

WHAT'S NEW?



IREMS 2.2

Overview

This document provides information on the issues included in **iREMS** release 2.2.

The **What's New** addresses new issues identified by users or the iREMS development team. These items may include functionality or feature changes. There are also explanations for modifications or improvements instituted to maintain system performance.

The **Policy/Regulations** section addresses any business rule highlights, announcements, or changes that are necessary to maintain accurate property portfolios.

ASSET MANAGEMENT

My Events

An **Event Notification** has been added for when an existing loan, switches from source system status active to inactive. The assigned PM will receive the notification. The notification will state: *“Your loan\capital advance status has been terminated”*. This event is a financing based event. It applies to all loans from: **DAP, MARS, FHASL, LAS/NLS, and PAS.**

My Properties (558)	My Events (406)	My Troubled Properties (170)	Open EH&S Items (0)	Open Management Reviews (0)	Open Project Actions (5)	Advanced Search
My Events for ANA PECKUTT Records 1 to 40 of 406						
Search: Property Name <input type="text"/> <input type="button" value="Go"/>						
<input type="button" value="Remove Checked Events"/>						
First < Previous Next > Last						
	Property Name	Identifier	Notification Date	Description		
1	<input type="checkbox"/> NORTH PARK APTS, PHASE II	11335249	02/07/2013	Your loan/capital advance status has been terminated.		
2	<input type="checkbox"/> CHAI MANOR	800020759	01/23/2013	AFS Submission Received - Referred to Housing (Compliance)		
3	<input type="checkbox"/> CHRISTIAN VILLAGE	800020772	01/07/2013	Physical Inspection Released		

Portfolio/Dashboard

DEC Referrals

DEC Report & Narratives

Financial Statements

Financing

Management Reviews

Occupancy

Physical Inspections

Financing List

Financing Detail

Status History

Financing List

FHA Number	SOA/Group Type	Field Office Status	Active	Business Phase	Under Management	Pipeline	Primary Financing Instrument	In Delinquency or Default
11335249	221d4 NC/SR	Under Management - Active	No	Terminated	No	No	1	N

Workload Management

➤ Project Action Detail

If there are any open DEC referrals already on a property, and a MFH Referral *“Critical Data Missing”* is closed, **iREMS** does not create another DEC referral *“Administrative Review Required”* upon the closure of the project action. **iREMS** should do nothing in this instance. Only **FASS** should create the referral (if one is needed after the owner re-submits).

Financial Statements

➤ Detail

There are properties (such as nursing homes) that are managed by a Housing entity called **OHP** (Office of Healthcare Programs). A stored procedure has been added that **FASS** can call when they wish to have the project action "AFS Letter Sent to Owner & Response Due" referred to **OHP** instead of **MFH**. On the **Financial Statement Detail** page the field "Referred To (MFH or DEC)" has been changed to "Referred To (MFH, DEC or OHP)". The field "Date Reviewed (MFH or DEC if Applicable)" has been changed to "Date Reviewed (MFH, DEC or OHP if Applicable)".

Owner Annual Financial Statement Detail

Related Project Actions

TIN: 943286122
 Submission FYE: 09/30/2011
 Submission Type: AUD-A133 (Non-coop)
 Date Due: 12/29/2011
 Extended Due Date (if Applicable):
 Date Received: 01/19/2012
 Number of Compliance Flags - Assessed: 1
 Number of Compliance Flags - Not Assessed: 0
 Reason Compliance Not Assessed by FASS: (if Applicable)
 Performance Value: 53,000
 Performance Color: Red
 Reason Performance Not Assessed by FASS: (if Applicable)
 Number of Management Conditions: 0
 Management Conditions Description (if Applicable):
 Date FASS Letter Sent: 05/29/2012
 Response Due Date: 06/28/2012
 Referred To (MFH, DEC or OHP): MFH
 Date Referred: 05/29/2012
 Date Reviewed (MFH, DEC or OHP if Applicable): 08/17/2012
 Submission Status: Active
 Date Owner Response Received: 08/18/2012
 Plan Required: ☐ Yes ☒ No
 Plan Approved: ☐ Yes ☐ No ☒ Not Applicable
 Closed Date: 08/18/2012
 Non-Filer Email Date: 01/08/2012
 Non-Filer DEC Referral Date:
 Comments:

Financial Statements - Detail page

Property ID: 00075942 Name: BANCROFT SENIOR HOMES
 Contract/FHA#: 121EE106 Active Status: Y Watch List: N Troubled Status: Not Troubled DEC Status: NONE

Search: FHA # Settings

Project Action List

Project Actions 1 to 1 of 1

Action	Responsible Person	Role	Type of Plan	Start Date	Target Completion Date	Amended Target Date	Closed Date	Related Referral ID
1 AFS Letter Sent to Owner & Response Due	MORRIS ANGEL	PM	H	05/29/2012	06/28/2012		08/18/2012	

Related Project Action

Management Reviews

➤ Management Review Detail

Workload Management

➤ Project Action Detail

When an assigned user updates or changes the “*Person/Role Responsible for Review*” on the **Management Review Detail** page, the “*Person/Role responsible for Action*” will be changed on all **Related Project Actions**. This changed name will display on the **Project Action List** page and on the **Project Action Detail** page.

When the user updates a “*Person/Role responsible for Action*” on a **Project Action Detail** page, the related **Management Review Detail** will update the “*Person/Role Responsible for Review*”.

The user is allowed to correct the “*Response Due Date*” for a Management Review on the **Management Review Detail** page if the Management Review is not closed. If the review has only one open related Project Action, the system will allow an update to the “*Target Completion Date*” on the **Project Action List** and **Project Action Detail** pages.

Management Review Detail

Scheduled Date: 02/01/2013

Review Type: Management Review Only

Person/Role Responsible for Review: JEAN CASS - Role BPM

Performed Date: 02/01/2013

Report Date: 02/06/2013

Date Report Date Entered: 03/05/2013

Owner Response Due: ☒ Yes ☐ No

Response Due Date: 02/15/2013

Response Received Date:

Closed Date:

Overall Rating:

Management Review Detail – Related Project Actions
(Saved with Responsible to Review, Owner Response Due = Yes, and Response Due Date entered)

Project Action List

Project Actions 1 to 1 of 1

Action	Responsible Person	Role	Type of Plan	Start Date	Target Completion Date	Amended Target Date	Closed Date	Related Referral ID
1 Management Review Sent to Owner & Response Due	JEAN CASS	BPM		02/06/2013	02/15/2013			

Project Action List
(Shows Responsible Person, Target Completion Date)

Project Action Detail

Save Reset

Action Entered Date: 03/05/2013
 Action Type: Asset Management Activities
 Current Action: Management Review Sent to Owner & Response Due
 Action Group: Housing Program
 Type of Plan: Housing
 Action Start Date: 02/06/2013
 Person/Role Responsible for Action: LEE GARY - Role: PM
 Target Completion Date: 02/15/2013
 Amended Target Date:
 Date Amended:
 EC Concurrency: ☐ Yes ☒ No
 EC Concurrency Date:
 Closed Date: 03/06/2013
 Reason for Closure: Completed
 Estimate of Hours Spent on Activity: 0
 Further Action Required (Another Project Action is Needed): ☐ Yes ☒ No
 Comments:

Project Action Detail
(User Changed Responsible for Action, enters Closed Date)

Management Review Detail

Save Reset Delete Related Project Actions

Scheduled Date: 02/01/2013
 Review Type: Management Review Only
 Person/Role Responsible for Review: LEE GARY - Role: PM
 Performed Date: 02/01/2013
 Report Date: 02/06/2013
 Date Report Date Entered: 03/05/2013
 Owner Response Due: ☐ Yes ☒ No
 Response Due Date: 02/15/2013
 Response Received Date: 03/06/2013
 Closed Date: 03/06/2013
 Overall Rating:

Management Review Detail
(System changed Responsible for Review and Closed Date (not editable))

On the **Management Review Detail** page, the user creates a **Project Action** where the “*Owner Response Due*” is “**Yes**” and the “*Response Due Date*” is entered. When the Related Project Action is completed, the assigned user adds the “*Closed Date*”. In the **Management Reviews** section the “*Closed Date*” date is not editable and can only be closed through the related Project Action. This closed date is also not editable when the “*Owner Response Due*” is “**Yes**” and is changed to “**No**”.

There are several warning boxes when changing from “**Yes**” to “**No**” or “**No**” to “**Yes**” in the *Owner Response Due* field.

Management Review List Management Review Detail

Management Review Detail Save successful (x) Save Reset Delete

Scheduled Date: 03/05/2013

Review Type: Management Review Only

Person/Role: JEAN CASS - Role:BPM

Responsible for Review: JEAN CASS - Role:BPM

Performed Date: 03/05/2013

Report Date:

Owner Response Due: ☐ Yes ☒ No

Response Due Date:

Response Received Date:

Closed Date:

Overall Rating:

Management Review Detail
(User saved with Owner Response Due = No)

Management Review List Management Review Detail

Management Review Detail Save Reset Delete

Scheduled Date: 03/05/2013

Review Type: Management Review Only

Person/Role: JEAN CASS - Role:BPM

Responsible for Review: JEAN CASS - Role:BPM

Performed Date: 03/05/2013

Report Date:

Owner Response Due: ☒ Yes

Response Due Date:

Response Received Date:

Closed Date: 03/15/2013

Overall Rating: Above Average

Message from webpage

Owner Response Due indicator cannot be switched to "Yes" when Closed Date is set. Click OK to clear the Closed Date or Cancel to return without clearing the date.

OK Cancel

Management Review Detail
(User changes Owner Response Due to Yes and enters Closed Date)

Management Review List Management Review Detail

Management Review Detail Save successful (x) Save Reset Delete Related Project Actions

Scheduled Date: 03/05/2013

Review Type: Management Review Only

Person/Role: JEAN CASS - Role:BPM

Responsible for Review: JEAN CASS - Role:BPM

Performed Date: 03/05/2013

Report Date: 03/15/2013

Date Report Date Entered: 03/26/2013

Owner Response Due: ☒ Yes ☐ No

Response Due Date: 03/22/2013

Response Received Date:

Closed Date:

Overall Rating: Above Average

Management Review Detail
(User changes Owner Response Due to Yes and enters Response Due Date)

The screenshot shows the 'Management Review Detail' form. At the top, there are tabs for 'Management Review List' and 'Management Review Detail', and buttons for 'Save', 'Reset', 'Delete', and 'Related Project Actions' (which is circled in red). The form fields include: 'Scheduled Date' (03/05/2013), 'Review Type' (Management Review), 'Person/Role' (JEAN C), 'Responsible for Review' (JEAN C), 'Performed Date' (03/01/2013), 'Report Date' (03/21/2013), 'Date Report Date Entered' (03/27/2013), 'Owner Response Due' (radio buttons for Yes and No, with No selected), 'Response Due Date' (03/22/2013), 'Response Received Date', 'Closed Date', and 'Overall Rating' (Above Average). A blue message box with a yellow warning icon is overlaid on the form, stating: 'When there is a related Project Action, the Owner Response Due indicator cannot be set to No for a review. If existing value of Yes was set in error, delete this review and create a new review instead.' The message box has an 'OK' button.

Management Review Detail
(User changed Owner Response Due to No)

The screenshot shows the 'Management Review Detail' form. At the top, there are tabs for 'Management Review List' and 'Management Review Detail', and buttons for 'Save', 'Reset', and 'Delete'. The form fields include: 'Scheduled Date' (03/01/2013), 'Review Type' (Management Review), 'Person/Role' (JEAN C), 'Responsible for Review' (JEAN C), 'Performed Date' (03/01/2013), 'Report Date' (03/21/2013), 'Date Report Date Entered' (03/27/2013), 'Owner Response Due' (radio buttons for Yes and No, with Yes selected), 'Response Due Date' (empty), 'Response Received Date', 'Closed Date', and 'Overall Rating' (empty). A blue message box with a yellow warning icon is overlaid on the form, stating: 'Response Due Date is required when Report Date is populated and the Response Due Indicator equals Yes!'. The message box has an 'OK' button.

Management Review Detail
(User changes Owner Response Due to Yes)

Occupancy

- Type and Occupancy Eligibility

Summaries

- Summary
- Consolidated Print Screen

IREMS has reinstated the “*Client Group Type*” and “*Client Group Name*” in the **Occupancy** section, the **Summaries** section and on the **Consolidated Screen Print** page.

Within the **Occupancy** section and the **Type and Occupancy Eligibility** tab, just under '*Occupancy Eligibility Restriction*' a new section named “*Client Group*” has been added. In this section, there is a field named *Client Group* with a drop down that contains the various types and names of groups. Every choice displays two columns: “*Client Group Type*” and “*Client Group*”

Name". The client group selected should match the selection in the active survey (if there is one) and vs. versa. If one is updated and they don't match types a warning message is produced.

Within the **Summaries** section and the **Summary** tab, just under *'Building and Unit Information'*, a new section named *'Client Group Information'* has been added with one read-only field named *"Client Group"*. It displays the client group type and name selected on the **Occupancy** section.

On the **Consolidated Screen Print** page, if a user checkmarks either 'Print All Housing Screens' or 'Occupancy', a new subsection named *"Client Group"* will fall directly under *"Occupancy Eligibility Restriction"*. The consolidated print screen will display the data that appears on the **Occupancy** section.

Users who have update rights to the Client Group information will be 'PM', 'BPM' and 'SPM' who are assigned to the property, as well as all assigned PBCAs. PBCA users should only update the client group if it does not match the survey they have entered. All other users will have view rights only.

The screenshot shows the 'Occupancy - Type and Occupancy Eligibility' form. The sidebar on the left contains links to various sections like Portfolio Dashboard, DEC Referrals, and Occupancy. The main form area has tabs for 'Type and Occupancy Eligibility', 'Units and Narratives', 'Housing for Disabled', 'Current Review', 'Section I', 'Section II', 'Section III', and 'Final Submission'. The 'Property Information' section includes an 'Initial Occupancy Date' field and a 'Property Type' section with checkboxes for various property types. The 'Occupancy Eligibility Restriction' section includes a 'View only' link and a table with columns for 'Original' and 'Current' occupancy eligibility restrictions. A red circle highlights the 'Client Group' dropdown menu, which is currently set to 'Elderly-Wholly Elderly Housekeeping'.

Occupancy - Type and Occupancy Eligibility

The screenshot shows the 'Client Group' dropdown menu. The dropdown is open, showing a list of client group options. A red arrow points to the dropdown arrow icon.

Occupancy - Type and Occupancy Eligibility – Client Group drop down

Portfolio/Dashboard DEC Referrals DEC Report & Narratives Financial Statements Financing Management Reviews Occupancy Physical Inspections Property Attributes Property Participants Risk Management Servicing Summaries Workload Management Security Administration DEC Portfolio Reviews DEC Workload Queues Secure Systems Logout	Summary Summary Narrative Consolidated Screen Print																								
	Building Count: 1 Initial Occupancy Date: 02/26/1972																								
	<table border="1"> <thead> <tr> <th>Unit Type</th> <th># Total Units</th> </tr> </thead> <tbody> <tr><td>0</td><td>107</td></tr> <tr><td>1</td><td>51</td></tr> <tr><td>2</td><td>1</td></tr> <tr><td>3</td><td>0</td></tr> <tr><td>4</td><td>0</td></tr> <tr><td>5</td><td>0</td></tr> <tr><td>6</td><td>0</td></tr> <tr><td>7</td><td>0</td></tr> <tr><td>8</td><td>0</td></tr> <tr><td>9</td><td>0</td></tr> <tr> <td>Total Units</td> <td>159</td> </tr> </tbody> </table>	Unit Type	# Total Units	0	107	1	51	2	1	3	0	4	0	5	0	6	0	7	0	8	0	9	0	Total Units	159
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Client Group Information Client Group: Elderly - Wholly Elderly Housekeeping																									
Property Status Active Status: Y																									

Summaries - Summary

Summary Summary Narrative Consolidated Screen Print																
Property Information Initial Occupancy Date: 02/26/1972 Property Type (Check all that apply) <input type="checkbox"/> Apartments <input type="checkbox"/> Assisted Living <input type="checkbox"/> Board & Care <input type="checkbox"/> Condominiums <input type="checkbox"/> Co-op <input type="checkbox"/> Group Home <input type="checkbox"/> Group Practice(Healthcare) <input type="checkbox"/> Hospital(Healthcare) <input type="checkbox"/> Intermediate Care <input type="checkbox"/> Mobile Home Park <input type="checkbox"/> Nursing/ICF <input type="checkbox"/> Nursing/Skilled Care <input type="checkbox"/> Single Room Occupancy(SRO)	Occupancy Eligibility Restriction (View only) <table border="1"> <thead> <tr> <th></th> <th>Original (MFH Survey)</th> <th>Current (MFH Survey)</th> </tr> </thead> <tbody> <tr><td>Exclusively Elderly</td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Exclusively Disabled</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Elderly & Disabled</td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Family (No Eligibility Restriction)</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> </tbody> </table> Client Group (Choose applicable row) Client Group: Elderly - Wholly Elderly Housekeeping		Original (MFH Survey)	Current (MFH Survey)	Exclusively Elderly	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Exclusively Disabled	<input type="checkbox"/>	<input type="checkbox"/>	Elderly & Disabled	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Family (No Eligibility Restriction)	<input type="checkbox"/>	<input type="checkbox"/>
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Exclusively Elderly	<input checked="" type="checkbox"/>	<input type="checkbox"/>														
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Family (No Eligibility Restriction)	<input type="checkbox"/>	<input type="checkbox"/>														
Income Restrictions (Check all that apply) <table border="1"> <thead> <tr> <th></th> <th>Original</th> <th>Current</th> </tr> </thead> <tbody> <tr><td>Extremely Low Income</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Very Low Income</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Low Income</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> </tbody> </table>		Original	Current	Extremely Low Income	<input type="checkbox"/>	<input type="checkbox"/>	Very Low Income	<input type="checkbox"/>	<input type="checkbox"/>	Low Income	<input type="checkbox"/>	<input type="checkbox"/>				
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Low Income	<input type="checkbox"/>	<input type="checkbox"/>														

Summaries – Consolidated Screen Print

Property Participants

- Current Owner Detail
- Owner History Narrative List

Summaries

- Summary Detail
- Consolidated Screen Print

Contract Processing

- Assistance Contracts
 - Assistance Contract List

All project owners and agents, receiving monthly rental assistance, are required to register with Dun & Bradstreet and obtain a Data Universal Numbering System (DUNS) Number.

An entity gets one DUNS number to identify their company/business name. However, one company can do business with HUD under multiple TAX IDs and therefore can have multiple participant records. However, a DUNS number is "location" specific so if a company has multiple locations, each location may have a different DUNS number. If these multiple locations are using the same federal TAX_ID, they could be the same participant. This means that one participant could have multiple "active" DUNS numbers. The owner needs to provide the DUNS number associated with the award when they registered.

Owners and Agents submit the DUNS number to TRACS via the MAT therefore the DUNS number will be tied to a contact and owner. iREMS will receive the DUNS number during the nightly from TRACS, store the number and display on the following pages:

Property Participants	Current Owner /Contact	Current Owner Detail
	Owner History /Narratives	Owner List/History
Summaries	Summary	Current Owner
	Consolidated Screen Print	Current Owner Detail Owner List/History
Assistance Contracts	Assistance Contract List	

Current Owner Detail

Name: Lakeview Housing, Inc. TIN: 942916437
 Street: 499 Leslie Street Phone: (707)463-1975
 City: Ukiah Fax: (707) 463-2252
 U.S. State or Territory: CALIFORNIA E-Mail: lgoforth@rchdc.org
 Country: USA
 U.S. Zip Code: 95482
 Foreign Postal Code:
 Standardization Status: 100% Overall probable correctness
 Source System: APPS

Company Type: Non-Profit
 Owner Legal Structure: Corporation
 DUNS #:

Owner Fiscal Year End Date: (mm/dd) 10/31
 Date Deed Recorded: 09/30/1987
 Date Owner Assumed
 Financial Responsibility (FASS): 09/30/1987

Property Participants - Current Owner Detail

Owner List/History

Owner Name	Owner TIN	DUNS #	Date Owner Assumed Financial Responsibility (FASS)	FASS Ownership Expiration Date	FYE	Company Type	Legal Structure
Lakeview Housing, Inc.	942916437		09/30/1987		10/31	Non-Profit	Corporation
Clearlake Housing Corporation	580112019		01/31/1900	09/29/1987	10/31	Non-Profit	Corporation

Owner/Field Office Contact Narrative: Ownership

Summary Narrative: Ownership

Property Participants - Owner List/History

Portfolio/Dashboard DEC Referrals DEC Report & Narratives Financial Statements Financing Management Reviews Occupancy Physical Inspections Property Attributes Property Participants Risk Management Servicing Summaries Workload Management Security Administration DEC Portfolio Reviews DEC Workload Queues Secure Systems Logout	Summary	Summary Narrative	Consolidated Screen Print						
	IRP List								
	<table border="1"> <thead> <tr> <th>Non-Insured Number</th> <th>Previous Associated Financing</th> <th>Current Associated Financing</th> </tr> </thead> <tbody> <tr> <td colspan="3"> Current Owner </td> </tr> </tbody> </table>			Non-Insured Number	Previous Associated Financing	Current Associated Financing	Current Owner		
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Summaries - Current Owner

Summary	Summary Narrative	Consolidated Screen Print																								
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Owner Fiscal Year End Date: (mm/dd) 10/31 Date Deed Recorded: 09/30/1987 Date Owner Assumed Financial Responsibility (FASS): 09/30/1987 Regulatory Agreement signed by current owner and HUD? Unconfirmed Date Signed: Date of Last Amendment: Distribution Allowed: No Distribution Allowed Source Document for Distributions: Regulatory Agreement Final HUD TPA Approval Date:																										
Owner Contact																										
Name: W. T. Howland Phone: 707-463-1975 Title: Chairman of Board Fax: 707-463-2252 Street: 499 Leslie St Pager/Cell Phone: E-Mail: City: Ukiah U.S. State or Territory: CALIFORNIA Foreign State or Territory: Country: USA U.S. Zip Code: 95482 - 5506 Foreign Postal Code: Standardization Status: 100% Overall probable correctness																										
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Consolidated Screen Print - Current Owner Detail \ Owner List History

The screenshot shows the 'Assistance Contract List' form. The left sidebar contains a menu with options like PortfolioDashboard, Assistance Contracts, Contract Processing, etc. The main form has tabs for Assistance Contract List, Status, Detail, Current Contract Administrator/Contact, and Contract Administrator History. Below the tabs is a table with columns: Contract #, Current Contract Status, TRACS Contract Status, Program, Disc Type, Exp Date, Staged, Contract Authority, and Budget Authority. The first row shows Contract # CA39T851018, Current Contract Status Active - Active, TRACS Contract Status Active, Program 202/8 NC, Disc Type HAP, Exp Date 06/30/2013, Staged N, Contract Authority 242244.00, and Budget Authority 5427222.00. Below the table are several text input fields: First Contract or Stage Expiration Date Pursuant to MAHRA, DUNS Number (circled in red), Does Owner Participate in LHPRA/ELHPA? (Yes/No/Unconfirmed), Discuss Preservation, and Owner/Field Offices Contacts Narrative: Assistance Contracts.

Assistance Contracts - Assistance Contract List

Property Attributes

➤ Buildings

The “*MSA Code*” and the “*MSA Name*” fields are displayed when a user selects the primary Property Address record from the list of property addresses under the **Building** tab. **MSA** stands for Metropolitan Statistical Area. **IREMS** has added the “*CBSA Code*” and “*CBSA Name*” to the **Building** screen. **CBSA** stands for Core Based Statistical Area. The new system will eventually replace the MSA system; however both systems MSA and CBSA will display during the transition time period. If the “*Automated GEO Code*” is selected as “Manual” the “*CBSA Code*” and the “*CBSA Name*” will be editable with all the **Geocode Information**.

When a property’s primary Property Address is standardized online, the *Federal Congressional District (USPS)* code will display in the **Congressional District** field. The *Congressional District* code displayed before and it was incorrect.

The screenshot shows the 'Property Address' form under the 'Buildings' tab. The left sidebar contains a menu with options like PortfolioDashboard, DEC Referrals, DEC Report & Narratives, etc. The main form has tabs for Property Name, Address, Buildings (selected), RENTS (TRACS), and Neighborhood Network Center. Below the tabs is a form with fields for Address (Street, Street2, City, U.S. State or Territory, Foreign State or Territory, Country, U.S. Zip Code, Foreign Postal Code, Mailing Address for the Property), Automated GEO Code (Automated/Manual), and Address Standardization (100% Overall probable correctness). On the right is a section titled 'Geocode Information: (Automated)' which is circled in red. This section contains fields for County Code, County Name, Census Tract, MSA Code, MSA Name, CBSA Code, CBSA Name, County Subdivision Code, County Subdivision Name, Congressional District, State House District, State Senate District, Place Based City, and Longitude/Latitude.

Geocode Information (Automated)

Buildings

Property Address

Address

Street: 3700 PACIFIC AVE

Street2:

City: LIVERMORE

U.S. State or Territory: CALIFORNIA

Foreign State or Territory:

Country: USA

U.S. Zip Code: 94550 -4871

Foreign Postal Code:

Mailing Address for the Property: ☐ Yes ☒ No

Automated GEO Code: ☐ Automated ☒ Manual

Address Standardization 100% Overall probable correctness

Geocode Information: (Manual)

County Code: 001

County Name: Alameda

Census Tract: 451501

CBSA Code: 36084

CBSA Name:

MSA Code: 3775

MSA Name: Oakland, CA PMSA

County Subdivision Code: 91660

County Subdivision Name:

Congressional District: 15

State House District: 00

State Senate District: 00

Place Based City: Livermore

Longitude/Latitude: -121.75251|37.676292

Save Reset Close

Geocode Information (Manual)

Servicing

➤ Reserve Tracking

IREMS has added a new indicator in the **Servicing** section under the **Reserve Tracking** tab. At the top of the **Reserve for Replacement Balance and Deposit List** there is a “Reserve Account Required?” field added with a “Yes or No” radio button. In addition, a “Reserve Account Effective Date” field has been added with a date entry box. The Project Manager assigned to the property would be responsible for setting this “Yes/No” indicator, and the Date to show the date they set the indicator. A **Save** button displays in the top right hand corner of the **Reserve Tracking** screen for the PM to confirm/complete their action.

A Standard Red error message will appear at the top of the screen stating “Reserve Account Required: Is a Required Field” when a PM does not select a radio button for the Reserve Account Required Indicator when the Date was updated/set and clicks on **Save**.

A Standard Red error message will appear at the top of the screen stating “Reserve Account Effective Date: Is a Required Field” when a PM does not enter in a Reserve Account Effective Date when the Indicator (even if they set the indicator to ‘No’) was updated/set and clicks on **Save**.

The setting of the indicator will NOT be saved if you receive either of the two above error messages. Therefore, a date is required in order to save your changes.

A confirmation message box will display when the PM selects the “Yes”/“No” indicator and saves a date. The message reads: “You have entered **mm/dd/year** as the date the Reserve Indicator has been updated/set, is this Correct?” The user will click “OK” or “Cancel”.

PortfolioDashboard DEC Referrals DEC Report & Narratives Financial Statements Financing Management Reviews Occupancy Physical Inspections Property Attributes Property Participants Risk Management Servicing Summaries Workload Management Security Administration DEC Portfolio Reviews DEC Workload Queues Secure Systems Logout	Associations to Property	Reserve Tracking	Use Restriction List	IRP List	Other Public Subsidies List																					
	<input type="button" value="Save"/>																									
	Reserve Account Required? : <input type="radio"/> Yes <input type="radio"/> No Reserve Account Effective Date : <input type="text"/>																									
	Reserve for Replacement Balance and Deposit List <input type="button" value="Add"/>																									
	Displaying records 1 to 6 of 6 <input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/>																									
	<table border="1"> <thead> <tr> <th>Monthly Deposit Effective Date</th> <th>Monthly Deposit Amount (most recent entered amount)</th> <th>Suspend Start Date</th> <th>Suspend End Date</th> </tr> </thead> <tbody> <tr> <td>11/01/2011</td> <td>1050.00</td> <td></td> <td></td> </tr> <tr> <td>07/01/2011</td> <td>1001.00</td> <td></td> <td></td> </tr> <tr> <td>07/01/2010</td> <td>998.00</td> <td></td> <td></td> </tr> <tr> <td>07/01/2009</td> <td>980.00</td> <td></td> <td></td> </tr> </tbody> </table>						Monthly Deposit Effective Date	Monthly Deposit Amount (most recent entered amount)	Suspend Start Date	Suspend End Date	11/01/2011	1050.00			07/01/2011	1001.00			07/01/2010	998.00			07/01/2009	980.00		
	Monthly Deposit Effective Date	Monthly Deposit Amount (most recent entered amount)	Suspend Start Date	Suspend End Date																						
	11/01/2011	1050.00																								
	07/01/2011	1001.00																								
	07/01/2010	998.00																								
07/01/2009	980.00																									

Reserve Tracking - Reserve Account Required

Associations to Property	Reserve Tracking	Use Restriction List	IRP List	Other Public Subsidies List	
	Reserve Account Required?: Is a required field. Reserve Account Effective Date: Is a required field.				
	<input type="button" value="Save"/>				
	Reserve Account Required? : <input type="radio"/> Yes <input type="radio"/> No Reserve Account Effective Date : <input type="text"/>				
	Reserve for Replacement Balance and Deposit List <input type="button" value="Add"/>				
	Displaying records 1 to 5 of 5 <input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/>				

Reserve Tracking – Saved without clicking Yes or No

Associations to Property	Reserve Tracking	Use Restriction List	IRP List	Other Public Subsidies List	
	Reserve Account Effective Date: Is a required field.				
	<input type="button" value="Save"/>				
	Reserve Account Required? : <input type="radio"/> Yes <input checked="" type="radio"/> No Reserve Account Effective Date : <input type="text"/>				
	Reserve for Replacement Balance and Deposit List <input type="button" value="Add"/>				
	Displaying records 1 to 5 of 5 <input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/>				

Reserve Tracking – Saved with No selected but no date

Associations to Property	Reserve Tracking	Use Restriction List	IRP List	Other Public Subsidies List	
	Reserve Account Effective Date: Is a required field.				
	<input type="button" value="Save"/>				
	Reserve Account Required? : <input checked="" type="radio"/> Yes <input type="radio"/> No Reserve Account Effective Date : <input type="text"/>				
	Reserve for Replacement Balance and Deposit List <input type="button" value="Add"/>				

Reserve Tracking – Saved with Yes requested but no date

Associations to Property | Reserve Tracking | Use Restriction List | IRP List | Other Public Subsidies List

Save

Reserve Account Required?: ☒ Yes ☐ No

Reserve Account Effective Date: 03/05/2013

Reserve for Replacement

Add

Message from webpage

You have entered 03/05/2013 as the date the Reserve Indicator has been updated/set, is this Correct?

OK Cancel

Monthly Deposit Effective Date	Monthly Deposit Amount (most recent entered amount)	Suspend Start Date	Suspend End Date
11/01/2011	1050.00		
07/01/2011	1001.00		
07/01/2010	998.00		
07/01/2009	980.00		
07/01/2008	960.00		
01/01/2006	935.42		

Reserve Tracking – Yes is selected and date is entered

Message from webpage

You have entered 03/05/2013 as the date the Reserve Indicator has been updated/set, is this Correct?

OK Cancel

Reserve Tracking - Reserve Account Required- Confirmation message

Associations to Property | Reserve Tracking | Use Restriction List | IRP List | Other Public Subsidies List

Save Successful (x)

Save

Reserve Account Required?: ☒ Yes ☐ No

Reserve Account Effective Date: 03/05/2013

Reserve for Replacement Balance and Deposit List

Add

Displaying records 1 to 8 of 8

Reserve Tracking - Reserve Account Required- Save Successful

Subsidy Administration

Contract Processing

➤ Function Detail

- Rents
- Final Review

Previously, the Contract Processing and Rent Adjustments had one effective date. It was the *Rent Effective Date*. This date was used for the rent and utility allowance effective dates. In reality, the utility allowance effective dates do not always coincide with the effective date of the rents.

The **Contract Processing Renewal**, **Amend Rents** and **Rent Adjustment** functionality has been modified to add the *Utility Allowance Effective Date* field that will initially come from **TRACS**. This new date field will be added to the **Rent** and the **Final Review** screens. The *Utility Allowance Effective Date* has been added for all options 1-5 and the Rent Adjustments details screen for AAF, Budget, OCAF rent adjustments and manual corrections. The field will be editable so users can update, if needed.

The Utility Allowance field is tied to the Utility Allowance Effective date field. Therefore, if the utility allowance amount changes then there must be a new utility allowance effective date entered. If a date is not entered when the amount has been changed, an error message will display and the change will not be saved. This works the same way if a new utility allowance date is entered without a change to the utility allowance amount. Once the utility allowance amount and date have been changed, the Utility Allowance Change indicator is automatically set to 'Yes' and comments must be entered in the Utility Allowance Comments text box. If comments are not entered when the Change Indicator is 'Yes' an error message will display alerting you that the record will not be saved without comments. After comments are entered and the save button is selected, the record will be saved. The *Utility Allowance Effective Date* will be locked when the renewal is locked.

Any changes made to the Utility Allowance amount and effective date will be passed to **ARAMS** once the record is locked. **ARAMS** will pass this information to **TRACS** and both **TRACS** and **iREMS** will be in sync.

Contract Processing / Function / Contract Selection / Function Detail

Dates and Comments / Comparability Study Selection / Budget Selection / OCAF / Rents / Final Review

Save Reset

Surviving Contract: CA39T851018
Function Type: Renewal
Effective Date: 07/01/2013

Stage: N/A
Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
ARAMS Status:

Add New Rent Record Overlay Rents with Current Rents from TRACS

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
0	9	690		700		700
1	4	950		963		963
1	23	950		963		963
Rent Potentials						
Monthly		31860		32301		32301
Annual		382320		387612		387612

Renewal Rent Effective Date: 07/01/2013

Monthly Reserve for Replacement Deposit Amount (most recently entered amount): 1050.00

Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF): 14.70

Monthly Reserve for Replacement Deposit Amount (Sum of the Two Lines Above): 1064.70

Dispute/Appeal Comments:

Rents Final for Contract Exhibit: Yes No

Rents Final for Contract Exhibit Date:

Utility Allowance Changed Comments :

Utility Allowance Changed: No

Rents - with no Utility Allowance Changed

Calculated Renewal Rent Detail

Save Delete Reset Close

Unit Type: 0

Number of Units: 9

Current Contract Rent at Expiration: 690

Current Utility Allowance (if separate from rent): 28

Comparable(HUD92273) Rent:

OCAF Adjusted Rent: 700

Budget Based Rent: 0

Budget Based Utility Allowance (if separate from rent): 0

Energy Adjustment Amount Applied to Final Rent: 0

Renewed Rent: 0

Renewed Utility Allowance (if separate from rent): 32

Utility Allowance Effective Date: 08/01/2012

Unit/Bedroom Type Description:

Calculated Renewal Rent Detail – with a Renewed Utility Allowance Change
and therefore a Renewed Utility Allowance Effective Date

Contract Processing List Function / Contract Selection Function Detail

Dates and Comments Comparability Study Selection Budget Selection OCAF Rents Final Review

Rents Save Reset

Surviving Contract: CA39T851018 Stage: N/A
Function Type: Renewal Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
Effective Date: 07/01/2013 ARAMS Status:

Add New Rent Record Overlay Rents with Current Rents from TRACS

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
0	9	690		700		700
1	4	950		963		963
1	23	950		963		963
Rent Potentials						
Monthly		31860		32301		32301
Annual		382320		387612		387612

Renewal Rent Effective Date: 07/01/2013

Monthly Reserve for Replacement Deposit Amount (most recently entered amount): 1050.00
Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF): 14.70
Monthly Reserve for Replacement Deposit Amount (Sum of the Two Lines Above): 1064.70

Dispute/Appeal Comments:

Rents Final for Contract Exhibit: ☐ Yes ☒ No

Rents Final for Contract Exhibit Date:

Utility Allowance Changed Comments:

Utility Allowance Changed: Yes

Rents - Utility Allowance Changed indicated sets to Yes when a change has been made to the Utility Allowance and Utility Allowance Effective Date

Contract Processing List Function / Contract Selection Function Detail

Dates and Comments Comparability Study Selection Budget Selection OCAF Rents Final Review

Rents Utility Allowance Comments cannot be null when the utility allowance changed indicator is Yes Save Reset

Surviving Contract: CA39T851018 Stage: N/A
Function Type: Renewal Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
Effective Date: 07/01/2013 ARAMS Status:

Add New Rent Record Overlay Rents with Current Rents from TRACS

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
0	9	690		700		700
1	4	950		963		963
1	23	950		963		963
Rent Potentials						
Monthly		31860		32301		32301
Annual		382320		387612		387612

Renewal Rent Effective Date: 07/01/2013

Rents – attempting to save without comments in the Utility Allowance Changed Comments textbox

Utility Allowance Comments cannot be null when the utility allowance changed indicator is Yes

Sample of message

Contract Processing List	Function / Contract Selection	Function Detail			
1	23	950		963	963
Rent Potentials					
Monthly		31860		32301	32301
Annual		382320		387612	387612

Renewal Rent Effective Date: 07/01/2013

Monthly Reserve for Replacement Deposit Amount (most recently entered amount): 1050.00

Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF): 14.70

Monthly Reserve for Replacement Deposit Amount (Sum of the Two Lines Above): 1064.70

Dispute/Appeal Comments:

Rents Final for Contract Exhibit: ☐ Yes ☒ No

Rents Final for Contract Exhibit Date:

Utility Allowance Changed Comments : Owner's Utility allowance need to be updated

Utility Allowance Changed: Yes

Rents - with Comments entered for Utility Allowance Changed

Also note that on the **Calculated Renewal Rent Detail** pop-up, the user can enter a 4 digit number as the *Number of Units* for any unit type.

Calculated Renewal Rent Detail

Unit Type: 0

Number of Units:

Current Contract Rent at Expiration: 690

Current Utility Allowance (if separate from rent): 28

Comparable(HUD92273) Rent:

OCAF Adjusted Rent: 700

Budget Based Rent: 0

Budget Based Utility Allowance (if separate from rent): 0

Energy Adjustment Amount Applied to Final Rent:

Renewed Rent:

Renewed Utility Allowance (if separate from rent):

Utility Allowance Effective Date: 08/01/2012

Unit/Bedroom Type Description:

Contract Processing

➤ Function/Contract Selection

When the user selects the **ADD** button on the **Contract Processing List** screen, the **Function/Contract selection** page will display to enter in a new Contract renewal record. If the Owner has **not** submitted a request to renew the contract, the user will enter in the surviving contract, HUD policy, Fiscal Year, Contract Function, Contract Action Selection and "No Owner Response" within the *Processing Status* drop down list. The dates requested at the bottom of the page will no longer display and the action/option does not have to be selected at this time. When the user hits the **SAVE** button, the "Saved Successful" message will display but the user will not be able to complete any of the other data until the package is received from the owner.

If a user enters in a Renewal record, and selects a *Processing Status* other than, "No Owner Response", all dates must be completed and an action/option selected on the **Function/Contract selection** page. If not, the error message will still display. When dates are completed and saved, the user can then go into the Function Detail tab to fill in the Renewal Contract details.

Note: If the user goes back into the **Function/Contract selection** screen, and changes the *Processing Status* back to "No Owner Response" and saves the record; the recorded dates are automatically removed and the data saved on the Function Detail screens will be deleted immediately.

The screenshot shows the 'Function/Contract Selection' screen. The 'Processing Status(if applicable):' dropdown is set to 'No Owner Response' and is circled in red. The 'Contract Action Selection' dropdown is set to '2: Request Renewal Without Reinvesting at or Below Comparable Rents'. The 'Surviving Contract' is CA39M000215, and the 'HUD Policy' is User Guide. The 'Fiscal Year' is 2013, and the 'Contract Function' is MAHRA Renewal or Short-Term Renewal. The 'Expiration Date at Contract/Stage Expiration' is 07/31/2029, and the 'Original Contract Effective Date Prior to October 1981?' is N.

Function Contract Selection – with "No Owner Response"

The screenshot shows the 'Function/Contract Selection' screen after saving. A yellow banner at the top says 'Save Successful (x)'. The 'Processing Status(if applicable):' dropdown is now set to 'Option Selected - In Process'. The 'Contract Action Selection' dropdown is set to '1a: Mark-Up-To-Market Eligibility'. The 'Date Owner Signed Submission' is 03/08/2013, 'Date Owner Submission Package Initially Received' is 03/14/2013, and 'Date Complete Package Received from Owner' is 03/15/2013. The 'Is the Owner Debarred or Suspended?' and 'Does the Owner Have Material Violations?' questions are both set to 'Unconfirmed'.

Function Contract Selection – with "Option Selected – in Process"

Contract Processing

➤ Function Detail

• Rents

In **Contract Processing** under the **Function Detail**, **Rents** tab, the wording of "Monthly Increase to the Reserve for Replacement Account" has been changed to "Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF)". A new field called "Monthly Reserve for Replacement Deposit Amount (Sum of the two lines above)" has been added.

The amount listed in the *Monthly Reserve for Replacement Deposit Amount* must display the original amount of the renewal and must be view only. The increase to the Reserve for Replacement monthly account should only be done AFTER the renewal/amend rents is finalized.

The three fields will appear on all Amend Rents options. They will also appear on all Renewal options **except** Option 1a, Option 1b, Option 3a and Option 3b. These renewal options do not have OCAF adjustment options. These fields are:

Monthly Reserve for Replacement Deposit Amount (most recently entered amount): **Existing**
Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF): **Modified**
Monthly Reserve for Replacement Deposit Amount (Sum of the Two Lines Above): **New**

Contract Processing / Function / Contract Selection / Function Detail

Dates and Comments / Comparability Study Selection / Budget Selection / OCAF / Rents / Final Review

Rents [Save] [Reset]

Surviving Contract: CA39L000117 Stage: N/A
 Function Type: Renewal Action: FY 2012 - 2: Request Renewal Without Restructuring at or Below Comparable Rents
 Effective Date: 06/01/2012 ARAMS Status: Posted

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
1	12	553	1141	565		565
2	18	649	1358	663		663
3	2	734	1684	749		749
4	1	925	2010	842		842
Rent Potentials						
Monthly		20611	43514	21054		21054
Annual		247332	522168	252648		252648

Renewal Rent Effective Date: 06/01/2012
 Monthly Reserve for Replacement Deposit Amount (most recently entered amount): 3795.00
 Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF): 79.70
 Monthly Reserve for Replacement Deposit Amount (Sum of the Two Lines Above): 3874.70
 Date Sent to OAHF: (If rents determined by HUD/ICA to be over Comparable) [Date Picker]
 Reason sent to OAHF: [Dropdown]
 Date Review Results Received from OAHF: [Date Picker]
 OAHF Results: [Dropdown]
 Dispute/Appeal Comments:
 Rents Final for Contract Exhibit: Yes
 Rents Final for Contract Exhibit Date: 06/21/2012
 Utility Allowance Changed Comments : [Text Area]
 Utility Allowance Changed: No

Contract Processing

➤ Function Detail

- Comparability Study Selection
- Budget Selection

A *Fiscal Year* column has been added to the **Comparability Study Selection** screens for *Renewals* Option 1a; Option 1b; Option 2: Option 3a; Option 4 and Option 5b. A *Fiscal Year* column has been added to the **Comparability Study Selection** screens for *Amend Rents* for Option 1a; Option 1b; Option 2 and Option 4 and Option 5b.

A *Fiscal Year* column has been added to the **Budget Selection** screens for *Renewals* and *Amend Rents* for Option 2, Option 4 and Option 5b.

The Fiscal Year column will identify the year of the Budget or Comparability Study records, eliminating the confusion of what action goes with which particular record.

Portfolio/Dashboard Assistance Contracts Contract Processing Comparability Studies Renewal Budgets Secure Systems Logout	Contract Processing List	Function / Contract Selection	Function Detail					
	Dates and Comments Comparability Study Selection Budget Selection OCAF Rents Auto OCAF Letter Final Review							
	Comparability Study Selection							
	Surviving Contract: CA392976201				Stage: N/A			
	Function Type: Amend Rents				Action: FY 2012 - 2: Request Renewal Without Restructuring at or Below Comparable Rents			
Effective Date: 07/01/2012				ARAMS Status:				
Comparability Study Required? Yes								
Type of Alternative to Comparability Study Used:								
Comparability Study:								
	Select	Fiscal Year	Date Appraiser Signed HUD 92273	Source	Execution Date of First Related Renewal	Auto OCAF Created	Unit Type	Comparable Rent
	<input checked="" type="checkbox"/>	2012	03/03/2011	Owner	05/15/2012	No	1	1241
							2	1458

Comparability Study Selection - Amend Rents

Portfolio/Dashboard Assistance Contracts Contract Processing Comparability Studies Renewal Budgets Secure Systems Logout	Contract Processing List	Function / Contract Selection	Function Detail					
	Dates and Comments Comparability Study Selection Budget Selection OCAF Rents Final Review							
	Comparability Study Selection							
	Surviving Contract: CA39M000138				Stage: N/A			
	Function Type: Renewal				Action: FY 2013 - 2: Request Renewal Without Restructuring at or Below Comparable Rents			
Effective Date: 03/01/2015				ARAMS Status:				
Comparability Study Required? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Alternative <input checked="" type="radio"/> Unconfirmed								
Type of Alternative to Comparability Study Used: <input type="text"/>								
Comparability Study:								
	Select	Fiscal Year	Date Appraiser Signed HUD 92273	Source	Execution Date of First Related Renewal	Auto OCAF Created	Unit Type	Comparable Rent
	<input checked="" type="checkbox"/>	2013	11/30/2009	Owner	11/30/2012	Yes	1	1065

Comparability Study Selection - Renewal

Portfolio/Dashboard Assistance Contracts Contract Processing Comparability Studies Renewal Budgets Secure Systems Logout	Contract Processing List	Function / Contract Selection	Function Detail					
	Dates and Comments Comparability Study Selection Budget Selection OCAF Rents Final Review							
	Budget Selection							
	Surviving Contract: CA390265201				Stage: N/A			
	Function Type: Renewal				Action: FY 2011 - 4: Request Renewal for Projects Exempt from OAHF			
Effective Date: 04/01/2011				ARAMS Status:				
Renewal Budget Required? Yes								
Renewal Budget Type: Standard Renewal Budget								
Renewal Budget:								
	Select	Fiscal Year	Date Approved by HUD	Budget Based Rents % Increased	Unit Type	Budget Based Rent		
	<input checked="" type="checkbox"/>	2011	02/28/2011	8.42	1	1249		
					2	1549		
					2	1549		

Budget Selection - Renewal

PortfolioDashboard Assistance Contracts Contract Processing Comparability Studies Renewal Budgets Secure Systems Logout	Contract Processing		Function / Contract Selection		Function Detail																								
	Dates and Comments		Comparability Study Selection		Budget Selection																								
	Budget Selection																												
	Surviving Contract: CA390201265			Stage: N/A																									
	Function Type: Amend Rents			Action: FY 2011 - 4: Request Renewal for Projects Exempt from OAHF																									
	Effective Date: 04/01/2011			ARAMS Status:																									
	Renewal Budget Required? Yes			Standard Renewal Budget																									
	Renewal Budget Type:																												
	Renewal Budget:																												
	<table border="1"> <thead> <tr> <th>Select</th> <th>Fiscal Year</th> <th>Date Approved by HUD</th> <th>Budget Based Rents % Increased</th> <th>Unit Type</th> <th>Budget Based Rent</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>2011</td> <td>01/13/2011</td> <td>6.00</td> <td>1</td> <td>1272</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>2</td> <td>1578</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>2</td> <td>1578</td> </tr> </tbody> </table>						Select	Fiscal Year	Date Approved by HUD	Budget Based Rents % Increased	Unit Type	Budget Based Rent	<input checked="" type="checkbox"/>	2011	01/13/2011	6.00	1	1272					2	1578					2
Select	Fiscal Year	Date Approved by HUD	Budget Based Rents % Increased	Unit Type	Budget Based Rent																								
<input checked="" type="checkbox"/>	2011	01/13/2011	6.00	1	1272																								
				2	1578																								
				2	1578																								

Budget Selection – Amend Rents

Comparability Studies

➤ Comparability Study List

Contract Processing

➤ Function Detail

• Comparability Study Selection

On the *Comparability Study List* and the *Comparability Study Selection* within **Contract Processing** if there is a renewal that is associated to the comp study and that renewal is associated to a pending contract (ARAMS status at the top of the renewal past the status of 'PEND'), IREMS will display the pending contract execution date in the table column called "*Execution Date of First Related Renewal*".

If there is a renewal that is associated to the comparability study but the renewal is not associated to any pending contract the "*Execution Date of the First Related Renewal*" will be blank.


[Portfolio Dashboard](#)
[Assistance Contracts](#)
[Contract Processing](#)
[Comparability Studies](#)
[Renewal Budgets](#)
[Secure Systems](#)
[Logout](#)

Comparability Study

List

Comparability Study

Detail



Comparability Studies

Add

Fiscal Year	Date Appraiser Signed HUD 92273	Source	Execution Date of First Related Renewal	Auto OCAF Created	Unit Type	Comparable Rent
2013	02/08/2011	Owner		Yes	1	1083.00
					2	1266.00
					3	1554.00
2012	02/08/2011	Owner	06/20/2012	Yes	1	1059.00
					2	1238.00
					3	1519.00
2011	02/08/2011	Owner	04/28/2011	No	1	1035.00
					2	1210.00
					3	1485.00

**Comparability Study List – 2013 Renewal is not associated to a pending contract
- 2012 Renewal is associated to a pending contract**

Select	Fiscal Year	Date Appraiser Signed HUD	Source	Execution Date of First Related Renewal	Auto OCAF Created	Unit Type	Comparable Rent
<input checked="" type="checkbox"/>	2013	02/08/2011	Owner		Yes	1	1083
						2	1286
						3	1554

Comparability Study Selection – Fiscal Year 2013

Select	Fiscal Year	Date Appraiser Signed HUD	Source	Execution Date of First Related Renewal	Auto OCAF Created	Unit Type	Comparable Rent
<input checked="" type="checkbox"/>	2012	02/08/2011	Owner	06/20/2012	Yes	1	1059
						2	1238
						3	1519

Comparability Study Selection – Fiscal Year 2012

Contract Processing

➤ Function Detail

• Dates and Comments

When a user creates a renewal, the expiration date is not editable and is calculated from the effective date and term entered. Once the record is saved, a user can update the term or expiration date to anything they want, in which the expiration date may not match the term. This is okay if a contract is effective in the middle of the month and the user wants to align the expiration to the end of the month.

When the user clicks the save button on the **Dates and Comments** screen the system determines if the difference of the Effective and Expiration dates match the term. In addition, the system will calculate the number of days that the difference is off by.

iREMS has added a warning message when the user attempts to save a renewal contract processing record, where the effective date plus the term do not equal the expiration date.

The warning will state the following *“The Term and Expiration Date do NOT match up on this Contract process. The difference between the Effective date and Expiration date is [number] days [less than or greater than] the term. This could cause an error in TRACS/ICON. Please check the term, blank out the expiration date and SAVE again”*

The screenshot shows the 'Dates and Comments' form in the Integrated Real Estate Management System. The form is titled 'Contract Processing' and includes tabs for 'List', 'Function / Contract Selection', and 'Function Detail'. The 'Dates and Comments' tab is active. The form displays the following information:

- Surviving Contract: IN36L000047
- Function Type: Renewal
- Effective Date: [blank]
- Stage: N/A
- Action: FY 2013 - 1a: Mark-Up-To-Market Eligibility

A warning message box is displayed over the form, stating: "The Term and Expiration Date do NOT match up on this Contract process. The difference between the Effective date and Expiration date is [363] of days [greater than] the term. This could cause an error in TRACS/ICON. Please check the term, blank out the expiration date and SAVE again". The message box includes an 'OK' button.

The form also includes the following fields:

- Renewal Contract: [Basic Renewal Contract]
- Contract/Stage Date Information: [blank]
- Contract Effective Date: [blank]
- Length of Contract in Months: 12
- Contract Expiration Date: 06/30/2015
- Reason for Short-term Renewal: [blank]
- Decision Comments: [blank]

Dates and Comments - with 2015 date

The screenshot shows a warning message box titled 'Message from webpage'. The message box contains the following text: "The Term and Expiration Date do NOT match up on this Contract process. The difference between the Effective date and Expiration date is [364] of days [greater than] the term. This could cause an error in TRACS/ICON. Please check the term, blank out the expiration date and SAVE again". The message box includes an 'OK' button.

Dates and Comments – example of message box

The screenshot shows the 'Dates and Comments' form in the Integrated Real Estate Management System. The form is titled 'Contract Processing' and includes tabs for 'List', 'Function / Contract Selection', and 'Function Detail'. The 'Dates and Comments' tab is active. The form displays the following information:

- Surviving Contract: IN36L000047
- Function Type: Renewal
- Effective Date: 07/01/2013
- Stage: N/A
- Action: FY 2013 - 1a: Mark-Up-To-Market Eligibility
- ARAMS Status: [blank]

A 'Save Successful (x)' message is displayed in a yellow box. The form also includes the following fields:

- Renewal Contract: [Basic Renewal Contract]
- Contract/Stage Date Information: [blank]
- Contract Effective Date: 07/01/2013
- Length of Contract in Months: 12
- Contract Expiration Date: 06/30/2014
- Reason for Short-term Renewal: [blank]
- Decision Comments: [blank]

Dates and Comments – date changed to 2014 and Saved

Contract Processing

➤ Function Detail

• Rents

iREMS has been modified so when the user finalizes a Renewal record (of any option) or an Amend Rents record(of any option), two messages will display. To finalize the renewals or amend rents record, the user will select the “Yes” that follows “*Rents final for Contract Exhibit*” and the first message “*Processing Status will be set to Completed*” will display. After clicking the OK button for renewals the second message will display, “*This Renewal record is now complete; please initiate your funding request procedures.*” For amend rents records the second message will display “*This Amend Rents Only Rent Increase is now complete; please initiate your funding request procedures.*”

Contract Processing / Function / Contract Selection / Function Detail

Rents

Surviving Contract: FL293073201 Stage: N/A
Function Type: Renewal Action: FY 2013 - 2: Request Renewal Without Restructuring at or Below
Effective Date: 03/04/2016

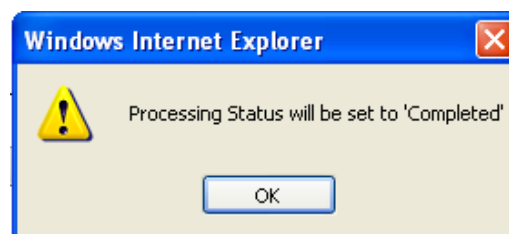
Message from webpage: Processing Status will be set to 'Completed'

HUD Approved Rent: OCAF Adjusted

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
1	149	783		796		796
Rent Potentials						
Monthly		116667		118604		118604
Annual		1400004		1423248		1423248

Renewal Rent Effective Date: 03/04/2016

Rents – Renewal Rents final (1st message)



Contract Processing List Function / Contract Selection Function Detail

Dates and Comments Comparability Study Selection Budget Selection OCAF Rents Final Review

Rents Save Successful (x) Save Reset

Surviving Contract: FL293073201 Stage: N/A
Function Type: Renewal Action: FY 2013 - 2: Request Renewal Without Restructuring at or Below
Effective Date: 03/04/2016

Add New Rent Record

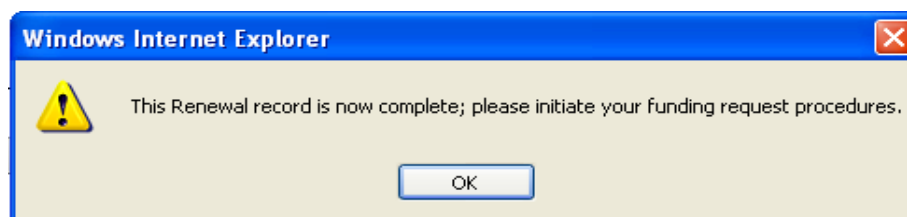
HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
1	149	783		796		796
Rent Potentials						
Monthly		116667		118604		118604
Annual		1400004		1423248		1423248

Renewal Rent Effective Date: 03/04/2016

Rents – Renewal Rents Final (2nd message)



PortfolioDashboard Assistance Contracts Contract Processing Comparability Studies Renewal Budgets Secure Systems Logout

Contract Processing List Function / Contract Selection Function Detail

Dates and Comments Comparability Study Selection Budget Selection OCAF Rents Auto OCAF Letter Final Review

Rents Save Reset

Surviving Contract: CA39R000027 Stage: N/A
Function Type: Amend Rents Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
Effective Date: 08/01/2013 ARAMS Status:

Add New Rent Record

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
1	4	635	650		650
2	15	735	752		752
3	19	878	898		898
Rent Potentials					
Monthly		30247	30942		30942
Annual		362964	371304		371304

Renewal Rent Effective Date: 08/01/2013

Rents – Amend Rents Final (1st message)

The screenshot shows the 'Rents' section of the Integrated Real Estate Management System. A message box is overlaid on the screen with the following text:

Message from webpage

This Amend Rents Only Rent Increase is now complete; please initiate your funding request procedures.

OK

Below the message box, the 'Calculated Renewal Rents' table is visible:

Unit Type	# of Units	Current Contract Rent at Expiration	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
1	4	635	650		650
2	15	735	752		752
3	19	878	898		898
Rent Potentials					
Monthly		30247	30942		30942
Annual		362964	371304		371304

Renewal Rent Effective Date: 08/01/2013

Rents – Amend Rents Final (2nd message)

The screenshot shows a 'Message from webpage' dialog box with the following text:

Message from webpage

This Amend Rents Only Rent Increase is now complete; please initiate your funding request procedures.

OK

Assistance Contracts

- Assistance Contract List
- Assistance Contract Detail

Contract Processing

- Function/Contract Selection
- Function Detail

The Energy Performance Program (EPC) is a new program within HUD's multifamily housing group. This program is available for options 1a, 1b, 2, 4 and 5b. These options while in the EPC Term will not be a part of auto OCAF. However, Options 3 and 5a are not eligible for the EPC program; they will remain in auto OCAF.

This program is in compliance with one of HUD's strategic objectives: 'expand access to and availability of decent, affordable rental housing'. One of the key strategies of accomplishing this goal is to increase the energy efficiency of household appliances and lighting. This way, savings in energy costs can be used by HUD to provide additional housing.

If an owner makes energy improvements that affect utility bills that HUD provides direct annual assistance for, this new program allows for a time period in which the owner captures these savings so they can repay the capital required to make the improvements.

HUD requires that the owner contracts with a company to install energy efficient utilities in agreed upon multifamily properties. The contractor has guaranteed to lower a certain amount of energy consumption for each property where this is done. The actual utilities that qualify will be specified at a later date.

The 2500 units participating in the EPC Pilot will receive an energy savings adjustment (ESA) based on their projected energy savings, which will allow these properties to pay off the capital costs associated with energy conservation measures that they install.

The savings will be realized over an estimated period of 8-12 years for each property. The energy adjusted effective and expiration dates will be at the contract level. One contract on the property can have energy efficient entries and another not.

An overview of some of the details and system changes are as follows:

- Contract. PRAC owners will remain under their current contracts. Section 8 owners will enter a new 20 year HAP contract and sign the preservation exhibit that maintains the years remaining on their existing contract, and enter the new 20 year HAP renewal into iREMS.
- Year 1 Adjustment. Year 1 is defined the first rent anniversary date equal to or after the EPC Retrofit Completion date.
- Year 2 Adjustment. Year 2 is defined the second rent anniversary date equal to or after the EPC Retrofit Completion date.
 - Option 1a&1b will realize their savings in the iREMS system in year 1 & 2 (as described above) in a new rent increase screen. Option 2, 4 and 5b will realize their savings through the budget entries in year 1 & 2.
- OCAF. Year 3 to end of the EPC Term. Operating Cost Adjustment Factor (OCAF), or a similar rate, will be applied to the total rent, including the ESA (energy savings adjustment).
- Contract Rider. A rider will be placed on the property contract that allows for these adjustments and requires the ESA is removed when the EPC contract term or amortization period ends.
- Junior Lien. HUD will allow a junior lien to be place on the property.
- Incentive Payments. Owners will be able to request an incentive payment annually for up to 15% of the projected savings amount from an escrow account they set up, if savings are greater than required to pay applicable debt service and measurement and verification costs.
- End of Term Adjustment: Option 1a, 1b, &2 will submit an RCS and renew rents to RCS. Option 4 and 5b will have the ESA (energy savings adjustment) removed from the debt service reserve line item in the budget worksheet.
- Threshold Requirements:
 - The sum of the annual debt service and measurement and verification fee, if applicable, will be at least 80% of the projected savings amount.
 - Owners will also be required to agree to replace any of the ECMs with equal or higher performing ones from an energy consumption basis after the ESRA contract terminates for the term remaining on the contract.

Identifying and Entering Contracts in the Energy Performance Program (EPC):

The screenshot shows the 'Assistance Contract List' screen. The 'EPC Enrollment' column is circled in red. The table below shows the data for contract CA390079003.

Contract #	Current Contract Status	TRACS Contract Status	Program	Doc Type	Exp Date	Staged	EPC Enrollment	Contract Authority	Budget Authority
CA390079003	Active - Active	Active	Sec 8 NC	HAP	11/30/2028	N	N	514584.00	17119539.00

First Contract or Stage Expiration Date Pursuant to MAHRA: 11/27/2003

DUNS Number:

Does Owner Participate in LIHPRA/ELHPA? ☐ Yes ☐ No ☒ Unconfirmed

Discuss Preservation:

Assistance Contract List screen: A new column for “EPC Enrollment” has been added.

The screenshot shows the 'Assistance Contract Status' screen. The 'Energy Performance Contract Enrollment Indicator' is set to 'No'.

Contract Number: CA390079003 TRACS Contract Status: Active

Program Type: Sec 8 NC Status Update: ☒ Automatic ☐ Manual

Contract Administered By: PBCA Current Contract Status: Active - Active

Stages

Stage Number	Stage Effective Date	Stage Expiration Date	TRACS Status	Next Expiring
Staged [N]				

Energy Performance Contract

Energy Performance Contract Enrollment Indicator: ☐ Yes ☒ No

Assistance Contract Status screen: A new “Energy Performance Contract” section has been added. The “Energy Performance Contract Enrollment Indicator” is defaulted to “No”. When “Yes” is selected, a new “Energy Performance Contract Details” section will display:

The screenshot shows the 'Energy Performance Contract Details' screen. The fields are as follows:

Contract Number: CA390079003

Energy Performance Contract Effective Date:

Energy Performance Contract Term (Years):

Energy Performance Contract Expiration Date:

Energy Performance Retrofit Completion Date:

Energy Performance Contract Total Debt Amount:

Energy Performance Contract Annual Debt Amount:

Energy Performance Contract Total Project Savings Amount:


Energy Performance Contract Annual Project Savings Amount:

Energy Performance Contract 47.5% of Annual Project Savings Amount:



Energy Performance Contract Yearly Savings Tracking Indicator: ☐ Yes ☒ No

The page above displays the new fields that are requested for the EPC contracts: All fields are required to be entered at the moment a contract is in the EPC program except the “*Energy Performance Retrofit Completion Date*” which will be completed when the retrofits are completed. This field is important because it starts the 1st and 2nd year’s savings mark.

- The “Energy Performance Contract Effective Date”, “Energy Performance Contract Term”, and “Energy Performance Retrofit Completion Date” will be editable.
- The “Energy Performance Contract Expiration Date” field will be calculated and displayed.
- The “Energy Performance Contract Total Debt Amount” and “Energy Performance Contract Total Project Savings Amount” will be editable.
- The “Energy Performance Contract Annual Debt Amount”, “Energy Performance Contract Annual Project Savings Amount” and “Energy Performance Contract 47.5% of Annual Project Saving Amount” fields will be calculated and displayed.
- The “Energy Performance Contract Yearly Savings Tracking Indicator” is applicable for options 4 and 5b only) - If the EPC Yearly Savings Tracking Indicator is set to ‘Yes’ the EPC Yearly Savings screen will display for entry years.. Each year will be updated on a yearly basis. The final year may be used in the Final Year’s Adjustment.

Assistance Contract List	Assistance Contract Status	Assistance Contract Detail	Current Contract Administrator/ Contact	Contract Administrator History
Energy Performance Contract Details Back				
Contract Number:		CA390079003		
Energy Performance Contract Effective Date:		12/01/2013		
Energy Performance Contract Term (Years):		12		
Energy Performance Contract Expiration Date:		11/30/2025		
Energy Performance Retrofit Completion Date:				
Energy Performance Contract Total Debt Amount:		126000		
Energy Performance Contract Annual Debt Amount:		10500		
Energy Performance Contract Total Project Savings Amount:		145000		
Energy Performance Contract Annual Project Savings Amount:		12083		
Energy Performance Contract 47.5% of Annual Project Savings Amount:		5739		
Energy Performance Contract Yearly Savings Tracking Indicator:		No 		

The page above displays the saved **Energy Performance Contract Details** page (when “No” is selected for the “Energy Performance Contract Yearly Savings Tracking Indicator” field).

Assistance Contract List	Assistance Contract Status	Assistance Contract Detail	Current Contract Administrator/ Contact	Contract Administrator History
Energy Performance Contract Details Save Reset Back				
Contract Number:		CA39H113089		
Energy Performance Contract Effective Date:		08/01/2013 		
Energy Performance Contract Term (Years):		10		
Energy Performance Contract Expiration Date:		07/31/2023		
Energy Performance Retrofit Completion Date:				
Energy Performance Contract Total Debt Amount:		100000		
Energy Performance Contract Annual Debt Amount:		10000		
Energy Performance Contract Total Project Savings Amount:		50000		
Energy Performance Contract Annual Project Savings Amount:		5000		
Energy Performance Contract 47.5% of Annual Project Savings Amount:		2375		
Energy Performance Contract Yearly Savings Tracking Indicator:		<input checked="" type="radio"/> Yes <input type="radio"/> No 		
Energy Performance Contract Yearly Savings				
<small>Note: Year 1 is the Annual Project Savings x 47.5%, Year 2 is the Annual Project Savings x 95%, Year 3 is Year 2 Savings x that year's OCAF, Year 4 is Year 3 Savings x that year's OCAF, etc.</small>				
Year	Adjustment Amount			
1	0			
2	0			
3	0			
4	0			
5	0			
6	0			
7	0			
8	0			
9	0			
10	0			

The page above displays the saved **Energy Performance Contract Details** page (when “Yes” is selected for the “Energy Performance Contract Yearly Savings Tracking Indicator” field).

Assistance Contract List	Assistance Contract Status	Assistance Contract Detail	Current Contract Administrator/ Contact	Contract Administrator History
--------------------------	----------------------------	----------------------------	---	--------------------------------

Assistance Contract Status


Contract Number: CA390079003 TRACS Contract Status: Active
 Program Type: Sec 8 NC Status Update: Automatic
 Contract Administered By: PBCA Current Contract Status: Active - Active

Stages

Staged [0]

Stage Number	Stage Effective Date	Stage Expiration Date	TRACS Status	Next Expiring
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Energy Performance Contract

Energy Performance Contract Enrollment Indicator: Yes 

EPC Effective Date	EPC Term (Years)	EPC Expiration Date	EPC Retrofit Completion Date	EPC Yearly Saving
12/01/2013	12	11/30/2025		N

The page above displays the *Assistance Contract Status* page after the EPC Details have been saved. The “Energy Performance Contract Enrollment Indicator” is “Yes”.

Contract Processing for EPC Contracts (Amend Rents Only Records): (Using Option 1b as a sample - Year 1 adjustment)

Assistance Contract List	Assistance Contract Status	Assistance Contract Detail	Current Contract Administrator/ Contact	Contract Administrator History
--------------------------	----------------------------	----------------------------	---	--------------------------------

Energy Performance Contract Details Save Reset Back

Contract Number: CA39M000136
 Energy Performance Contract Effective Date: 02/01/2009
 Energy Performance Contract Term (Years): 12
 Energy Performance Contract Expiration Date: 01/31/2021
 Energy Performance Retrofit Completion Date: 02/01/2011
 Energy Performance Contract Total Debt Amount: 126000
 Energy Performance Contract Annual Debt Amount: 10500
 Energy Performance Contract Total Project Savings Amount: 149000
 Energy Performance Contract Annual Project Savings Amount: 12417
 Energy Performance Contract 47.5% of Annual Project Savings Amount: 5898
 Energy Performance Contract Yearly Savings Tracking Indicator: ☐ Yes ☒ No

Assistance Contract List	Assistance Contract Status	Assistance Contract Detail	Current Contract Administrator/ Contact	Contract Administrator History
--------------------------	----------------------------	----------------------------	---	--------------------------------

Assistance Contract Status Save Reset

Contract Number: CA39M000136 TRACS Contract Status: Active
 Program Type: LMSA Status Update: ☒ Automatic ☐ Manual
 Contract Administered By: PBCA Current Contract Status: Active - Active

Stages

Staged [0]

Stage Number	Stage Effective Date	Stage Expiration Date	TRACS Status	Next Expiring
--------------	----------------------	-----------------------	--------------	---------------

Energy Performance Contract

Energy Performance Contract Enrollment Indicator: Yes

EPC Effective Date	EPC Term (Years)	EPC Expiration Date	EPC Retrofit Completion Date	EPC Yearly Saving
02/01/2009	12	01/31/2021	02/01/2011	N

(confirm that contract is listed as a EPC)

Contract Processing / List Function / Contract Selection Function Detail

Function/Contract Selection Save Reset

Contract(s) and/or Stage(s):

Select	Contract #	Stage	Expiration Date at Contract/Stage Expiration	Original Contract Effective Date Prior to October 1981?
<input checked="" type="checkbox"/>	CA39M000136	N/A	01/31/2031	N

Combine Contracts and/or Stages: ☐ Yes ☒ No ☐ Not Applicable

Surviving Contract: CA39M000136

HUD Policy: User Guide

Fiscal Year: 2012

Contract Function: MAHRA Amend Rent Increases

Contract Action Selection: 1b: Discretionary Authority Eligibility Mark-Up-To-Market

Processing Status(if applicable): Option Selected - In Process

Date Owner Signed Submission: 01/02/2012

Date Owner Submission Package Initially Received: 01/09/2012

Date Complete Package Received from Owner: 01/10/2012

Is the Owner Debarred or Suspended? ☐ Yes ☒ No ☐ Unconfirmed

Does the Owner Have Material Violations? ☐ Yes ☒ No ☐ Unconfirmed

(enter Function Contract Selection)

Contract Processing / List Function / Contract Selection Function Detail

Dates and Comments Rent Increase Rents Final Review

Dates and Comments Save Reset

Surviving Contract: CA39M000136 Stage: N/A
Function Type: Amend Rents Action: FY 2012 - 1b: Discretionary Authority Eligibility Mark-Up-To-Market
Effective Date: 02/01/2012 ARAMS Status:

Amend Rents Dates

Amend Rents Effective Date: 02/01/2012

Amend Rents Expiration Date: 02/01/2013

Energy Performance Contract Indicator: Yes

Contract/Stage Date Information

Contract/Stage Renewal Execution Date: 02/01/2011

Contract Effective Date: 240

Length of Contract in Months: 01/31/2031

Contract Expiration Date:

Decision Comments:

(enter Dates and Comments)

Contract Processing / List Function / Contract Selection Function Detail

Dates and Comments Rent Increase Rents Final Review

Rent Increase Save Reset

Surviving Contract: CA39M000136 Stage: N/A
Function Type: Amend Rents Action: FY 2012 - 1b: Discretionary Authority Eligibility Mark-Up-To-Market
Effective Date: 02/01/2012 ARAMS Status:

Rent Increase Calculations

Annual Rent Potential for all Section 8 Units Included in the Current Process: 2855520.00

Energy Performance Contract Adjustment (47.5% of Annual Projected Utility Savings): 5898.00

Rent Increase Factor: 1.002

[Dates and Comments](#) | [Rent Increase](#) | [Rents](#) | [Final Review](#)

(1st and 2nd Year's Savings New Increase Screen-confirm Rental Increase)

Contract Processing / List Function / Contract Selection Function Detail

Dates and Comments Rent Increase Rents Final Review

Rents Save Reset

Surviving Contract: CA39M000136 Stage: N/A
Function Type: Amend Rents Action: FY 2012 - 1b: Discretionary Authority Eligibility Mark-Up-To-Market
Effective Date: 02/01/2012 ARAMS Status:

Add New Rent Record Overlay Rents with Current Rents from TRACS

HUD Approved Rent: EPC Adjusted Current EPC Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Gross Rent at Expiration	EPC Adjusted Gross Rent	Renewed Gross Rent
0	132	1303	1306	1306
1	46	1434	1437	1437
Rent Potentials				
Monthly		237960	238494	238494
Annual		2855520	2861928	2861928

Renewal Rent Effective Date: 02/01/2012

Approved by Housing HQ Date:

Rents Final for Contract Exhibit: ☒ Yes ☐ No

Rents Final for Contract Exhibit Date:

Utility Allowance Changed Comments:

Utility Allowance Changed: No

EPC Adjusted has been added to drop-down
(select *EPC Adjusted* – Select *Yes* for *Rents Final for Contract Exhibit* and *SAVE*)

Contract Processing / List Function / Contract Selection Function Detail

Dates and Comments Rent Increase Rents Final Review

Rents Save Successful (x) Save Reset

Surviving Contract: CA39M000136 Stage: N/A
Function Type: Amend Rents Action: FY 2012 - 1b: Discretionary Authority Eligibility Mark-Up-To-Market
Effective Date: 02/01/2012

Add New Rent Record

HUD Approved Rent: EPC Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Gross Rent at Expiration	EPC Adjusted Gross Rent	Renewed Gross Rent
0	132	1303	1306	1306
1	46	1434	1437	1437
Rent Potentials				
Monthly		237960	238494	238494
Annual		2855520	2861928	2861928

Renewal Rent Effective Date: 02/01/2012

Approved by Housing HQ Date:

Rents Final for Contract Exhibit: ☒ Yes ☐ No

Rents Final for Contract Exhibit Date:

Utility Allowance Changed Comments:

Utility Allowance Changed: No

Message from webpage
Processing Status will be set to 'Completed'
OK

(select *OK*)

Contract Processing / List Function / Contract Selection Function Detail

Dates and Comments Rent Increase Rents Final Review

Rents Save Successful (x) Save Reset

Surviving Contract: CA39M000136 Stage: N/A
Function Type: Amend Rents Action: FY 2012 - 1b: Discretionary Authority Eligibility Mark-Up-To-Market
Effective Date: 02/01/2012

Add New Rent Record

HUD Approved Rent: EPC Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Gross Rent at Expiration	EPC Adjusted Gross Rent	Renewed Gross Rent
0	132	1303	1306	1306
1	46	1434	1437	1437
Rent Potentials				
Monthly		237960	238494	238494
Annual		2855520	2861928	2861928

Renewal Rent Effective Date: 02/01/2012

Message from webpage
This Amend Rents Only Rent Increase is now complete; please initiate your funding request procedures.
OK

(select *OK*)

Contract Processing List Function / Contract Selection Function Detail

Dates and Comments Rent Increase Rents Final Review

Rents Save Reset

Surviving Contract: CA39M000136 Stage: N/A
Function Type: Amend Rents Action: FY 2012 - 1b: Discretionary Authority Eligibility Mark-Up-To-Market
Effective Date: 02/01/2012 ARAMS Status:

Add New Rent Record Overlay Rents with Current Rents from TRACS

HUD Approved Rent: EPC Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Gross Rent at Expiration	EPC Adjusted Gross Rent	Renewed Gross Rent
0	132	1303	1306	1306
1	46	1434	1437	1437
Rent Potentials				
Monthly		237960	238494	238494
Annual		2855520	2861928	2861928

Renewal Rent Effective Date: 02/01/2012

Approved by Housing HQ Date:

Rents Final for Contract Exhibit: ☒ Yes ☐ No

Rents Final for Contract Exhibit Date: 04/15/2013

Utility Allowance Changed Comments:

Utility Allowance Changed: No

(this is the saved *Rents* screen)

The pages above displays the new screens that are requested for the EPC contracts – *Amend Rents for Option 1b*. The individual pages are slightly different for each option. For example, option 2 and 4 will display budget based selection screens and have the user realize the savings directly in the budget pulled into the amend rents for the 1st and 2nd year.

Contract Processing for EPC Contracts (Amend Rents Only Records): (Using Option 4 as a sample for Final year)

Portfolio Dashboard Assistance Contracts Contract Processing Contract Processing Studies Renewal Budgets Secure Systems Logout

Contract Processing List Function / Contract Selection Function Detail

Function/Contract Selection Save Reset Delete

Contract(s) and/or Stage(s):

Select	Contract #	Stage	Expiration Date at Contract/Stage Expiration	Original Contract Effective Date Prior to October 1981?
<input checked="" type="checkbox"/>	KY360013020	N/A	08/31/2022	N

Combine Contracts and/or Stages: No

Surviving Contract: KY360013020

HUD Policy: User Guide

Fiscal Year: 2013

Contract Function: MAHRA Amend Rent Increases

Contract Action Selection: 4: Request Renewal for Projects Exempt from OAHF

Processing Status(if applicable):

Date Owner Signed Submission: 04/17/2013

Date Owner Submission Package Initially Received: 04/17/2013

Date Complete Package Received from Owner: 04/17/2013

Is the Owner Debarred or Suspended? ☐ Yes ☐ No ☒ Unconfirmed

Does the Owner Have Material Violations? ☐ Yes ☐ No ☒ Unconfirmed

(enter Function Contract Selection)

Contract Processing List Function / Contract Selection Function Detail

Dates and Comments Budget Selection OCAF Rents Final Review

Dates and Comments Save Reset

Surviving Contract: KY360013020 Stage: N/A
Function Type: Amend Rents Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
Effective Date: 09/01/2013 ARAMS Status:

Exception Project Exempted from OAHF:

Contract/Stage Date Information

Contract/Stage Renewal Execution Date:

Contract Effective Date: 09/01/2002
Length of Contract in Months: 240
Contract Expiration Date: 08/31/2022

Amend Rents Dates

Amend Rents Effective Date: 09/01/2013
Amend Rents Expiration Date: 08/31/2014
Energy Performance Contract Indicator: Yes
Decision Comments:

(enter Dates and Comments)

Contract Processing List Function / Contract Selection Function Detail

Dates and Comments Budget Selection OCAF Rents Final Review

Budget Selection Save Reset

Surviving Contract: KY360013020 Stage: N/A
Function Type: Amend Rents Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
Effective Date: 09/01/2013 ARAMS Status:

Renewal Budget Required? ☒ Yes ☐ No ☐ Unconfirmed

Renewal Budget Type: Standard Renewal Budget

Renewal Budget:

Select	Fiscal Year	Date Approved by HUD	Budget Based Rents % Increased	Unit Type	Budget Based Rent
<input checked="" type="checkbox"/>	2013	04/17/2013	5.00	1	381
				2	489
				3	642

(mark "Yes" for Renewal Budget Required)

Contract Processing List Function / Contract Selection Function Detail

Dates and Comments Budget Selection OCAF Rents Final Review

OCAF Save Reset

Surviving Contract: KY360013020 Stage: N/A
Function Type: Amend Rents Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
Effective Date: 09/01/2013 ARAMS Status:

Annual Rent Potential for all Section 8 Units Included in the Current Process: 246084.00
Annual Budget-Based Rent Potential for Section 8 Units Included in the Current Process: 258264.00
Annual Rent Potential for all Non-Expiring Section 8 Units (Not Included in the Current Process): 0.00
Annual Rent Potential Non-Section 8 Units: 0.00
Annual Project Rent Potential: 246084.00
Expiring Section 8 Portion of Total Rent Potential: 1.00
Annual Project Debt Service: 24466.43
Note: Already includes MIP amount
Annual Expiring Section 8 Share of Debt Service: 24466.43
Escalated Value of EPC Adjustment as of Final year of the EPC Loan: 7150.00
Annual Expiring Section 8 Rent Potential Less Expiring Section 8 Share of Debt Service: 214467.57
Annual Expiring Section 8 Rent Potential Attributed to Operation Multiplied by the Published OCAF (2.600%): 220043.73
OCAF Adjusted Contract Rent Potential: 244510.16
Lessor of OCAF or Budget-Based Rent Potential: 244510.16
Rent Increase Factor (Based upon Lesser of OCAF vs. Budgets): 0.994

(view and save the OCAF page)

Note, there is a “*Escalated Value of EPC Adjustment as of Final year of the EPC Loan*” field on this OCAF page. In addition, Option 5b final year will have the final year’s savings entered in the EPC Yearly savings screen on the new OCAF screen if the prior year’s rent increase were all OCAF Adjusted. Option 5b new OCAF screen will display a zero for the final year’s savings amount if the prior year’s rent increase were all budget increase. Option 5b will display what ever the user entered into the final year’s savings amount if the prior year’s rent increases were a mix of rent increase type, and a warning message will display to ensure the correct final year’s savings amount is used.

Contract Processing
List
Function /
Contract Selection
Function Detail

Dates and Comments
Budget Selection
OCAF
Rents
Final Review

Save
Reset

Surviving Contract: KY360013020
Function Type: Amend Rents
Effective Date: 09/01/2013

Stage: N/A
Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
ARAMS Status:

Add New Rent Record
Overlay Rents with Current Rents from TRACS

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	OCAF Adjusted Rent	Renewed Rent
1	24	363	361	361
2	24	466	463	463
3	1	611	607	607
Rent Potentials				
Monthly		20507	20383	20383
Annual		246084	244596	244596

Renewal Rent Effective Date: 09/01/2013

Dispute/Appeal Comments:

Rents Final for Contract Exhibit: Yes No

Rents Final for Contract Exhibit Date:

Utility Allowance Changed Comments :

Utility Allowance Changed: No

(select type of *HUD Approved Rent* – click on *Yes* for *Rents Final for Contract Exhibit* and SAVE)

The different pages are displayed in the Contract Processing chapter of the User’s Guide.

Please note that option 3a, 3b and 5a are not eligible for the EPC program.

Database Changes

MPRD

Enhanced iREMS by adding the REAC last inspection released date to the MPRD active_property table.

Enhanced iREMS by adding the demo closing date and the OAHP/OMHAR mark to market restructure date to the MPRD active_property table.

HEREMS

A new database table has been added to herems called nls_irems_extract. This new table holds all NLS loans, including loan with numbers longer than 8 characters. The loans longer than 8 characters do not display in iREMS, and they will not display in iREMS going forward, however they will be in the database table. This new table is for query/reporting purposes only.

Previously, when **TRACS** created a new property in **iREMS** and **TRACS** did not have a name for the property, it created a property in **iREMS** with no name. **iREMS** has been modified to look in specific new areas for a property name, and if no name is available it will default to inserting the contract number for the property name.

Each time a new contract (most are PRACs) is added to **TRACS** and it is tied to a financing instrument that exists in **iREMS**, the new contract will go to the existing property that the financing is attached to through a look up table.