



HOUSING AUTHORITY 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

TABLE OF CONTENTS

1	Form 50058	1-1
1.1	Viewer.....	1-2
1.1.1	The Search Tab: Accessing Form 50058 Data.....	1-2
1.1.2	The Household Tab.....	1-5
1.1.3	The Members Tab.....	1-8
1.1.4	The Rent Tab	1-10
1.1.5	The FSS/WtW Tab.....	1-13
1.1.6	The ISS/Exp Vouchers Tab	1-16
1.1.7	Reports Tab.....	1-17
1.1.8	The Reports Tab: MTCS Transaction Report	1-18
1.1.8.1	Program Type: All.....	1-19
1.1.8.2	Program Type: Public Housing	1-19
1.1.8.3	Program Type: Section 8.....	1-20
1.1.8.4	Information Presented in an MTCS Transaction Report	1-22
1.1.9	The Reports Tab: MTCS Voucher ISS/Exp Report.....	1-22
1.1.9.1	Information Presented in the MTCS Voucher Issuance/Expiration Report.....	1-24
1.1.10	The Reports Tab: Overlapping Date Report	1-24
1.1.10.1	Information Presented in the Overlapping Date Report	1-25
1.1.11	The Reports Tab: Portability Billing Report	1-27
1.1.11.1	Information Presented in the Portability Billing Report.....	1-28

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 'Search' page with a navigation bar at the top containing 'Search', 'Household', 'Members', 'Rent', 'FSS/WtW', 'Iss/Exp Of Vouchers', and 'Reports'. The 'Search' tab is active. Below the navigation bar, there are several search filters: 'Select View' (Field Office HA), 'HQ Division' (Public and Indian Housing), 'HQ Office' (PO Field Operations), 'Hub' (3HBLT Baltimore Hub), 'Field Office' (3BPH BALTIMORE HUB OFFICE), and 'Housing Authority' (MD003 Frederick Housing Authority). Below these filters, there is a section titled 'Housing Authorities Search Filters' with the text 'Search Results 1-50 of 447'. To the right of this text is a link 'IssExp Records'. Below this section is a table with 10 columns: SSN, First Name, Last Name, Middle Initial, Relation, Date Of Birth, Sex, Update date, Online EOP, and Entire 50058. The table contains 10 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	Online EOP	Entire 50058
xxx-xx-6360	A	Bzcqg	T	H	08/xx/1984	F	12/28/2007	Online EOP	View
xxx-xx-0233	A	BMWNBf	T	H	07/xx/1925	M	09/12/2003	EOP	View
xxx-xx-5994	A	Eaioeodf	C	H	11/xx/1973	M	08/31/2007	Online EOP	View
xxx-xx-9116	A	Jzvl Fb.	F	H	06/xx/1933	M	07/27/2007	Online EOP	View
xxx-xx-1178	A	Mmcncf	V	H	02/xx/1932	M	01/25/2008	Online EOP	View
xxx-xx-8469	A	Mtqhibd	A	H	07/xx/1934	M	03/17/2008	Online EOP	View
xxx-xx-7644	A	SKXIHFQS	D	H	10/xx/1928	M	03/14/2006	EOP	View
xxx-xx-7799	A	Vkafgv	G	H	08/xx/1922	M	07/27/2007	Online EOP	View
xxx-xx-1546	A	VKMQRVYD	V	H	04/xx/1933	M	01/02/2002	EOP	View

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 7).

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.



1.0 Form 50058

The **Online EOP** column displays the current tenant participation status and allows the user to perform EOP without submitting Form 50058 EOP. That is, whether the tenant is part of the housing program. If the status displays as **EOP** (end of participation), then the tenant used to be part of the housing program in the past, however, the tenant is not part of the program anymore. The **Online EOP** status displays as a link and if the user clicks it, it will display the tenant's information (see Figure 3). At this point, the user can end the tenant's participation.

Online EOP

Head of household name: A Bzcqg T
Social Security Number: xxx-xx-6360
Date Updated(mm/dd/yyyy): 12/28/2007

Action

2a. Type of action: Interim Reexamination
2b. Effective date (mm/dd/yyyy) of action: 12/01/2007 *(MM/DD/YYYY)

Save Close

Figure 3: Online EOP

When the user clicks **Save**, the program displays the EOP update status message (see Figure 4).

Online EOP

Head of household name: A Bzcqg T
Social Security Number: xxx-xx-6360
Date Updated(mm/dd/yyyy): 12/28/2007

Online EOP Update - Success.

Click [here](#) to close the window.

Figure 4: Online EOP update status window

The **Entire 50058** column allows the user to view Form 50058 for the respective tenant (see Figure 5).



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
Agency	
1a. Agency name	Fredrick Housing Authority
1b. PHA code	MD003
1c. Program	Sec. 8 Voucher
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. Completed (Y or N)	N
2d. If completed, check on move record	
2e. Date completion date (mm/dd/yyyy)	N/A
2f. Inspection agreement	N/A
2g. Monthly amount of payment	N/A

Figure 5: 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 6). 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 7). 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				
Agency						
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 6: 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				
Action						
2a. Type of action:		Find Participation				
2b. FSS date (mm/dd/yyyy) of action:		04/01/2009				
2c. Connection? (Y or N):		N				
2d. If correction: (check primary reason):						
2e. Date correction terminated(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				
2i. Projected effective date(mm/dd/yyyy) of new admission:		12/01/2008				
2j. Projected effective date(mm/dd/yyyy) of new 1st rent admission(Public Housing only):						
2k. FSS participation new or in the last year? (Y or N):		N				
2l. Special program(s) (check only one):						
2m. PHA Use Only:		354173P 50				
2n. PHA Use Only:		1201200/02				
2o. PHA Use Only:		35				
2p. PHA Use Only:						

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

Figure 7: 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 8). 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				
Background at Admission						
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 8: 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 9). 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				
Unit to be Occupied on Effective Date of Action						
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 9: 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 10):

- 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 10). 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 10 : 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 11). 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 12). 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	Top Of Vouchers	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				
Household Member Details						
3a	Member number:	01				
3b	Last name & Suffix:	IRWIGMAF				
3c	First name:	A				
3d	Middle initial:	S				
3e	Date of birth:	04/xx/1900				
7b	Age on effective date of action:	08				
8a	Sex:	Female				
8b	Relation:	Head				
8c	Citizenship:	Eligible Citizen				
9	Disability(Y/N):	Y				
3e	Race:	White				
3e	Ethnicity:	Not Hispanic or Latino				
3a	Social Security Number:	xxx-xx-9999				
3a	Armed Registration Number:					
3a	Meeting community service requirement(Public Housing only):	4				
Next Member						

Figure 11: The Members information in details on the Members sub tab

Search	Household	Members	Rent	FSS/MWV	Top Of Vouchers	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				
Assets						
Family Member Name	No.	Type of asset	Calculation(PHA use)	Cash value of asset	Anticipated Income	
A S IRWIGMAF	01					
IRWIGMAF	02					
0b, 0c Column Totals				\$ 2,527	\$ 0	
0b		Percentage rate (written as decimal):	0.2%			
0c		Imputed asset income at 7.6% (0.12	\$ 0			
0c		Final xxx-xx income (sign of 0g or 0)	\$ 0			

Figure 12: The Assets sub tab of the Members tab

The **Income** sub tab displays the relevant income information for the household (see Figure 13). 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	Rent	FSS/MW	History of Watches	Reports
Members			Assets		Income	
Head of household name			A. BROWN, M. S.			
Social Security Number			xxx-xx-9565			
Date Household Added (yyyy)			05/05/2005			
Income						
Family member name	No.	Income code	Calculation (FRA rate)	Dollars per year	Income exclusions	Income after exclusions
A. S. BROWN, M. S.	01	S		\$ 0.000	\$ 0	\$ 0.000
A. S. BROWN, M. S.	01	H		\$ 1,554	\$ 0	\$ 1,554
A. S. BROWN, M. S.	01	SS		\$ 0.400	\$ 0	\$ 0.400
K. V. J. F. W. R.	02	H		\$ 1,554	\$ 0	\$ 1,554
K. V. J. F. W. R.	02	SS		\$ 9,548	\$ 0	\$ 9,548
Total Combined						\$ 25,016
Total Expected Income \$ 25,016						

Figure 13: 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 14):

- 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 14). 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
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/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 14: 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 15).



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) * 12			\$ 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:			\$ 600			
k. Most recent TTP:			\$ 600			
l. Qualify for minimum net household exemption? (Y or N)			N			

Figure 15: 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 16). 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 16: 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 17).

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 17: 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 18). 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				
General Information						
17a	Participates 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:					MD001
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:					
17i (3)	Re-employment employment (check all that apply)					
17i (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
17i (5)	Assets owned by the family (check all that apply)					General Assistance
17i (6)	Number of children receiving child care services:					0

Figure 18: 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 19). 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 19: 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 20). 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				
Family Self-Sufficiency Program						
17j. FSS Contract Information						
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)						
17k. FSS account information						
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)						
17m. FSS exit information (FSS Exit Report only)						
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 20: 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 21). 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				
Welfare to Work Voucher Program						
17n. WtW program Information						
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				
17q. Welfare to Work exit information (WtW exit report only)						
(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 21: 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
07/20/2009 11:29:52.157				MD004		10
01/30/2009 11:08:14.767				MD004		11

Figure 22: 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 23). 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 Vouchers	Reports			
Iss/ Exp Vouchers List									
Iss/ Exp Voucher Details									
Head of household name: I Mgol									
Social Security Number: xxx-xx-5955									
Date updated(mm/dd/yyyy): 02/06/2003 11:29:52.157									
Agency									
1a. District Code: MD004									
1b. Program Type: VO									
Action									
2a. Type Of Action: 10									
2b. Effective Date: 01/31/2003									
2c. Correction (Y/N): N									
2d. Correction Primary Reason:									
2e. Date 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									
Background At Admission									
3a. F.P. Case Review Admission: 25010									
3b. Homeless At Admission (Y/N): N									
Unit To be Occupied on Effective Date Of Action									
3c. Number of Bedrooms in a Unit:									
Income									
7. Total annual income: \$11 To: 3744									
Household									
3. Total Household Members: 2									
Member Details									
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 23: 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 24):

- 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 Frederick Housing Authority (Select)
- Database: ☒ MTCS Current
- 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 by 'In Inventory'.

Below the table, there are sections for Project-based Certificates, Project-based Vouchers, Tenant-based Vouchers, Homeownership Vouchers, and SS Modernization 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 24: 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 24). 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 25). 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 HA: MD003 Frederick Housing Authority

Database: MTCS Current
 Program Type: All
 Effective Date From: 2/20/2009

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

Developments: All

Section 8: Select One

Select Page Size: 12

Program Type : Public Housing

Type of Action	Seq No	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	00010002291	Y		Wright	WD00000002	21	20	0427	04/01/2009	2	10,170	10,170		
1	00010000190	S		Dwyer	WD00000002	11	01L	0009	03/10/2009	2	7,170	6,600		
1	00010001425	Y	Y	Bozice	WD00000002	11	01A	03/09	03/14/2009	2	14,190	13,100		
1	00010000170	B	Y	Moore	WD00000002	20	20	0420	04/11/2009	2				
1	00010004100	A	A	Padgett	WD00000002	11	02L	0410	04/04/2009	2	14,100	13,100		
1	00010000120	L		Bynne	WD00000001	4	01A	0110	03/06/2009	2	19,700	19,200		
1	00010000012	L	Y	Stamper	WD00000002	4	127	0306	03/14/2009	1	26,720	26,700		
1	00010001735	L	L	Skoloff	WD00000001	1	010	0102	04/01/2009	2	27,140	27,100		
1	00010000000	M		Manzano	WD00000001	1	1	0202	02/29/2009		14,100	12,000		

Figure 25: 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 26). 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.MITC

Database: MTCS Current
Program Type: Public Housing
Effective Date From: 2/29/2008
Effective Date To: 8/31/2009
Development: ALL

Total No. Of Records: 1301
Effective Date To: 8/31/2009

Select Page Size: 1-10

Program Type: Public Housing

Type Or Action	SSN	First Name	Middle Initial	Last Name	Dev. No.	Bldg. No.	Ent. No.	Unit No.	Eff. Date	Bed Room Size	Tot. Ann. Inc. (\$)	Adj. Ann. Inc. (\$)	Type Of Rent Code
1	XXX-XX-XXXX	J		KENDRICK	AK00100293	104R	1	67104A	05/04/2008	2	15,850	17,500	
1	XXX-XX-XXXX	B	N	BLUFF	AK00100297	805	1	40075	05/04/2008	1	11,850	11,450	
1	XXX-XX-XXXX	M		TAYLOR	AK00100297	1750	1	40750	05/07/2008	2	15,450	15,750	
2	XXX-XX-XXXX	V		SWANSON	AK00100295	2510	5	2510.5	05/04/2008	8	27,500	21,650	
2	XXX-XX-XXXX	G		HUNTER	AK00100297	805	1	40070	05/04/2008	1	15,950	13,155	
2	XXX-XX-XXXX	K	E	KENDRICK	AK00100293	501K	1	41070	05/04/2008	3	15,350	17,850	
2	XXX-XX-XXXX	N	G	NEWMAN	AK00100297	1251	1	40070	05/04/2008	1	13,610	13,240	
2	XXX-XX-XXXX	A	G	WILKINSON	AK00100297	805	1	40070	05/04/2008	1	15,950	15,050	

Figure 26: 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 27). 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/Utility Reports

MTCS Transaction Report MTCS MD Iss/Lap Report Overlapping Date Report Portability Billing Report

Select View: Field Office HA Search

HQ Division: Public and Indian Housing

HQ Office: Public Operations Select

Hub: Baltimore Section 8 Select

Field Office: WAPITOMI FIELD OFFICE Select

Housing Authority: AKOIAHFC Select

Database: ☒ MTCS Current

Program type: ☒ All ☐ Public Housing ☐ Section 8

Section 8

☒ All
☐ Project based Certificates
☐ Project based Vouchers
☐ Tenant based Vouchers
☐ Homeownership Vouchers
☐ SS Moderate Rehabilitation

Type of Action: All

☒ Effective Date From: 2/29/2008 Mandatory Effective Date To: 8/31/2009 Mandatory

☐ Update Date From: 2/29/2008 Mandatory Update Date To: 8/31/2009 Mandatory

Select Report Type: ☒ Denied

Generate Report

Figure 27: 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 28).

MTCS Transaction Report

Hub: 3HBLT Baltimore Hub

Field Office: 3BPH BALTIMORE HUB OFFICE

Field Office HA: MD001 Annapolis Housing Authority

Database: MTCS Current

Program Type: Section 8

Effective Date From: 2/29/2008

Total No. Of Records: 40

Effective Date To: 8/31/2009

Section 8: Tenant-based Vouchers

Select Page Size: 11

Type of Action	First Name	Middle Initial	Last Name	E.D. Date	Total Room Rows	Int. Ann. Inc. (\$)	Adj. Ann. Inc. (\$)	Int. Rent (\$)	Update Date
1	John		John	01/01/2008	3				08/08/2009
1	John		John	01/01/2008	1			20	08/08/2009
1	John		John	02/01/2008	1			20	08/08/2009
1	John		John	04/01/2008	3	16,104	11,264	900	08/08/2009
4	John		John	04/01/2008	2	16,104	14,640	250	08/08/2009
4	John		John	04/01/2008	3				08/08/2009
4	John		John	04/01/2008	3	19,824	7,774	113	08/08/2009
4	John		John	04/01/2008	3	14,491	12,019	22	08/08/2009

Figure 28: 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 29).

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.

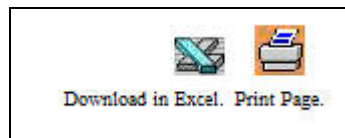


Figure 29: The options for further use of report data

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 30).



1.0 Form 50058

Select View:

HQ Division: Public and Indian Housing

HQ Office:

Hub:

Field Office:

Housing Authority:

Database: ☒ MTCS Current

Type of Action:

☒ Effective Date:
☐ Update Date:

Figure 30: 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 31).

Issuance And Expiration Voucher Report

HQ Division: Public and Indian Housing
HQ Office: PO Field Operations
Hub: PHH Baltimore Hub
Field Office: PHH BALTIMORE HUD OFFICE
Housing Authority: MD018 Anne Arundel County Housing Commission
Database: MTCS Current
Effective Start Date: 2/29/2008
Effective End Date: 08/31/2009
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-7338	CARANA	A		MT018	VO	10	05/05/2009	N	0				N
EXXXXX-7338	CARANA	A		MT018	VO	10	05/05/2009	N	0				N
EXXXXX-7338	CARANA	A		MT018	VO	10	05/05/2009	N	0				N
EXXXXX-3161	YKOTIE	F		MT018	VO	10	04/28/2008	N	0				N

Page 1 of 7

Figure 31: 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 32).

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.

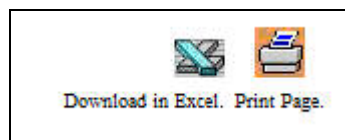


Figure 32: The options for further use of report data

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 33). 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

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 35).

Overlapping Date Report

As of 9/10/2009

Hub: 21NYC New York City Hub
 Field Office: 24PH NEW YORK CITY HUB OFFICE
 Housing Authority: NY005 New York City HA

 Download in Excel
 Print Page
 Open Entire Report

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

Total Number of Records = 13

#	HOH SSN or AID	HOH Name	HA CODE Losing	HA NAME Losing	Program Type Losing	Occurrence Date of Overlap	Projected Automatic EOP / Port Out Date
1	xxxxxx2036	TOCOT	NY005	New York City HA	F	05/05/2004	05/05/2004
2	xxxxxx2232	YERFACOLUP	NY005	New York City HA	F	07/07/2004	08/01/2004
3	xxxxxx4155	AMWAFED	NY005	New York City HA	F	01/05/2004	09/01/2004
4	xxxxxx0958	HOLLES	NY005	New York City HA	F	07/04/2005	03/01/2008
5	xxxxxx5645	A AFH-FULCH R	NY005	Central HA	VO	05/25/2005	07/01/2009
6	xxxxxx2654	EMCO	NY005	New York City HA	F	05/07/2004	07/01/2004
7	xxxxxx5571	YOKUBF	NY005	New York City HA	F	01/05/2004	05/01/2004
8	xxxxxx2870	WOOLEBR	NY005	New York City HA	F	05/05/2004	06/01/2004
9	xxxxxx5657	MATTNEP	NY005	Dallas County HA	VO	05/25/2007	07/01/2009
10	xxxxxx5647	CRTR	NY005	NYCHA	F	01/04/2005	09/01/2005

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

1 2 3 4 5 6 7 8 9 10 11 12

Page 1 of 2

Figure 35: 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 36).

Overlapping Date Report




As of 9/10/2009

Hub: 21NYC New York City Hub

Field Office: 24PH NEW YORK CITY HUB OFFICE

Housing Authority: NY005 New York City HA

Current Month Code - Start: 5/10/2005




Download in Excel Print Page View Online Report

Current Month Code - End: 9/10/2009

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

Select Page Size: 1 - 10

Total Number of Records = 2052

#	HOH SSN or AID	HOH Name	HA CODE Gaining	HA NAME Gaining	Program Type Gaining	Occurrence Date of Overlap	Date of Automatic EOP / Port Out
1	xxxxxx1926	WIKUZZ	NY002	Hesperia HA	F	10/22/2006	11/01/2006
2	xxxxxx1970	SWINGR	NY001	USCLOU CO.	VO	09/06/2007	10/01/2007
3	xxxxxx3340	WILUZZ	NY001	Medford Housing Authority	VO	07/21/2007	08/01/2007
4	xxxxxx5777	WISUGRUR	NY003	Sunbury HA	F	11/22/2006	12/01/2006
5	xxxxxx1950	WICWET	NY005	New Castle County HA	VO	07/10/2008	08/01/2008
6	xxxxxx2652	WELGOC	NY001	Johnsonville	VO	02/13/2007	03/01/2007
7	xxxxxx1422	WUUTIK	NY005	Waterbury Housing Authority	VO	05/16/2007	06/01/2007
8	xxxxxx2750	WONLLRW	NY005	SALINA	F	05/14/2008	06/01/2008
9	xxxxxx1022	WILHMO	NY005	New York City HA	VO	04/22/2008	05/01/2008
10	xxxxxx3056	WELUZZ	NY002	Central Texas COG	VO	02/22/2007	03/01/2007

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

1 2 3 4 5 6 7 8 9 10

Page 1 of 207

Figure 36: 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 37).



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.

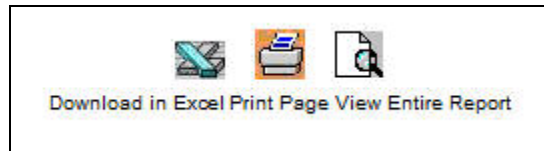


Figure 37: The options for further use of report data

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 38).

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 38: 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 39). 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 Yonkers 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, J	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, J	XXXXXX-5857	AA005-5556	HY025	1025	2	09/10/2008

Page 1 of 1

Figure 39: 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 40). 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 Yonkers 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, J	XXXXXX-2200	N/A	CL001	2073	2	09/10/2008
ABRAHAM, J	XXXXXX-2247	N/A	PH009	721	2	09/10/2008
ABRAHAM, J	XXXXXX-1737	N/A	FL091	152	2	09/10/2008
ABRAHAM, J	XXXXXX-1220	N/A	NY027	454	2	09/10/2008
ABRAHAM, J	XXXXXX-1229	AA005-5556	NY110	1120	2	09/10/2008
ABRAHAM, J	XXXXXX-2120	N/A	NY009	354	2	09/10/2008
ABRAHAM, J	XXXXXX-1737	N/A	NY024	191	2	09/10/2008
ABRAHAM, J	XXXXXX-2120	N/A	NY010	190	2	09/10/2008
ABRAHAM, J	XXXXXX-2020	N/A	FL091	194	2	09/10/2008
ABRAHAM, J	XXXXXX-2017	N/A	FL091	195	2	09/10/2008

Page 1 of 4

Figure 40: The PHA Billed Report tab Portability Billing Report

The Portability Billing Report screen contains three options for further use of the data (see Figure 41).



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.

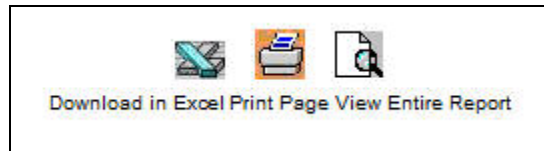


Figure 41: The options for further use of report data