



# HUD USER MANUAL

*Public and Indian Housing (PIH)*

*Real Estate Assessment Center (REAC)*

*Inventory Management System (IMS)*

*Form 50058 Module*

*Viewer sub Module*

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

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# TABLE OF CONTENTS

<b>1</b>	<b>Form 50058 .....</b>	<b>1-1</b>
<b>1.1</b>	<b>Viewer.....</b>	<b>1-2</b>
1.1.1	The Search Tab: Accessing Form 50058 Data.....	1-2
1.1.2	The Household Tab.....	1-4
1.1.3	The Members Tab.....	1-7
1.1.4	The Rent Tab .....	1-9
1.1.5	The FSS/WtW Tab.....	1-12
1.1.6	The ISS/Exp Vouchers Tab .....	1-15
1.1.7	Reports Tab.....	1-16
1.1.8	The Reports Tab: MTCS Transaction Report .....	1-17
1.1.8.1	Program Type: All.....	1-18
1.1.8.2	Program Type: Public Housing .....	1-18
1.1.8.3	Program Type: Section 8.....	1-19
1.1.8.4	Information Presented in an MTCS Transaction Report .....	1-21
1.1.9	The Reports Tab: MTCS Voucher ISS/Exp Report.....	1-21
1.1.9.1	Information Presented in the MTCS Voucher Issuance/Expiration Report.....	1-23
1.1.10	The Reports Tab: Overlapping Date Report .....	1-23
1.1.10.1	Information Presented in the Overlapping Date Report .....	1-24
1.1.11	The Reports Tab: Portability Billing Report .....	1-26
1.1.11.1	Information Presented in the Portability Billing Report.....	1-27

**1 FORM 50058**



# 1 FORM 50058

**Form 50058** module in the IMS PIC system allows HUD to obtain the information about the people who participate in the subsidized housing programs. PHAs (Public Housing Agencies) use the Form 50058 to electronically submit the data about the tenants to HUD.

**Form 50058** module consists of the **Submission** sub module, **Viewer** sub module, **Reports** sub module, and the **Tenant ID Management** sub module. The **Submission** sub module allows the HA user to submit the Form 50058 file to HUD for processing. The **Viewer** sub module allows the user to view all sections of Form 50058 that the user submitted for the tenants. The **Reports** sub module allows the user to run various reports in order to access and analyze the information about the tenants and PHAs all over the country. The **Tenant ID Management** sub module allows the user to generate AIDs (alternate ID numbers for people who do not have SSNs), replace IDs, identify duplicate tenants, resolve duplicate tenant instances, and replace IDs.



## 1.0 Form 50058

### 1.1 VIEWER

The **Viewer** sub module allows the user to retrieve specific Form 50058 data for tenants or their households. The information provided in this sub module is taken directly from forms submitted by PHAs. Different tabs of the **Viewer** sub module display information from various sections of Form 50058.

Additional information about the data displayed in the **Viewer** sub module can be found in the Technical Reference Guide (TRG). Technical Reference Guide contains information about the type of data presented, abbreviations, Form 50058 field descriptions, etc.

The user can access the data in the **Viewer Sub Module** by clicking the tabs on top of the **Viewer Sub Module** start page. The user can access different types of data using the following tabs (see Figure 1):

- Search
- Household
- Members
- Rent
- FSS/WtW (Family Self-Sufficiency/Welfare-to-Work)
- Issuance/Expiration of Vouchers
- Reports

#### 1.1.1 The Search Tab: Accessing Form 50058 Data

Start with the **Search** tab (see Figure 1). Here, the user can enter the criteria that enable them to find the tenant data. Once the user identifies the correct PHA, they can find the desired tenant record by using the controls in the **Housing Authorities Search Filters** section of the page.

**Search** | Household | Members | Rent | FSS/WtW | Iss/Exp Of Vouchers | Reports

**Select View:** Field Office HA

**HQ Division:** Public and Indian Housing

**HQ Office:** PO Field Operations

**Hub:** 10HSEA Seattle Hub

**Field Office:** OAPH SEATTLE HUB OFFICE

**Housing Authority:** AK001 AHFC

**Housing Authorities Search Filters**

☐ Historical Database ☒ Current Database

SSN:

First Name:

Last Name:



## 1.0 Form 50058

Figure 1: The default Search page

In the **Housing Authorities Search Filters** section, the user must select the database that they want to use. If the user selects the **Historical Database** option, the program will include all tenant data forms past and present. If the user selects the **Current Database** option, the program will include only the most recent tenant forms submitted.

In the **SSN** box, the user can enter the social security number, if known. The user must enter the social security number of the tenant they are looking for without the dashes and click **Search**. Then, the program will display the record of the tenant whose social security number matched the search criterion.

The user can also search for the tenants by entering the first and/or last names. After the user clicks the **Search** button, the program will display the list of tenants whose information matched the search criteria entered. The user can also enter the first several characters in the **First Name** and/or **Last Name** boxes and click the **Search** button. Then, the program will display the list of tenants whose information matched the search criteria.

The screenshot shows the 'Housing Authorities Search Filters' page. At the top, there are tabs for 'Search', 'Household', 'Members', 'Rent', 'FSS/MW', 'Vouchers', and 'Reports'. The 'Search' tab is active. Below the tabs, there are several dropdown menus and buttons for filtering search results. The filters include: 'Select View' (set to 'Field Office: HA'), 'HQ Office' (set to 'Public and Indian Housing'), 'HQ Division' (set to 'HO Field Operations'), 'Hub' (set to 'DHNYC New York City Hub'), 'Field Office' (set to '24PIL NEW YORK CITY HUB OFFICE'), and 'Housing Authority' (set to 'NY003 Yankee HA, City of'). Below the filters, there is a section titled 'Housing Authorities Search Filters' with a sub-header 'Search Results: 1 of 2283'. To the right of this section is a link 'View All Records'. Below the search results section is a table with the following columns: SSN, First Name, Last Name, Middle Initial, Relation, Date Of Birth, Sex, Update date, and Entire 50058. The table contains 7 rows of data, each with a link to view the record.

SSN	First Name	Last Name	Middle Initial	Relation	Date Of Birth	Sex	Update date	Entire 50058
<a href="#">256425744</a>	zuzufy	afix		H	12/07/1928	F	08/04/2008	<a href="#">View</a>
<a href="#">251723042</a>	zrkzicpaz	afix		H	09/10/1943	F	10/01/2000	<a href="#">View</a>
<a href="#">079861200</a>	zral	afix		H	12/11/1960	F	07/11/2008	<a href="#">View</a>
<a href="#">257815700</a>	zuzmz	afix		H	10/15/1970	F	02/03/2009	<a href="#">View</a>
<a href="#">107403043</a>	zuzmz	afix		H	11/15/1950	F	11/20/2006	<a href="#">View</a>
<a href="#">073003000</a>	bwms	afixzow		H	11/17/1980	F	10/05/2006	<a href="#">View</a>
<a href="#">114767060</a>	hacine	afixzow		H	12/23/1976	F	09/04/2007	<a href="#">View</a>

Figure 2: Column data headings for search results

The program presents the information for the tenants that matched the search criteria in form of a table with the following columns: **SSN**, **First Name**, **Last Name**, **Middle Initial**, **Relation**, **Date of Birth**, **Sex**, **Update Date**, **Online EOP**, **Entire 50058** (see Figure 2).

The **SSN** column displays masked social security numbers as links. The user can click on any one to display the data associated with the social security number the user selected (see Figure 5).

The **First Name**, **Last Name**, **Middle Initial**, **Relation**, **Date of Birth**, **Sex**, **Update Date** columns display the respective information about the tenant as plain text entries.

The **Entire 50058** column allows the user to view Form 50058 for the respective tenant (see Figure 3).



## 1.0 Form 50058

**Form 50058 for xxx-xx-6360**

Head of household name	A. Brown T.
Social Security Number	xxx-xx-6360
Date modified (mm/dd/yyyy)	12/26/2007
<b>Agency</b>	
1a. Agency name	Fredrick Housing Authority
1b. PHA code	MD003
1c. Program	Sec. 8 Vouchers
1d. Project number (Public Housing only)	
1e. Building number (Public Housing only)	
1f. Building entrance number (Public Housing only)	
1g. Unit number (Public Housing only)	
<b>Action</b>	
2a. Type of action	Interim Reexamination
2b. Effective date (mm/dd/yyyy) of action	12/01/2007
2c. Completed (Y or N)	N
2d. Inspection (check on many record)	
2e. Date of next action (mm/dd/yyyy)	N/A
2f. Inspection agreement	N/A
2g. Monthly amount of payment	N/A

Figure 3: Form 50058

### 1.1.2 The Household Tab

The **Household** tab allows the user to access the data that corresponds to Sections 1, 2, 4, and 5 of the Form 50058. Select the SSN of the tenant the user is looking for and the program will display the appropriate data on the **Household** tab. From this first page of Form 50058 data, the user can also access additional information on this tenant through the following four sub tabs:

- Agency Information
- Action
- Background at Admission
- Unit to be Occupied

For easy reference, the following information for the tenant the user selected is displayed in the first tier: head of household's name, SSN, and the date the information was updated.

The **Agency Information** sub tab of the **Household** tab displays the PHA information (see Figure 4). This information allows the user to identify what PHA the tenant record is associated with, what program the tenant is enrolled in, and the building, entrance, and unit information for the tenant.

The **Action** sub tab of the **Household** tab displays the information about the previous or current types of action performed on the tenant's record (see Figure 5). It includes the type of action, the effective date, reexamination information, and other applicable information.



1.0 Form 50058

Search	Household	Members	Rent	FSS/MW	Waiting List Voucher	Reports
Agency Information		Action	Background at Admission		Unit to be Occupied	
Head of household name:		A IKWIGMAF S				
Social Security Number:		xxx-xx-9606				
Date Updated(mm/dd/yyyy):		06/05/2009				
<b>Agency</b>						
1a. Agency name:		AHFC				
1b. FHA code:		AK001				
1c. Program:		Public Housing				
1d. Project number(Public Housing only):		AK001000774				
1e. Building number(Public Housing only):		0110				
1f. Building entrance number(Public Housing only):		1				
1g. Unit number(Public Housing only):		501103				

Figure 4: The Agency Information sub tab of the Household tab

Search	Household	Members	Rent	FSS/MW	Waiting List Voucher	Reports
Agency Information		Action	Background at Admission		Unit to be Occupied	
Head of household name:		A IKWIGMAF S				
Social Security Number:		xxx-xx-9606				
Date Updated(mm/dd/yyyy):		06/05/2009				
<b>Action</b>						
2a. Type of action:		Find Participation				
2b. FFA case date (mm/dd/yyyy) of action:		04/01/2009				
2c. Connection? (Y or N):		N				
2d. If correction: (check primary reason):						
2e. Date correction faxed(mm/dd/yyyy):		N/A				
2f. Re-payment agreement:		N/A				
2g. Monthly amount of repayment:		N/A				
2h. Date(mm/dd/yyyy) of submission to program:		12/20/2008				
3. Projected effective date(mm/dd/yyyy) of new admission:		12/01/2008				
3. Projected effective date(mm/dd/yyyy) of new 1st rent admission(Public Housing only):						
3a. FSS participation now or in the last year?(Y or N):		N				
3b. Special program(s) (check only one):						
3c. PHA Use Only:		354173P 50				
3d. PHA Use Only:		1201200/02				
3e. PHA Use Only:		35				
3f. PHA Use Only:						

N/A - User Derived from Form 50058 with Expiration Date 1/31/2017

Figure 5: The Action sub tab of the Household tab

The **Background at Submission** sub tab of the **Household** tab displays the information about the tenant's background before the tenant's information was entered in the database (see Figure 6). It includes the date the tenant entered the waiting list, the zip code before admission, and whether the tenant was homeless or received continual housing assistance.





1.0 Form 50058

Search	Household	Members	Rent	FSS/WtW	Iss/Exp Of Vouchers	Reports
Agency Information		Action		Background at Admission		Unit to be Occupied
Head of household name:		A IKWIGMAF S				
Social Security Number:		xxx-xx-9666				
Date Updated(mm/dd/yyyy):		06/05/2009				
<b>Background at Admission</b>						
4a. Date(mm/dd/yyyy) entered waiting list:						
4b. Zip code before admission:						
4c. Homeless at admission? (Y or N):						
4d. Does family qualify for admission over the very low-income limit?(Section 8 only)(Y or N):						
4e. Continually assisted under the 1937 Housing Act? (head of household only)(Y or N):						
4f. Is there a HUD approved income targeting disregard? (Y or N)						

Figure 6: The Background at Admission sub tab of the Household tab

The **Unit to be Occupied** sub tab of the **Household** tab displays the information about the unit that the tenant occupies when the tenant moves into the house in compliance with the program (see Figure 7). It contains the addresses (the unit address and the mailing address), number of bedrooms, examination information about the unit, and the accessibility information (if applicable).

Search	Household	Members	Rent	FSS/WtW	Iss/Exp Of Vouchers	Reports
Agency Information		Action		Background at Admission		Unit to be Occupied
Head of household name:		A IKWIGMAF S				
Social Security Number:		xxx-xx-9666				
Date Updated(mm/dd/yyyy):		06/05/2009				
<b>Unit to be Occupied on Effective Date of Action</b>						
5a. Unit address:						
Number and street:		5804 B 04WI XC				
Apt. :		3				
City:		ANCHORAGE				
State:		AK				
Zip Code(+4):		99504-4234				
5b. Is mailing address same as unit address:		Y				
5c. Family's mailing address						
Number and street						
Apt. :						
City:						
State:						
Zip Code(+4):						
5d. Number of bedrooms in unit:		2				
5e. Has the PHA identified this unit as an accessible unit? (Public Housing only) (Y or N):		N				
5f. Has the family requested accessibility features?(Public Housing only) (Y or N) (if no. skip to next section):		N				
5g. Has the family received requested accessibility features?(Public Housing only):						
5h. Date(mm/dd/yyyy) unit last passed HQS inspection:						
5i. Date(mm/dd/yyyy) of last annual HQS inspection (Section 8 only except Homeownership):						
5j. Year(yyyy) unit was built (Section 8 only except Homeownership):						
5k. Structure type(check only one) (Section 8 only):						

Figure 7: The Unit to be Occupied sub tab of the Household Tab



## 1.0 Form 50058

### 1.1.3 The Members Tab

From the **Members** tab, the user can access data that corresponds to Sections 3, 6, and 7 of the Form 50058. The user can find the data within the following three sub tabs (see Figure 8):

- Members
- Assets
- Income

It provides the information as to the number of people in the household and the financial situation of the household.

For easy reference, the following information for the tenant the user selected is displayed in the first tier: head of household's name, SSN, and the date the information was updated.

The first page of the **Members** sub tab displays the members of household data (see Figure 8). The **Household** section of the page displays the list of members and the applicable information: date of birth, disability status, race, sex, type of relation, citizenship information, social security number, and the alien registration number, if applicable.

Search	Household	Members	Rent	FSS/WtW	Iss/Exp Of Vouchers	Reports		
Members		Assets		Income				
Head of household name:		A IKWIGMAF S						
Social Security Number:		xxx-xx-9666						
Date Updated(mm/dd/yyyy):		06/05/2009						
Household								
Name	DOB	Disability	Race	Sex	Relation	Citizenship	SSN	Alien Registration Number
<a href="#">A IKWIGMAF</a>	04/xx/1980	Y	White	F	H	EC	xxx-xx-9666	
<a href="#">K JLFWB</a>	08/xx/2004	N	White	F	Y	EC	xxx-xx-3373	
3t. Total number in household :		2						
3u. Family subsidy status under noncitizen rule :		Eligible for full assistance						
3v. Effective date(mm/dd/yyyy) if 3u = C or T :								
3w. If new head of household, former head of household's SSN :								

Figure 8 : The Members sub tab of the Members tab

If the user clicks any member's name, the program will display that member's information in detail (see Figure 9). To proceed to the next member's information, click **Next Member**

The **Assets** sub tab displays the information about all the assets that belong to the tenant and have a dollar value (see Figure 10). If the tenant owns any assets, this tab provides the type of asset, calculation (PHA use), estimated dollar value of the asset and the expected income (if applicable).



1.0 Form 50058

Search	Household	Members	Rent	FSS/MWV	Exp/Dep Of Members	Reports
Members		Assets		Income		
Head of household name:		A IRWIGMAF S				
Social Security Number:		xxx-xx-9999				
Date updated(mm/dd/yyyy):		05/05/2009				
<b>Household Member Details</b>						
3a	Member number:	01				
3b	Last name & Suffix:	IRWIGMAF				
3c	First name:	A				
3d	Middle initial:	S				
3e	Date of birth:	04/xx/1900				
3f	Age on effective date of action:	08				
3g	Sex:	Female				
3h	Relation:	Head				
3i	Citizenship:	Eligible Citizen				
3j	Disability(Y/N):	Y				
3k	Race:	White				
3l	Ethnicity:	Not Hispanic or Latino				
3m	Social Security Number:	xxx-xx-9999				
3n	Alien Registration Number:					
3o	Meeting community service requirement? (Public Housing only):	4				
<a href="#">Next Member</a>						

Figure 9: The Members information in details on the Members sub tab

Search	Household	Members	Rent	FSS/MWV	Exp/Dep Of Members	Reports
Members		Assets		Income		
Head of household name:		A IRWIGMAF S				
Social Security Number:		xxx-xx-9999				
Date updated(mm/dd/yyyy):		05/05/2009				
<b>Assets</b>						
Family Member Name	No.	Type of asset	Calculation(PHA use)	Cash value of asset	Anticipated Income	
A S IRWIGMAF	01					
IRWIGMAF	02					
G1, G2 Column Totals				\$ 2,527	\$ 0	
G3: Fairstock rate (written as decimal):		0.2%				
G4: Imputed asset income at 7.6% (G12		\$ 0				
G5: First xxx-xx income (right of 5) of 6		\$ 0				

Figure 10: The Assets sub tab of the Members tab

The **Income** sub tab displays the relevant income information for the household (see Figure 11). It lists all the household members and displays the types of income (income code), type of calculation (PHA use), annual income amounts, income exclusion amounts and income amounts after exclusion.

## 1.0 Form 50058

Search	Household	Members	Parent	FSS/WWV	Backup Of Worksheet	Reports
Members			Assets		Income	
Head of household name			A. KUMAR S.			
Social Security Number			xxx-xx-9999			
Tax Identification # (yyyyy)			05/05/2003			
Income						
Family member name	No.	Income code	Calculation (PRA score)	Dollars per year	Income exclusions	Income after exclusions
A. S. KUMAR	01	G		\$ 3,600	\$ 0	\$ 3,600
A. S. KUMAR	01	N		\$ 1,800	\$ 0	\$ 1,800
A. S. KUMAR	01	SS		\$ 0,400	\$ 0	\$ 0,400
K. V. J. KUMAR	02	N		\$ 1,800	\$ 0	\$ 1,800
K. V. J. KUMAR	02	SS		\$ 9,648	\$ 0	\$ 9,648
Total Column total						\$ 26,248
(b) Received: Total second income \$ 1.7g						
			\$ 25,010			

Figure 11: The Income sub tab of the Members tab

### 1.1.4 The Rent Tab

From the **Rent** tab the user can access data that corresponds to Sections 8, 9, and 10 of the Form 50058. The data displayed on the **Rent** tab will depend on the type of program the tenant is involved in. So, the information displayed for individual tenants may differ. The user can access the data using four sub tabs (see Figure 12):

- Expected Income Per Year
- TTP (Total Tenant Payment)
- Rent Calculation (Program Type)
- Manufactured Home

For easy reference, the following information for the tenant the user selected is displayed in the first tier: head of household's name, SSN, and the date the information was updated.

The **Expected Income per Year** sub tab of the **Rent** tab displays the expected yearly income information for the tenant's household (see Figure 12). The **Expected Income per Year** section of the page displays the combined total expected annual income for the household (it includes the expected annual incomes of all members of the household). It also displays the list of permissive deductions, if applicable. After the deductions, the program displays the adjusted annual income.



1.0 Form 50058

Search	Household	Members	Rent	FSS/WtW	Iss/Exp Of Vouchers	Reports
<b>Expected Income Per Year</b>		<b>TTP</b>		<b>Rent Calculation(Program Type)</b>		<b>Manufactured Home</b>
Head of household name:		A IKWIGMAF S				
Social Security Number:		xxx-xx-9666				
Date Updated(mm/dd/yyyy):		06/05/2009				
<b>Expected Income Per Year</b>						
8a. Total Annual Income: copy from 7i		\$ 25,016				
Permissive Deductions (If Section 8, skip to 8f or 8q)						
<b>8b. Family member name</b>		<b>No.</b>	<b>8c. Type of permissive deduction</b>			<b>8d. Amount</b>
A IKWIGMAF		01				\$0
K JLFWB		02				\$0
<b>8e. Permissive deductions</b>		\$0				
8f. Medical/disability threshold: 8a * 0.03		\$ 750				
8g. Total unreimbursed disability assistance expense(if no disability expenses,skip to 8k):		\$ 0				
8h. Maximum disability allowance:If 8g minus 8f is positive or zero,put amount		\$ 0				
If negative and head/spouse/co-head under 62 and head/spouse/co-head not disabled,put zero						
If negative and head/spouse/co-head elderly and head/spouse/co-head not disabled,put zero						
8i. Earnings in 7d made possible by disability assistance expense:		\$ 0				
8j. Allowable disability assistance expense:lower of 8h or 8i (If 8g is less than 8f and head/spouse/co-head elderly and head/spouse/co-head not disabled,copy from 8h)		\$ 0				
8k. Total out of pocket medical expense: (If head/spouse/co-head under 62 and head/spouse/co-head not disabled,put 0)		\$ 0				
8m. Total disability assistance and medical expenses: 8j + 8k (if no disability expenses,copy from 8k)		\$ 0				
8n. Medical/disability assistance allowance: If no disability assistance expenses or if 8g is less than 8f, put 8m minus 8f(if 8m minus 8f is negative, put zero) If disability assistance expenses and 8g is greater than or equal to 8f, copy from 8m		\$ 0				
8p. Elderly/disability allowance(default=\$400):		\$ 400				
8q. Number of dependents(people under 18, or with disability,or full-time student.Don't count head of household,spouse,co-head,foster child/adult,or live-in aide):		1				
8r. Allowance per dependent(default = \$480):		\$ 480				
8s. Dependent allowance:8q * 8r		\$ 480				
8t. Yearly estimated childcare costs that are not reimbursed:		\$ 0				
8x. Total allowances: 8e + 8n + 8p + 8s + 8t		\$ 880				
8y. Adjusted annual income:8a minus 8x (if 8x is larger,put 0)		\$ 24,136				

Figure 12: The Expected Income per Year sub tab of the Rent tab

The **TTP (Total Tenant Payment)** sub tab displays the information about the payment that the tenant is responsible for based on the program the tenant is involved in. The program displays the tenant payment calculation and how the tenant payment is achieved in the **Total Tenant Payment (TTP)** section of the page (see Figure 13).





1.0 Form 50058

Search	Household	Members	Rent	FSS/MWV	IssType Of Voucher	Reports
Expected Income Per Year			TTP	Rent Calculation(Program Type)		Manufactured Home
Head of household name:			A IRVINGMAN S			
Social Security Number:			xxx-xx-9866			
Date Updated(mm/dd/yyyy):			05/05/2009			
Total Tenant Payment (TTP)						
a. Total monthly income:(a) / 12			\$ 2,605			
b. TTP based on annual income:(a) * 0.10			\$ 260			
c. Adjusted monthly income:(b) / 12			\$ 2,041			
d. Percent of adjusted monthly income:(c) 35% for Section 8			3000			
e. TTP based on adjusted annual income:(c) * 36(100)			\$ 600			
f. Welfare rent per month:(f) none put 0:			\$ 0			
g. Minimum rent in welfare, put 0:			\$ 50			
h. Unfunded voucher minimum rent:			\$ 0			
i. TTP, highest of lines b,c,d,g or h:			\$ 600			
j. Unfunded voucher, highest of b,c,d,g,h or 9:						
k. Most recent TTP:			\$ 600			
m. Qualify for minimum net household exemption? (Y or N)			N			

Figure 13: The TTP sub tab of the Rent tab

The **Rent Calculation (Program Type)** sub tab displays the applicable rent information for the tenant based on the type of program that the tenant is involved in (see Figure 14). It also displays how the rent is calculated. Depending on whether the rent is prorated or not, the user will see the calculation in the appropriate section of the page. The program also displays the type of rent in the **Type of Rent** section of the page.

Search	Household	Members	Rent	FSS/MWV	IssType Of Voucher	Reports
Expected Income Per Year			TTP	Rent Calculation(Program Type)		Manufactured Home
Head of household name:			A IRVINGMAN S			
Social Security Number:			xxx-xx-9866			
Date Updated(mm/dd/yyyy):			05/05/2009			
Public Housing and Turnkey III						
10a. TTP any line 9:			\$ 600			
10b. 1st rent:			\$ 0			
Rent Calculation (If prorated rent, skip to 10h)						
10c. Income based ceiling rent, if any:			\$ 0			
10d. Lower of TTP or income based ceiling rent if no income based ceiling rent, put 10c:			\$ 600			
10e. Utility allowance, if any:			\$ 50			
10f. Tenant rent: 10d minus 10e: If positive or 0, put -tenant rent If negative, credit tenant			\$ 545			
Prorated Income Based Rent Calculation						
10g. Public Housing maximum rent:			\$			
10h. Family maximum subsidy: 10g minus 10a			\$			
10i. Total number eligible:						
10j. Total number in family:						
10k. Right-to-subsidy(10i / 10j * 10h)			\$			
10l. Mixed family TTP 10h minus 10a			\$			
10m. Utility allowance, if any:			\$			
10n. Mixed family tenant rent: 10l minus 10m: If positive or 0, put tenant rent If negative, credit tenant			\$			
Type of Rent						
10o. Type of rent - Public Hous			Income based			

Figure 14: The Rent Calculation (Program Type) sub tab of the Rent tab



## 1.0 Form 50058

The information on the **Manufactured Home** sub tab is not supported in the program (see Figure 15).

Search	Household	Members	Rent	FSS/WtW	Iss/Exp Of Vouchers	Reports
Expected Income Per Year		TTP		Rent Calculation(Program Type)		Manufactured Home
Head of household name:		A IKWIGMAF S				
Social Security Number:		xxx-xx-9666				
Date Updated(mm/dd/yyyy):		06/05/2009				
Manufactured Home Owner Renting the Space( Pre-merger Certificates only)						
Not applicable						

Figure 15: The Manufactured Home sub tab of the Rent tab

### 1.1.5 The FSS/WtW Tab

This **FSS/WtW** tab allows the user to view household information regarding participation in family self-sufficiency and welfare-to-work programs. The data is found within the following four sub tabs:

- General
- Services
- FSS
- WTW

The **General** sub tab of the **FSS/WtW** tab displays the applicable information about the program the tenant is involved in, if any. If the tenant is involved in a program, then the sub tab will display the general program and employment information (see Figure 16). The **General** sub tab displays the data that corresponds to sections 17a through 17h of the Form 50058.



## 1.0 Form 50058

Search	Household	Members	Rent	FSS/WtW	Track of Vouchers	Reports
General		Services		FSS	WtW	
Head of household name:		P. OMORUSUR P				
Social Security Number:		xxx-xx-1463				
Date Updated(mm/dd/yyyy):		05/20/2008				
<b>General Information</b>						
17a	Participant in special program? (check all that apply)					FSS
17b	FSS report category (check no more than one)					Progress
17c	FSS effective date(mm/dd/yyyy):					05/01/2008
17d	FSS code of FSA administering FSS account:					M0001
17e	WtW report category (check no more than one)					Not Applicable
17f	WtW effective date (mm/dd/yyyy):					Not Applicable
17g (1)	FSA code of FSA that issued the WtW voucher:					Not Applicable
17g (2)	FSA code of FSA counting the family as enrolled in its WtW voucher program in direction (1g)(1):					
17h (1)	Current employment status of head of household. Check the box to indicate the head of household's employment status at the time addendum completed.					Not Employed
17h (2)	Date (mm/dd/yyyy) current employment began:					
17h (3)	Res-firm current employment (check all that apply):					
17h (4)	Years of school completed by the head of household. Enter the highest grade of education in years of formal schooling the head of household completed at the time Addendum is submitted (1-25):					9
17h (5)	Assets owned by the family (check all that apply):					General Assistance
17h (6)	Number of children receiving child care services:					0

Figure 16: The General sub tab of the FSS/WtW tab

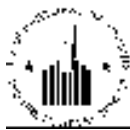
The **Services** sub tab of the **FSS/WtW** tab displays the information about the services that the tenant needed and/or received while participating in the program in form of a table (see Figure 17). If the tenant received any of the services, then the table includes the service provider information. The **Services** sub tab displays the data that corresponds to Family Services Table of Section 17 of Form 50058.

Search	Household	Members	Rent	FSS/WtW	Tracking Of Vouchers	Reports
General			Services		FSS	WtW
Head of household name			P. OMORUSUR P			
Social Security Number			xxx-xx-1463			
Date Updated(mm/dd/yyyy)			05/20/2008			
Family services table (optional for WtW Voucher)						
Service Code	(1) Need	(2) Need Met During Participation in Program	(3) Service Provider			
GLD	Y	Y	Non Profit Agency			
High School	Y	Y	Non Profit Agency			
Job Retention	Y	Y	Non Profit Agency			
Job Search/Placement	Y	Y	Non Profit Agency			
Vocational/Job Training	Y	Y	Non Profit Agency			

Figure 17: The Services sub tab of the FSS/WtW tab

The **FSS** sub tab of the **FSS/WtW** tab displays the information about the FSS contract, account, and exit information if the tenant is involved in the program (see Figure 18). The **FSS** sub tab displays the data that corresponds to Sections 17j –17m of Form 50058.





1.0 Form 50058

Search	Household	Members	Rent	FSS/WtW	Vouchers	Reports
General		Services		FSS	WtW	
Head of household name:		P UMORUSUR P				
Social Security Number:		xxx-xx-1463				
Date modified (mm/dd/yyyy):		05/20/2008				
<b>Family Self-Sufficiency Program</b>						
<b>17j. FSS Contract Information</b>						
17j. (1) Initial start date (mm/dd/yyyy) or contract of		/				
same policy (FSS enrollment report only)						
17j. (2) Initial end date (mm/dd/yyyy) of contract or		/				
same policy (FSS enrollment report only)						
17j. (3) Contract date extended to (mm/dd/yyyy) (if applicable)						
17j. (4) Number of family members with individual Taxing and		4				
Service Plan						
17j. (5) Did the family receive selection preference because of						
an FSS-related service program participation? (FSS						
enrollment report only) (Y or N)						
<b>17k. FSS account information</b>						
17k. (1) Current FSS account monthly credit:		\$ 0				
17k. (2) Current FSS account balance:		\$ 0				
17k. (3) FSS account amount disbursed to the family		\$ 0				
(cumulative at end of reporting period)						
<b>17m. FSS exit Information (FSS Exit Report only)</b>						
17m. (1) Did family complete contract of participation? (Y or N)						
17m. (2) If (1) is Yes, did family meet income requirement? (Y or N)						
17m. (3) If (1) is No, reason for exit:						

Figure 18: The FSS sub tab of the FSS/WtW tab

The **WtW** sub tab of the **FSS/WtW** tab displays the information about the welfare to work program if the tenant is involved in it (see Figure 19). It displays the information about the WtW program, and the WtW exit information. The **WtW** sub tab displays the data that corresponds to Section s 17n –17q of the Form 50058.

Search	Household	Members	Rent	FSS/WtW	Vouchers	Reports
General		Services		FSS	WtW	
Head of household name:		I Mgal				
Social Security Number:		xxx-xx-6966				
Date updated (mm/dd/yyyy):		09/11/2007				
<b>Welfare to Work Voucher Program</b>						
<b>17n. WtW program Information</b>						
17n. (1) (mm/dd/yyyy) voucher issued (WtW enrollment						
(1) report only)						
17n. (2) Date (mm/dd/yyyy) or request for release approved (N/A)						
(2) for a unit issued:						
17n. (3) Help in finding search form:		N/A				
(3)						
17n. (4) Issued in a different unit, reasons (check all that						
apply) (WtW enrollment only)						
		N/A				
<b>17q. Welfare to Work exit Information (WtW exit report only)</b>						
(1) Is the family finding a home now? (Y or N)		N				
(2) Primary reason for leaving the WtW Voucher program Other						
N/A - Link removed from New Form 50058 with Effective Date 1/31/2007						

Figure 19: The WtW sub tab of the FSS/WtW tab



### 1.1.6 The ISS/Exp Vouchers Tab

The **ISS/Exp of Vouchers** tab allows the user to view tenant information related to the date of the voucher issuance and the expiration date. The **Iss/Exp Vouchers List** section of the page displays the head of the household's name and social security number. The **Voucher Issuance and Expiration** section of the page displays the voucher information, namely the update date, the participant code and the type of action (issuance or expiration of voucher).

Search	Household	Members	Rent	FSS/MW	Iss/Exp of Vouchers	Reports
Iss/ Exp Vouchers List						
Head of household name				1 Mgal		
Social Security Number				xxx xx 8066		
Voucher Issuance and Expiration						
Update Date				Participant Code		Type Of Action
<a href="#">07/20/2009 11:29:52.157</a>				MD004		10
<a href="#">01/30/2009 11:08:14.767</a>				MD004		11

Figure 20: The ISS/Exp Vouchers tab

When the user clicks any of the links in the **Update Date** column, the program displays the voucher details on the **Iss/Exp Voucher Details** sub tab (see Figure 21). On the **Agency** section of the page, the program displays the program type and the participant code data. On the **Action** section of the page the program displays the action type (voucher issuance or expiration) and the related information, such as the effective date, applicable correction, repayment information, and special program information, if any.



## 1.0 Form 50058

Search	Household	Members	Rent	FSS/AMW	Iss/Exp Of Vouchers	Reports			
<b>Iss/ Exp Vouchers List</b>									
<b>Iss/ Exp Voucher Details</b>									
Head of household name: I Mgol									
Social Security Number: xxx-xx-5955									
Date updated(mm/dd/yyyy): 02/06/2003 11:29:52.157									
<b>Agency</b>									
1a. District Code: MD054									
1b. Program Type: VO									
<b>Action</b>									
2a. Type Of Action: 10									
2b. Effective Date: 01/31/2003									
2c. Correction (Y/N): N									
2d. Correction Primary Reason:									
2e. Data Correction Transmitted:									
2f. Replacement Agreement (Y/N):									
2g. Monthly amount of Replacement: 0									
2h. FSS participation now or in the last year? (Y/N): Y									
2i. Special Program(Section 8 only) (check only one):									
2j. Other Special Programs : Number 01									
2k. Other Special Programs : Number 02									
2l. Other Special Programs : Number 03									
2m. Other Special Programs : Number 04									
2n. Other Special Programs : Number 05									
<b>Background At Admission</b>									
3a. F.P. Case Review Admission: 25010									
3b. Homeless At Admission (Y/N): N									
<b>Unit To be Occupied on Effective Date Of Action</b>									
3c. Number of Bedrooms in a Unit:									
<b>Income</b>									
7. Total annual income: \$11 To: 3744									
<b>Household</b>									
8. Total Household Members: 2									
<b>Member Details</b>									
No.	Name	DOB	Age	Sex	Relation	Citizenship	Disability	Race	Ethnicity
01	I MGOL	12/xx/1955	47	F	H	FN	N		Not Hispanic or Latino
N/A - Link Removed from New Form 50058 with Expiration Date 1/31/2003									

Figure 21: The Iss/Exp Voucher Details sub tab of the ISS/Exp of Vouchers tab

### 1.1.7 Reports Tab

The **Reports** tab allows the user to run various reports that include tenant information filtered by the desired categories. The reports that the user generates retrieve information from several different areas of the Form 50058.

The user can generate four types of reports (see Figure 22):

- MTCS Transaction Report
- MTCS Voucher Issued/Expiration Report
- Overlapping Report
- Portability Billing Report



## 1.0 Form 50058

The user can access these reports in form of sub tabs in the **Reports** tab of the **Viewer Sub Module**.

The screenshot displays the MTCS Transaction Report sub tab. At the top, there are tabs for Search, Household, Member, Rent, FSS/MW, and Reports. The Reports tab is active, showing sub-tabs for MTCS Transaction Report, MTCS Voucher Report, Overlapping Date Report, and Portability Billing Report. The MTCS Transaction Report sub-tab is selected.

Filters include:

- Select View: First of Two PHA (Select)
- HQ Division: Public and Indian Housing
- HQ Office: PHA and Operations (Select)
- Hubs: PHA and Operations (Select)
- Field Office: PHA and Operations (Select)
- Housing Authority: MTCS Housing Authority (Select)
- Database: ☒ MTCS Current ☐ Public Housing ☐ Section 8
- Program type: ☒ All ☐ Public Housing ☐ Section 8

The main table displays tenant records with columns for Development Code, Development Name, and Unit Status. The table is filtered to show records for the PHA and Operations hub. The Unit Status is set to In Inventory.

Below the table, there are sections for Project-based Certificates, Project-based Vouchers, Tenant-based Vouchers, Homeownership Vouchers, and SS Allocation Rehabilitation.

At the bottom, there are filters for Type of Action (All), Effective Date From (2/28/2008), Effective Date To (8/31/2008), Update Date From (2/28/2008), Update Date To (8/31/2008), and Select Report Type (Detailed). A Generate Report button is located at the bottom right.

Figure 22: The MTCS Transaction Report sub tab of the Reports tab

### 1.1.8 The Reports Tab: MTCS Transaction Report

When the user clicks the **Reports** tab, the program displays the **MTCS Transaction Report** sub tab by default (see Figure 22). The MTCS Transaction Report allows the user to view the tenant information of all tenant records uploaded by PHA within a specific effective or update date range. For the public housing program type, the user can group the records by buildings or building sites called developments. This report allows the user to filter the tenant records by development (public housing program), by Section 8 program (if the user selects the **Section 8** option), by action type, by effective dates, and by update dates.

The MTCS Transaction report lists all the tenants whose records a PHA submitted within a certain effective or update date range. Users can run this report to make sure that all the tenant records that they submitted got updated properly in PIC.

To run the MTCS Transaction Report, the user must select the appropriate settings in the report criteria controls. After the user selects the appropriate PHA, the **MTCS Current** option in the **Database** area, the



## 1.0 Form 50058

user must select the program type in the **Program Type** area. The user can select the **All, Public Housing**, or **Section 8** options. Further configuration depends on the program type the user selected.

The user also is required to select the type of action in the **Type of Action** list, and the effective or update dates. The **Update Dates** denote the dates when the information about the type of action was submitted. The **Effective Dates** denote the dates when the type of action took effect. To run the report, the user must click the **Generate Report** button.

### 1.1.8.1 Program Type: All

If the user selects the **All** option, then the program will display the tenant information for both the tenants that live in developments and take part in the Section 8 program. After the user runs the report, they can filter the information by selecting specific developments in the **Developments** list, or specific programs in the **Section 8** list (see Figure 23). The list of developments includes the developments specific to the PHA that the user selected, and the list of Section 8 programs includes the following programs: Project-based Vouchers, Tenant-based Vouchers, Homeownership Vouchers, and Moderate Rehabilitation.

The **Update Dates** denote the dates when the information about the type of action was submitted. The **Effective Dates** denote the dates when the type of action took effect.

**MTCS Transaction Report**

Hub: 3HBLT Baltimore Hub  
Field Office: 3BPH BALTIMORE HUB OFFICE  
Field Office: MID003 Frederick Housing Authority

Headline: MTCS Current  
Program Type: All  
Effective Date From: 1/1/2009

Developments: All

Total No. Of Records: 414  
Effective Date To: 8/31/2009  
Section 8: Select One

Select Page Size: 12

Program Type: Public Housing

Type of Action	Action	First Name	Middle Initial	Last Name	Dev. No.	Orig. No.	Unit No.	Unit No.	Unit Date	Real Estate Fee	Total Amt. Inc. (\$)	Adj. Amt. Inc. (\$)	Type of Rent Code	Unit Rent (\$)
1	0001	Y		Wright	WD00000002	21	20	0427	04/01/2009	2	10,175	10,175		
1	0001	S		Dwyer	WD00000002	11	01L	0009	03/10/2009	2	7,175	6,605		
1	0001	Y	Y	Bozice	WD00000002	11	01A	0009	03/14/2009	2	14,190	13,590		
1	0001	B	Y	Moore	WD00000002	20	20	0420	04/11/2009	2				
1	0001	A	A	Padgett	WD00000002	11	02L	0410	04/04/2009	2	14,005	13,105		
1	0001	L		Bynne	WD00000001	4	204	0110	03/06/2009	2	19,705	19,295		
1	0001	L	Y	Stamper	WD00000002	4	127	0006	03/14/2009	1	26,720	26,700		
1	0001	L	L	Skoloff	WD00000001	1	200	0102	04/01/2009	2	27,340	27,160		
1	0001	M		Manzano	WD00000001	1	1	0202	02/29/2009		14,105	12,005		

Figure 23: The MTCS Transaction Report

### 1.1.8.2 Program Type: Public Housing

If the user selects the **Public Housing** option in the **Program Type** area, then the program will display the tenant information for the developments that the user selects (see Figure 24). Once the user selects the desired PHA, the program displays the list of developments associated with the selected PHA. The user





## 1.0 Form 50058

must select the desired developments by selecting the check boxes in the **Development Code** area. The user can also select or clear all the check boxes by clicking the **Select/Deselect All** check box.

When the user runs the report by clicking the **Generate Report** button, the user can select different developments in the **Development** list. Then, the program filters the report data and displays only the data specific to the selected developments. The **Update Dates** denote the dates when the information about the type of action was submitted. The **Effective Dates** denote the dates when the type of action took effect.

**MTCS Transaction Report**

Hub: 10HSEA Seattle Hub  
Field Office: OAPH SEATTLE HUB OFFICE  
Field Office ID: AK001 AMTC

Database: MTCS Current  
Program Type: Public Housing  
Effective Date From: 2/29/2008  
Development: ALL

Total No. Of Records: 1200  
Effective Date To: 8/31/2009

Select Page No: 1-10

Program Type: Public Housing

Type Or Action	ESN	First Name	Middle Initial	Last Name	Dev. No.	Bldg. No.	Ent. No.	Unit No.	Ent. Date	Bed Room Size	Tot. Ann. Inc. (\$)	Adj. Ann. Inc. (\$)	Type Of Rent Code
1	XXXXXXXXXX-7033	J		KRUDWST	AK00100293	101R	1	6710A	05/04/2008	9	15,850	17,500	
1	XXXXXXXXXX-6104	R	N	BLUF-F	AK00100277	835	1	4007E	05/04/2008	1	11,850	11,450	
1	XXXXXXXXXX-4538	M		TR70R-COE	AK00100274	1750	1	407504	05/07/2008	9	16,450	16,700	
2	XXXXXXXXXX-6563		V	RUZMAC	AK00100275	2510	5	2510E	05/04/2008	6	27,500	24,650	
2	XXXXXXXXXX-8367	G	T	HVDN	AK00100277	835	1	400707	05/04/2008	1	15,050	13,455	
2	XXXXXXXXXX-5205	K	E	NOVWST	AK00100273	501K	1	410705	05/04/2008	3	19,350	17,850	
2	XXXXXXXXXX-5215	N	G	MEU	AK00100247	1251	1	470710	05/04/2008	1	13,610	13,240	
2	XXXXXXXXXX-8543	A	G	YUWFR-COE	AK00100277	835	1	400307	05/04/2008	1	15,050	15,050	

Figure 24: The Public Housing MTCS Transaction Report

### 1.1.8.3 Program Type: Section 8

If the user selects the **Section 8** option in the **Program Type** area, the program will allow them to run the Section 8 MTCS Transaction Report (see Figure 25). The Section 8 Transaction Report displays the information that a PHA submitted within the selected effective or update date range about the tenants who take part in the Section 8 programs that the user selected.

When the user selects the **Section 8** option in the **Program Type** area, the program displays the list of Section 8 programs to select. The user can select the Section 8 programs individually, or select the **All** option in the **Section 8** area. If the user selects the **All** option in the **Section 8** area, then the program will include all the applicable Section 8 programs in the report.

The **Update Dates** denote the dates when the information about the type of action was submitted. The **Effective Dates** denote the dates when the type of action took effect.

## 1.0 Form 50058

Search	Household	Members	Rent	FSS/VANV	Tracking Of Assets/Debt	Reports
MCHN Transaction Report		MCHN VI Iss/Exp Report		Overlapping Date Report		Portability Billing Report
Select View:	<input type="button" value="First Office HA"/> <input type="button" value="Second"/>					
HQ Division:	Public and Indian Housing					
HQ Office:	Public Housing					<input type="button" value="Select"/>
Habit:	For SLA Section 8					<input type="button" value="Select"/>
Field Office:	WAFI SLA/ ILLI NOIS OFFICE					<input type="button" value="Select"/>
Housing Authority:	AKRON AHC					<input type="button" value="Select"/>
Database:	<input checked="" type="radio"/> MCHN Current					
Program type:	<input checked="" type="radio"/> All <input type="radio"/> Public Housing <input type="radio"/> Section 8					
Section 8						
<input checked="" type="radio"/> All <input type="radio"/> Project based Certificates <input type="radio"/> Project based Vouchers <input type="radio"/> Tenant based Vouchers <input type="radio"/> Homeownership Vouchers <input type="radio"/> SS Moderate Rehabilitation						
Type of Action	All <input type="button" value="X"/>					
<input checked="" type="radio"/> Effective Date From:	2/28/2008	<input type="button" value="MCHN/HHN Keyword Date To"/>	8/31/2008	<input type="button" value="MCHN/HHN"/>		
<input type="radio"/> Update Date From:	2/28/2008	<input type="button" value="MCHN/HHN Update Date To"/>	8/31/2008	<input type="button" value="MCHN/HHN"/>		
Select Report Type:	<input checked="" type="radio"/> Detailed					
<input type="button" value="Generate Report"/>						

Figure 25: The Section 8 MTCS Transaction Report

After the user selects all the desired Section 8 programs, the types of action in the **Type of Action** list, the effective dates or the update dates, the user must click the **Generate Report** button. The program displays the Section 8 tenant report. Once the user runs the section 8 report, they can select different Section 8 programs in the **Section 8** list (see Figure 26).

### MTCS Transaction Report

**Hub:** 3001.F Baltimore Hub  
**Field Office:** 300H BALTIMORE HUB OFFICE  
 61100501 HA  
**Division:** MTCS Current  
**Program Type:** Section 8  
**Effective Date from:** 2/29/2008

**Total No. Of Records:** 40  
**RTS from Date To:** 8/31/2009  
**Section 8:** Tenant-based Vouchers

Select Page Size: 11

Type of action	SSN	First Name	Middle Initial	Last Name	1st Date	Real Econ. Status	Int. Ann. Inc. (\$)	Adj. Ann. Inc. (\$)	Int. Rent (\$)	Update Date
1	XXXX-XX-XXXX	A		JOE	01/01/2008	3				06/29/2009
1	XXXX-XX-XXXX	B		ROD	01/01/2008	1			10	11/02/14,717
1	XXXX-XX-XXXX	C		JOHN	02/01/2008	1			10	10/10/45,957
1	XXXX-XX-XXXX	E		ELLISGW	04/01/2008	3	16,184	11,224	600	05/07/12,343
4	XXXX-XX-XXXX	A	Y	MOUL	04/01/2008	2	16,125	14,640	250	05/07/12,457
4	XXXX-XX-XXXX	K		ANDREY	04/01/2008	3				05/07/05,140
4	XXXX-XX-XXXX	J		LEWIS	04/01/2008	3	13,934	7,774	110	05/07/14,700
4	XXXX-XX-XXXX	L		WOMERL	05/01/2008	3	14,491	12,009	22	03/14/2010

Figure 26: The Section 8 MTCS Transaction Report (Tenant-based Vouchers)



### 1.1.8.4 Information Presented in an MTCS Transaction Report

Reports for Public Housing and Section 8 programs contain the same type of information only filtered to display either tenants who live in the public housing developments or tenants who participate in the Section 8 programs. If the developments selected contain Section 8 programs, the user can filter the report to display data for a specific program.

The MTCS Transaction Report on Public Housing program type displays the following information about the tenant:

- The type of action (the user can also set the report to display a selected type of action only).
- The first name, last name, and the middle initial of the tenant.
- The development number, entrance number, and the unit number.
- The effective or update date (based on the selection).
- The bedroom size, which is the number of bedrooms in the unit.
- The total annual income and the adjusted annual income of the tenant.
- The type of rent code.

The user can view the report information in ascending or descending order by clicking the up or down arrow in the column.

This report screen contains two options for further use of the data (see Figure 27).

The user can select one of the following:

- Download in Excel: The program exports the report into a Microsoft Excel spreadsheet for further data manipulation.
- Print Page: The program prints the report screen as a web page.

**Note:** For best results, print in landscape orientation.

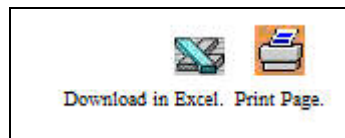


Figure 27: The options for further use of report data

### 1.1.9 The Reports Tab: MTCS Voucher ISS/Exp Report

The **MTCS Voucher ISS/Exp Report** provides data from Form 50058 about the vouchers that have been issued for the PHA that the user selected or that vouchers that are about to expire. It includes the information about the tenants in the selected PHA who have been issued vouchers and when those vouchers expire (see Figure 28).





1.0 Form 50058

Select View:

HQ Division: Public and Indian Housing

HQ Office: PO Field Operations

Hub: 3HBLT Baltimore Hub

Field Office: 3BPH BALTIMORE HUD OFFICE

Housing Authority: MD018 Frederick Housing Authority

Database: ☒ MTCS Current

Type of Action:

☒ Effective Date:

☐ Update Date:

Figure 28: The MTCS VO Iss/Exp Report sub tab of the Reports tab

After the user selects the desired PHA, the **MTCS Current** option in the **Database** area, the user must select the type of action. For this report, the program only allows to select one of the two types of action (voucher issuance, or voucher expiration), or both in the **Type of Action** list. Then, the user must select the **Effective Date**, or the **Update Date** option. The update date denotes the date the information about the type of action was submitted, and the effective date denotes the date the type of action takes effect.

After selecting all the desired options, the user must click the **Generate Report** button to run the report (see Figure 29).

Issuance And Expiration Voucher Report

HQ Division: Public and Indian Housing  
HQ Office: PO Field Operations  
Hub: 3HBLT Baltimore Hub  
Field Office: 3BPH BALTIMORE HUD OFFICE  
Housing Authority: MD018 Anne Arundel County Housing Commission  
Database: MTCS Current  
Effective Start Date: 2/29/2008  
Effective End Date: 02/31/2009  
Type Of Action: ALL  
Total Number of Records = 65

Head Of Household Details

Head Of Household SSN	Holl Last Name	Holl First Name	Holl Middle Initial	Participant Code	Program Type	Type Of Action	Effective Date	Correction Indicator	Correction Reason Code	Correction Date	Unk Rent Indicator	Unk Rent Indicator	FS Participant Index
EXXXXX-517	WILLIAMS	C		MT018	VO	10	12/05/2008	N	0				N
EXXXXX-517	WILLIAMS	C		MT018	VO	10	12/05/2008	N	0				N
EXXXXX-517	WILLIAMS	C		MT018	VO	10	12/05/2008	N	0				N
EXXXXX-457	HOWARD	C		MT018	VO	10	05/05/2009	N	0				N
EXXXXX-457	HOWARD	C		MT018	VO	10	05/05/2009	N	0				N
EXXXXX-457	HOWARD	C		MT018	VO	10	05/05/2009	N	0				N
EXXXXX-733	CARANA	A		MT018	VO	10	05/05/2009	N	0				N
EXXXXX-733	CARANA	A		MT018	VO	10	05/05/2009	N	0				N
EXXXXX-733	CARANA	A		MT018	VO	10	05/05/2009	N	0				N
EXXXXX-361	WYNNE	F		MT018	VO	10	04/28/2008	N	0				N

Page 1 of 7

Figure 29: The MTCS Voucher Issuance and Expiration Report



### 1.1.9.1 Information Presented in the MTCS Voucher Issuance/Expiration Report

The MTCS Voucher Issuance/Expiration Report contains the data based on the selections that the user made when the user ran the report, the total number of records retrieved, and the following information:

- Head of household's social security number, last name, first name, and middle initial.
- The participant code, program type, type of action, and the effective date. When the user runs the report, the user can select the desired type of action.
- The total number of people in the household.
- The total annual income of the household members.
- The following head of household information: date of birth, age, sex, race, ethnicity, and citizenship information.
- The date the information was last modified and the update date.

If the report contains more than 10 pages of data, the user can navigate to another group of pages by clicking the **Select Page Set** list.

This report screen contains two options for further use of the data (see Figure 30).

Select one of the following:

- Download in Excel: The program exports the report contents into a Microsoft Excel spreadsheet for further data manipulation.
- Print Page: The program prints the report screen as a web page.

**Note:** For best results, print in landscape orientation.

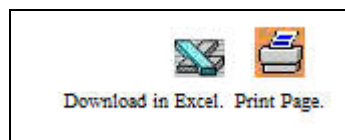


Figure 30: The options for further use of report data

### 1.1.10 The Reports Tab: Overlapping Date Report

The **Overlapping Date Report** allows the user to view the information about the tenants that are moving from one PHA to another PHA or one program type to another. The program considers tenants to be in the state of overlapping, until the PHAs process the EOPs (end of participation), or the port outs (see Figure 31). Another option is that the system automatically generates the EOP transactions for the tenants.

When a tenant moves from one PHA to another, the PHA that the tenant is moving from must submit the EOP. When a tenant is moving from one voucher program type to another within one and the same PHA, the PHA must process the port out.

The program processes EOPs and port outs once a month automatically (on the first day of the month). The user can also process the EOPs and port outs manually by submitting the appropriate sections of Form 50058. The program also processes EOPs every 30 minutes at a quarter past hour and three quarters past hour (for example 1:15 pm, 1:45pm, 2:15 pm, 2:45 pm, etc.).



## 1.0 Form 50058

Search | Household | Members | Rent | FSS/MW | Reports

MTCS Transaction Report | MTCS VO Iss/Exp Report | **Overlapping Date Report** | Portability Billing Report

Select View:

HQ Division: Public and Indian Housing

HQ Office: TC Field Operations

Hub: SRH - Baltimore Hub

Field Office: SRH BALTIMORE HUB OFFICE

Housing Authority: MDU/Anne Arundel County Housing Commission

Occurrence Date (Automatic EOPs/Port Outs Processed)

From: 9/8/2009

To: 9/8/2009

Figure 31: The Overlapping Date Report sub tab of the Reports tab

To run the Overlapping Date Report, the user must select the desired PHA, and enter the desired dates in the **Occurrence Date (Automatic EOPs/Port Outs Processed)** boxes. After the user selects the proper dates, they must click **Generate Report** to run the Overlapping Date Report.

### 1.1.10.1 Information Presented in the Overlapping Date Report

The Overlapping Date Report presents the information in three tabs. On the **Automatic EOPs/Port Outs Pending** tab of the Overlapping Date Report, the user can see the list of tenants that are moving out of the PHA that the user selected (see Figure 32). The user can see the information about the PHAs and program types that they are moving to. The user can also submit the online EOPs (if available), by clicking the **Online EOP** link on the **Online EOP** column. The **Online EOP** links on the **Online EOP** column may or may not be available to the user based on the security settings.

Overlapping Date Report  
As of 9/10/2009

Hub: PHNYC, New York City Hub  
Field Office: ZAPH NEW YORK CITY HUD OFFICE  
Housing Authority: NY005 New York City HA

Automatic EOPs / Port Outs Pending | New Admissions / Port Ins Causing Overlapping Dates | Automatic EOPs / Port Outs Processed

Total Number of Records = 55

#	HOH SSN or MID	HOH Name	HA CODE Gaining	HA NAME Gaining	Program Type Gaining	Occurrence Date of Overlap	Projected Automatic EOP / Port Out Date	Online EOP
1	x000000095	TDONR	L	NY005	New York City HA	VO	10/01/2004	<a href="#">Online EOP</a>
2	x000000105	ROSAHO	W	FL005	FLALLAH	VO	05/10/2009	<a href="#">Online EOP</a>
3	x000000171	Umahom	U	NY110	New York City Dept of Housing Preservation & Dev.	VO	05/11/2009	<a href="#">Online EOP</a>
4	x000002292	YADUKGJUL	L	NY005	New York City HA	VO	05/02/2004	<a href="#">Online EOP</a>
5	x000005190	AMUWAWO	L	NY005	New York City HA	VO	01/05/2004	<a href="#">Online EOP</a>
6	x000001200	Nzhuo	W	NY110	New York City Dept of Housing Preservation & Dev.	VO	03/21/2009	<a href="#">Online EOP</a>
7	x000004397	WVWVW	L	NY904	FLC	VO	05/01/2009	<a href="#">Online EOP</a>
8	x000003570	JMMWLRM	U	NY900	FLC	VO	05/20/2009	<a href="#">Online EOP</a>
9	x000009888	KUNNS	L	NY005	New York City HA	VO	02/04/2009	<a href="#">Online EOP</a>
10	x000006841	Zeeqad	L	PA002	Lebanon County HA	VO	05/21/2004	<a href="#">Online EOP</a>

Note: An Automatic EOP/Port Out will be generated on the first of the month after the Occurrence Date of the Event.

Figure 32: The Automatic EOPs/Port Outs Pending tab of the Overlapping Date Report







## 1.0 Form 50058

Select one of the following:

- Download in Excel: The program exports the report data into a Microsoft Excel spreadsheet for further data manipulation.
- Print Page: The program prints the report screen as a web page.

**Note:** For best results, print in landscape orientation.

- View Entire Report: The user can set the program to display entire report at once so that the user did not have to navigate through the pages.

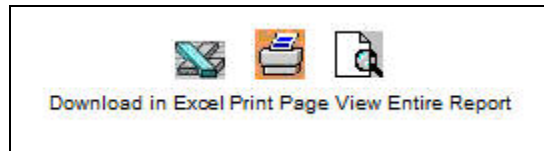


Figure 35: The options for further use of report data

### 1.1.11 The Reports Tab: Portability Billing Report

The **Portability Billing Report** sub tab of the **Report** tab allows the user to run the Portability Billing Report. The Portability Billing Report displays the list of tenants for which the user's PHA has to bill other PHAs, and the list of tenants for which other PHAs bill the user's PHA (see Figure 36).

Sometimes, a tenant has to move from one PHA to another, but wants to continue participating in the same program. If the tenant has to move before the program expires and has to be renewed, then the PHA that the tenant moves to has to bill the PHA the tenant moved from.

Figure 36: The Portability Billing Report sub tab of the Reports tab

After the user selects the desired PHA, the user must select the desired program type in the **Program Type** area. The user can select one program type, or select the **All Relevant Programs (listed above)** option. If the user selects the **All Relevant Programs (listed above)** option, then the program will include the tenant information for all the applicable programs. After selecting the appropriate program type option, the user must enter the desired dates in the **Effective Date** boxes.

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



1.0 Form 50058

### 1.1.11.1 Information Presented in the Portability Billing Report

When the user runs the Portability Billing Report, the program presents the report data in two tabs. The **PHA Billing Report** tab of the Portability Billing Report displays the list of tenants that the current PHA has to bill other PHAs for (see Figure 37). It also lists the respective PHA and billing data for each tenant. The user can run this report to view which PHAs must be billed and the billing amounts for every tenant.

**Portability Billing Report**  
As of September 10, 2009

Date: 2HNYC New York City Hub  
Field Office: 2APH NEW YORK CITY HUB OFFICE  
Housing Authority: NY003 Youkers H.A., City of  
Program Type: Tenant-based Vouchers  
Effective Dates: September 10, 2007 through September 10, 2009  
Included:

PHA Billing Report | PHA Billed Report

Select Page Size: 10  
Total Number of Records = 4

The selected PHA is billing other (initial) PHAs

Head of Household's Name	Head of Household's SSN	Alien Registration Number	Initial PHA Code	Cost Utilized to the Initial PHA	Type of action	Effective date of action
BOGUE, F	XXXXXX-5820	N/A	HY025	943	2	09/10/2008
HARRIS	XXXXXX-5517	N/A	HY025	352	2	09/10/2008
PHILLIPS	XXXXXX-2110	N/A	HY025	678	2	09/10/2008
BOGUE, F	XXXXXX-5857	AA001-5556	HY025	1025	2	09/10/2008

Page 1 of 1

Figure 37: The PHA Billing Report tab of the Portability Billing Report

The **PHA Billed Report** tab displays the list of the tenants that other PHAs are billing the current PHA for (see Figure 38). It also lists the respective PHA and billing data for each tenant. The user can run this report to view which PHAs bill the user's PHA and the billing amounts for every tenant.

**Portability Billing Report**  
As of September 10, 2009

Date: 2HNYC New York City Hub  
Field Office: 2APH NEW YORK CITY HUB OFFICE  
Housing Authority: NY003 Youkers H.A., City of  
Program Type: Tenant-based Vouchers  
Effective Dates: September 10, 2007 through September 10, 2009  
Included:

PHA Billing Report | PHA Billed Report

Select Page Size: 10  
Total Number of Records = 36

Other (receiving) PHAs are billing the selected PHA

Head of Household's Name	Head of Household's SSN	Alien Registration Number	Receiving PHA Code	Cost Billed by Receiving PHA	Type of action	Effective date of action
ABRAHAM, L	XXXXXX-0200	N/A	CL001	2073	2	09/10/2008
ABRAHAM, Y	XXXXXX-0747	N/A	PH009	721	2	09/10/2008
ABRAHAM, S	XXXXXX-1737	N/A	FL091	152	2	09/10/2008
ABRAHAM, S	XXXXXX-0200	N/A	NY025	454	2	09/10/2008
ABRAHAM, S	XXXXXX-0200	AA001-5556	NY025	1120	2	09/10/2008
ABRAHAM, S	XXXXXX-0200	N/A	NY025	352	2	09/10/2008
ABRAHAM, S	XXXXXX-1737	N/A	NY025	391	2	09/10/2008
ABRAHAM, S	XXXXXX-0200	N/A	NY025	1070	2	09/10/2008
ABRAHAM, S	XXXXXX-0200	N/A	FL091	152	2	09/10/2008
ABRAHAM, S	XXXXXX-0200	N/A	FL091	152	2	09/10/2008

Page 1 of 4

Figure 38: The PHA Billed Report tab Portability Billing Report

The Portability Billing Report screen contains three options for further use of the data (see Figure 39).



## 1.0 Form 50058

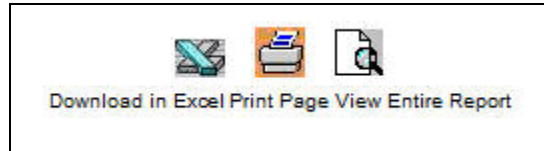
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Select one of the following:

- Download in Excel: The program exports the report data into a Microsoft Excel spreadsheet for further data manipulation.
- Print Page: The program prints the report screen as a web page.

**Note:** For best results, print in landscape orientation.

- View Entire Report: The user can set the program to display entire report at once so that the user did not have to navigate through the pages.



*Figure 39: The options for further use of report data*