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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Shiva Information Technology Services

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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.

1.1 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.

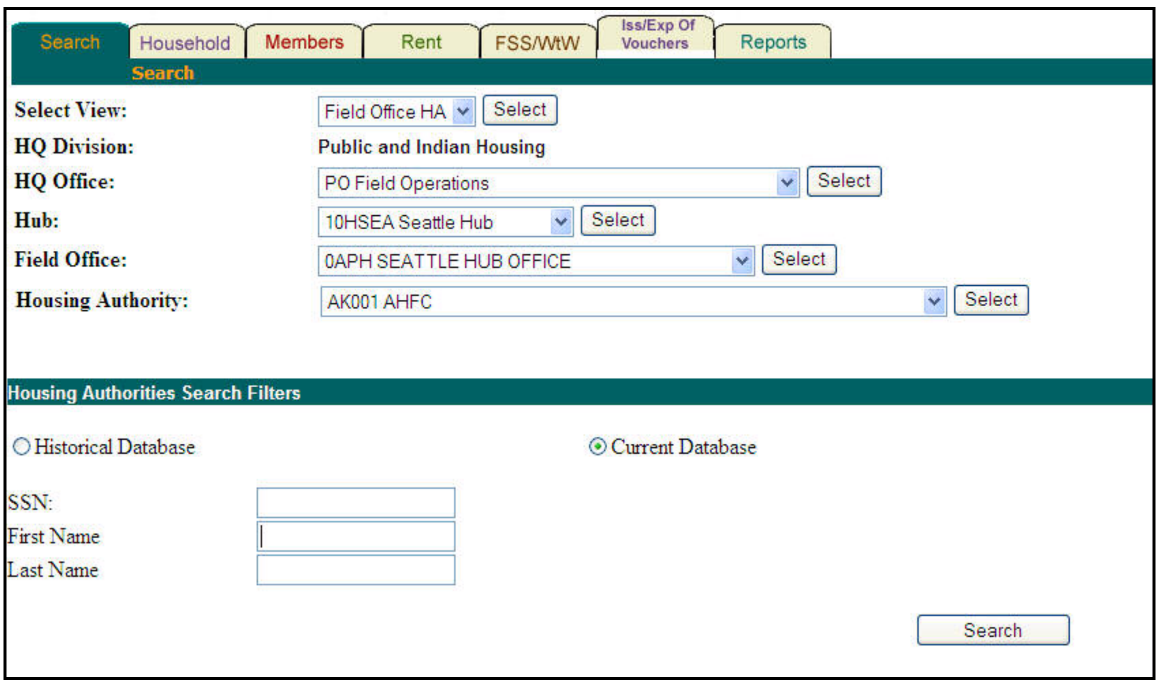


Figure 1: The default Search page

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.

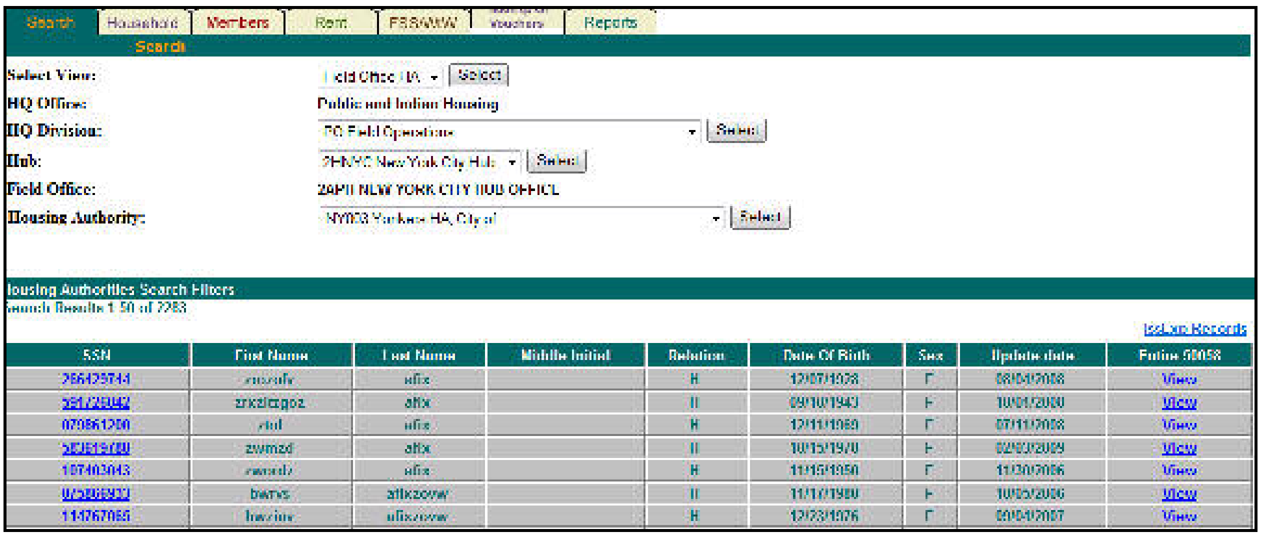


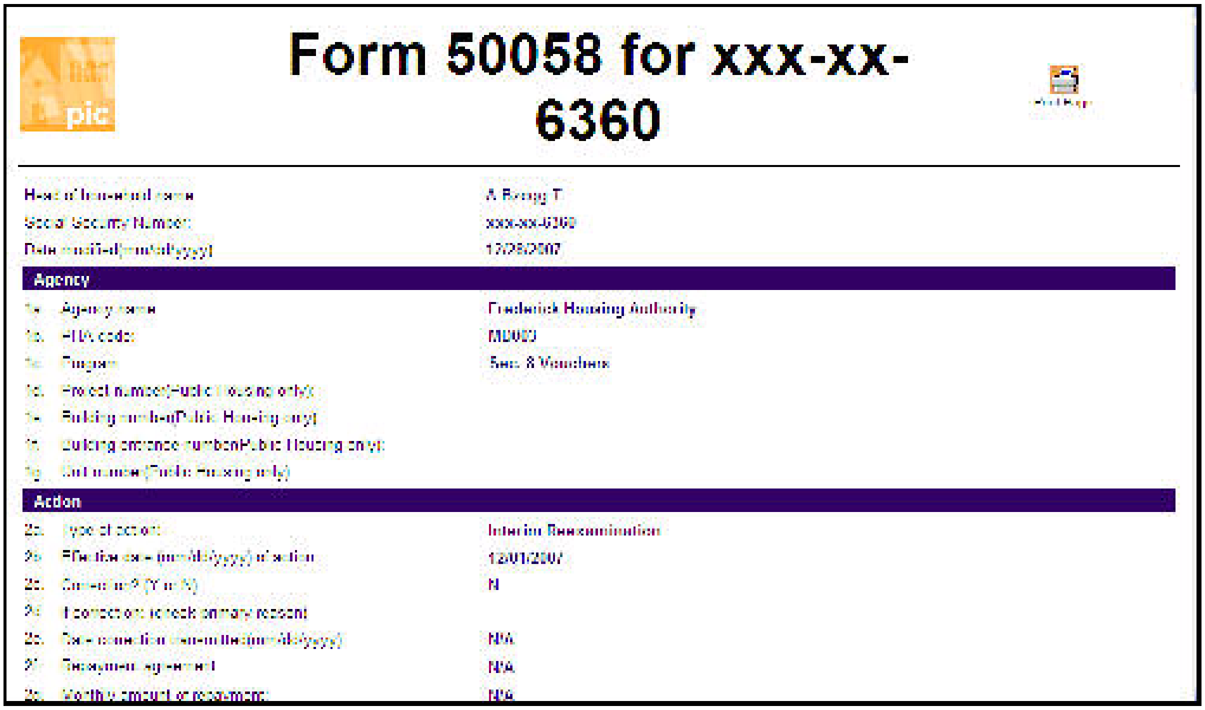
Figure 2: Column data headings for search results

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).



Form 50058 for xxx-xx-6360

Head of household name	A Bragg T
Social Security Number:	xxx-xx-6360
Date modified(mm/dd/yyyy)	12/28/2007
Agency	
1a. Agency name	Frederick Housing Authority
1b. PHA code:	MD009
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)	
Action	
2a. Type of action:	Interim Reexamination
2b. Effective date (mm/dd/yyyy) of action	12/01/2007
2c. Correction? (Y or N)	N
2d. If correction, check primary reason:	
2e. Date correction transmitted(mm/dd/yyyy)	N/A
2f. Repayment agreement	N/A
2g. Monthly amount of repayment:	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.

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

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.

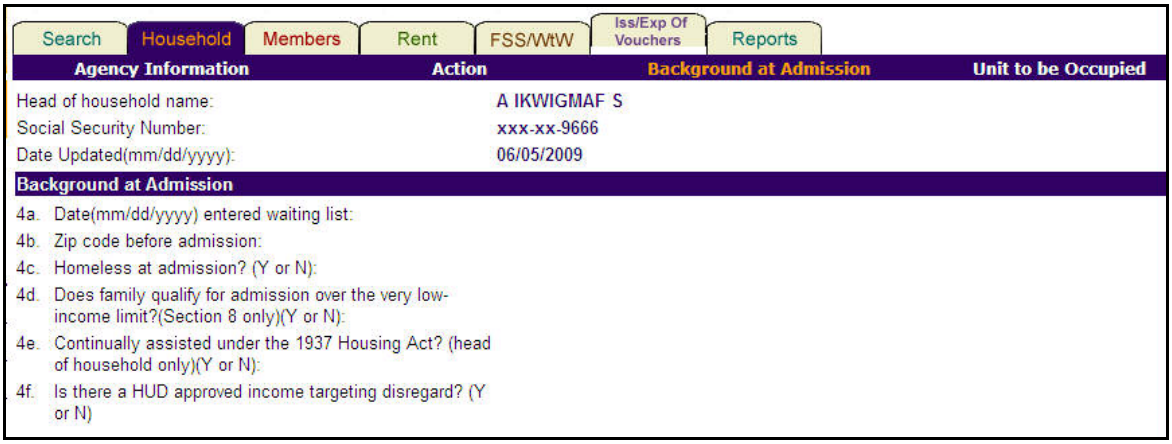


Figure 6: The Background at Admission sub tab of the Household tab

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).

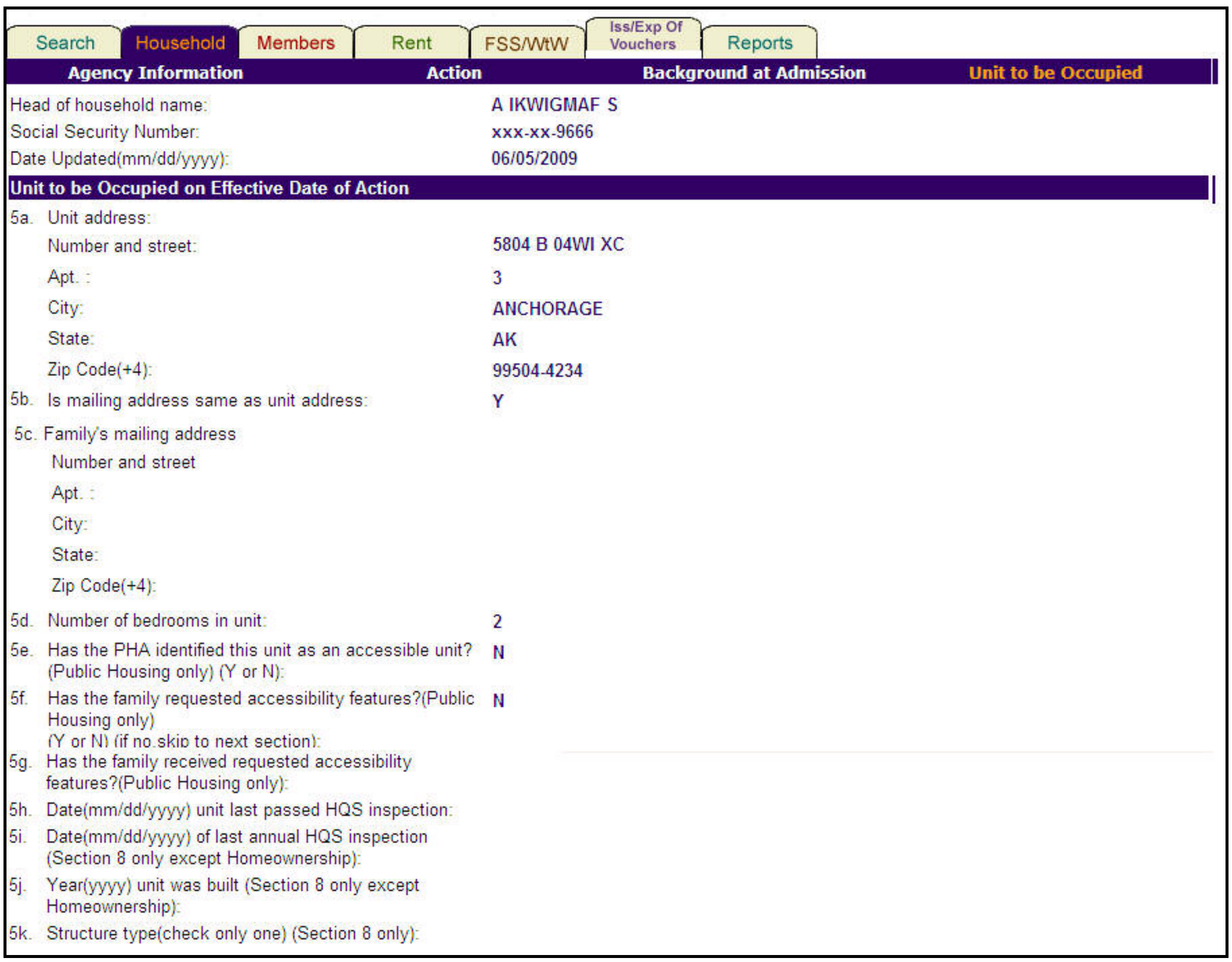


Figure 7: The Unit to be Occupied sub tab of the Household Tab

1.1.3 The Members Tab

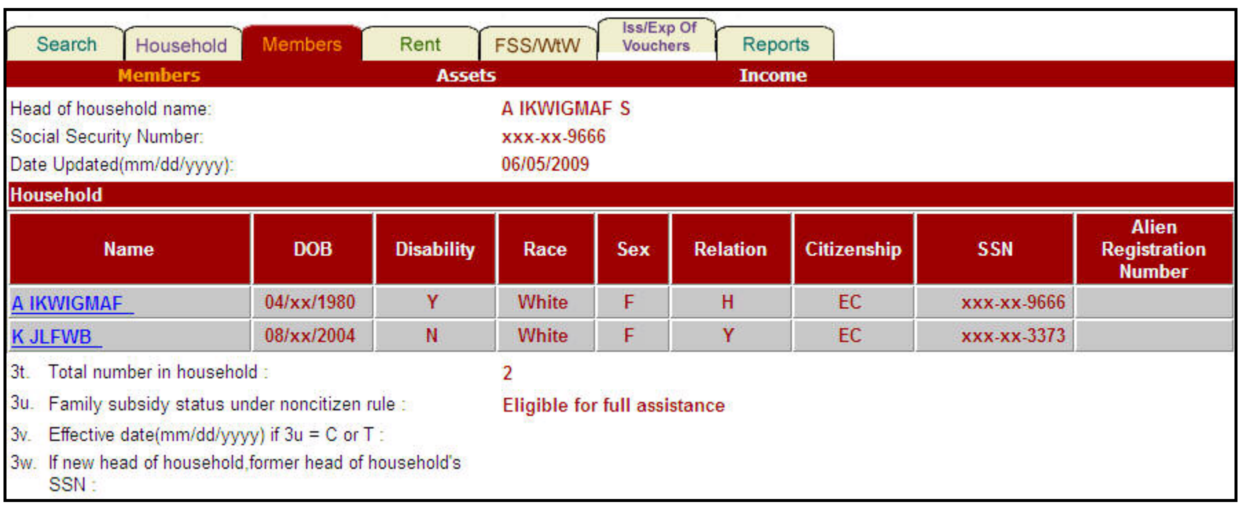
From the **Members** tab, the user can access data that corresponds to Sections 3, 6, and 7 of the Form 50058. The user can find the data within the following three sub tabs (see Figure 8):

- 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 IKWIGMAF	04/xx/1980	Y	White	F	H	EC	xxx-xx-9666	
K JLFWB	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).

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

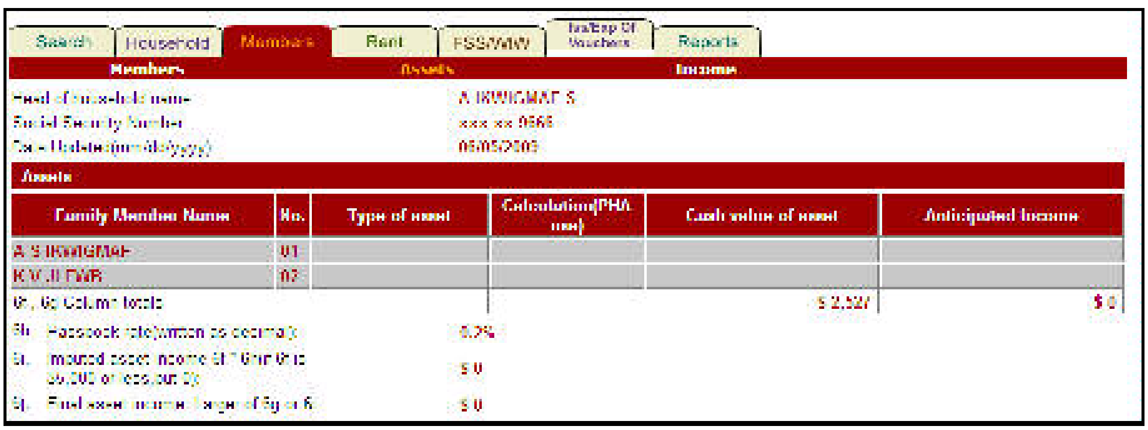


Figure 10: The Assets sub tab of the Members tab

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.

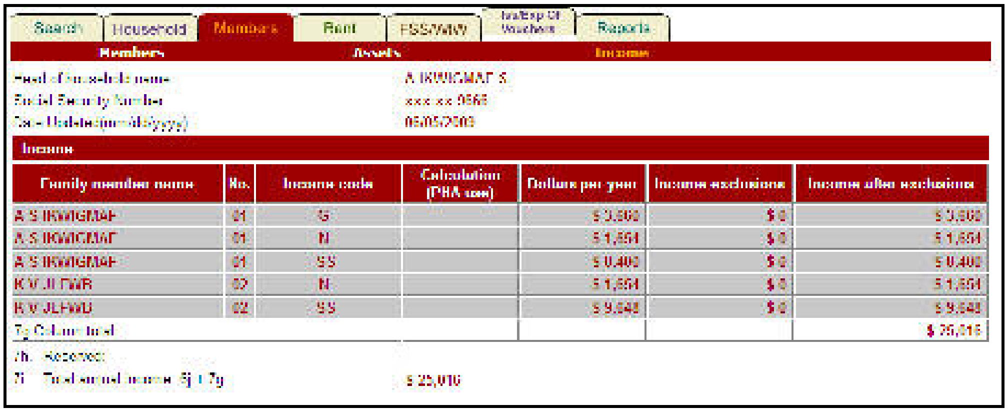


Figure 11: The Income sub tab of the Members tab

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.

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

Expected Income Per Year

8a.	Total Annual Income: copy from 7i	$ 25,016

Permissive Deductions (If Section 8, skip to 8f or 8q)

8b. Family member name	No.	8c. Type of permissive deduction	8d. Amount
A IKWIGMAF	01		$0
K JLFWB	02		$0
8e. Permissive deductions	$0		

8f.	Medical/disablity threshold: 8a * 0.03	$ 750
8g.	Total unreimbursed disabiltity assistance expense(if no disability expenses,skip to 8k):	$ 0
8h.	Maximum disability allowance:If 8g minus 8f is positive or zero,put amount 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	$ 0
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).

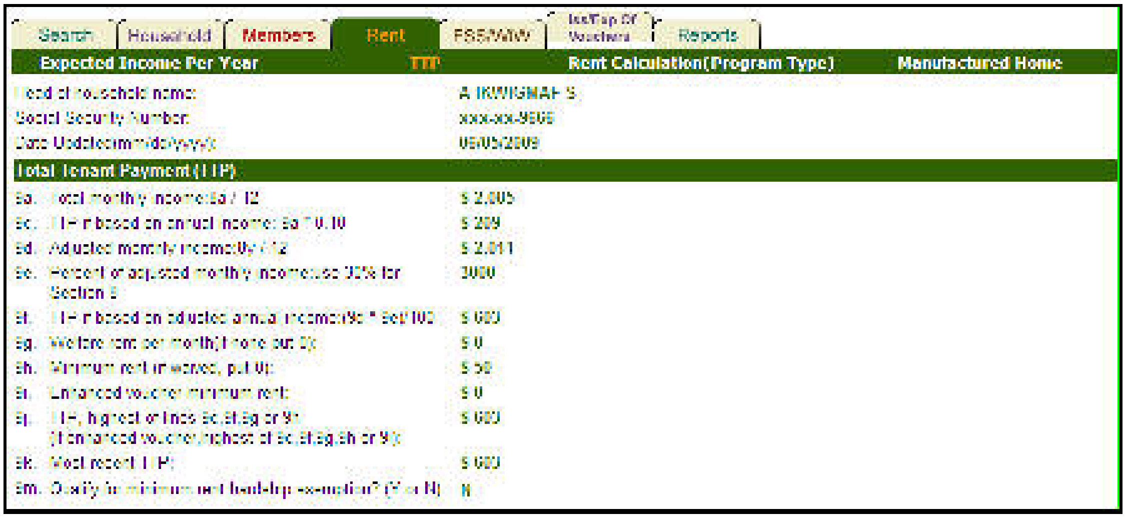


Figure 13: The TTP sub tab of the Rent tab

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.

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

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

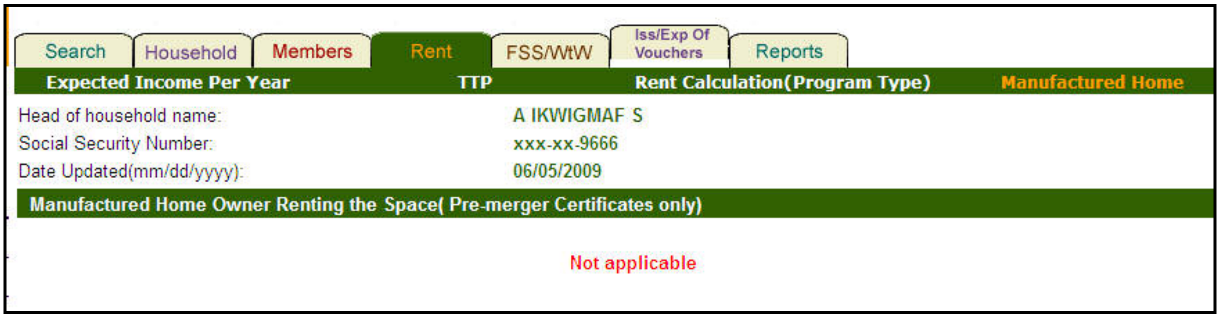


Figure 15: The Manufactured Home sub tab of the Rent tab

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.

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.

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.

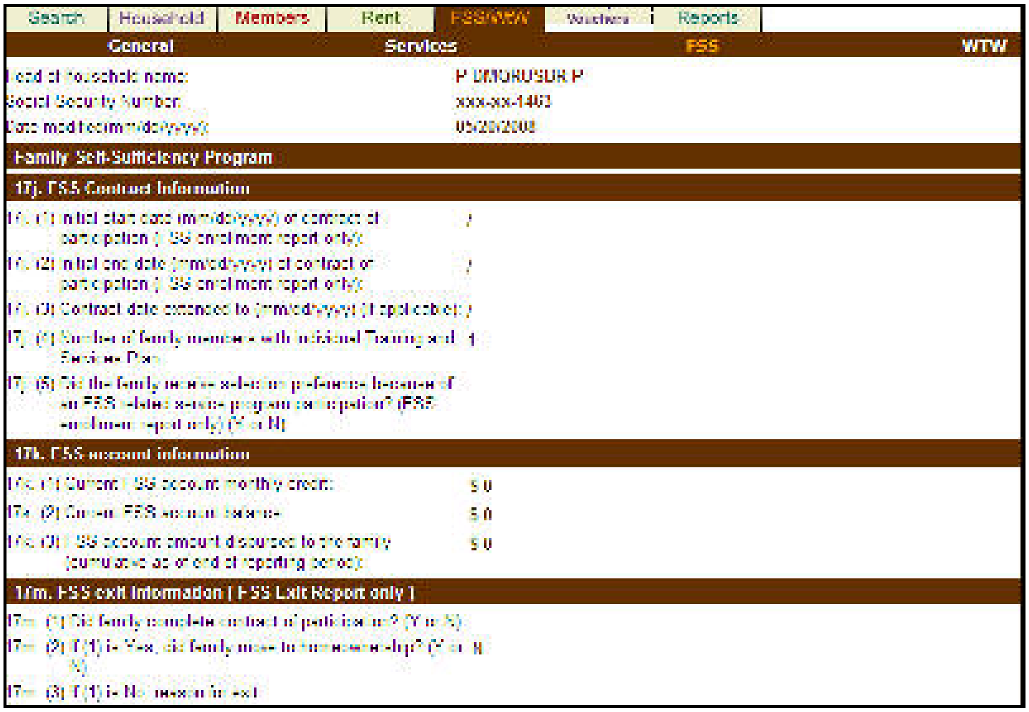


Figure 18: The FSS sub tab of the FSS/WtW tab

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.

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).

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.

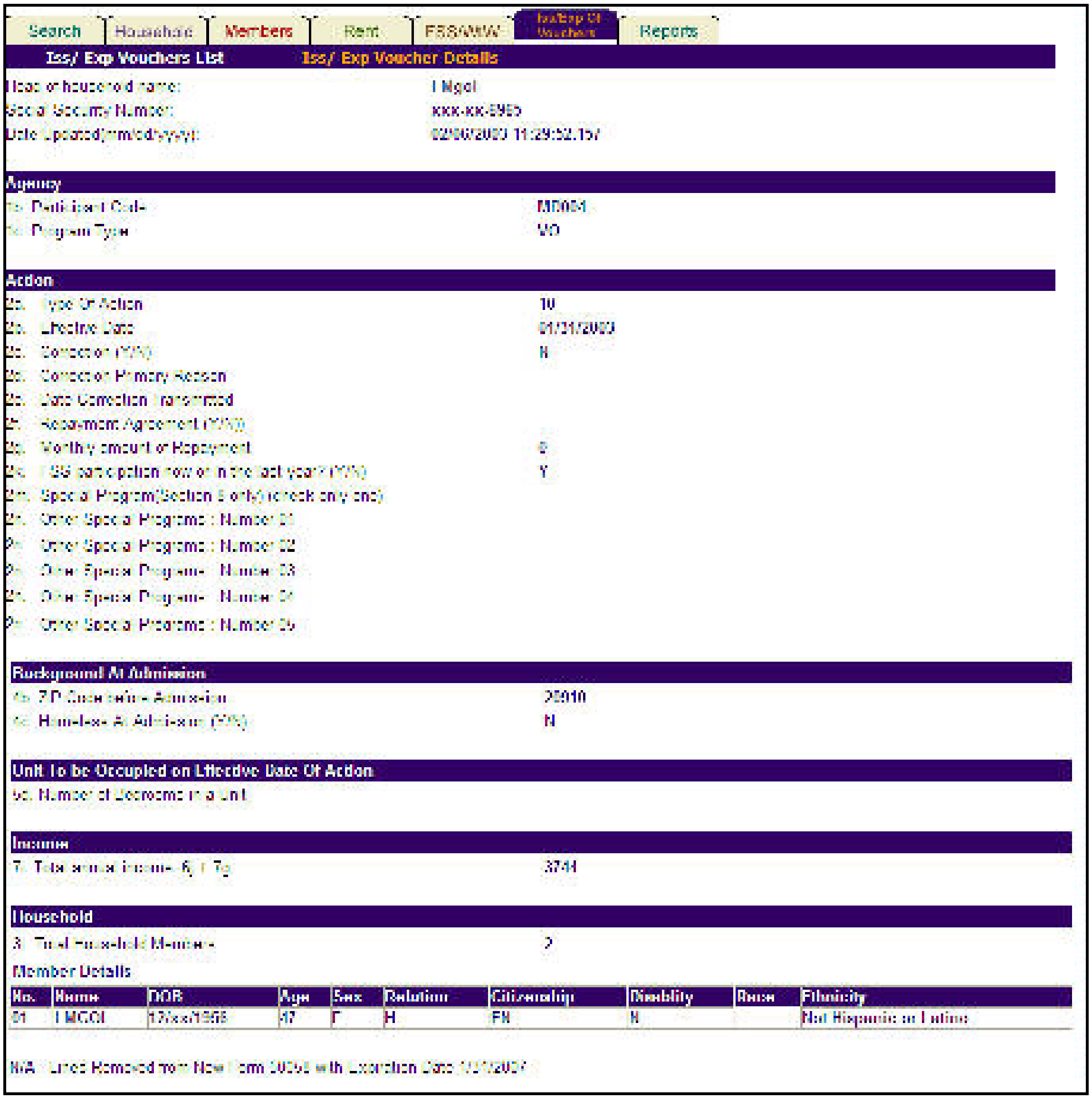


Figure 21: The Iss/Exp Voucher Details sub tab of the ISS/Exp of Vouchers tab

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

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

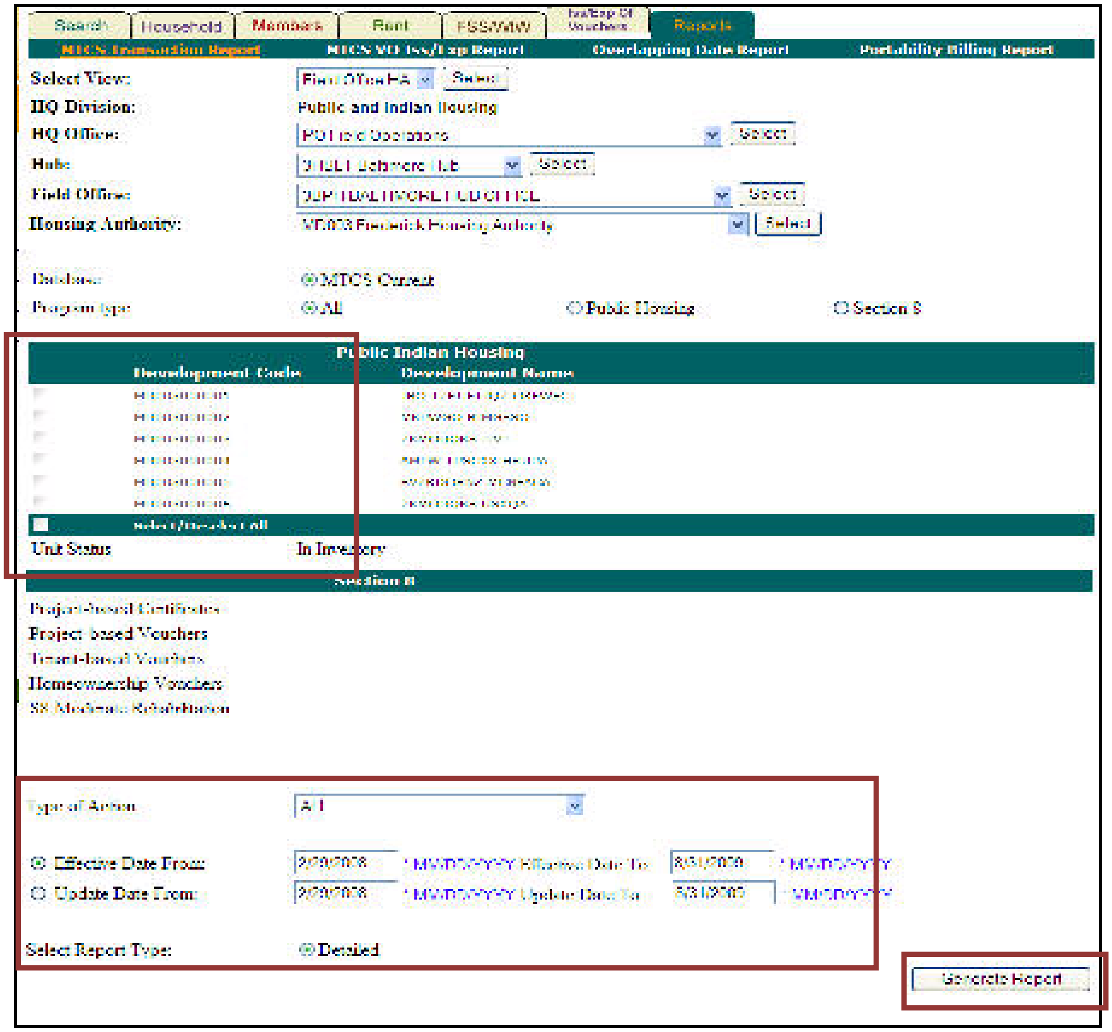


Figure 22: The MTCS Transaction Report sub tab of the Reports tab

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 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.

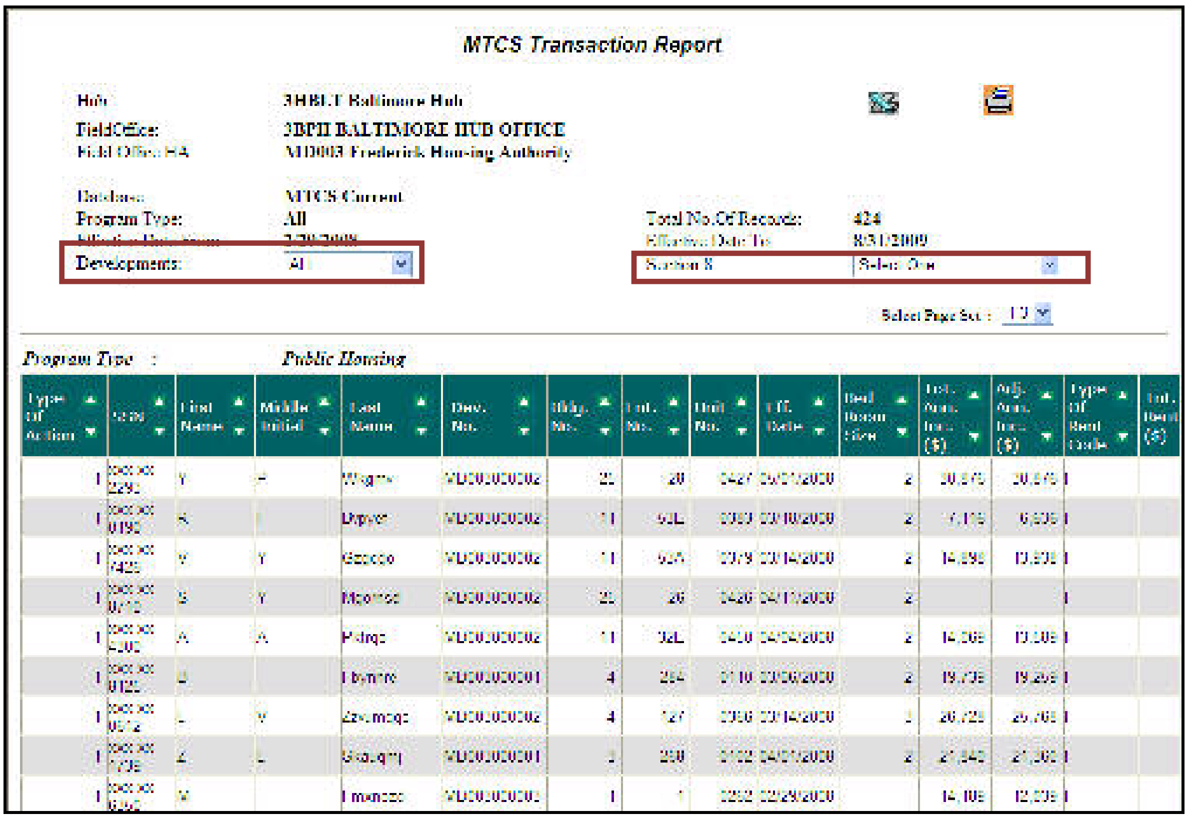


Figure 23: The MTCS Transaction Report

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 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.

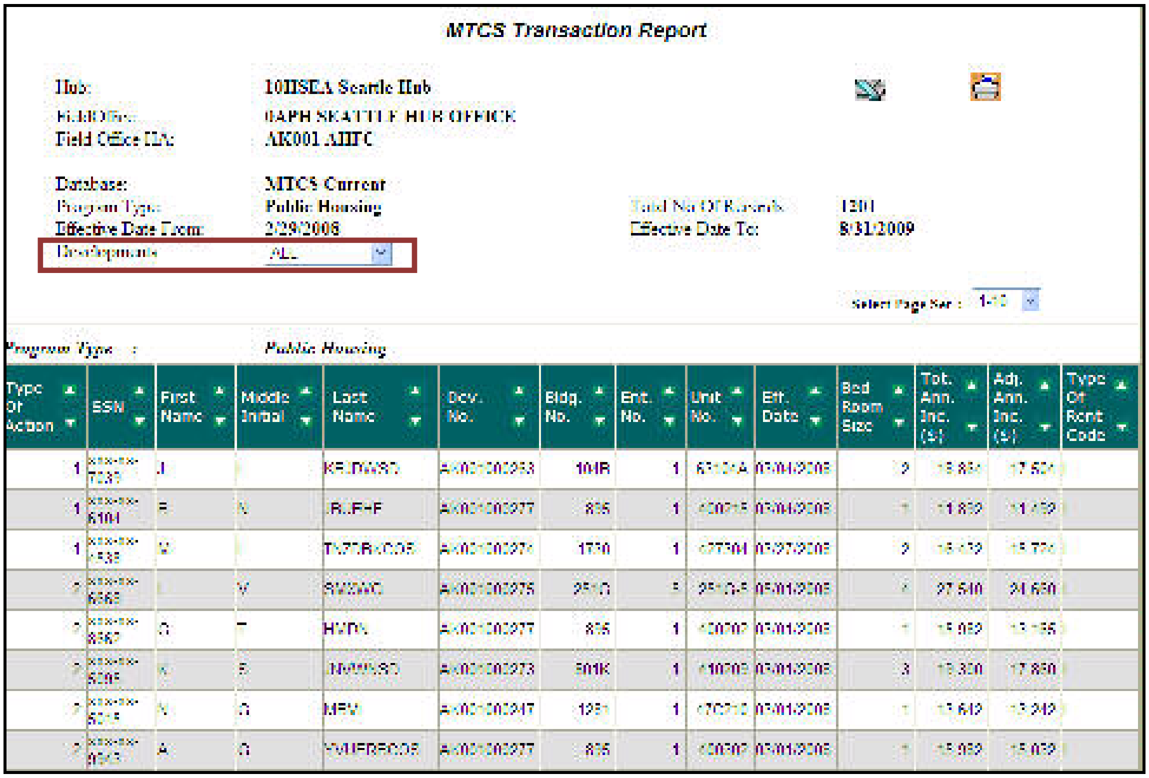


Figure 24: The Public Housing MTCS Transaction Report

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.

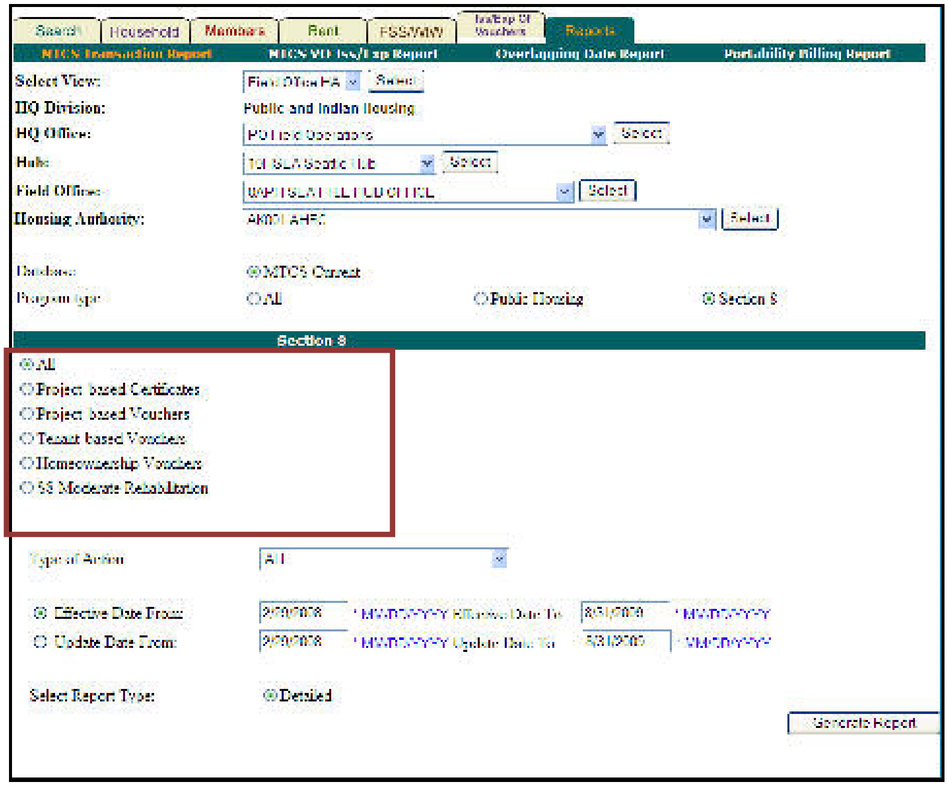


Figure 25: The Section 8 MTCS Transaction Report

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).

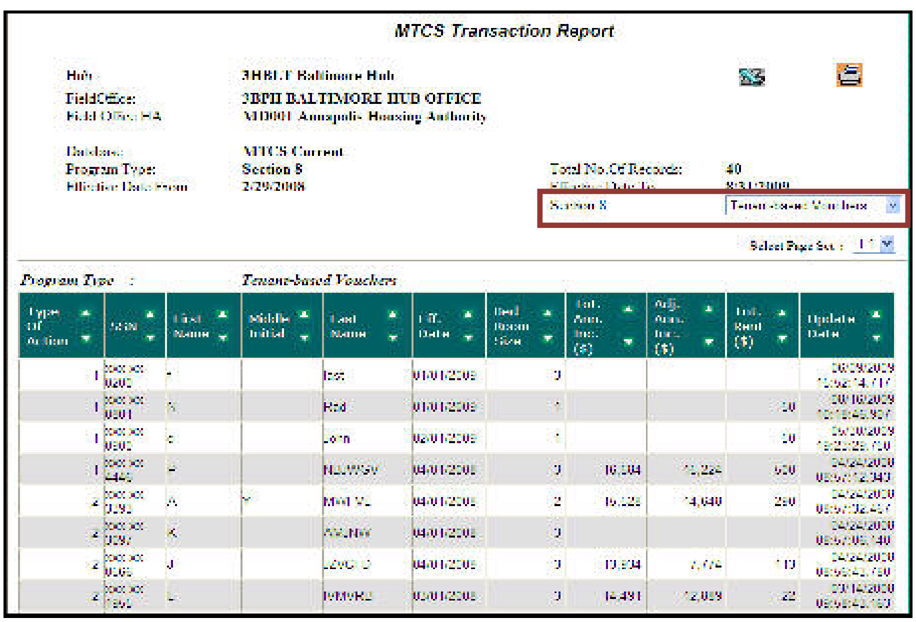


Figure 26: The Section 8 MTCS Transaction Report (Tenant-based Vouchers)

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).

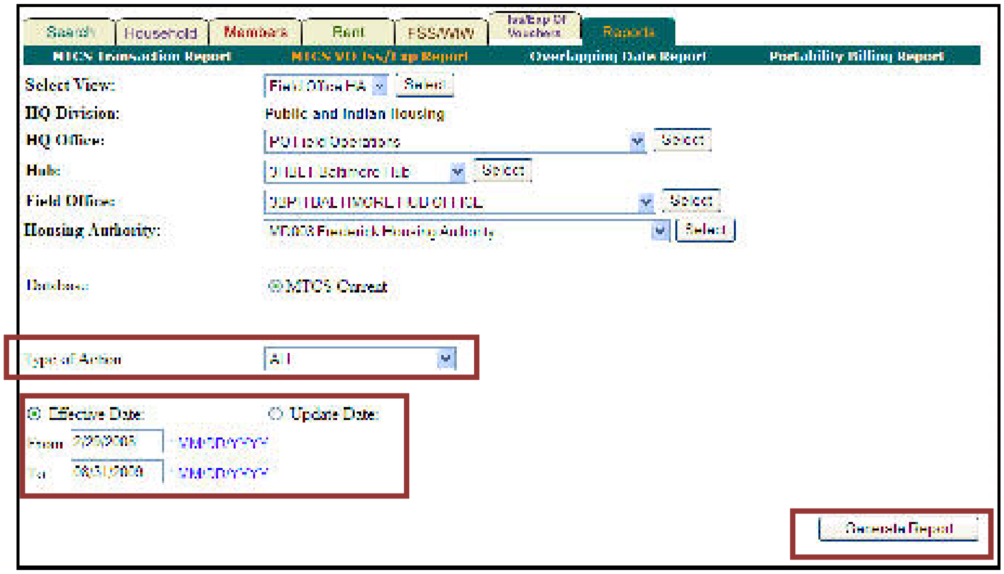


Figure 28: The MTCS VO Iss/Exp Report sub tab of the Reports tab

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).

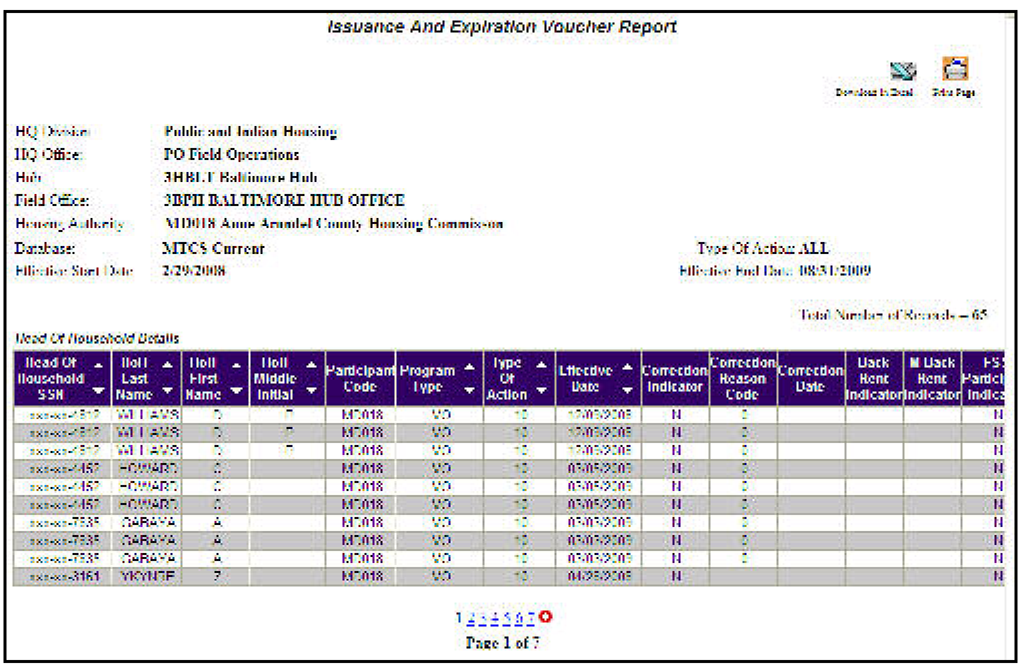


Figure 29: The MTCS Voucher Issuance and Expiration Report

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.

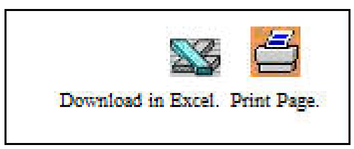


Figure 30: The options for further use of report data

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.).

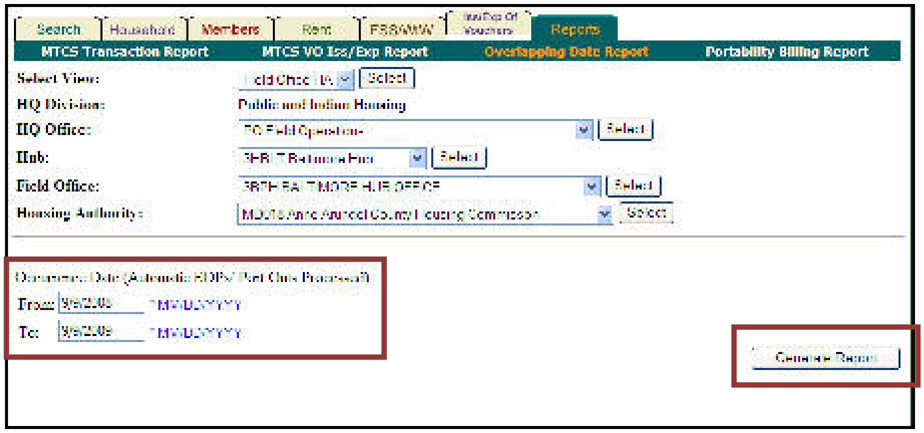


Figure 31: The Overlapping Date Report sub tab of the Reports tab

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.

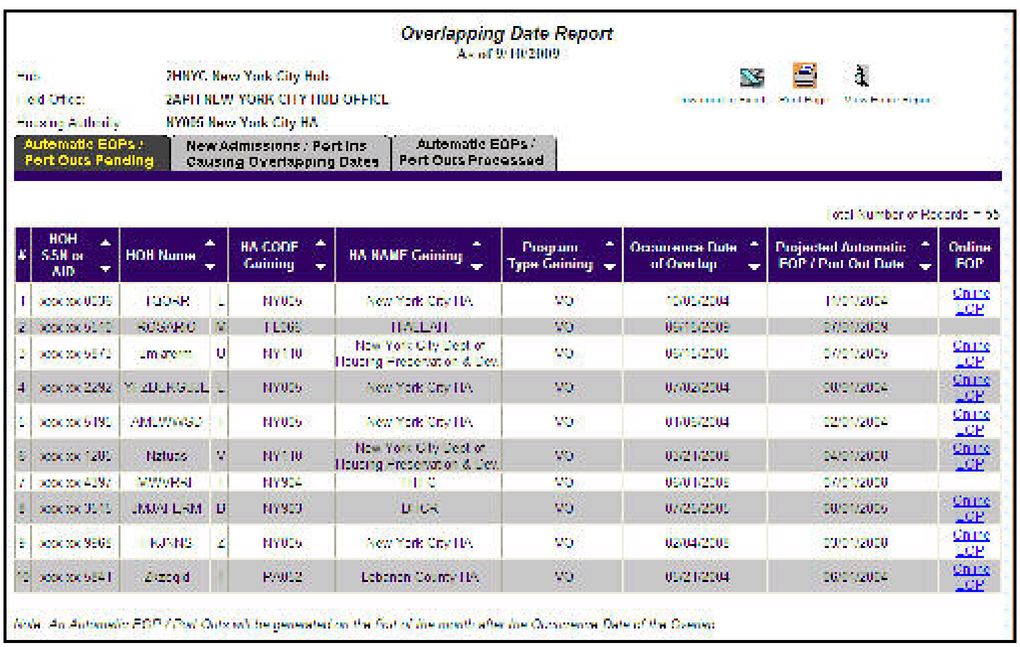


Figure 32: The Automatic EOPs/Port Outs Pending tab of the Overlapping Date Report

The **New Admissions/Port Ins Causing Overlapping Dates** tab of the Overlapping Date Report displays the list of tenants that are moving into the PHA the user selected. It also displays the information about the PHAs and the program types that they are moving from (see Figure 33).

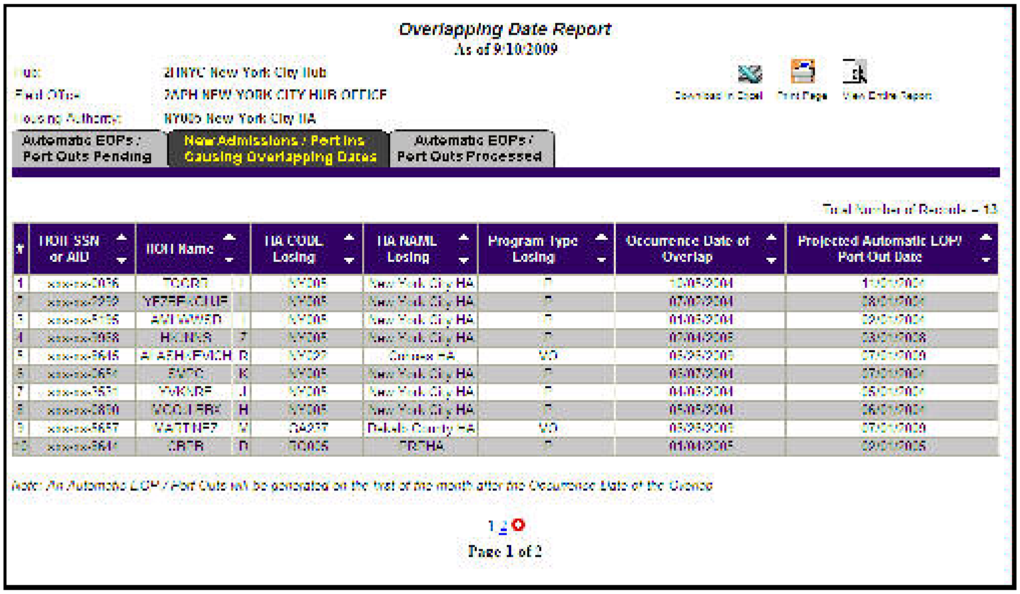


Figure 33: The New Admissions/Port Ins Causing Overlapping Dates tab of the Overlapping Date Report

The **Automatic EOPs/Port Outs Processed** tab of the Overlapping Date Report displays the list of EOPs and port outs that the program processed automatically on the first of the month (see Figure 34).

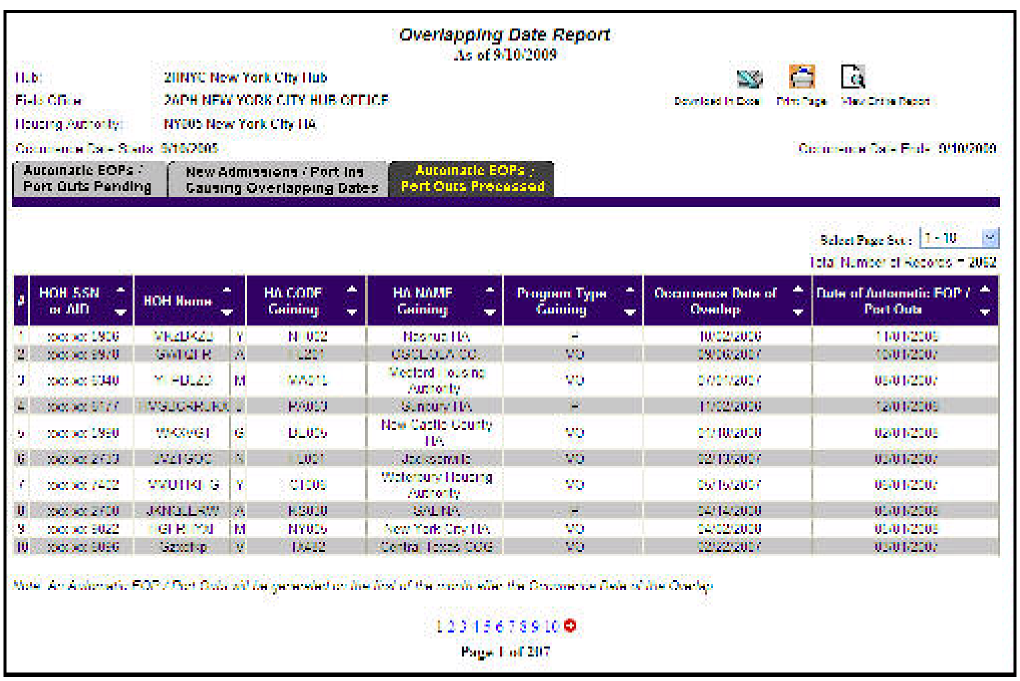


Figure 34: The Automatic EOPs/Port Outs Processed tab of the Overlapping Date Report

The Overlapping Date Report screen contains three options for further use of the data (see Figure 35).

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.

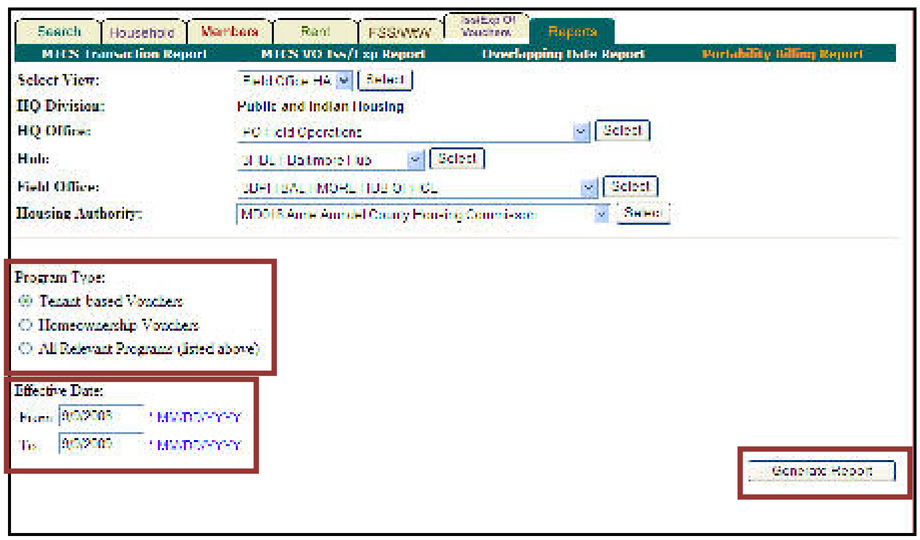


Figure 36: The Portability Billing Report sub tab of the Reports tab

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.

1.1.11.1 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.

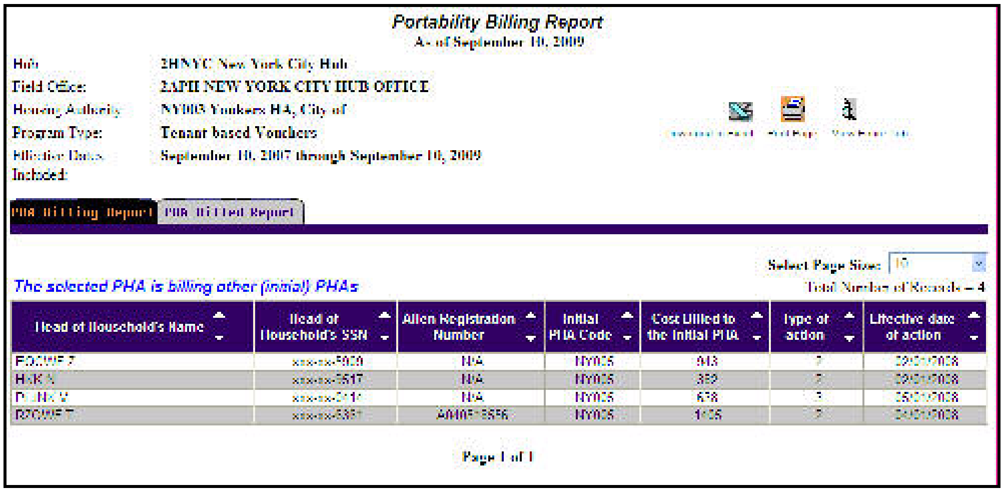


Figure 37: The PHA Billing Report tab of the Portability Billing Report

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.

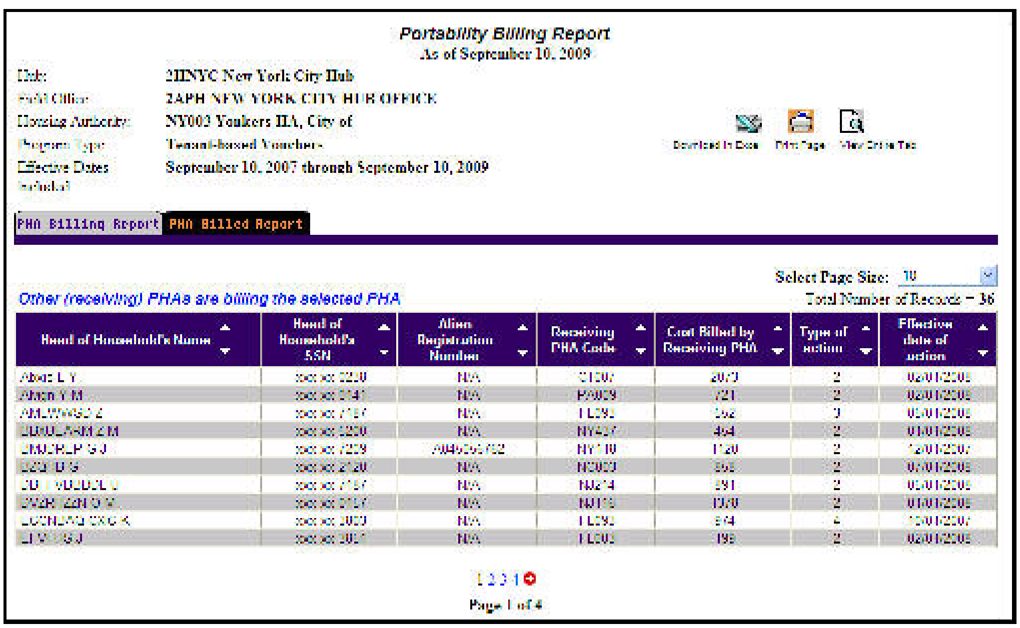


Figure 38: The PHA Billed Report tab Portability Billing Report

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

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