Not Applicable	Yes	Yes

Figure 59: Unit Detail Report

If the user cleared the **Occupancy** check box, the report will not include the data about the tenant that lives in the unit.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

### 1.1.8.2.2 Unit Summary by Development Report

The Unit Summary by Development report (see Figure 60) displays the unit counts by development, bedroom count, ACC status and occupancy data group in tables by unit designation types. The first tier of the report displays the information about the selected Hub, Field Office, PHA, and development(s). The second tier of the report (**Search Criteria** area) displays the selected searching options.

The unit counts are presented by development and unit designation. Within the unit designation, the unit counts are broken down by number of bedrooms in a unit, occupancy, vacancy, and ACC indicator. The **Total** section displays the total unit counts not broken down by bedroom count.

For each unit designation in every selected development, the table displays the following columns:

- The **Bedroom Size** column indicates the number of bedrooms.
- The **Unit Count** column displays the number of units within every bedroom number category including the total number of units in the **Total** section.



- The ACC Unit Count column displays the number of ACC units broken down by bedroom count as well as the total number of ACC units. ACC units are considered to be units that have ACC indicator set to "Y".
- The **Occupied** unit column displays the number of units that are occupied broken down by bedroom count.
- The **Vacant** unit column displays the number of units that are vacant broken down by bedroom count.

	Unit Su	mmary Report		<u></u>					
	Print Page Download in Excel								
Hub       : SHCLV Cleveland Hub         FieldOffice       : SHPH INDIANAPOLIS PROGRAM CENTER         FieldOffice HA       : IN002 Vincennes Housing Authority         Developments Selected       : IN002001001         Search Criteria									
Development :IN002001001									
Unit Designation :General Occupancy									
Bed Room Size	Unit Count	ACC Unit Count	Occupied Units	Vacant Units					
0	0	0	0	0					
1	16	16	16	0					
2	56	56	53	3					
3	11	11	8	3					
4	0	0	0	0					
5+	0	0	0	0					
Iotal : General Occupancy	83	83	77	6					
Unit Designation :Mixed Elderly and Di	sabled Not HUD Officially Designated								
Bed Room Size	Unit Count	ACC Unit Count	Occupied Units	Vacant Units					
0	0	0	Ō	0					
1	0	0	0	0					
2	0	0	0	0					
3	0	0	0	0					
4	0	0	0	0					
5+	0	0	0	0					
Total : Mixed Elderly and Disabled Not HUD Officially Designated	0	0	0	0					

Figure 60: Unit Summary by Development Report

For merged unit designation the report only displays the **Bedroom Size**, **Unit Count**, and the **ACC Unit Count** columns.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

## 1.1.8.2.3 Unit Summary Report

The Unit Summary report (see Figure 61) displays the unit counts for every unit designation sorted by bedroom count in all the developments selected for the report.

The first tier of the report displays the information about the selected Hub, Field Office, PHA, and development(s). The second tier of the report (**Search Criteria** area) displays the selected searching options.

The unit counts are presented per unit designation. Within the unit designation, the unit counts are broken down by number of bedrooms in a unit, occupancy, vacancy, and ACC indicator. The **Total** section displays the total unit counts not broken down by bedroom count.



For each unit designation, the table displays the following columns:

- The **Bedroom Size** column indicates the number of bedrooms.
- The **Unit Count** column displays the number of units within every bedroom number category including the total number of units in the **Total** section.
- The ACC Unit Count column displays the number of ACC units broken down by bedroom count as well as the total number of ACC units. ACC units are considered to be units that have ACC indicator set to "Y".
- The **Occupied** unit column displays the number of units that are occupied broken down by bedroom count.
- The **Vacant** unit column displays the number of units that are vacant broken down by bedroom count.

	Unit Su As o	<b>mmary Report</b> of 7/20/2010		Print Page Download in Excel								
Hub FieldOffice												
Field Office HA	: IN002 Vincennes Housing Author	nity										
Developments Selected	: IN002001001											
Search Criteria												
Details Complete : ALL Unit Designation :General Occupancy	Zentals Complete : ALL Details Complete : ALL											
Bed Room Size	Unit Count	ACC Unit Count	Occupied Units	Vacant Units								
0	0	0	0	0								
1	16	16	16	0								
2	56	56	53	3								
3	11	11	8	3								
4	0	0	0	0								
5+	0	0	0	0								
Total : General Occupancy	83	83	77	6								
Unit Designation :Mixed Elderly and Dis	sabled Not HUD Officially Designated											
Bed Room Size	Unit Count	ACC Unit Count	Occupied Units	Vacant Units								
0	0	0	0	0								
1	0	0	0	0								
2	0	0	0	0								
3	0	0	0	0								
4	0	0	0	0								
5+	0	0	0	0								
Total : Mixed Elderly and Disabled Not HUD Officially Designated	0	0	0	0								

Figure 61: Unit Summary Report

For merged unit designation the report only displays the **Bedroom Size**, **Unit Count**, and the **ACC Unit Count** columns.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

## 1.1.8.2.4 Status Changes Detailed Report

The Unit Status Changes Detailed report (see Figure 62) displays all the transaction records for unit tenant status changes, unit designation changes, and the accessibility indicator changes.



Users can run the report for a specific date range and one or more specific developments. The first tier of the report displays the selected date range and allows the user to select a development to display the transactions.

The transactions records include the following information:

- The number of the records in ascending order.
- The **Dev No.** column specifies the development associated with the transaction. The **Building No.** column identifies the building associated with the unit. The **Building Entrance No.** column displays the building entrance number associated with the unit.
- The **Unit No.** column displays the unit number. The **Field Type** column displays the unit property that was changed. The report displays data for the following unit properties: unit designation, unit tenant status, and the accessibility indicator. The **Old Value** column displays the original unit property. The **New Value** column displays the modified unit property. The **Effective Date** column displays the date on which the change takes effect. The unit designation and the accessibility indicator changes take effect immediately upon approval and the when changing unit tenant status the user is required to indicate the effective date. The **Comments** column displays the test that users enter in the **Comments** box.

The **User** column displays the name of the user that performed a change. The **Update Date** column displays the date when the transaction was performed or proposed.

X	pic				Units St	atus C	hanges	Repor	t	Download in Excel	Print
Re	port Start Dat	e:	05	5/20/2009	9						
Re	port End Date	:	01	7/20/201	0						
De	velopment Nu	mber:	I	_001000	001	-					
Re	cords 1 - 25 (	of 36 <u>(View A</u>	NII)						<< Prev	page 1 2 No	ext Page >>
#	▼ Dev. No.	Building No.	Building Entrance No.	Unit No.	Field Type	Old Value	New Value	Effective Date	Comments	User	Update Date
1	IL001000001	0134	6	013406	Unit Status/Reason Change	Vacant	Assisted Tenant	08/05/2009	User MP8591 has changed the Unit Status from VACLUP to OCCAT	SHERROD, VERONICA	09/04/2009
2	IL001000001	0134	4	013404	Unit Status/Reason Change	Vacant	Assisted Tenant	06/01/2009	User MP8591 has changed the Unit Status from VACLUP to OCCAT	SHERROD, VERONICA	06/05/2009
3	IL001000001	0133	5	013305	Unit Status/Reason Change	Vacant	Assisted Tenant	09/12/2009	User MP8591 has changed the Unit Status from VACLUP to OCCAT	SHERROD, VERONICA	10/09/2009
4	IL001000001	0133	5	013305	Unit Status/Reason Change	Assisted Tenant	Vacant	06/01/2009	User sp_oleffdt has changed the Unit Status from OCCAT to VACLUP	sp_oleffdt	06/05/2009
5	IL001000001	0133	3	013303	Unit Status/Reason Change	Vacant	Assisted Tenant	10/01/2009	User MP8591 has changed the Unit Status from VACLUP to OCCAT	SHERROD, VERONICA	10/06/2009
6	IL001000001	0130	6	013007	Unit Status/Reason Change	Vacant	Assisted Tenant	08/27/2009	User MP8591 has changed the Unit Status from VACLUP to OCCAT	SHERROD, VERONICA	09/04/2009
7	IL001000001	0130	6	013007	Unit Status/Reason Change	Assisted Tenant	Vacant	06/10/2009	User MP8591 has changed the Unit Status from OCCAT to VACLUP	SHERROD, VERONICA	07/13/2009
8	IL001000001	0130	4	013005	Unit Status/Reason Change	Assisted Tenant	Vacant	09/09/2009	User MP8591 has changed the Unit Status from OCCAT to VACLUP	SHERROD, VERONICA	09/11/2009

Figure 62: Unit Status Changes Detailed Report



Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

### 1.1.8.2.5 Unit Status Changes Summary Report

The Unit Status Changes Summary report (see Figure 63) displays the summarized unit counts distributed by unit tenant statuses. To run the report, the user must select the Hub, Field Office, PHA, the **Status Changes Summary** option in the **Report Type** list.

The program will refresh the page and allow the user to select the developments to run the report. The user can select one or more development(s) in the list of developments (to select or clear all developments, the user can click the **Select/Deselect All** check box). Then, the user must select the desired date range. The date range can be selected by using the **Start Date** and **End Date** boxes. The dates must be entered in the MM/DD/YYYY format.

pic								Unit	Unit Status Summary Report						Download in E	<u>acel</u>	Print Print		
Report Start Date:         07/22/2009           Report End Date:         07/22/2010           Date:         07/22/2010						•													
Counts at the FIRST V of Month																			
Date	Development	Occupied by Assisted Tenant	Occupied by Non- Assisted Tenant Over- Income	Occupied by Police Officer	Occupied by Employee	Vacant HUD Approved - Demo Dispo Approved	Vacant HUD Approved Casualty Loss	Vacant HUD Approved - Court Litigation	Vacant	Vacant HUD Approved - Market Conditions	Vacant HUD Approred - Undergoing Modernization	Vacant HUD Approved - Natural Disaster	Unauthorized (Occupied and/or Non- Dwelling)	Non- Dwelling - Special Use - Anti Drug/Crime	Non- Dwelling - Special Use - Self- Sufficiency Activities	Non- Dwelling - Special Use - Other Resident Activities	Non-Dwelling - Administrative Uses	Non-Dwelling - MTW Neighborhood Services	Non- Dwelling - Resident Amenities
08/01/2009	IN002001001	81	0	0	0	0	0	0	2	0	0	0	0	0	0	0	0	0	0
09/01/2009	IN002001001	79	0	0	0	0	0	0	4	0	0	0	0	0	0	0	0	0	0
10/01/2009	IN002001001	79	0	0	0	0	0	0	4	0	0	0	0	0	0	0	0	0	0
11/01/2009	IN002001001	79	0	0	0	0	0	0	4	0	0	0	0	0	0	0	0	0	0
12/01/2009	IN002001001	79	0	0	0	0	0	0	4	0	0	0	0	0	0	0	0	0	0
01/01/2010	IN002001001	79	0	0	0	0	0	0	4	0	0	0	0	0	0	0	0	0	0
02/01/2010	IN002001001	79	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
04/01/2010	IN002001001	78	0	0	0	0	0	0	3	0	0	0	0	0	0	0	0	0	0
05/01/2010	IN002001001	82	0	0	0	0	0	0	1	0	ő	0	0	0	0	0	õ	0	0
06/01/2010	IN002001001	82	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0
07/01/2010	IN002001001	82	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0

Then, the user can run the report by clicking the Generate Report button.

Figure 63: Unit Status Changes Summary Report

The first tier of the report displays the selected start and end dates of the report, as well as the development number(s) selected. The user can also set the report to display the unit counts at the first or the last day of the month. The report displays the dates for every month within the selected report range, the development number and the counts for every unit tenant status as of the date in the **Date** column.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.



# 1.1.8.3 Upload Task List sub Tab

The **Upload Task List** sub tab (see Figure 64) allows the user to run the Upload Task List report (see Figure 65). The Upload Task List report displays the unit counts by unit submission status type that PHAs uploaded to IMS/PIC.

To run the Upload Task List report, the user must select the appropriate Hub and Field Office. In the **Upload Task List Report Filter** area, the user must select the desired option in the **Unit Status** list. The unit statuses that a user can select in the **Unit Status** list represent all the stages of a demo / dispo process. The following options are available for selection: **Approved**, **Draft**, **Not Started**, **Rejected**, **RMI Approved**, and **Submitted**. The user can also select the **All** option to set the report to display all the available unit statuses.

To run the report, the user must click the **Generate Report** button.

Reports Maintain CAPFL Inventory Certi	IND B&U fication			
Development Building Unit	Submission Approval			
Building Reports Un	it Reports Upload Task List	RASS Report	Vac/Occ Report	Geo Coded Addresses
Select View:	Development - Select			
HQ Office:	Public and Indian Housing			
HQ Division:	PO Field Operations	- Select		
Hub:	5HCLV Cleveland Hub    Select			
Field Office:	5HPH INDIANAPOLIS PROGRAM CENTER	✓ Select		
IInload Task List Report Filter				
Unit States	Array			
Unit Status	Approved 👻			
			Gei	nerate Report

Figure 64: Upload Task List sub tab

## 1.1.8.3.1 Upload Task List Report

The **Upload Task List** report (see Figure 65) allows the user to view the uploaded unit and building data for a Field Office. The units and buildings included in the report are sorted by the unit submission status type for every PHA associated with the selected Field Office.

The report displays the following information:

- The **Housing Authority** column displays the PHA code. The user can click the column name to sort the report data by PHA code in an ascending or descending order.
- The **Status** column displays the unit status types. It may display all the status types (if the user selects the **All** option) or only the selected status type. The user can click the column name to sort the report data by unit status type in an ascending or descending order.
- The **Status Begin Date** column displays the date on which the current unit status took effect. The user can click the column name to sort the report data by unit status type date in an ascending or descending order.
- The Units Chgd since Approval and the Bldgs Chgd since Approval columns display the number of units and buildings that changes submission status type since the date indicated in the Status Begin Date column.
- The **Total Approved Units** and the **Total Approved Bldgs** columns display the total approved number of buildings and units for that PHA.



• The **Last Approved Date** column displays the date of the most recent submission status type approval.

	Upload Task List As of 7/22/2010											
Hub : 5HCLV (	Hub : 5HCLV Cleveland Hub											
FieldOffice : 5HPH IN	DIANAPOLIS	PROGRAM CENTER										
Search Criteria												
Status : Approved												
Housing Authority	Status	Status Begin Date	Units Chgd Since Approval	Bldgs Chgd Since Approval	Total Approved Units	Total Approved Bldgs	Last Approved Date					
IN002	Approved	02/24/2010	0	0	381	369	02/24/2010					
IN003	Approved	04/07/2010	0	0	723	421	04/07/2010					
IN004	Approved	03/27/2008	0	0	162	164	03/27/2008					
IN006	Approved	03/27/2008	0	0	136	88	03/27/2008					
IN009	Approved	05/02/2008	0	0	304	201	05/02/2008					
IN010	Approved	10/21/2009	0	0	466	475	10/21/2009					
IN011	Approved	05/12/2009	0	0	2447	1884	05/12/2009					
IN012	Approved	12/30/2009	0	0	1085	759	12/30/2009					
IN015	Approved	07/29/2009	0	0	823	573	07/29/2009					
IN016	Approved	07/28/2009	0	0	1074	614	07/28/2009					
IN017	Approved	03/25/2010	0	0	2016	1333	03/25/2010					
IN018	Approved	07/13/2001	0	0	199	72	07/13/2001					
IN019	Approved	02/18/2009	0	0	194	112	02/18/2009					
IN020	Approved	03/27/2008	0	0	299	150	03/27/2008					
IN021	Approved	03/27/2008	0	0	868	723	03/27/2008					
IN022	Approved	03/27/2008	0	0	312	82	03/27/2008					
IN023	Approved	02/22/2008	0	0	381	285	02/22/2008					
IN024	Approved	03/27/2008	0	0	144	79	03/27/2008					
IN025	Approved	03/27/2008	0	0	250	215	03/27/2008					
IN026	Approved	03/27/2008	0	0	672	304	03/27/2008					
IN028	Approved	07/03/2007	0	0	50	14	07/03/2007					
IN029	Approved	02/22/2010	0	77	808	307	02/22/2010					

Figure 65: Upload Task List report

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

# 1.1.8.4 RASS Report sub Tab

The **RASS Report** sub tab (see Figure 66) allows users to run the RASS report. The RASS report provides occupied units data for RASS (Resident Assessment Sub System) use. RASS team uses the information provided by this report to send survey mailers to residents.

To run the report, the user must select the appropriate Hub, Field Office and PHA. The program refreshes the page and displays the list of developments associated with the selected PHA. The user must select the desired development(s) to include in the report. Then, the use must select the desired option in the **Occupied Indicator** list. The available options are the **Yes**, **No**, and **All**. If the user selects the **Yes** option, then the report will only include occupied units. If the user selects the **No** option, then the report will only include selects the **All** option, then the report will include both the occupied and the vacant units.

The user must also select the report date range using the **Last Update Date From** and **To** boxes. The report will only include resident information with update dates within the update date range. The dates must be entered in the MM/DD/YYYY format.

To run the report, the user must click the **Generate Report** button.



Denote Maintain (CA	APFUND B&LL				
Inventory Co	ertification				
Development Building Unit	Submission Approval				
Building Reports	Unit Reports Uplo	ad Task List	RASS Report	Vac/Occ Report	Geo Coded Addresses
Select View:	Development -	Select			
HQ Office:	Public and Indian Hou	sing			
HQ Division:	PO Field Operations		- Select		
Hub:	5HCLV Cleveland Hub	- Select			
Field Office:	5HPH INDIANAPOLIS	PROGRAM CENTER	- Select		
Field Office HA:	IN002 Vincennes Housi	ng Authority 👻 S	elect		
Development Co	ode Dev	elopment Name			
IN002001001	OLAM	R BOWMAN TERRACE			
IN002002002	OLD	RENCH TOWNE			
IN002003003	PIAN	ENSHAW PLACE			
IN002004004	PRES	DENTIAL ESTATES			
Select/Deselect All					
Occupied Indicator:	ALL 👻				
Last Update Date From:	12/30/2008 * MM/DD/YYYY L	st Update Date To: 7/2	2/2010 * MM/DD/YY	Y	
		-			Generate Report

Figure 66: RASS Report sub tab

### 1.1.8.4.1 RASS Report

The RASS Report (see Figure 67) displays the public housing resident information for the REAC RASS sub system.

The first tier of the report displays the Hub, Field Office and PHA information. The second tier of the report displays the search criteria and the total number of records that matched the search criteria. The **Select Page Set** list allows the user to browse the report data by pages more efficiently.

The report provides the following data:

- The **Dev No.** column displays he development number in IMS/PIC. The user can click the column name to sort the report data by development numbers in ascending or descending order.
- The **Bldg/Ent/Unit** column displays the building, entrance and unit numbers accordingly. The user can click the column name to sort the report data by building/entrance/unit numbers in ascending or descending order.
- The report also includes the **Physical Address** and the **Mailing Address** graphs. Within the address graphs the user can sort the report data by city or state in ascending or descending order.
- The **Occ. Ind.** column displays the occupancy indicator. It allows the user to see whether the unit is occupied or vacant when the user selects the **All** option. The user can click the column name to sort the report data by occupancy indicator in ascending or descending order.
- The Last Update Date column displays the date when the last record update was made for the tenant in the unit. The user can click the column name to sort the report data by the last update date in ascending or descending order.


				R	ASS I	Report					
Hub: FieldOffice: Field Office HA:	5H 5H IN	ICLV Clev IPH INDL 002 Vince	eland Hub ANAPOLIS nnes Housin	PROGRA g Authorit	M CEN y	NTER					<b>S</b> 4
Occupied Indicator: Update Date From: Developments:	All 12/ AL	l / <b>30/2009</b> _L	<ul> <li>✓ Select</li> </ul>				Ta Uj	otal No.Of ] pdate Date	Records To:	s: 83 7/22/2010	
										Select Page Set :	-2 - Select
Dev. No.	BLDG/ENT/UNIT	Address	City	State	Zip Code	Address	City	State	Zip Code	Occ. Ind.	Last A Update Date
IN002001001	10/201/201	vxziivg mzndly 342	VINCENNES	IN	47591					Y	07/21/2010
IN002001001	10/203/203	vxziivg mzndly 142	VINCENNES	IN	47591					Y	07/21/2010
IN002001001	11/202/202	vxziivg mzndly 242	VINCENNES	IN	47591					Y	07/21/2010
IN002001001	11/204/204	vxziivg mzndly 042	VINCENNES	IN	47591					Y	07/21/2010
IN002001001	12/205/205	vxziivg mzndly 942	VINCENNES	IN	47591					Y	07/21/2010
IN002001001	12/207/207	vxziivg mzndly 742	VINCENNES	IN	47591					Y	07/21/2010
IN002001001	13/206/206	vxziivg mzndly 842	VINCENNES	IN	47591					Y	07/21/2010

Figure 67: RASS Report

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

# 1.1.8.5 Occ/Aging Report sub Tab

The **Occ/Aging Report** sub tab (see Figure 68) allows the user to run Aging report and the Occupancy report. The Aging report lists all the units which are not occupied by assisted tenant (Unit Tenant Status) in the selected development(s) with the total number of days in the Current Unit Tenant Status and with the unit tenant status. The Occupancy report lists all the occupied units within the selected development(s) and provides the total number of occupied units.

To run the Aging and Occupancy reports, the user must select the Hub, Field Office and the PHA. Then, the program will refresh the page and display the list of developments associated with the selected PHA. The user can include one development, multiple development or all developments. To include a development in the report, the user must select the check box. To exclude a development from the report, the user must clear the check box. The user can also select or clear all the check boxes by using the **Select** / **Deselect All** check box.

Then, the user must select the report type, i.e. the **Aging** or **Occupancy** option in the **Select Report Type** area. The **Occupancy** option is the default. To run the report, click the **Generate Report** button.



								Get Help   Logoff / Return to Secure Systems
Repo	rts Ma	intain CAPF	ND B&U					
Development	Building	Interv   Cerca	Submission	Annroval				
Development	Building Re	ports	Stantassion	Unit Re	ports Upload Task List	RASS Report	Occ/Aging Report	Geo Coded Addresses
Select View:					Development			
HQ Office:					Public and Indian Housing			
HO Division:					PO Field Operations	ct		
Habi					Ald IAC Instrumentille block and Select			
Huo:					4HJAC Jacksonville Hub			
Field Office:					4HPH JACKSONVILLE HUB OFFICE			
Field Office F	IA:				FL004 Orlando			
		Developm	ant Cada		Development Name			
		Developm Blookcocco	ent Coue		General Development Name			
H I		FL004000003			REEVES TERRACE			
		FL004000004			LAKE MANN HOMES			
		FL00400000			MURCHISON TERRACE			
		FL004000009			IVEY LANE HOMES			
		FL004000010			LORNA DOONE APTS			
		FL004000011			MEADOW LAKE APTS			
		FL004000012			CITRUS SQ/JOHNSON MANOR			
		FL004000013			OMEGA APTS			
		FL004000014			CVMX VIRVMK TM UMBBER IFT			
		FL004000015			CVMX VIRVMK TM UGZEJZME IFT			
		FL004003			CARVER CT			
		FL004007			ORANGE VILLA			
		FL004009999			CARVER CT			
-		Selecty Deser	ect All					
Select Report 7	Ivne 🔿 Ar	ing 💿 Occurs	anev					
	10000							Consulta Report
								Consiste report

Figure 68: Occ/Aging Report sub tab

## 1.1.8.5.1 Aging Report

The Aging Report (see Figure 69) lists all the units which are not occupied by assisted tenant (Unit Tenant Status) associated with the selected development(s). The first tier of the report displays the Hub, the Field Office, the PHA, and the report type. The **Development Code** list allows the user to select the development number from the developments included in the report. To select the development, the user must select the appropriate option and then click the **Select** button.

The **Total Records** area displays the total number of records included in the report. The **Page Set** list allows users to navigate the report pages should the report contain more than one page.

			Occupancy/Aging Report	
ub: eldOffice: eld Office HA: eport Type:	4HJAC J: 4HPH JA FL004 Or Aging	acksonville Hub CKSONVILLE HUB OF lando	FICE Total Records:	Decomposed Example 2
evelopment Code:	FL004000	001 V Select		
evelopment Code: Bldg Num	Bldg Ent	Unit No	Unit Tenant Status	Number of days in the Current Unit Tenant Status
evelopment Code: Bldg Num	FL004000	001 Select	Unit Tenant Status	Number of days in the Current Unit Tenant Status
Bldg Num 714A 7158	FL0040001	Unit No 010111 010113	Unit Tenant Status	Number of days in the Current Unit Tenant Status
evelopment Code: Bidg Num 714A 716B 715B	FL0040001	Unit No 010111 010111 010173 010174	Unit Tenant Status	Number of days in the Current Unit Tenant Status
Bldg Num 714A 715B 715B 739B	FL004000	Unit No 010111 010173 010174 010143	Unit Tenant Status	Number of days in the Current Unit Tenant Status
evelopment Code: Bldg Num 714A 715B 715B 739B 800A	FL0040001 Bldg Ent 5 6 1 5	Unit No 010111 010113 010174 010143 010029	Unit Tenant Status Vacant Vacant Vacant Non-Dwelling - Special Use: Other Resident Activities Vacant	Number of days in the Current Unit Tenant Status
evelopment Code: Bldg Num 714A 715B 715B 739B 800A 800A	FL0040001 Bldg Ent 7 5 6 1 5 7	Unit No	Unit Tenant Status	Number of days in the Current Unit Tenant Status

Figure 69: Aging report

The **Bldg Num** column displays the building numbers associated with the vacant unit numbers within the selected development. The **Bldg Ent** column displays the building entrance numbers associated with the vacant unit numbers within the associated buildings. The **Unit No** column displays the number of the vacant unit numbers within the associated buildings. The **Unit Tenant Status** column displays both the Unit Tenant Status and Exception Reason Code description. The **Number of days in the Current Unit Tenant Status** column displays the difference between the Current Date and the Unit Tenant Status Effective Date of the current Unit Tenant Status.



Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.

## 1.1.8.5.2 Occupancy Report

The Occupancy Report (see Figure 69) lists the occupied units associated with the selected development(s). The first tier of the report displays the Hub, the Field Office, the PHA, and the report type. The **Development Code** list allows the user to select the development number from the developments included in the report. To select the development, the user must select the appropriate option and then click the **Select** button.

The **Total Records** area displays the total number of records included in the report. The **Page Set** list allows users to navigate the report pages should the report contain more than one page.

					Occupancy/Agi	ng Report			
Hub:	4	HJAC Jacksonvill	e Hub					<b>N</b> S	<b></b>
								in Excel	Print
FieldOffice:	4	HPH JACKSONV	ILLE HUB OFFICE						
Field Office HA:	F	L004 Orlando				T ( 17)	1.5		
Report Type:	C C	occupancy				Total Records:	165		
Development Codes			loct						
Development Code.	L.		sider					Pages: 1 2 3 4 Next:	>> Records: 1 to 50 [Total: 165]
A Bldg Num	Bldg Est	Lusit No	EEN Hoad	Einct Namo	Lact Name	A Occupancy Date	Rodroom Count	Monthly Bont	Moursehold Size
Biug Num 🔻	Bug Ent		- son nead			vectopancy Date	■ Bedroom Count	wontiny kent	
714A	1	010105	xxx-xx-8139		ZYUVUZIF	11/09/2004	1	124	1
714A	2	010106	xxx-xx-6118	M	QYBVMK	06/01/2002	3	307	3
714A	3	010107	xxx-xx-8495	M	UEVVMF	06/01/2002	2	113	2
714A	4	010108	xxx-xx-8772		GZSYO	08/09/2002	2	100	3
714A	5	010109	xxx-xx-3632	I	ZYUVUZIF	02/06/2006	3	241	4
714A	6	010110	xxx-xx-7729	Z	UZIQY	04/06/2010	2	327	3
714A	8	010112	xxx-xx-2037		IKVIEX	09/07/2010	1	119	1
715A	1	010097	xxx-xx-9639	0	MVIREV-MVIREV	04/01/2009	1	117	1
715A	2	010098	xxx-xx-7315	M	OMBK	10/05/2007	3	116	3
715A	3	010099	xxx-xx-1373	Z	OMVG	06/01/2008	2	327	3
715A	4	010100	xxx-xx-3140	M	CKEVOA	03/01/2007	3	218	2
715A	5	010101	xxx-xx-6843	I	ZMGVYA	08/10/2009	2	320	2
715A	6	010102	xxx-xx-9961	M	UZIBBEG	04/01/2011	2	252	3
715A	7	010103	xxx-xx-0823	M	IBMNZYG	05/09/2007	3	201	4
715A	8	010104	xxx-xx-1040	0	ZQYVL	05/18/2009	1	119	2
715B	1	010169	xxx-xx-4741	Z	UZECJM	08/29/2008	0	247	1
7158	2	010170	xxx-xx-0503	0	OBBMIZKA	06/01/2002	1	302	1
7158	3	0101/1	xxx-xx-4396		ZEBASU	-	1	1/2	1
/158	4	010172	XXX-XX-8655	-	VIBBEA	09/01/1981	1	302	2
724A	1	010089	xxx-xx-9902	F M	ZTUZELYV	11/04/2009	2	130	
724A	4	010090	XXX-XX-3324	0	IMEITEEO	10/02/2009	2	343	2
724A	4	010091	xxx-xx-3040	B	ULIMI	06/29/2005	3	343	4
724A		010092	xxx-xx-5050	0	IZMB	12/02/2009	2	943	3
7244	6	010094	xxx.xx.2122	M	ZEOJYYG	03/01/2010	2	181	3
7240	7	010095	xxx.xx.3677	M	UERMI	02/15/2008	3	125	4
724A	8	010096	xxx-xx-3168	M	UYAMV	06/01/2002	1	226	1
725A	1	010081	xxx-xx-8395		UEQIB	06/01/2002	1	119	1
725A	2	010082	xxx-xx-1755	i i	YTTSF	06/01/2002	3	343	3
725A	3	010083	xxx-xx-5556	M	IGMAAMG	06/02/2010	2	89	3
725A	4	010084	xxx-xx-9179	M	OVMBMU	01/31/2005	2	223	2
725A	5	010085	xxx-xx-6862	M	ZMGVYA	05/05/2005	3	151	3
725A	6	010086	xxx-xx-7698	M	TZMOVL	03/09/2010	2	265	2
725A	7	010087	xxx-xx-7786	0	ZYUXAYFT	05/01/2008	3	145	4
725A	8	010088	xxx-xx-2805		UQYJMIA	06/01/2002	1	125	1

Figure 70: Occupancy Report

The **Bldg Num** column displays the building numbers associated with the occupied unit numbers within the selected development. The **Bldg Ent** column displays the building entrance numbers associated with the occupied unit numbers within the associated buildings. The **Unit No** column displays the number of the occupied unit. The **SSN Head, First Name, Last Name** column display the corresponding information about the head of household that lives in the unit. The **Occupancy Date** column displays the date when the unit was occupied by the current head of household. The **Bedroom Count** column displays the number of bedrooms in the unit. The **Monthly Rent** column displays the amount charged for the unit. The **Household Size** column displays the number of people (members of household) that live in the unit.

Users can print the report or download the report data in the Excel format for further manipulation. To print the report, the user must click the **Print** button. To download the report data for further manipulation, the user must click the **Download in Excel** button.



# 1.1.8.6 Geo Coded Addresses sub Tab

The **Geo Coded Addresses** sub tab (see Figure 71) allows users to view the data received from the Geo Coding service Center (GSC).

To run the Geo Coded Addresses reports, the user must select the Hub, Field Office and the PHA. Then, the program will refresh the page and display the list of developments associated with the selected PHA. The user can include one development in the report, more than one or all developments. To select include a development in the report, the user must select the check box. To exclude a development from the report, the user must clear the check box. The user can also select or clear all the check boxes by using the **Select / Deselect All** check box.

The **No of Rows to Display** list allows users to select the number of rows to be displayed per page which affects the number of pages in the report. The **Sort Report Data by** list and the **Order by** list allow the user to determine the way the program presents the report data.

	Reports Inv	rentory Certi	fication					
Develop	ment Building	Unit	Submission	Approval				
Bu	ilding Reports	Un	it Reports	Upload	Task List	RASS Report	Vac/Occ Report	Geo Coded Addresses
Select	View:		Develop	ment 👻	Select			
HQ Div	vision:		Public ar	nd Indian Housin	g			
HQ Off	ice:		PO Field	Operations		- Select		
Hub:			4HMIA N	liami Hub	- Select			
Field O	ffice:		4DPH MI	AMI HUB OFFICE				
Field O	ffice HA:		FL002 S	. PETERSBURG	à	✓ Select		
	Development Co	ode	Developr	nent Name				
	FL002000001		GRAHAM P	ARK				
	FL002000002		Disston Pl	ace				
	FL002000003		New Jorda	n Park 21A				
	FL002000004		JAMES/CLE	ARVIEW PARK				
	FL002000005		SCATTERE	D SITES				
	FL002001		Historic Vil	lage				
	FL002001A		JORDAN P	ARK				
	FL002009		NAME UNK	NOWN				
	FL002018		SCATTERE	D SITES				
	FL002024		Gateway P	lace				
	Select/Deselect #	All						
Display	Filters for Geo Co	oded Addresse	s Report					
No of r	ows to display		50 Rows	perpage 🔻				
Sort rep	port data by:		Develop	oment No.	▼ (	Order By in Ascending	order. 🔻	
								Generate Report

To run the report, the user must click the **Generate Report** button.

Figure 71: Geo Coded Addresses sub tab

# 1.1.8.7 Geo Coded Addresses Report

The Geo Coded Addresses report (see Figure 72) displays the data received by IMS/PIC from GSC. This data is used in IMS/PIC to allow users to run Form 50058 reports by such entities as Locality or Congressional District.

The report displays the following data:

- The **Development No** column displays the development number.
- The **Building No** column displays the building number.
- The **Building Entrance No** column displays the building entrance number.



- The Address column displays the building entrance address.
- The **City** column displays the building entrance city name.
- The **State** column displays the building entrance state.
- The **Zip Code** column displays the building entrance zip code.
- The Locality Code column displays the building entrance locality code.
- The **Census Tract** column displays the census tract code.
- The **Block Code** displays the building entrance block code.
- The **Congressional District Code** column displays the congressional district code associated with the building entrance number.
- The Geo Match Code (or Equivalent English) column displays the result of the geo coding matching. For example, if the zip code of the address is not found, the column will display Z.

	pic			Geo	Coded A	ddr	esse	s Repo	rt		<u>Download in</u>	Excel Print
HQ I	Division:		Publi	c and Indian Hous	ing							
HQ (	Office:		PO F	ield Operations								
Hub	:		4HM	A Miami Hub								
Field	Office:		4DPH	I MIAMI HUB OF	FICE							
Field	Office HA:		FL00	2 ST. PETERSBU	RG							
Leg [Bla H: H C: C	end for Geo M ank]: Match Suc House/Box Range Critical Error ords 101 - 150 of	atch Code cessful e Not Found	On Street	Z: Zip Code A: Apt Ran E: External	e Not Found ge Not Found Match	B: I M: I X: C	nsufficie Multiple Geo-Cod	ent Address Matches Fou ling Error	Info : ind :	5: Street N: Geo-Co Prey page	Name Not Found In oding Incomplete	Zip Code
Reco	JAS 101 - 150 01	343 (view /							<u></u>	Prev page	123450	Coo Match
#	▲ Development No.	Building No.	Building Entrance No.	Address	City	State	Zip Code	Locality Code	Census Tract	Block Code	Congressional District Code	Code (or Equivalent English)
101	FL002000003	40	1	sgflh gvvigh wi12 4133	tifyhivgvk .gh	FL	33712	9999	020900	1		
102	FL002000003	40	2	sgflh gvvigh wi12 2133	tifyhivgvk .gh	FL	33712	9999	020900	1		
103	FL002000003	41	1	sgflh gvvigh wi12 4233	tifyhivgvk .gh	FL	33712	9999	020900	1		
104	FL002000003	41	2	sgflh gvvigh wi12 2233	tifyhivgvk .gh	FL	33712	9999	020900	1		
105	FL002000003	42	1	sgflh gvvigh wi12 4433	tifyivgvk .gh	FL	33712	9999	020900	1		
106	FL002000003	42	2	sgflh gvvigh wi12 2433	tifyhivgvk .gh	FL	33712	9999	020900	1		
107	FL002000003	42	3	sgflh gvvigh wi12 0433	tifyhivgvk .gh	FL	33712	9999	020900	1		
108	FL002000003	43	1	sgflh vfmvez mlwtmzo 4012	tifyhivgvk .gh	FL	33712	99999	020900	1		

Figure 72: Geo Coded Addresses Report

# **1.1.9 Maintain Inventory**

The **Maintain Inventory** tab allows users to view and alter the development, building, and unit information (see Figure 73).



Reports Inver	tory Certification				
Development Building	Unit Submission Approval				
Development Inv	Building Inv	Unit Inv	Dev Regrouping	Reports	Terminate Dev
Select View:	Development	Select			
HQ Division:	Public and Indian Ho	ising			
HQ Office:	PO Field Operations		- Select		
Hub:	2HNWK Newark Hub	- Select			
Field Office:	2FPH NEWARK HUB C	FFICE			
Field Office HA:	NJ004 North Bergen H	A 🔹 Sel	ect		
Development Inventory Sea	rch				
Development Number:					
Development Name:					
		Se	arch		
Development Inventory List					
It is possible to delete a dev	velopment only if it has zero units and b	uildings (including RMI	inventory). Additionally, none	of its buildings and units can b	e in Demo Dispo process to
modify or delete the develo	pment.				
Developments 1 to 5 of 5					
Page No: 1 of 1					
Development Number	Development Name	Total Buildin Structure Cou	g Total Unit nt Count	Edit Development?	Delete Development?
NJ004000001	MEADOW VIEW	22	172	Edit	
NJ004000002	LAWLER TWS	2	253	Edit	

Figure 73: Maintain Inventory tab

The **Maintain Inventory** tab contains six sub tabs:

- **Development Inventory** sub tab allows users to modify development inventory for the selected PHA.
- **Building Inventory** sub tab allows users to modify building inventory for the selected PHA
- Unit Inventory sub tab allows users to modify unit inventory for the selected PHA
- **Development Regrouping** sub tab allows users to move the buildings from one development to another.
- **Reports** sub tab allows users to run the National Report.
- **Terminate Development** sub tab allows users to terminate developments when there are existing buildings and units associated with it.

The sub tabs mentioned above are described in detail below.

# 1.1.9.1 Development Inventory sub Tab

The **Development Inventory** sub tab (Figure 74) lists the details of the developments present for a selected PHA. This page allows users to view and edit development data. Users can also remove a development from the inventory database if all the conditions pertaining to the removal are met. However, if any buildings or units assigned to the selected development are in the demo / dispo process, the user will not be able to edit any of the development data.

The development inventory displayed on the page reflected the options user selected from the **Select View, HQ Division, Hub, Field Office** and **Field Office HA** lists.

## 1.1.9.1.1 Searching for a Development

The user can specify the number of the development in the **Development Number** box, and the name of the development in the **Development Name** box and click the **Search** button. The system will display the inventory information for that particular development number.



Reports	Mainta Invente	ain CAPFU ory Certifi	ND B&U cation					
Development Buil	lding (	Unit	Submission	Approval				
Development Inv	Buil	ding Inv	Unit I	nv De	ev Regrouping		Reports T	erminate Dev
Select View:		Develo	pment	Select				
HQ Office:		Public a	nd Indian Ho	using				
HQ Division:		PO Fiel	d Operations			*	Select	
Hub:		10HSE	A Seattle Hub	V Se	lect			
Field Office:		0CPH A	LASKA COM	IUNITY SERV		<ul> <li>Seletion</li> </ul>	ect	
Field Office HA:		AK001 A	HFC					
Development Invento	ory Searc	ch						
Development Number	r:							
Development Name:								
				Searc	h			
Development Invento	ory List							
It is possible to delet	te a deve can be in	lopment on Demo Disp	ly if it has zer	o units and b	uildings (inclue	ding RM	II inventory). Additio	onally, none of its
Developments 1 to 1	9 of 19			,				
Page No: 1 of 1								
Development Number	Dev	velopment l	Name	Total Buildi Structure Co	ng Total unt Cou	Unit Int	Edit Development?	Delete Development?
AK001000199 *	Dem	no/Dispo Bui	dings	0	0		<u>Edit</u>	
AK001000213		Wrangell		5	20	)	Edit	
AK001000216		Cordova		4	16	;	<u>Edit</u>	

Figure 74: Development Inventory List

### 1.1.9.1.2 Editing a Development

The **Development Inventory List** section table contains the **Edit Development?** column. The **Edit Development?** column allows users to access the **Edit Development Number** section in the **Development Inventory** sub tab. This section allows users to change the number of an existing development. To access this section, the user must click the **Edit** link in the **Edit Development?** column for the development that the user wants to edit. Enter new **Development Number** and **Comments** in the respective text boxes and click **Save**. The asterisk designates a required option. Information in the empty option cannot be saved. The user can also click the **Cancel** button to undo any changes.



Rep	orts Mai	ntain ntory CAPFU	ND B&U cation				
Development	Building	Unit	Submission	Approval			
Developmer	it Inv 🛛 Bi	uilding Inv	Unit I	nv De	v Regrouping	Reports	Terminate Dev
HO Office:		Public a	and Indian Ho	usina			
HO Division		PO Fiel	d Operations	uonig			
Hub:		5HCHI C	hicago Hub				
Field Office:		5APH C	HICAGO HUB	OFFICE			
Field Office H	A:	IL001 E.	St. Louis Hou	ising Authority	1		
Edit Developm	ent Number						T 1 1 1 1
G							Terminated Developments
Current Develo	opment Numb	er		IL001000010			
Development 1	Name:			CENTRAL C	TY APARTMENTS	3	
Development 1	Number:				*		
						*	
Comments:							
						~	
				* Designate	s a required field		
							Save Cancel

Figure 75: Edit Development Page

**Note**: the system won't allow a user to modify the development if any building and/or unit associated with that development is in Inventory Removals Application or in RMINOA process (Removed from Inventory without approval) process.

### 1.1.9.1.3 Deleting a Development

The **Development Inventory List** sub tab allows users to delete developments. To delete a development user should select the **Delete Development?** check box and click the **Delete** button. Upon clicking the **Delete** button, system will display the **Comments for deleting the developments** message. The user should enter the comments into the designated box and click the **Save** button. The asterisk indicates a required option. If there is no data entered for any of these options, the user will not be able to save the information.

When deleting a development, the user must ensure that there are no unit or building records associated with the development. Otherwise the program will not allow the user to delete the development record.



Comments for Deleting the Developments	- Microso 🔳 🗖
Enter Comments:	
1	<u>~</u> •
	×
Cancel	
* Designates a required field.	

Figure 76: Comments Box

**Note:** the system won't allow to the user to delete a development if Inventory Removals or RMINOA (Removed from Inventory without approval) units and buildings are present in that development.

### 1.1.9.1.4 Terminated Developments

The **Terminated Developments** link on the **Edit Development Number** section allows the user to run a report that provides the list of developments which were removed from the PHA's inventory.

Repo	orts Main	ntain ntory Certif	ND B&U ication				
Development	Building	Unit	Submission	Approval			
Developmen	t Inv 🛛 Bu	uilding Inv	Unit Ir	ıv De	v Regrouping	Reports	Terminate Dev
HO Office:		Public	and Indian Hou	ising			
HO Division:		PO Fiel	d Operations	5			
Hub:		5HCHI (	Chicago Hub				
Field Office:		5APH C	HICAGO HUB (	OFFICE			
Field Office HA	A:	IL001 E	St. Louis Hou	sing Authorit	/		
Edit Developm	ent Number						
							Terminated Developments
Current Develo	pment Numb	er:		IL001000010			
Development N	Vame:			CENTRAL C	TY APARTMENTS		
Development N	lumber:				*		
						^ <b>*</b>	
Comments:							
						~	
				* Designate	s a required field		
							Save Cancel

Figure 77: Terminated Developments link

Upon clicking the **Terminated Developments** link the report (see Figure 78) will be displayed.



	TERMINATED DEVELOPMENTS As of 9/14/2009	
Hub	: 4HJAC Jacksonville Hub	
Field Office	: 4HPH JACKSONVILLE HUB OFFICE	
Field Office HA	: FL001 Jacksonville	
ents : 1 to 20 of 42 1 of 3	List of Terminated Developments	Page: 1 <u>2</u> 3
ents : 1 to 20 of 42 1 of 3 Development Number	List of Terminated Developments Development Name	Page: 1 2
ents : 1 to 20 of 42 1 of 3 Development Number FL001001	List of Terminated Developments Development Name BZOWNGQOW ASF1	Page: 1 2 ; Termination Date 04/14/2008
ents : 1 to 20 of 42 1 of 3 <b>Development Number</b> FL001001 FL001001A	List of Terminated Developments Development Name BZOWNGQOW ASFI BZOWNGQOW ASFI	Page: 1 2 3
ents : 1 to 20 of 42 1 of 3 Development Number FL001001 FL001001A FL001002	List of Terminated Developments Development Name BZOWNGQOW ASFI BZOWNGQOW ASFI AMNNMT J AGCVSSII ETGYJ	Page: 1 2 ; Termination Date 04/14/2008 04/14/2008 06/30/1994
ents : 1 to 20 of 42 1 of 3 Development Number FL001001 FL001001A FL001002 FL001003	List of Terminated Developments Development Name BZOWNGQOW ASFI BZOWNGQOW ASFI AMNNMT J AGCVSSII ETGYJ AMNNMT J AGCVSSII FGZX	Page: 1 2 ; Termination Date 04/14/2008 04/14/2008 06/30/1994 04/13/1993
ents : 1 to 20 of 42 1 of 3 <b>Development Number</b> FL001001 FL001001A FL001002 FL001003 FL001004	List of Terminated Developments           Development Name           BZOWNGQOW ASFI           BZOWNGQOW ASFI           AMNNMT J AGCVSSII ETGYJ           AMNNMT J AGCVSSII FGZX           KLXSGBYVKMF XRUYBUT	Page: 1 2 5 Termination Date 04/14/2008 04/14/2008 06/30/1994 04/13/1993 08/27/1997
ents : 1 to 20 of 42 1 of 3 <b>Development Number</b> FL001001 FL001001A FL001002 FL001003 FL001004 FL001006	List of Terminated Developments Development Name BZOWNGQOW ASFI BZOWNGQOW ASFI AMNNMT J AGCVSSII ETGYJ AMNNMT J AGCVSSII FGZX KLXSGBYVKMF XRUYBUT KLXSGBYVKMF XRUYBUT DEEF	Page: 1 2 5 Termination Date 04/14/2008 04/14/2008 06/30/1994 04/13/1993 08/27/1997 08/27/1997
ents : 1 to 20 of 42 1 of 3 <b>Development Number</b> FL001001 FL001001A FL001002 FL001003 FL001004 FL001006 FL001007	List of Terminated Developments Development Name BZOWNGQOW ASFI BZOWNGQOW ASFI AMNNMT J AGCVSSII ETGYJ AMNNMT J AGCVSSII FGZX KLXSGBYVKMF XRUYBUT KLXSGBYVKMF XRUYBUT AKGSWSDBJMGV JSKLA	Page: 1 2 5
ents : 1 to 20 of 42 1 of 3 <b>Development Number</b> FL001001 FL001001A FL001002 FL001003 FL001004 FL001006 FL001007 FL001008	List of Terminated Developments Development Name BZOWNGQOW ASFI BZOWNGQOW ASFI AMNNMT J AGCVSSII ETGYJ AMNNMT J AGCVSSII FGZX KLXSGBYVKMF XRUYBUT KLXSGBYVKMF XRUYBUT KLXSGBYVKMF XRUYBUT DEEF AKGSWSDBJMGV JSKLA BKZETRD	Page: 1 2 Termination Dat 04/14/2008 04/14/2008 06/30/1994 04/13/1993 08/27/1997 08/27/1997 04/14/2008 04/14/2008

Figure 78: Terminated Developments report

Users can download the report in form of an Excel spreadsheet by clicking the **Download in Excel** button. The report can also be printed by clicking the **Print** button.

# 1.1.9.2 Building Inventory sub Tab

The **Building Inventory** sub tab lists the details of the buildings associated with a specific development that the user can select in the **Physical Development** list (see Figure 79). Users can edit or delete buildings using this sub tab. However, if any units assigned to the selected building are in the demo / dispo process, the user will not be able to edit any of the building data.

The building inventory information listed in the page is determined by the options selected by the user from the **Select View**, **HQ Division**, **Hub**, **Field Office**, **Filed Office HA**, and **Physical Development** lists.

Mid section of the page allows user to search within the development by entering the building or entrance number in the **Building Number** box and the **Building Entrance Number** box, and then clicking **Search** button (see Figure 79).



Reports Maintain CAPFUND B&U Inventory Certification							
Development Building	Unit Submission	Approval					
Development Inv Buildi	ng Inv Unit Inv	r Dev	Regrouping	Reports	Terminate D	ev	
Select View:	Development 👻	Select					
HQ Office:	Public and Indian Hous	ing					
HQ Division:	PO Field Operations		*	Select			
Hub:	5HCHI Chicago Hub	V Sele	ect				
Field Office:	5APH CHICAGO HUB OF	FICE					
Field Office HA:	IL001 E. St. Louis Housin	ig Authority	✓ Select				
Physical Development:	hvgzghv hgiflx crmvlsk 3	34444344or	✓ Select	)			
Building Inventory Search							
Building Number:							
Entrance Number:	] ]						
Building Inventory Information							
It is possible to delete a buildin the building/ building entrance entrance.	It is possible to delete a building/ building entrance only if there are no units within that building/building entrance. Additionally, the building/ building entrance and none of its units can be in Demo Dispo process to modify or delete the building/ building entrance.						
Buildings 1 to 10 of 10							
Page No: 1 of 1							
Building Building No. Entrance No.	Building Name		Building Status Type	e Unit Count	Edit Building?	Delete Building?	
5201 1	hvgzghv hgiflx crmvlsk	Ini	tial Approval Comple	eted 1	<u>Edit</u>		
5201 2	hvgzghv hgiflx crmvlsk	Ini	tial Approval Comple	eted 1	Edit		
5202 1	hvgzghv hgiflx crmvlsk	Ini	tial Approval Comple	eted 1	Edit		

Figure 79: Building Inventory List Page

### 1.1.9.2.1 Editing Building Information

The user can change the information about any particular building and if the user clicks the **Edit** link in the **Edit Building?** column. The **Edit Building and Entrance Number** section is displayed (see Figure 80). The user can change the number in the **Building Number** and **Building Entrance Number** boxes, and provide comments explaining the change in the **Comments** box. All three options are required and have to be filled by the user. When finished entering data, click **Save**. The changes made will be effective immediately.



Reports Main	ntain CAPFU ntory Certifi	ND B&U cation			
Development Building	Unit	Submission	Approval		
Development Inv Build	ing Inv	Unit Inv	Dev Regrouping	Reports	Terminate Dev
HQ Office: HQ Division: Hub: Field Office: Field Office HA: Physical Development:	Public and PO Field O 6HSNA San 6JPH SAN / TX001 Aust TX00100000	Indian Housin perations Antonio Hub ANTONIO HUB in 11 CHALMERS	g OFFICE COURTS		
Edit Building and Entrance	Number				
Current Building Number:			0101		
Current Entrance Number:			1		
Building Number:			*		
Building Entrance Number:			*		
Comments:			* Designates a require	ed field	*
					Save Cancel

Figure 80: Edit Building and Entrance number page

### 1.1.9.2.2 Delete Building

The user can delete any building using the **Delete Building?** functionality. To delete a building, the user must select the check box in the **Delete Building?** column and then click the **Delete** button. Before deleting the building the user must ensure that there are no unit records associated with the building. The user can click the **Delete** button to delete the building. The program displays the Comments for Deleting the Building window prompting the user to enter appropriate explanation for deleting the building record. After the user enters all the appropriate comments, the user can click **Save** (see Figure 82). The asterisk indicates a required option. If there is no data entered for any of these options, user will not be able to save the information.

Building Inventory Information It is possible to delete a building/ building entrance only if there are no units within that building/building entrance. Additionally, the building/ building entrance and none of its units can be in Demo Dispo process to modify or delete the building/ building entrance. Buildings 1 to 1 of 1 Page No: 1 of 1							
Building No. Building Building Building Name Building Status Type Unit Count Edit Building?						Delete Building?	
01AD	1	BZOWNGQOW SWNMXVAZABXFQF DXUSFTFQ	Initial Approval Completed	0	Edit		
1		• <u>•</u> •••	·,	Select All on Page	Deselect All on Page	Delete	

Figure 81: Delete Building



🥹 Comments for Deleting the Buildings - Mozilla Firefox 📃	
hud.gov https://hwvauad426.hud.gov/pic/picunits/unitdev	/bldginv 숫
Enter Comments:	
	*
Save	
<ul> <li>Designates a required field.</li> </ul>	

Figure 82: The Comments Box

Note: To delete a building, the unit count should be zero.

# 1.1.9.3 Unit Inventory sub Tab

The **Unit Inventory** sub tab lists the details of the units for a specific development selected in the **Physical Development** list (see Figure 83). It also allows users to edit unit data. However, if any of the units are in the Inventory Removals process, the user will not be able to edit any data for those units. This page also enables users to view the information for other developments in the HAs permitted by user security access role.

The unit inventory information displayed on the page reflects the options selected from the **Select View**, **HQ Division**, **Hub**, **Field Office**, **Field Office HA**, and **Physical Development** lists.



Reports Mainta	ory CAPFUND B&U Certification							
Development Building	Unit Submiss	sion Approval						
Development Inv Buildi	ng Inv Unit	Inv Dev Regroup	ing Report	5	Terminate Dev	v		
Select View:	Development	✓ Select						
HQ Office:	Public and Indian H	lousing						
HQ Division:	PO Field Operation	s	🗸 🔽	elect				
Hub:	5HCHI Chicago Hub	o 🗸 Select						
Field Office:	5APH CHICAGO HU	B OFFICE						
Field Office HA:	IL001 E. St. Louis Ho	ousing Authority	Select					
Physical Development:	hvgzghv hgiflx crmvl	lsk 334444344or	✓ Select					
Unit Inventory Search								
Unit Number:	First Name:							
Building Number:	Last Name:		]					
Entrance Number:		Search						
Unit Inventory Information								
Please attempt to edit, delete	e or reassign the unit	s, after business hours in	ncase the 50058 d	ata has a	already been			
submitted for the units. All 50	058 data pertaining t	to the unit you have cho	sen to delete will	be delet	ed.			
Page No: 1 of 1								
Unit Building Entrance Number Number Number	Unit Status Type	Tenant Name (Last, First Name)	Reassign Unit?	Edit Unit?	Edit Effective Dates?	Delete Unit?		
527721 5201 1	Initial Approval Completed	ivknfq, vrggvy	Reassign	<u>Edit</u>	Edit			
527725 5201 2	Initial Approval Completed	mlhriizs, zrolmtzn	Reassign	<u>Edit</u>	Edit			
527729 5202 1	Initial Approval Completed	ilobzg, zilmvov	Reassign	<u>Edit</u>	Edit			

Figure 83: Unit Inventory sub tab

### 1.1.9.3.1 Unit Inventory Search

The program can display all unit records associated with the development, or users can run a search and display only unit(s) that matched the search criteria. Users can search the inventory by **Unit Number**, **Building Number**, **Entrance Number**, **First Name** or **Last Name** of the tenant inhabiting the unit. The **Unit Inventory Search** section of the **Unit Inventory** sub tab provides these options. After entering the data, the user should click **Search** button to run the search (see Figure 84).

Unit Inventory Search					
Unit Number:	First Name:				
Building Number:	Last Name:				
Entrance Number:		Search			

Figure 84: Unit Inventory Search



## 1.1.9.3.2 Reassign Units

The user can reassign a particular unit to a different development. To reassign a unit, the user needs to select the desired unit number and click the **Reassign** link in the **Reassign Unit?** column. The system will display the **Reassign Unit to different Building and Entrance Number** section. User should select the desired building, enter comments and click **Save** (see Figure 86). The asterisk indicates a required option. If there is no data entered for any of these options, user will not be able to save the information.

Unit Inven	unit inventory information								
Please att have chos Units 1 to	Please attempt to edit, delete or reassign the units, after business hours incase the 50058 data has already been submitted for the units. All 50058 data pertaining to the unit you have chosen to delete will be deleted. Units 1 to 50 of 240								
Page No: 1	of 5						Page: 1 2	<u>3 4 5</u>	
Unit Number	Building Number	Entrance Number	Unit Status Type	Tenant Name (Last, First Name)	Reassign Unit?	Edit Unit?	Edit Effective Dates?	Delete Unit?	
010101	0101	1	Initial Approval Completed	FZVWAEKS, IKNCQMJL	<u>Reassign</u>	Edit	Edit		
010102	0101	2	Initial Approval Completed	GDVUW, LZFSHFGL	<u>Reassign</u>	Edit	Edit		
010103	0101	3	Initial Approval Completed	SKXXGV, LBJDARP	Reassign	Edit	Edit		
010104	0101	4	Initial Approval Completed	SJUN, ILO	Reassign	Edit	Edit		
010105	0101	5	Initial Approval Completed	TEOIWSD, HKANRZ	Reassign	Edit	Edit		
010106	0101	6	Initial Approval Completed	IKWFQM, KLVWF	<u>Reassign</u>	Edit	Edit		
010107	0101	7	Initial Approval Completed	DVNNOZD, NKKDG	Reassign	Edit	Edit		
010108	0101	8	Initial Approval Completed	DVZFQM, IK YDWTP	Reassign	Edit	Edit		
010202	0102	1	Initial Approval Completed	DVZRHF-ABBJZUJSEUO, MGOICV	Reassign	Edit	Edit		
010203	0102	2	Initial Approval Completed	LZCFW, YBFSQ	Reassign	Edit	Edit		
010204	0102	3	Initial Approval Completed	IBWDW, FKZBEMJL	<u>Reassign</u>	Edit	Edit		
010205	0102	4	Initial Approval Completed	MXFVL, ZNVICRENQ	<u>Reassign</u>	Edit	Edit		
010206	0102	5	Initial Approval Completed	TDWBCAE, NVOB	<u>Reassign</u>	Edit	Edit		
010207	0102	6	Initial Approval Completed	MWFVL, ZZTFNZU	Reassign	Edit	Edit		
010301	0103	1	Initial Approval Completed	GKXOB, MGVWBSD	Reassign	Edit	Edit		

Figure 85: Reassign Unit? column

Reassign Unit to different Building and E	Entrance Number	
Current Unit Number:	010101	
Current Building Number:	0101	
Current Entrance Number:	1	
Building:	Select One 💙 *	
Comments:	*	
	* Designates a required field	
		Save

Figure 86: Reassign unit to different building and entrance number section

### 1.1.9.3.3 Edit a Unit

Users can edit unit information. Upon clicking the **Edit** link for the desired unit in the **Edit Unit?** column, the **Edit Unit Number** section will be displayed (see Figure 87) allowing to change the unit number. User should type new number in the **Unit Number** box, enter comments in the **Comments** box, and click **Save**. The asterisk indicates a required option. If there is no data entered for any of these options, user will not be able to save the information.



Edit Unit Number	
Current Unit Number: Current Building Number: Current Entrance Number: Unit Number:	
Comments:	Designates a required field
	Save

Figure 87: Edit Unit Number section

## 1.1.9.3.4 Edit Effective Date

Users can edit effective date information for a particular unit in the system. To edit effective dates, the user must click the **Edit** link for the desired unit in the **Edit Effective Dates?** column. The **Unit Information** section and the **Unit Data Type Change** section will be displayed (see Figure 88) allowing user to edit the dates in the **Effective Date of Change** column. Once the user clicks the date that must be changed in the **Effective Date of Change** column, the program displays the Effective Dates Comments window. This window contains the **Effective Date** box and the **Enter Comments** box. After entering the dates and explanatory comments, the user can click **Save**(see Figure 89). The asterisk indicates a required option. If there is no data entered for any of these options, user will not be able to save the information.

Unit Information				
Building Number:	1124			
Entrance Number:	1			
Unit Number:	10124H			
Unit Data Type Change 1 to 3 of 3				
Page No: 1 of 1				
Unit Data Type Change	Old Value	New Value	Effective Date Of Change	Comments
ACC Indicator	Y	N	12/28/2005	Conversion in process to AK001065.
Unit Status/Reason Change		CU	01/01/2004	User H01801 has set the Unit Status/Reason to CU
Unit Status/Reason Change	CU	OCCPO	02/25/2009	sdfsdf

Figure 88: Unit Information Page

Effective Date:	e Date: 9/19/2009 *MM/DD/YYYY						
Enter Comments *							
Conversion	in process to AKOO1C	.65.					
Save Ca	ancel						

Figure 89: Comments Box

## 1.1.9.3.5 Delete a Unit

Users can delete vacant units from the system. To delete a unit, the user needs to select a check box next to the unit that needs to be deleted on the **Unit Inventory Information** section and click the **Delete** button at the bottom-right corner of the page. The system will display the Comments for Deleting the Unit window for the user to provide explanatory comments. The user should enter the comments in the Enter **Comments** box and click **Save**. The asterisk indicates a required option. If there is no data entered for any of these options, user will not be able to save the information. After clicking **Save**, the system will refresh and display the **Unit Inventory** sub tab.



Enter Comments:						
		*				
		~				
Save	Cancel					
* Designate	s a required field.					

Figure 90: Enter Comments box

Note: Only vacant unit can be deleted using this functionality.

## 1.1.9.4 Development Regrouping sub Tab

The **Development Regrouping** sub tab allows users to move buildings from one development to another. The **Proposal List** section lists the information regarding the development regrouping proposals. In order to perform the regrouping, the user needs to create a proposal by clicking the **Create Proposal** link on the **Development Regrouping** sub tab (see Figure 91). Proposals can be filtered based on the proposal status (see Figure 92).



Rep	orts Main	ntain ntory (	APFUND B&U					
Development	Building	Unit	Subm	nission	Approval			
Development	Inv Buildin	g Inv	Unit In	IV I	Dev Regrou	ping Reports	s Termina	ite Dev
Select View:		Develo	pment	<b>v</b> 5	elect			
HQ Office:		Public a	and Indian H	lousing				
HQ Division:		PO Fiel	d Operations	5		~	Select	
Hub:		3HBLT	Baltimore H	ub	<ul> <li>Select</li> </ul>	]		
Field Office:		3GPH V	VASHINGT	DN, DC I	PROGRAM		Select	
Field Office I	IA:	DC001	D.C Housing	Authori	ty	~	Select	
Proposal List					*			
Proposals 1 to Page No: 1 of 1	o 7 of 7			Re	trieve		0162	ile a Floposa
Proposal Number	Proposal St	atus	Submission Date	Sul Q	omission uarter Date	Approval/Rejecti Date	ion Effective Date	Edit/Delete
000000010	Approved/Effe FYB	ective	05/27/2008	12/	31/2008	07/10/2008	03/19/2009	
000000014	Approved/Effe FYB	ective	05/28/2008	12/	31/2008	07/10/2008	03/19/2009	
000000289	Effective		02/10/2009	03/	31/2009	02/18/2009	03/19/2009	
000000290	Effective		02/10/2009	03/	31/2009	02/18/2009	03/19/2009	
000000298	Submittee	1	11/18/2009	12/	31/2009			
000000671	Draft							<u>Edit</u> <u>Delete</u>
000000674	Draft							<u>Edit</u> <u>Delete</u>
Proposals 1 to Page No: 1 of 1	o 7 of 7 1			L		1	1	

Figure 91: Development Regrouping sub tab

A particular proposal can be retrieved based on current status. The options in the **Proposal Status** list include **All**, **Approved/Effective FYB**, **Draft**, **Effective**, **Rejected**, and **Submitted**.

Proposal Status:	ALL 💙
	ALL
	Approved/Effective FYB
	Draft
	Effective
	Rejected
	Submitted

Figure 92: Options in the Proposal Status list



## 1.1.9.4.1 Editing a Proposal

Users can modify existing proposal by clicking the **Edit** link in the **Edit** / **Delete** column in the **Proposal List** section corresponding to the desired proposal number. When a user clicks on the link, the system opens a new page where the user can edit the information and can submit it.

Edit Proposal					
Proposal Number:	000000021		Proposal Status:	Draft	View Proposal Details Page
Available Developments: Available Buildings	ddwyra Lina D	DC001000009 💌		Proposed Developments: Proposed Buildings (Puilding Muncher/Puilding Address Line 1)	DC001000009 💌
17/239 C EH EF 2/2352 BPHUE RV GP 22/239 C EH EF 23/239 C EH EF			< <		Save Bubmit Cancel

Figure 93: Edit Proposal section

## 1.1.9.4.2 Deleting a Proposal

The application allows the user to delete an existing proposal by clicking on the **Delete** link in the **Edit** / **Delete** column in the **Proposal List** section corresponding to the desired proposal number. When the user clicks on the link, the system displays the following warning message: "The proposal will be deleted. Do you want to continue?" prompting the user to click the **Ok** or **Cancel** button.

Proposal List						
Proposal Status:	ALL	~				<u>Create a Proposal</u>
Proposals 1 to 4 of 4 Page No: 1 of 1		Microso	ft Internet Explorer			
Proposal Number	Proposal Status	Sul mi: Dat		A proval/Rejection Date	Effective Date	
000000027	Draft		OK Cancel			Edit Delete
000000037	Draft					Edit Delete
000000041	Draft					<u>Idit</u> Delete
000000042	Draft					Dain Delete

Figure 94: System displaying warning message

# 1.1.9.4.3 Creating a Proposal

To create a proposal, the user must click the **Create Proposal** link in the **Development Regrouping** sub tab. The system displays the following warning message: "A Proposal will be created. Do you want to continue?" if the user clicks the **Ok** button, the systems will display a new page where user can create a proposal. If the user clicks **Cancel**, the proposal will not be created.

Proposal List								
Proposal Status:	ALL	~		Microsoft Internet Explorer				<u>Create a Proposal</u>
Proposals 1 to 1 of 1 Page No: 1 of 1				A proposal will be created. Do you want to continue?				
Proposal Number	Proposal Status	Submissi Date	n	OK Cancel Date	l/Rejo Date	ction	Effective Date	
00000038	Draft							Edit Delete

Figure 95: System displaying a warning message when the user attempts to create a proposal



The new page displays the **Available Developments** and, **Proposed Developments** lists, the Available **Buildings** and **Proposed Buildings** boxes, and the **Save** and **Cancel** button.

Edit Proposal						
Proposal Number:	0000000045		Proposal Status:	Draft	<u>View Proposal</u>	Details Page
4		AK/001000100		Description of Description	AV(221222122	
Available Developments:		AKUUTUUUT99 Y		Proposed Developments:		
Available Buildings				Proposed Buildings		
(Building Number/Building Add 1010/2200 TKUKWJWL 1012/2200 YKUKHU 1018/2201 YKUKHU 101P/2204 YKUKHU	tress Line 1)		>	(Building Number/Building Address Line I)	Sevi 1	Submit Cancel

Figure 96: Creating a proposal

When a user selects one development from the **Available Developments** list, the program refreshes the page and displays the buildings associated with the selected development in the **Available Buildings** box.

When a user selects the desired buildings from the **Available Buildings** box and clicks the button, the system displays the selected building in the **Proposed Buildings** box. The user must save the proposal before submitting it. To save the proposal, the user must click **Save**. To submit the proposal, the user must click **Submit**. Once the proposal is submitted, the system displays the following message: "The proposal has been submitted successfully". To complete creating and submitting the proposal, the user must click the **Done** button. When the user clicks **Done**, the system refreshes the page and displays the **Dev Regrouping** sub tab. The nightly batch will run every night and regroup the submitted proposals.

Proposal Submission			
Proposal Number:	000000045	Proposal Status:	Submitted
The Proposal has been s	ubmitted successfully.	Dana	
		Dolle	

Figure 97: Proposal submitted successfully

## 1.1.9.5 Reports sub Tab

The **Reports** sub tab allows user to retrieve the PHA Configuration Change Request Report on a National level only, but results can be narrowed down by the status of the development regrouping proposals using the **Proposal Status** list (see Figure 98). In order to retrieve the report, the user should select the desired **Proposal Status** and, **Number of rows to display**, and click the **Generate Report** button. A report will be displayed in the separate screen.



Repo	orts Main	tain CAPI tory Cerl	FUND B&U tification	<u> </u>		
Development	Building	Unit	Submission	Approval		
Development	Inv Buildir	ig Inv	Unit Inv	Dev Regrouping	Reports	Terminate Dev
Report Type: Proposal Statu	s.	[	National 💌	*		
No of rows to	display:		50 Rows per pag Gene	ge 💙 rate Report		

Figure 98: Reports tab

# 1.1.9.6 Terminate Development sub Tab

The **Terminate Development** sub tab allows a user to terminate a development. The development to be terminated should not have active buildings or units (except in 'RMI' status) associated with it. The development that is eligible for removal will have a check box in the **Terminate Development?** column. When terminating a development, the user must enter the appropriate date of termination in the **MM/DD/YYYY** box in the **ACC Amendment Date?** column. To terminate a development, click **Terminate** (see Figure 99).



Development I	nv Building	TUA	Unit Inv	Dev Regrou	ping Reports	s Terminate Dev
Select View:	Г	Developmer	at 💉	Select		
HO Office:		Public and l	n Housi	00000		
HO Division		PO Field On	orations	iig	~	Select
HQ Division.				Colort	<u>י</u>	
					J	
Field Office:		CPH BUFFA	TO HOR OF	FICE	0.1	
Field Office H.	A:	NY001 Syrad	cuse HA	× (	Select	
Development Ir	iventory Searc	ch				
Development N	umber:		1			
Development N	ame:		]			
Development IV	un.			Search		
				Search		
Development Ir	wentory List			•		
Development In It is possible to	terminate a d	evelopmen	t only if it ha	as zero units a	nd buildings (incl	uding RMI inventory).
Development In It is possible to Developments Page No: 1 of 1	nventory List terminate a d 1 to 10 of 10	evelopmen	t only if it ha	as zero units a	nd buildings (incl	uding RMI inventory).
Development In It is possible to Developments Page No: 1 of 1 Development Number	nventory List terminate a d 1 to 10 of 10 Developm	evelopmen ent Name	t only if it ha Tota Build Struct Cou	as zero units ar al Total ing Unit ture nt Count	nd buildings (incl Terminate Development?	uding RMI inventory). ACC Amendment Date?
Development In It is possible to Developments Page No: 1 of 1 Development Number NY001000070	ventory List terminate a d 1 to 10 of 10 Developm PIONEER	evelopmen ent Name HOMES	t only if it ha Tota Build Struct Cou 58	al Total ing Unit ture Count 612	nd buildings (incl Terminate Development?	uding RMI inventory). ACC Amendment Date?
Development In It is possible to Developments Page No: 1 of 1 Development Number NY001000070 NY001000071	ventory List terminate a d 1 to 10 of 10 Developm PIONEER CENTRAL	evelopmen ent Name HOMES VILLAGE	t only if it ha Tota Build Struct Cou 58 48	al Total Unit Count 612 446	nd buildings (incl Terminate Development?	uding RMI inventory). ACC Amendment Date?
Development In It is possible to Developments Page No: 1 of 1 Development Number NY001000070 NY001000071 NY001000072	Developm PIONEER CENTRAL TOOMEY	evelopment ent Name HOMES VILLAGE ABBOTT	t only if it ha Build Struct Cou 58 48 1	al Total Unit Count for the formation of	nd buildings (incl	uding RMI inventory). ACC Amendment Date?
Development In It is possible to Developments Page No: 1 of 1 Development Ny001000070 NY001000071 NY001000072 NY001000073	Developm PIONEER CENTRAL JAMES C	evelopment ent Name HOMES VILLAGE ABBOTT GEDDES	t only if it has Build Struct Cou 58 48 1 39	al Total Unit Count for the formation of	nd buildings (incl	uding RMI inventory). ACC Amendment Date?
Development In It is possible to Developments Page No: 1 of 1 Development Number NY001000070 NY001000071 NY001000072 NY001000073 NY001000074	Developm PIONEER CENTRAL TOOMEY JAMES G	ent Name HOMES VILLAGE ABBOTT SEDDES TOWERS	t only if it has Build Struct Cou 58 48 1 39 2	al Total Unit Count for the second se	nd buildings (incl Terminate Development?	uding RMI inventory). ACC Amendment Date?
Development Ir           It is possible to           Developments           Page No: 1 of 1           Development           Number           NY001000070           NY001000071           NY001000072           NY001000073           NY001000074           NY001000075	PIONEER Developm PIONEER CENTRAL TOOMEY JAMES G VINETTE T SCATTER TOWNH	ent Name HOMES VILLAGE ABBOTT GEDDES TOWERS RED SITE OUSES	t only if it has Build Struct Cou 58 48 1 39 2 30	al Total Unit Count nt 612 446 308 477 183 157	nd buildings (incl Terminate Development?	uding RMI inventory). ACC Amendment Date?
Development Ir           It is possible to           Developments           Page No: 1 of 1           Development           Number           NY001000070           NY001000071           NY001000072           NY001000073           NY001000074           NY001000075           NY001000075	PIONEER Developm PIONEER CENTRAL TOOMEY JAMES C VINETTE SCATTER TOWNH	ent Name HOMES VILLAGE ABBOTT SEDDES TOWERS RED SITE OUSES eet Homes	t only if it has Build Struct Cou 58 48 1 39 2 30 2 30 2	al Total Unit Count for the second se	nd buildings (incl Terminate Development? 	uding RMI inventory). ACC Amendment Date?
Development In It is possible to Developments Page No: 1 of 1 Development Number NY001000070 NY001000072 NY001000073 NY001000075 NY001000075 NY001000077	Developm PIONEER CENTRAL TOOMEY JAMES C VINETTE T SCATTER TOWNHI McBride Str ROSS TO	ent Name HOMES VILLAGE ABBOTT GEDDES TOWERS RED SITE OUSES eet Homes DWERS	t only if it has Build Struct Cou 58 48 1 39 2 30 2 30 2 1	al Total Unit Count 612 446 308 477 183 157 2 160	nd buildings (incl Terminate Development? 	uding RMI inventory). ACC Amendment Date?
Development Ir           It is possible to           Developments           Page No: 1 of 1           Development           Ny001000070           NY001000071           NY001000073           NY001000074           NY001000075           NY001000076           NY001000077           NY001000076           NY001000077	PIONEER CENTRAL TOOMEY JAMES C VINETTE T SCATTER TOWNH McBride Str ROSS TO PIONEER	ent Name HOMES VILLAGE ABBOTT SEDDES TOWERS RED SITE OUSES eet Homes DWERS HOMES	t only if it has Build Struct Cou 58 48 1 39 2 30 2 30 2 1 0	al Total Unit Count 612 446 308 477 183 157 2 160 0	nd buildings (incl Terminate Development? 	ACC Amendment Date?

Figure 99: Terminate Development

# 1.1.10CAPFUND B&U Certification Tab

The CAPFUND B&U Certification tab (see Figure 100) allows PHA users to verify the capital funding data and submit the capital funding certification.

The data certification process proceeds as follows:

- 1. PHA reviews the data for inaccuracies.
- 2. PHA corrects any data inaccuracies which it is able to correct.
- 3. PHA certifies all of the developments that have accurate data.
- 4. PHA provides the TAC ticket number which reports the data inaccuracy for correction by HUD and marks the developments for which it cannot correct inaccurate IMS/PIC data as "rejected."

Once all of the PHA's developments have been either marked "certified" or "rejected," the PHA submits the certification.



Reports Maintain CAPFUND	B&U				
Inventory Certificat	tion				
Development Building Unit S	Submission Approval				
Development List					
Select View:	Development				
Hub:	5HCHI Chicago Hub 👻 Select				
Field Office:	5APH CHICAGO HUB OFFICE				
Field Office HA:	IL001 E. St. Louis Housing Authority	✓ Select			
Search					
Capital Fund Certification Fiscal Year:	2009 - Select				
Development Number:					
1					Search
Chatwa					
Status	00/01/0010				
Due Date:	08/31/2010				
Certification Status:	Draft				
Page No: 1 of 1					Page: 1
Development Number	Development Status	DOFA	PIC Ticket No.	Certification Status	
<u>IL001000001</u>	Management	01/01/1943			
<u>IL001000002</u>	Management	09/05/1950			
<u>IL001000003</u>	Management	05/29/1977			
<u>IL001000004</u>	Management	04/09/1977			
IL001000005	Management	04/01/1962			
<u>IL001000006</u>	Management	11/29/1967			
<u>IL00100007</u>	Management	02/16/1969			

Figure 100: CAPFUND B&U Certification tab

The Capital Fund Data Certification pages (the Capital Fund Building and Unit Data Certification tab page and the Development Details page) in IMS/PIC display the state of a PHA's inventory <u>as of</u> the reporting date established by the Office of Public and Indian Housing (PIH). PIH normally sets the reporting date at September 30 of the previous Federal Fiscal Year (e.g. 9/30/2009).

To certify developments, the user must select the check boxes for every development and either click **Certify** or **Reject**. To reject a development, the user must have an IMS/PIC TAC desk ticket number. To enter an IMS/PIC TAC desk ticket number, the user must click the development number and enter the IMS/PIC TAC desk ticket number on the development details page. Then, the user may enter comments and click **Save** to save the updates. The user can also click the **Reset Development Status** button to clear the certification status selection.

After completing all the development certifications, the user must click **Submit** to complete the Capital Fund Certification process.

<u>IL001003</u>	Management	03/01/1954			
<u>IL001004</u>	Management	03/01/1954			
<u>IL001007</u>	Management	04/01/1962			
<u>IL001011</u>	Management	05/30/1970			
<u>IL001013</u>	Management	08/31/1971			
<u>IL001016</u>	Management	03/31/1974			
<u>IL001017</u>	Terminated	02/01/1973			
<u>IL001018</u>	Management	05/01/1975			
<u>IL001020</u>	Management	06/17/1976			
<u>IL001022</u>	Management	07/07/1977			
<u>IL001023</u>	Management	03/30/1980			
<u>IL001024</u>	Management	05/31/1978			
Page No: 1 of 1					Page: 1
			Certify	Reject Reset Developme	nt Status
					Submit



### Figure 101: CAPFUND B&U Certification tab

The Data Certification pages display data that is stored elsewhere in IMS/PIC (usually accessible from the **Development** or **Inventory Removals** sub modules of the **Housing Inventory** module. Therefore, PHAs cannot correct erroneous information on the Capital Fund Data Certification pages themselves. Thus, PHAs must navigate to the location where IMS/PIC stores the source information that the Capital Fund Data Certification pages display in order to make corrections to erroneous data. Certain changes must undergo HUD Field Office review and approval process for the changes to take effect.

Once data is changed or corrected in IMS/PIC outside of the Capital Fund Data Certification pages, there will be a one day lag from the time the correction is finalized before the Capital Fund Data Certification pages display the corrected data. Users have to be assigned the appropriate access rights to access the Capital Fund Data Certification pages.

# 1.1.10.1 Development List sub Tab

The **Development List** sub tab allows users to select a PHA and view the list of developments associated with this PHA (see Figure 102).

When a user selects a PHA, the **Search** section of the page allows the user to select the certification fiscal year and click **Select** to select development data for that certification year. If the PHA has a long list of developments, than the user can enter a development number in the **Development Number** box and click **Search**. The program will only display the development number that was indicated in the **Development Number** box.

Reports Maintain CAPFUND BE	RU n			
Development Building Unit Sul	bmission Approval			
Development List				
Select View:	Development - Select			
HQ Division:	Public and Indian Housing			
HQ Office:	PO Field Operations	- Select		
Hub:	5HCHI Chicago Hub - Select			
Field Office:	5APH CHICAGO HUB OFFICE			
Field Office HA:	IL030 St. Clair County Housing Authority	- Select		
Search				
Capital Fund Certification Fiscal Year:	2009 - Select			
Development Number:				
				Search
Status				
Due Date:	02/20/2009			
Certification Status:	Submitted			
Page No: 1 of 1				Page: 1
Development Number	Development Status	DOFA	PIC Ticket No.	Certification Status
<u>IL03000010</u>	Management	05/27/1971		Certified
IL03000021	Management	02/28/1978		Certified
IL03000022	Management	11/01/1968		Certified
<u>IL03000031</u>	Management	02/09/1976		Certified

### Figure 102: Development List sub tab

First, a PHA should check whether the list of developments is complete and accurate. If a PHA has added a new development that has reached Date of Full Availability (DOFA) prior to the CAPFUND Certification date, and the development is not displayed in the list, the user must navigate to the Development Profile page for the missing development and validate that the **DOFA Date Actual** data element has the correct DOFA date listed. If it does not, the PHA can work with the local PIH Field



Office staff to correct or approve the DOFA date (DOFA dates are not effective until approved by appropriate Field Office staff). If a development reaches DOFA after the date the CAPFUND Certification is due, it should not be displayed in the list of developments. If the list includes a development that reached DOFA after the reporting date, follow the same course of action to correct the DOFA date. The IMS/PIC system lists DOFA dates in the **Development** sub module under the **Housing Inventory** module on the **Development** tab.

In addition to checking DOFA dates, PHAs must also check removal from inventory (RMI) status. Units that have been removed from inventory (have RMI action/closing dates) that are more than 11 years prior to the reporting date will not be considered for Replacement Housing Factor funding in the Capital Fund formula, therefore any developments that were entirely removed more than 11 years prior to the reporting date will not display on the list of developments. If a development that was entirely removed more than 11 years prior to the reporting date is listed, the PHA must work with appropriate Field Office staff to enter or correct the RMI action/closing dates to properly mark all of the units in the development as removed. If the RMI action/closing date is within the 11 year timeframe but is inaccurate, this also potentially affects the Capital Fund formula and needs to be corrected. The IMS/PIC system lists RMI action/closing dates in the **Inventory Removals** sub module of the **Housing Inventory** module.

## 1.1.10.1.1 Development Details Page

The Development Details page of the **Development List** sub tab displays the detailed data for the selected development drawn from the **Development** tab of the **Development** sub module (see Figure 103). To access this page, the user must click any development number on the **Development List** sub tab. The development numbers are displayed as links and allow users to access development details.

Reports	Maintain CAPFUND B& Inventory Certification							
Development Buildin	ng Unit Sub	mission Approval						
Development	List	Building List	List	RMI Units 1999 Unit Counts				
HQ Division:		Public and Indian Hou	using					
HQ Office:		PO Field Operations						
Hub:		5HCLV Cleveland Hub	)					
Field Office:		5HPH INDIANAPOLIS	PROGRAM CENTER					
Field Office HA:		IN032 Bloomfield Hou	sing Authority					
Physical Development:		IN032000001 bgrilsgfz	tmrhfls wovrunlloy					
Development Details (2	009)							
		Unit	Count			Standing Unit	Removed Unit	
Standing Units	Removed Units	Non-ACC Units	Non-Dwelling Units	Elderly Units	Family Units	Bedroom Count	Bedroom Count	
92	0	0	4	76	12	109	0	
PIC Help Ticket No :								
Comments:				HQ Comments:				
			<b></b>					
A PHA is required to enter a valid PICHelp Ticket Number if it is rejecting certification for a development.								
						Baar	et Covo	

Figure 103: Development Details page

The Development details page displays the unit counts for the development, IMS/PIC Help desk ticket number (if applicable), and comment from PHA users and Field Office users.



The Development Details page contains the essential data related to the development that HUD uses to calculate the Capital Fund formula:

**Standing units** – standing units are the number of units in the development as of the reporting date that have not been removed from the inventory of the development.

**Removed units** – removed units are units in the development that have an approved action date/closing date for the removal that is on or before the reporting date.

**Non ACC Units** – non-ACC units are units that are not included under the public housing annual contributions contract between HUD and the PHA. Usually these units are market rate or non public housing units in mixed finance developments. (Note that demolished/disposed units are still ACC units even though they are no longer in the inventory – they retain the status that they had when they were removed from the inventory.) Units that are marked as non-ACC units, will not be included in the Capital Fund formula.

**Non-Dwelling Units** - non-dwelling units include both merged units and non-dwelling buildings in the development. Non-dwelling units will not be included in the Capital Fund formula.

Standing Unit Bedroom Count is the total number of bedrooms in the standing units.

**Removed Unit Bedroom Count** is the total number of bedrooms that were in the removed units prior to their removal.

An error in any of the above data elements will affect the calculation of the Capital Fund formula.

The **Building List**, **Unit List**, and **RMI Units** sub tabs allow users to view the source data to facilitate further investigation. These sub-tabs are on the purple navigation bar underneath the tabs at the top of the page.

To save the development details, the user must click Save.

### 1.1.10.1.2 Correcting Incorrect Development Data

If the data displayed on the Development Details page for a development is incorrect, a PHA must take steps to correct the inaccurate data prior to certifying the accuracy of the data for that development on the Capital Fund Building and Unit Data Certification tab. In this instance, a PHA would follow the normal procedures for changing the source data in IMS/PIC. Some corrections will require coordination with Field Office staff to ensure that any corrections that require Field Office approval prior to taking effect are approved prior to certifying the accuracy of the data. Some corrections require Field Office staff to make the corrections on a PHA's behalf (particularly corrections relating to development level data such as DOFA dates). Any changes in source data will be reflected in the IMS/PIC Data Certification pages the day after they are finalized. Once the data is correct, a PHA can then mark the development as certified on the Capital Fund Building and Unit Data Certification tab.

In rare instances, PHAs may encounter errors that cannot be corrected by either the PHA or Field Office staff because of the way the IMS/PIC system operates. In those instances, PHAs are to submit a request to the Real Estate Assessment Center Technical Assistance Center (TAC) PHA staff can either send an email describing the issue (include staff member name, phone number, housing authority number and field office name where applicable) to REAC\_TAC@hud.gov or call TAC at 1-888-245-4860 between 7:00 am and 8:30 pm EST on business days. TAC will assign a ticket number to track the issue to resolution. (The ticket number will be a number preceded by either "IM" or "IMS/PIC".) If the issue is resolved sufficiently before the deadline for certifying, the PHA should take the necessary steps to correct the remaining inaccurate data and certify that the data for the development is accurate.



If the issue is not resolved prior to the deadline for certification or there is insufficient time to make the correction after the issue is resolved before the certification deadline, the affected PHA must reject certification for the development. In order to reject a certification for a development, a PHA must provide certain data on the Development Details page for the development.

In this situation, TAC will assign a IMS/PIC help ticket number to the PHA. Note that the IMS/PIC help ticket number may be different from the normal TAC help ticket number. It may use the following format: the characters "IMS/PIC" (instead of "IM") followed by five numbers (e.g. IMS/PIC12345). The PHA must enter the IMS/PIC help ticket number into the space provided on the Development Details web page. If the ticket begins "IM" instead of "IMS/PIC", replace the "IM" with "IMS/PIC" when it is entered The PHA must also provide a comment in the space provided that indicates what data element(s) is/are wrong, what the correct data is and why it cannot correct the data through the normal procedure.

After entering the IMS/PIC help ticket number, the user must save the changes by clicking **Save**. Multiple numbers can be entered if separated by commas.

# 1.1.10.2 Building List sub Tab

The **Building List** sub tab (see Figure 104) displays the building and entrance information associated with the selected development. The data on this sub tab is read-only. However, it is accessible for editing in the **Building** tab of the **Development** sub module if the user has sufficient editing privileges.

The **Building Information** section of the page lists all of the building numbers and building entrance numbers providing the following information:

- Building name
- Building type
- Building status
- Building address
- Floor count
- Unit count

R	eports Mai	ntain CAPFU ntory Certifi	ND B&U cation						
Developme	nt Building	Unit	Submission	Approval					
De	evelopment Lis	t	Buildin	g List	Unit List	RMI Unit	5	1999 Unit Cou	ints
HQ Divisio	n:		Public and I	ndian Housing	9				
HQ Office:			PO Field Op	erations					
Hub:			5HCHI Chica	go Hub					
Field Office	e:		5APH CHICA	go hub offi	CE				Download in Excel
Field Office	Field Office HA: IL001 E. St. Louis Housing Authority								
Physical De	evelopment:		IL001000001	hvnls hivknlt	ovfnzh				
Building In	formation								
<b>Buildings</b>	1 to 50 of 241								
Bldg. No.	Entrance No.	Bld	g. Name		Building Type	Building Status	Address Line 1	Floor Count	Unit Count
<u>0100</u>	1	twoy bgrmfnn	lx hivknlt	Non Dw	elling Structure	Initial Approval Completed	gh sg8 sgilm 490	1	0
<u>0101</u>	1	s3-z3 gkz gh s	sg8 m 490	Row or '	Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg8 sgilm 490	1	1
<u>0101</u>	2	s3-z3 gkz gh s	sg8 m 490	Row or 7	Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg8 sgilm 490	1	1
<u>0101</u>	3	s3-z3 gkz gh s	sg8 m 490	Row or 7	Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg8 sgilm 490	1	1
<u>0101</u>	4	s3-z3 gkz gh s	sg8 m 490	Row or '	Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg8 sgilm 490	1	1
<u>0101</u>	5	s3-z3 gkz gh s	sg8 m 490	Row or 7	Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg8 sgilm 490	1	1
<u>0101</u>	6	s3-z3 gkz gh s	sg8 m 490	Row or 7	Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg8 sgilm 490	1	1
<u>0101</u>	7	s3-z3 gkz gh s	sg8 m 490	Row or	Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg8 sgilm 490	1	1
<u>0101</u>	8	s3-z3 gkz gh s	sg8 m 490	Row or	Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg8 sgilm 490	1	1

Figure 104: Building List sub tab



The **Download in Excel** button allows the user to download the entire building data in form of an Excel spreadsheet. If the list of buildings cannot fit on one page, the program will display the **Next** and **Prev** links in the bottom for the user to navigate to the desired building.

# 1.1.10.3 Unit List sub Tab

The **Unit List** sub tab (see Figure 105) displays the unit data associated with a selected building and building entrance number. The **Unit Information** section displays the following details:

- Unit Number
- Building number
- Entrance number
- Floor number
- Door number
- ACC unit indicator
- Bedroom count
- Unit designation
- Submission status type

All these details are essential for proper Capital Fund certification calculations, so they must be checked for accuracy.

Re	ports Maint	ain CAPFUND B&U tory Certification						
Development	Building	Unit Subrr	nission	Approval				
Dev	elopment List/		Building I	list		Unit List	RMI Units	1999 Unit Counts
HQ Division	:	Publ	ic and Ind	ian Housing				
HQ Office:		PO F	ield Operation	ations				
Hub:		5HCI	HI Chicago	Hub				
Field Office:		5API	H CHICAGO	HUB OFFICE				Download in Excel
Field Office I	HA:	IL00	1 E. St. Lo	uis Housing Autho	ority			
Physical Dev	elopment:	IL00	1000001 hv	nls hivknlt ovfnzh	1			
Unit Informat	tion							
Units 1 to 8	of 8							
Unit Number	Building Number	Entrance Number	Floor Number	Door Number	ACC Unit Indicator	Bedroom COunt	Unit Designation	Submission Status Type
010101	0101	1	1		Y	2	General Occupancy	Initial Approval Completed
010102	0101	2	1		Y	2	General Occupancy	Initial Approval Completed
010103	0101	3	1		Y	2	General Occupancy	Initial Approval Completed
010104	0101	4	1		Y	2	General Occupancy	Initial Approval Completed
010105	0101	5	1		Y	2	General Occupancy	Initial Approval Completed
010106	0101	6	1		Y	2	General Occupancy	Initial Approval Completed
010107	0101	7	1		Y	2	General Occupancy	Initial Approval Completed
010108	0101	8	1		Y	2	General Occupancy	Initial Approval Completed

Figure 105: Unit List sub tab

The **Download in Excel** button allows the user to download the entire unit data in form of an Excel spreadsheet. If the list of buildings cannot fit on one page, the program will display the **Next** and **Prev** links in the bottom for the user to be able to navigate to the desired unit.

# 1.1.10.4 RMI Units sub tab

The **RMI Units** sub tab (see Figure 106) displays the approved RMI applications associated with the selected development. The RMI Units section displays the list of RMI application providing the following details:



- Application Number
- Application Type
- Application Status
- Action Dates
- RMI Unit Count

The first column allows the user to expand and RMI application record to display the full list of action dates for applications where units were removed on different dates. To expand an RMI application, click the + ('plus') sign. In the **Action Dates** column, the dates are displayed as links. If a user clicks any of the dates, the program will display the RMI Units Report.

Reports Maintain CAP Inventory Cer	FUND B&U tification			
Development Building Unit	Submission Approval			
Development List	Building List	Unit List	RMI Units 1	999 Unit Counts
HQ Division:	Public and Indian Housing			
HQ Office:	PO Field Operations			
Hub:	5HCHI Chicago Hub			
Field Office:	5APH CHICAGO HUB OFFICE			
Field Office HA:	IL002 Chicago Housing Authority			
Physical Development:	IL002003 hvnls hplliy s givyli			
RMI Units (2009)				
Application Number	Application Type	Application Status	Action Dates	RMI Unit Count
E IBSIL00230	Demolition	HQ Approved	<u>11/17/1997 - 07/11/2000</u>	126
			<u>11/17/1997</u>	110
			<u>07/11/2000</u>	16
	Demolition	HQ Approved	<u>12/31/1999 - 07/11/2000</u>	141
E IBSIL00241	Demolition	HQ Approved	04/02/2001 - 04/02/2001	63

Figure 106: RMI Units sub tab



### 1.1.10.4.1 RMI Units Report

	nic.	Download in Excel Print	
Developn	nent Number: IL002003		
Applicati	on Number: IBSIL00230		
Applicati	on Type: Demolition		
Applicati	on Status: HQ Approved		
Action D	ates: 07/11/2000	✓ Select	
Records	1 - 16 of 16		<< Prev page 1 Next Page >>
#	Building No.	Building Entrance No.	Unit No.
1	IBS23	BE1	IBSUN111
2	IBS23	BE1	IBSUN112
3	IB\$23	BE1	IBSUN113
4	IB\$23	BE1	IBSUN114
5	IB\$23	BE1	IBSUN115
6	IB\$24	BE1	IBSUN116
7	IB\$24	BE1	IBSUN117
8	IB\$24	BE1	IBSUN118
9	IB\$24	BE1	IBSUN119
10	IBS24	BE1	IBSUN120
11	IB\$25	BE1	IBSUN121
12	IB\$25	BE1	IBSUN122
13	IBS25	BE1	IBSUN123
14	IBS25	BE1	IBSUN124
15	IBS25	BE1	IBSUN125
16	IBS26	BE1	IBSUN126

#### Figure 107: RMI Units Report

The RMI Unit Report lists all the units removed from inventory under the selected RMI application and within the selected action dates. The report provides the following data:

- Building number
- Building entrance number
- Unit number

The user can download the report data in the Excel format or print the report by clicking the respective buttons. Users can find the **Download in Excel** and **Print** buttons in the report header.

## 1.1.10.5 1999 Unit Counts sub Tab

HUD does use the 1999 unit counts data to calculate the Capital Fund formula. However, PHA users in IMS/PIC cannot correct the **1999 Total Units** and the **1999 Bedroom Counts** data (see Figure 108).



Reports Maintain CAPFUND B	Bell Kon Submission Approval	
Development List	Building List Unit List RMI Units 1999 Unit Counts	
HQ Division:	Public and Indian Housing	
HQ Office:	PO Field Operations	
Hub:	5HCHI Chicago Hub	
Field Office:	5APH CHICAGO HUB OFFICE	
Field Office HA:	IL001 E. St. Louis Housing Authority	
Physical Development:	IL001003 hvnls hwovrshvw mslq	
1999 Units		
1999 DOFA Actual Date	03/01/1954 *(MM/DD/YYYY)	
1999 Total Units	300	
1999 Bedroom Counts	744	
H6RHF Ineligible	0	
Turnkey III	$\odot$ Y $\odot$ N	
ZIP 3	622	
RS Means	1	
Non Metro Indicator	⊙Y ● N	
Comments	x v	
	Reset	ve

Figure 108: 1999 Unit Counts sub tab

Users can edit the **1999 Total Units** and the **1999 Bedroom Counts** boxes as well as provide an explanation for the correction.

Once the users enter the correction and correction comments, they must click **Save** for the system to retain the data. Once the user clicks **Save**, the system indicates that the information has been saved.

HUD will analyze each instance where 1999 data has been edited. The certification that PHAs enter on the **Capital Fund Building and Unit Data Certification** tab does not extend to data entered in the **1999 Total Units** and the **1999 Bedroom Counts** boxes on the **1999 Unit Counts** sub tab. Even if 1999 data is corrected, if the remainder of the development data is accurate, the PHA is to certify to the accuracy of the data for the development on the **Capital Fund Building and Unit Data Certification** sub tab.