Mobility and Portability
Report Guide

Public and Indian Housing Information Center (PIC)
Form-50058 Module

December 2006

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1. Summary

NOTE: This guide reflects the function of the Mobility and Portability Report as of December 2006. The reports contained in the Form-50058 Module are being reviewed to determine future enhancements and/or corrections.

The *Mobility and Portability Report* summarizes information about Voucher and Certificate families who moved within the PHA's jurisdiction (mobility) or to a unit in another PHA's jurisdiction (portability).

The *Mobility and Portability Report* is divided into two sections:

- Mobility Information

- Portability Information

This guide helps users to:

- Understand Form HUD-50058 report data fields

- Interpret and use the data contained in the report

2. Report Applications

There are a variety of different uses for Form-50058 Module reports. This section highlights some of the important data fields in the report and describes the ways Form-50058 Module users can use the data contained in this report.

2.1 PHA Uses for the Report

- **Plan and administer programs**
  PHAs can use the data in the *Mobility and Portability Report* to monitor shifts in demand for assisted housing and support PHA analysis of local housing needs in their PHA Plans. For example, a PHA may find after examining its *Mobility and Portability Report* that the percentage of hard to house families (i.e., families with three or more minors) that moved increased. This statistic may indicate that their housing needs changed or that there was an increase in demand for larger units in the area. This information can help a PHA as it develops its PHA Plan and completes its strategic planning for the year.

- **Evaluate percent of families relocating**
  The percent of total families that moved provides Form-50058 Module users with an aggregate indicator of how many Voucher and Certificate families relocated to another unit within a PHA's jurisdiction (mobility). The percent of families exercising port-in moves reflects the number of families that used the opportunity of greater housing choice that the Voucher and Certificate programs offers to move to a PHA from another jurisdiction (portability).

2.2 HUD Uses for the Report

- **Assess PHA performance and monitor quality**
  Statistics on mobility do not provide enough information to identify noncompliance or assess a PHA's performance as strong or poor but they do provide data to show the percent of residents that move within the PHA. There are no objectively high or low rates of mobility but a comparison of mobility rates for PHAs with similar vacancy rates and housing markets may help Field Offices identify strengths and weaknesses in PHA briefings and owner outreach activities. Very high or very low mobility rates may indicate a data problem such as reporting all or no families as movers. Field Office analysis of portability data may indicate PHA budget or management issues such as whether cross-PHA billing is effective.

3. User Selection Criteria

Users can specify different criteria to display this report. The criteria include program type and geographic subset. Only families within the user-selected criteria will be included in the report.

3.1 Program Type

Users can choose one of the following program types.

- S8 Certificates:
  - Field 1c of the Form HUD-50058 equals "CE" and
  - Section 11 of the form is filled

- S8 Vouchers:
  - Field 1c of the Form HUD-50058 equals "VO" and
  - Section 12 of the form is filled (excludes Section 15 "Homeownership")

- S8 Moderate Rehabilitation
  - This option is available but produces no report

- S8 Certificates and Vouchers:
  - Field 1c of the Form HUD-50058 equals "CE" or "VO" and
  - Section 11 or 12 of the form is filled

- All Relevant Programs:
  - All of the above types

3.2 Geographic Subset (Level of Information)

This report aggregates information across families and is a summary report. Users can select any of the following levels of information to view the report:

- National

- State

- Field Office

- Public Housing Agency
  - ◊ Within a State
  - ◊ Within a State and County
  - ◊ Within a Field Office

3.3   Time Span Subset

This report includes all records with Effective Dates (2b) within a 16-month timeframe – 12 months back and 4 months forward from the "as of" date. For example, a report as of April 30, 2006, includes records with effective dates of May 1, 2005, through August 31, 2006.

4.   Report Layout

The schema in subsection 4.1 shows the available tabs if reviewing the report by specific section and the layout of the full report as it appears in the "View Entire Report" option.

The report will present information based on Program Type. For example, when Program Type "Section 8 Voucher" is selected, information will be presented for Section 8 Voucher families only.

Please note the following possibilities if data is not shown:

*   No data available

        No data was available for that particular indicator at that particular level of information.

**   Insufficient data

        There was insufficient data available to perform calculations for the summary report. To protect the privacy of assisted housing participants, Form-50058 Module reports must have at least 10 families on record to compute and display information in a summary report. Or, further investigation of the data may indicate that the PHA experienced a data quality problem and was not transmitting accurate information to the Form-50058 Module.

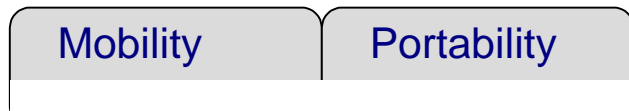## 4.1   Report Schema

The report schema begins on the next page.

Mobility and Portability Report

As of April 30, 2006

Program Type: **S8 Certificate and Voucher**

Level of Information: **National – US**

Download in Excel   Print Report   View Entire Report

Effective Dates Included: **May 1, 2005 through August 31, 2006**

Mobility	Portability

Figure 4.1

Mobility and Portability Report

As of April 30, 2006

Program Type: **S8 Certificate and Voucher**

Download in Excel   Print Report   Back to Report

Level of Information: **National – US**

Effective Dates Included: **May 1, 2005 through August 31, 2006**

Mobility Information

National	Admission Involving a Move		Admission Involving a Lease in Place		Total Families that moved		Total Hard to House Families that Moved		Previously Assisted Families that Moved		Families Moving from Public Housing (#)
	Count (#)	Percentage (%)	Count (#)	Percentage (%)	Count (#)	Percentage (%)	Count (#)	Percentage (%)	Count (#)	Percentage (%)	
US	X,XXX	XXX%	X,XXX	XXX%	X,XXX	XXX%	X,XXX	XXX%	X,XXX	XXX%	X,XXX

Portability Information

National	Families Exercising Port-in Moves		Portability Moves Involving PHA Billing	
	Count (#)	Percentage (%)	Count (#)	Percentage (%)
US	XX,XXX	XXX%	XX,XXX	XXX%

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4.2   Levels of Information Displayed

When users select a level of information (geographic subset), information is displayed as shown in the following table.

Level of Information Selected	Information Displayed	
National		National
State	National	State
Field Office	National	Field Office
Public Housing Agency		
• *Within a State*	State	PHA (within selected State)
• *Within a State and County*	County (within selected State)	PHA (within selected County)
• *Within a Field Office*	Field Office	PHA (within selected Field Office)

5.   Data Definitions/Business Rules

The data definitions/business rules give technical definitions for the fields on the *Mobility and Portability Report*. Business rules reflect program rules and calculations performed for each field. Lettered notation (e.g., line 2a) refers to the line number in the Form HUD-50058.

5.1   General Guidelines

UNLESS OTHERWISE SPECIFIED, INCLUDE ONLY:

1. Section 8 Certificate and Voucher programs (1c = 'CE' or 'VO') where the Type of action is:
    - New Admission (2a = 1)
    - Annual Reexamination (2a = 2)
    - Interim Reexamination (2a = 3)
    - Portability Move-in (2a = 4)
    - Other Change of Unit (2a = 7)

2. Families within the user selected criteria (program type and geographic subset).

3. Exclude Homeownership programs (Section 15 in the Form HUD-50058)

GENERAL DEFINITIONS:

- **Total family count** is the total count of families where
    - Type of Action is New Admission (2a = 1), Annual Reexamination (2a = 2), Interim Reexamination (2a = 3), Portability Move-in (2a = 4), Other Change of Unit (2a = 7)

- **Total families admitted** is the total count of families where
    - Type of Action is New Admission (2a = 1)

- **Total families previously assisted** is the total count of families where
    - Type of Action is Annual Reexamination (2a = 2), Interim Reexamination (2a = 3), Portability Move-in (2a = 4), Other Change of Unit (2a = 7)

- **Hard to House family** is a family with:
    - 3 or more minors (2b minus 3e < 18) or
    - Any family member who is disabled (3j = Y)

5.2   Data Definitions/Business Rules

#	Data Field	Data Definition/Business Rule
		Mobility Information
1.	Admission Involving a Move - Count (#)	**EQUALS:** • Count of families Where • Type of Action is New Admission (2a = 1) and • Family Moving to this Unit (11b or 12b) is Y
1.	Admission Involving a Move - Percent (%)	**EQUALS:** • Count of families Where • Type of Action is New Admission (2a = 1), and • Family Moving to this Unit (11b or 12b) is Y **Divided** by • Total families admitted (see General Definitions) **Multiplied** by 100
1.	Admissions Involving a Lease in Place -Count (#)	**EQUALS:** • Count of families Where • Type of Action is New Admission (2a = 1) and • Family Moving to this Unit (11b or 12b) is N
1.	Admissions Involving a Lease in Place -Percent (%)	**EQUALS:** • Count of families Where • Type of Action is New Admission (2a = 1), and • Family Moving to this Unit (11b or 12b) is N **Divided** by • Total families admitted (see General Definitions) **Multiplied** by 100
1.	Total Families that Moved - Count (#)	**EQUALS:** • Count of families Where • Type of Action is New Admission (2a = 1), Annual Reexamination (2a = 2), Interim Reexamination (2a = 3), Portability Move-in (2a = 4), Other Change of Unit (2a = 7), and • Family Moving to this Unit (11b or 12b) is Y

#	Data Field	Data Definition/Business Rule
1.	Total Families that Moved - Percent (%)	**EQUALS:** • Count of families Where • Type of Action is New Admission (2a = 1), Annual Reexamination (2a = 2), Interim Reexamination (2a = 3), Portability Move-in (2a = 4), Other Change of Unit (2a = 7), and • Family Moving to this Unit (11b or 12b) is Y **Divided** by • Total family count (see General Definitions) **Multiplied** by 100
1.	Total Hard to House Families that Moved - Count (#)	**EQUALS:** • Count of families Where • Type of Action is New Admission (2a = 1), Annual Reexamination (2a = 2), Interim Reexamination (2a = 3), Portability Move-in (2a = 4), Other Change of Unit (2a = 7), and • Family Moving to this Unit (11b or 12b) is Y, and • Family qualifies as Hard to House family (see General Definitions)
1.	Total Hard to House Families that Moved - Percent (%)	**EQUALS:** • Count of families Where • Type of Action is New Admission (2a = 1), Annual Reexamination (2a = 2), Interim Reexamination (2a = 3), Portability Move-in (2a = 4), Other Change of Unit (2a = 7), and • Family Moving to this Unit (11b or 12b) is Y, and • Family qualifies as Hard to House family (see General Definitions) **Divided** by • Total family count (see General Definitions) **Multiplied** by 100
1.	Previously Assisted Families that Moved - Count (#)	**EQUALS:** • Count of families Where • Type of Action is Annual Reexamination (2a = 2), Interim Reexamination (2a = 3), Portability Move-in (2a = 4), Other Change of Unit (2a = 7), and • Family Moving to this Unit (11b or 12b) is Y

#	Data Field	Data Definition/Business Rule
1.	Previously Assisted Families that Moved - Percent (%)	**EQUALS:** • Count of families Where • Type of Action is Annual Reexamination (2a = 2), Interim Reexamination (2a = 3), Portability Move-in (2a = 4), Other Change of Unit (2a = 7), and • Family Moving to this Unit (11b or 12b) is Y **Divided** by • Total families previously assisted (see General Definitions) **Multiplied** by 100
1.	Families moving from Public Housing - Count (#)	**EQUALS:** • Count of families Where • Type of Action is new admission (2a = 1) and • Program Type (1c) is 'CE' or 'VO' and • Previous Program Type (1c) from the last Head of Household's history record is 'P' and • Effective Date of Action (2b) of the previous transaction is not more than 15 months from the Report "As of" Date ("As of" date minus 2b < 15 months)

Portability Information

#	Data Field	Data Definition/Business Rule
1.	Families Exercising Port-in Moves - Count (#)	**EQUALS:** • Count of families Where • Did family move into your PHA jurisdiction under portability (11d or 12d) is Y
1.	Families Exercising Port-in Moves - Percent (%)	**EQUALS:** • Count of families Where • Did family move into your PHA jurisdiction under portability (11d or 12d) is Y **Divided** by • Total family count (see General Definitions) **Multiplied** by 100

#	Data Field	Data Definition/Business Rule

1.	Portability Moves Involving PHA Billing
	- Count (#)
		EQUALS:
		• Count of families
		
		Where
		   • Cost billed per month (11e or 12e) is greater than zero and
		   • Did family move into your PHA jurisdiction under portability (11d or 12d) is Y

1.	Portability Moves Involving PHA Billing
	- Percent (%)
		EQUALS:
		• Count of families
		
		Where
		   • Cost billed per month (11e or 12e) is greater than zero and
		   • Did family move into your PHA jurisdiction under portability (11d or 12d) is Y
		
		Divided by
		• Total family count (see General Definitions)
		
		Multiplied by 100