HA 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, submit, 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. **Major Reconstruction of Obsolete Public Housing Projects (MROP)**: An obsolete development method. **New Construction**: A new development is built. Most developments fall into this category. **New Construction – Conventional**: Same as the New Construction method. **New Construction – Turnkey**: A method where the developer builds the development but "turns the keys over" when it's ready for the HA. **Rehabilitation – Conventional**: An old development is rehabilitated for HA use. **Rehabilitation – Turnkey**: A method where the developer rehabilitates the development and "turns the keys over" when it's ready for the HA. **Note:** 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 units 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.

Figure 1: Development Profile page

1.1.1.2 List sub Tab

The **List** sub tab (see Figure 2) 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 / Return to Secure Systems				

Reports | Maintain Inventory | CAPFUND B&U Certification

Development | Building | Unit | Submission | Approval

| | | Profile | | List | | Address | | Contact |

HQ Office: — Public and Indian Housing
HQ Division: — PO Field Operations
Hub: — 4HJAC Jacksonville Hub
Field Office: — 4HPH JACKSONVILLE HUB OFFICE
Field Office HA: — FL004 Orlando

Development Status Filter

Status: — Management [dropdown]

Retrieve

		ACC Units						
Development Number	Development Name	General Occupancy	Elderly/Disabled	Non Dwelling	Other	Total ACC Units	Non ACC Units	Total Units
FL004000001	GRIFFIN PARK	171	0	1	0	172	0	172
FL004000002	REEVES TERRACE	219	0	5	0	224	0	224
FL004000004	LAKE MANN HOMES	207	0	3	0	210	0	210
FL004000006	MURCHISON TERRACE	188	0	2	0	190	0	190
FL004000009	IVEY LANE HOMES	181	0	3	0	184	0	184
FL004000010	LORNA DOONE APTS	104	0	0	0	104	0	104
FL004000011	MEADOW LAKE APTS	87	0	0	0	87	0	87
FL004000012	CITRUS SQ/JOHNISON MANOR	127	0	0	0	127	0	127
FL004000013	OMEGA APTS	118	0	1	0	119	0	119
FL004000014	CVMX VIRVMK TM UMBBER IFT	64	0	0	0	64	0	64
FL004000015	CVMX VIRVMK TM UGZEJZMB IFT	30	0	0	0	30	26	56
FL004003	CARVER CT	0	0	0	0	0	0	0
FL004007	ORANGE VILLA	0	0	0	0	0	0	0
FL004009999	CARVER CT	0	0	0	0	0	0	0

Figure 2: 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 3) 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.

Figure 3: 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.

Figure 4: 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 5) 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**.

Figure 5: Contact sub tab

The **Contacts List** table displays the contact name, role, phone number, email, and active status of the development manager.

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** page presents summary information for every building in the selected development. If the building status is **Initial Upload**, any user type can delete it except for Guest user.
- **The Building Detail** page 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 the IMS/PIC website. IMS/PIC Job **Aids provide users w**ith 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 6) 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.

Figure 6: 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 6). 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 7) displays several categories of information.

Building Information									
									Add Buildings
Buildings 1 to 50 of 151									
Building No.	Building Entrance No.	Building Name	Building Type	Building Status Type	Address Line 1	Floor Count	Unit Count	Construction Date	Delete Building?
001001	1	hgiflx bgrx iveorh	Row or Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg63 ghvd 347	1	1	03/31/1941	
001001	2	hgiflx bgrx iveorh	Row or Townhouse (Sep. entrances)	Initial Approval Completed	sg63 ghvd 347	1	1	03/31/1941	
001001	3	hgiflx bgrx iveorh	Row or Townhouse (Sep. entrances)	Initial Approval Completed	gvvigh sg63 ghvd 347	1	1	03/31/1941	
001001	4	hgiflx bgrx iveorh	Row or Townhouse (Sep. entrances)	Initial Approval Completed	sg63 d 347	1	1	03/31/1941	

Figure 7: 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.

Data Category	Description
Building Type	One of the following structure types is displayed: • Elevator Structure • Walkup/Multifamily Apartment (Shared Entrances) • Non Dwelling Structure • Row or Townhouse (Sep. Entrances) • Semi-Detached (Sep. Entrances) • Single-Family/Detached
Building Status Type	The status of the building entrance record in IMS/PIC. One of the following statuses is displayed: • Initial Upload: The building record has been entered but not approved by the Field Office. • Initial Approval Completed: The building record has been approved by the Field Office. • Demo/Dispo – Approved: The building in question has been approved for either demolition or disposition. Source: **Demo/Dispo** sub module. • Demo/Dispo – Proposed: The building in question has been proposed for either demolition or disposition. Source: **Demo/Dispo** sub module. • Demo/Dispo Draft: A draft has been created to propose either demolition or disposition for this building. Source: **Demo/Dispo** sub module. • Removed from Inventory: HUD HQ has completed the HA request to remove this building from the HA's inventory. Source: **Demo/Dispo** sub module. • 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. • 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.
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.

Data Category	Description
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 Removed 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.

1.2.1.2 The Building Detail sub Tab

To access the **Building Detail** sub tab (see Figure 8), 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.

Figure 8: Building Detail sub tab

1.1.2.1.3 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 9):

- 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 hgiflx cmvlsk
DOFA Date Actual:	05/30/2008 MM/DD/YYYY

Figure 9: 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 10) 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 10) 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 10: Building Details - Building Entrance Address & Details sections

The **Building Entrance Summary** section (see Figure 11) provides the following information about the units accessible via the selected entrance:

- Number of Units by Unit Designation

- o Family Units
- o Elderly Units
- o Total
- Number of Units by Bedroom Size
  - o 0 Bedroom
  - o 1 Bedroom
  - o 2 Bedrooms
  - o 3 Bedrooms
  - o 4 Bedrooms
  - o 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 :   0
Approved as of :   06/05/2009

Figure 11: 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.
	Note: 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.

1.1.2.1.4 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 12). 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 1.2.1.2 The Building Detail sub Tab.

Figure 12: The Add Buildings Page

1.1.3 The Unit Tab

The **Unit** tab (see Figure 13) 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.

Figure 13: 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 14). The user can use any combination of these tools for one search.

Figure 14: 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 15) 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 Information								
Units 1 to 10 of 10								Add Units
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?
527721	Initial Approval Completed	ivknfq, v	5201	1	1		
527725	Initial Approval Completed	mlhriizs, z	5201	2	1		
527729	Initial Approval Completed	ilobzg, z	5202	1	1		
527733	Initial Approval Completed	hpmzysxizn-bvmmrpxn, v	5202	2	1		

Figure 15: 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
Unit Number	The unique identifier for a unit. This number is the same as the HA's inventory number for the unit.

Data Category	Description
Submission Status Type	The status of the unit in IMS/PIC. One of the following statuses is displayed: • Initial Upload: The unit record has been entered into IMS/PIC but not approved by a Field Office. • Initial Approval Completed: The unit record has been approved by the Field Office. • Demo/Dispo – Approved: The building the unit is in has been approved for either demolition or disposition. Source: **Inventory Removals** sub module. • Demo/Dispo – Proposed: The building the unit is in has been proposed for either demolition or disposition. Source: **Inventory Removals** sub module. • 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. • Removed from Inventory: HUD HQ has completed the HA request to remove this unit from the HA's inventory. Source: **Inventory Removals** sub module. • 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. • 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. • Proposed Unit Information – PHAs proposed for units status/designation changes. • Submit Unit Information – PHA submitted the unit status/designation changes to the field office for approval. • Final Review results submitted – Field office approved the unit status/designation changes and waiting for the archival to take place.
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 **Form-50058** 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.
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.

Data Category	Description
Delete Unit?	If this functionality is available, the program will display a check box allowing the user 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

Figure 16: Unit Details

Additional information on how to perform certain actions in this page 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
- Building
- Entrance Number
- Building Entrance Address
- Door Number
- Floor Number
- Bedroom Count
- Submission Status Type
- Unit Designation
- Accessible Designation
- Unit Tenant Status
- ACC Indicator Change Date
- Effective 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 16) 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 controls can be changed:

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

Figure 17: Update Unit Detail

The user can easily change/add information by typing data into the boxes and clicking the **Update Unit Details** button. However, for **Unit Tenant Status**, **Unit Designation** and **Accessible Designation** option the user is taken to a new page upon clicking the "Modify" link, the steps are described below..

After the units are approved by HUD Field Office staff member, PHAs are limited in the changes that they can make to unit characteristics without HUD approval. Changes that potentially affect unit funding are controlled by Field Offices and thus must undergo HUD approval.

The PHA can make changes to unit tenant status, unit designation, or accessibility designation by submitting a Form 50058 or MTW for units under :

- OCCPD : Occupied
- VACOOC : Vacant

The PHA cannot make changes to units under :

- VACHUD : Vacant HUD Approved
- EXCPT : Non-Dwelling

So when PHA make changes to unit tenant status, unit designation, or accessibility designation, the program does not make any changes the existing unit characteristics until a Field Office user approves the proposed changes. So when a PHA user makes changes, the unit details are not updated immediately. Rather, the program saves the changes as proposed and changes the submission status type of the unit that undergoes unit characteristics changes.

To edit the **Unit Designation** option the user should click the **Modify** link as shown on the screenshot (see **Error! Reference source not found.**).

The following page will be displayed (see Figure 19), the user will have an option to select appropriate designation, reason for change in unit designation, and enter comments.

Figure 18: Modify Unit Designation

Figure 19: Unit Designation

In the **New Unit Designations** list the user can select the desired unit designation; the left side is for unit changes that do not require HUD approval (General Occupancy only). The right side of the screen is the unit changes that do require HUD approval. (see Figure 20)

No HUD Approval

HUD Approval Required

Figure 20: 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, before proceeding to the final step, the user can enter additional comments.

For the Unit Designation which does not require HUD approval the user can click the **SAVE** button to make the changes effective. For the Unit Designation which requires HUD approval the user can click the **Propose Change** button to propose a unit designation changes. After proposing changes to unit characteristics, the user must submit them to Field Office for approval using the **Submission** tab. The change will be effective in the system upon Field Office Approval.

The **Merged Unit** designation type is not available for PHA users. If PHA users need to change an existing unit designation to merged, they must contact the appropriate Field Office for assistance.

The **Non-Dwelling Unit** designation can be changed by clicking on the **Modify** link next to Unit Tenant Status. If a PHA user can select one of the non-dwelling unit tenant statuses, the unit designation will be changed to non-dwelling automatically.

Similarly, if a PHA user needs to change a non-dwelling unit designation to **General Occupancy**, then the PHA user must first change the unit tenant status to any of the vacant statuses (**Vacant**, or **Vacant HUD Approved**) and the program will change the unit designation to **General Occupancy** automatically.

Additional information on how to edit unit details can be found in Job Aids on the 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 following the link: http://www.hud.gov/offices/pih/systems/pic/ts/

To edit the **Accessible Designation** option the user should click the **Modify** link as shown on the screenshot (see **Error! Reference source not found.**) above. The page that is responsible for editing accessible designations will be displayed (see Figure).

Figure 2221: Modify Accessible Designation

Figure 23: 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 **Propose Change** button to propose a change in Accessible Designation. After proposing changes to unit characteristics, the user must submit them to Field Office for approval using the **Submission** tab. The change will be effective in the system upon Field Office Approval.

To edit **Unit Tenant Status** the user should click on **Modify** link as shown on the screenshot (see Figure 24) above. The page that is responsible for editing Accessible Designations will be displayed (see Figure 25).

Note: Users cannot edit the unit tenant status of the units occupied by assisted tenants or are in the merged unit designation.

Figure 24: Modify Unit Tenant Status

Figure 225: Unit Tenant Status

As shown on the screenshot (see Figure 25), the PHA user can select the unit tenant status, the left side is for the unit tenant status that do not require HUD approval .The right side of the screen is for the unit tenant statuses which require HUD approval..

Below are the available subcategories which do not require HUD approval:

- Occupied
  - Employee
  - Non-assisted Tenant
  - Police Officer
  - Unauthorized

Below are the available subcategories which require HUD approval:

- 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

- o Special Use: Self Sufficiency Activities
- o 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 three available choices: **Change In Use, Data Correction** and **Other**.
3) If necessary, enter comments into the **Comments** box.

For Unit Tenant Status changes- which does not require HUD approval the user can click the **SAVE** button to make the changes effective. For Unit Tenant Status which requires HUD approval the user can click the **Propose Change** button to propose a Unit Tenant status change. After proposing changes to unit characteristics, the user must submit them to Field Office for approval using the **Submission** tab. The change will be effective in the system upon Field Office approval.

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 23) 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 236: 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.
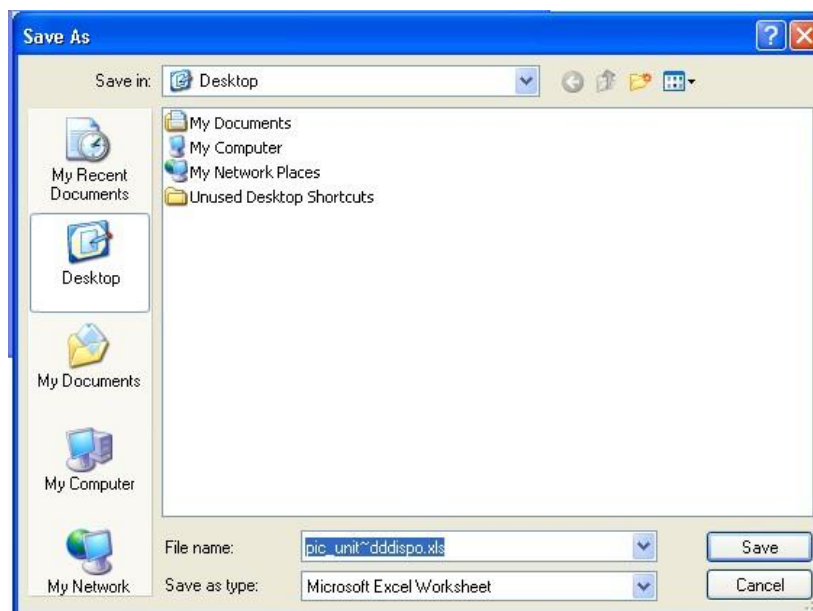
Figure 247: The Save As dialog box.

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 stored into the system's database 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.

Figure 258: 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 29) 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.

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

Upload Errors
Records 1 to 25 of 734

Figure 269: 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. PHA users must submit unit detail changes to Field Office for approval using the **Submission** 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/

1.1.6.1 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 30).

Figure30: 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 30). In this page, user can submit unit information to be approved by a member of the Field Office.

Figure31: 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:

  o **Submitted**: The unit information is submitted and is pending for approval/rejection by the Field Office personnel.

  o **Approved**: The unit information is approved by the Field Office personnel.

  o **Rejected**: The unit information is rejected by the Field Office personnel.

  o **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.

Figure32: The Submit Unit Information page after unit data has been submitted

The **Status History** table displays the list of users who have submitted and approved the unit information changes. The Super User can select any of these records and generate the Development Approval Status Report (see Figure 33) by clicking the **Generate Report** button at the bottom of the page.

Figure 273: 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 28).

Unit Number:	136	**Building:**	B_0083
Entrance Number:	2	**Building Entrance Address:**	vizfjh ivhrviw 0113
Door Number:	1334	**Floor Number:**	1 *
Bedroom Count:	0 *	**Submission Status Type:**	Initial Approval Completed
Unit Designation:	General Occupancy [Modify]	**Accessible Designation:**	Not Applicable [Modify]
Unit Tenant Status:	Occupied - Police Officer [Modify]		
Effective Date:	07/26/2010		
ACC Unit Indicator:	⊙ Yes ○ No	**ACC Indicator Change Date:**	10/01/1970
Cap Fund Indicator:	⊙ Yes ○ No	**Op Fund Indicator:**	⊙ Yes ○ No

Head of Family Details

First Name:	-
Last Name:	-
Occupancy Date:	-

[Update Unit Details]

Unit Status/Designations Change 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 284: 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 31).

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 29).

Once a user submits the unit data for a PHA for Field Office approval, the program locks the PHA inventory to prevent any changes. The PHA inventory will be unlocked only after the Field Office grants the approval, or rejects the proposal.

Figure 295: 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. PHA users cannot perform any actions using the **Approval** tab.

1.1.7.1 HA Approval sub Tab

Figure 306: 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 30). 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.

1.1.7.2 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). PHA users cannot perform any changes on this sub tab.

Figure37: The Approve Unit Status Changes page of the Approval tab

1.1.8 Reports Tab

The **Reports** tab of the **Development** sub module (see Figure 38) 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.

Figure 318: 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 38). 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 39) 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.

Figure 329: 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 40) 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.

Building Summary By Development Report

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	: IL001000001, IL001000002, IL001000003, IL001000004, IL001000005

Search Criteria

Status	: In Inventory

Select Page Set : 1-2 ▼

Development : IL001000001

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**

Development : 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	0	0	0
Multifamily/Walkup Apts (Shared Entrance)	0	0	0
Total for IL001000002	**41**	**314**	**314**

Figure40: 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) 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.

Building Detail Report

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

Search Criteria

Status	: In Inventory

Select Page Set : 1-1 ▼

Bldg. No. ▲▼	Ent. No. ▲▼	Loc.	Status ▲▼	Bldg. Type ▲▼	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 1452,pizk mlgtmrshzd	Initial Approval Completed	Elevator Structure	12/30/1967	11	93	93
0901	1	.vez boivezd 0452,pizk mlgtmrshzd	Initial Approval Completed	Elevator Structure	12/30/1969	11	84	84

Page No : 1
Showing 1 to 5 of 5 records

Figure41 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 42) 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 **Demo/Dispo** sub module.

To run a report, a 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 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.

Figure42: Unit Reports sub Tab

1.1.8.2.1   Unit Detail Report

The Unit Detail report (see Figure 43) 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 Fugure 43), 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 Detail Report
As of 6/21/2010

Hub   : 5HCHI Chicago Hub
FieldOffice   : 5APH CHICAGO HUB OFFICE
Field Office HA   : IL003 Peoria Housing Authority

Search Criteria

Status   : In Inventory
Details Complete   : ALL
ACC Indicator Selected : ALL
Occupancy   : Selected

Bldg 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	3					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

Showing 1 to 4 of 4

Figure43: 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 44) 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 Summary Report
As of 7/20/2010

Print Page   Download in Excel

Hub	: 5HCLV Cleveland Hub
FieldOffice	: 5HPH INDIANAPOLIS PROGRAM CENTER
Field Office HA	: IN002 Vincennes Housing Authority
Developments Selected	: IN002001001

Search Criteria

| Status | : ALL |
| Details Complete | : ALL |

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
Total : General Occupancy	83	83	77	6

Unit Designation :Mixed Elderly and Disabled 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

Figure44: 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 45) 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 Summary Report
As of 7/20/2010

Print Page   Download in Excel

Hub	: 5HCLV Cleveland Hub
FieldOffice	: 5HPH INDIANAPOLIS PROGRAM CENTER
Field Office HA	: IN002 Vincennes Housing Authority
Developments Selected	: IN002001001

Search Criteria

| Status | : ALL |
| Details Complete | : ALL |

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
Total : General Occupancy	83	83	77	6

Unit Designation :Mixed Elderly and Disabled 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

Figure45: 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 46) 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 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 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 the change. The **Update Date** column displays the date when the transaction was performed or proposed.

Units Status Changes Report

Download in Excel   Print

Report Start Date: 05/20/2009
Report End Date: 07/20/2010
Development Number: IL001000001

Records 1 - 25 of 36 (View All)   << Prev page 1 2 Next 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

Figure46: 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 Figure47) 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.

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

Unit Status Summary Report

Download in Excel   Print

Report Start Date: 07/22/2009
Report End Date: 07/22/2010
Development Number: IN002001001

Counts at the FIRST of Month

Records 1 - 12 of 12   << Prev page 1 Next Page >>

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 Approved - 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	77	0	0	0	0	0	0	6	0	0	0	0	0	0	0	0	0	0
03/01/2010	IN002001001	78	0	0	0	0	0	0	5	0	0	0	0	0	0	0	0	0	0
04/01/2010	IN002001001	80	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	0	0	0	0	0	0	0	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

Figure47: 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 RASS Report sub Tab

The **RASS Report** sub tab (see Figure48) 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 vacant units. If the user 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.

Figure48: RASS Report sub tab

1.1.8.3.1 RASS Report

The RASS Report (see Figure 49) 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.

RASS Report

Hub:	**5HCLV Cleveland Hub**		
FieldOffice:	**5HPH INDIANAPOLIS PROGRAM CENTER**		
Field Office HA:	**IN002 Vincennes Housing Authority**		
Occupied Indicator:	**All**	Total No.Of Records:	**83**
Update Date From:	**12/30/2009**	Update Date To:	**7/22/2010**
Developments:	ALL ▼ Select		

Select Page Set : 1-2 ▼ Select

Dev. No.	BLDG/ENT/UNIT	Physical Address				Mailing Address				Occ. Ind.	Last Update Date
		Address	City	State	Zip Code	Address	City	State	Zip Code		
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

Figure49: 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.

1.1.8.4 *Occ/Aging Report sub Tab*

The **Occ/Aging Report** sub tab (see Figure) 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.

Figure50: Occ/Aging Report sub tab

1.1.8.4.1   Aging Report

The Aging Report (see Figure51) 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.

Figure51: 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.

1.1.8.4.2 Occupancy Report

The Occupancy Report (see Figure 52) 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/Aging Report

Hub: **4HJAC Jacksonville Hub**

FieldOffice: **4HPH JACKSONVILLE HUB OFFICE**
Field Office HA: **FL004 Orlando**
Report Type: **Occupancy**   Total Records: 165

Development Code: FL004000001 [Select]

Pages: 1 2 3 4 Next>> Records: 1 to 50 [Total: 165]

Bldg Num	Bldg Ent	Unit No	SSN Head	First Name	Last Name	Occupancy Date	Bedroom Count	Monthly Rent	Household Size
714A	1	010105	xxx-xx-8139	I	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	I	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	I	IKVIEX	09/07/2010	1	119	1
715A	1	010097	xxx-xx-9639	O	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	O	ZQYVL	05/18/2009	1	119	2
715B	1	010169	xxx-xx-4741	Z	UZECJM	08/29/2008	0	247	1
715B	2	010170	xxx-xx-0503	O	OBBMIZKA	06/01/2002	1	302	1
715B	3	010171	xxx-xx-4396	I	ZEBASU	-	1	172	1
715B	4	010172	xxx-xx-8655	I	VIBBEA	09/01/1981	1	302	2
724A	1	010089	xxx-xx-9902	F	ZYUZELYV	05/09/2009	1	130	1
724A	2	010090	xxx-xx-9324	M	UITTYK	11/04/2009	3	343	3
724A	3	010091	xxx-xx-3648	O	JMIFITEFQ	10/02/2009	2	124	2
724A	4	010092	xxx-xx-9350	B	UUML	06/29/2006	3	343	4
724A	5	010093	xxx-xx-4060	O	IZMB	12/02/2009	2	94	3
724A	6	010094	xxx-xx-2122	M	ZEQJYYG	03/01/2010	2	181	3
724A	7	010095	xxx-xx-3677	O	UERMJ	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	I	UEQIB	06/01/2002	1	119	1
725A	2	010082	xxx-xx-1755	O	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	O	ZYUXAYFT	05/01/2008	3	145	4
725A	8	010088	xxx-xx-2805	I	UQYJMIA	06/01/2002	1	125	1

Figure52: 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.

1.1.8.5 Geo Coded Addresses sub Tab

The **Geo Coded Addresses** sub tab (see Figure53) 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.

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

Figure53: Geo Coded Addresses sub tab

1.1.8.6 Geo Coded Addresses Report

The Geo Coded Addresses report (see Figure) 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.

Geo Coded Addresses Report

Download in Excel   Print

HQ Division:	**Public and Indian Housing**
HQ Office:	**PO Field Operations**
Hub:	**4HMIA Miami Hub**
Field Office:	**4DPH MIAMI HUB OFFICE**
Field Office HA:	**FL002 ST. PETERSBURG**

Legend for Geo Match Code

[Blank]: Match Successful	**Z:** Zip Code Not Found	**B:** Insufficient Address Info	**S:** Street Name Not Found In Zip Code
H: House/Box Range Not Found On Street	**A:** Apt Range Not Found	**M:** Multiple Matches Found	**N:** Geo-Coding Incomplete
C: Critical Error	**E:** External Match	**X:** Geo-Coding Error	

Records 101 - 150 of 343 (View All)   << Prev page 1 2 3 4 5 6 7 Next Page >>

#	▲ Development No.	Building No.	Building Entrance No.	Address	City	State	Zip Code	Locality Code	Census Tract	Block Code	Congressional District Code	Geo Match 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	9999	020900	1		

Figure54: Geo Coded Addresses Report

1.1.9 Maintain Inventory

The **Maintain Inventory** tab allows users to view the development, building, and unit information (see Figure). PHA users have the read-only access to this tab.

Figure55: 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 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.

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).

The building inventory information listed on 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.

The building Inventory Search 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).

Figure56: Building Inventory List Page

1.1.9.2.1 Editing Building Information

The user can change the information about any particular building by clicking the **Edit** link in the **Edit Building?** column. The **Edit Building and Entrance Number** section is displayed (see Figure). 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. When finished entering data, click **Save**. The changes made will be effective immediately.

Figure57: Edit Building and Entrance number page

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). 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.

1.0 Housing Inventory

Figure58: 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).

Figure59: Unit Inventory Search

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). Proposals can be filtered based on the proposal status (see Figure).

1.0 Housing Inventory

Figure60: 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**.

Figure 61: Options in the Proposal Status list

1.0 Housing Inventory

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.

Figure62: 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.

Figure63: 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.

Figure 64: System displaying a warning message when the user attempts to create a proposal

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

Figure 65: 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.

Figure 66: 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). 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.

Figure 67: Reports tab

1.1.9.6 Terminate Development sub Tab

The **Terminate Development** sub tab for a PHA user displays a list of developments (see Figure). Since the PHA user has no data editing privileges in the **Maintain Inventory** tab, the **Terminate Development** sub tab allows a read-only access.

Figure 68: Terminate Development

1.1.10 CAPFUND B&U Certification Tab

The **CAPFUND B&U Certification** tab (see Figure) 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.

Figure 69: 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 a IMS/PIC TAC ticket number. To enter a IMS/PIC TAC ticket number, the user must click the development number and enter the IMS/PIC TAC 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 status selection.

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

IL001003	Management	03/01/1954				☐
IL001004	Management	03/01/1954				☐
IL001007	Management	04/01/1962				☐
IL001011	Management	05/30/1970				☐
IL001013	Management	08/31/1971				☐
IL001016	Management	03/31/1974				☐
IL001017	Terminated	02/01/1973				☐
IL001018	Management	05/01/1975				☐
IL001020	Management	06/17/1976				☐
IL001022	Management	07/07/1977				☐
IL001023	Management	03/30/1980				☐
IL001024	Management	05/31/1978				☐

Page No: 1 of 1   Page: **1**

[Certify] [Reject] [Reset Development Status]

[Submit]

Figure 70: CAPFUND B&U Certification tab

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).

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 Inventory	CAPFUND B&U Certification			
Development	Building	Unit	Submission	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
IL030000010	Management	05/27/1971		Certified
IL030000021	Management	02/28/1978		Certified
IL030000022	Management	11/01/1968		Certified
IL030000031	Management	02/09/1976		Certified

Figure 71: 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). 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.

	Unit Count						Standing Unit Bedroom Count	Removed Unit Bedroom Count
Standing Units	Removed Units	Non-ACC Units	Non-Dwelling Units	Elderly Units	Family Units			
196	0	0	2	0	194		398	0

Development List   **Building List**   **Unit List**   **RMI Units**

Hub: **5HCLV Cleveland Hub**
Field Office: **5HPH INDIANAPOLIS PROGRAM CENTER**
Field Office HA: **IN003 Fort Wayne Housing Authority**
Physical Development: **IN003000001 hgstrvs mlxzvy**

Development Details (2010)

PIC Help Ticket No.:
Comments: HQ Comments:

A PHA is required to enter a valid PICHelp Ticket Number if it is rejecting certification for a development.
Use commas to separate multiple PIC Tickets.

Reset   Save

Figure 72: 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 units 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 found 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) 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

Figure 73: 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) 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.

Figure 74: Unit List sub tab

The **Download in Excel** button allows the user to download the entire unit data in the 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) 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.

Figure 75: RMI Units sub tab

1.1.10.4.1 RMI Units Report

Figure 76: 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.