PIH Information Center

HUD PIC

Housing Authority

Field Office and Headquarters

User Manual
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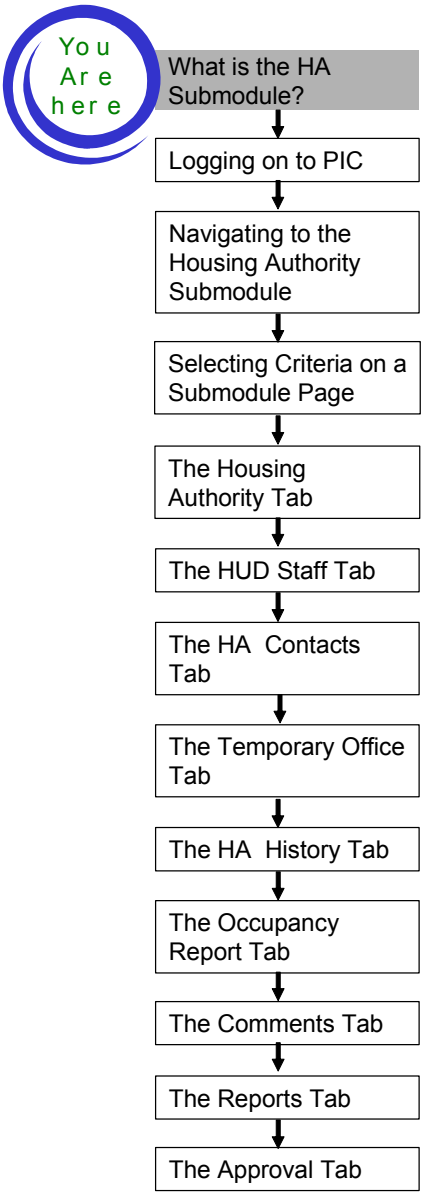
The Housing Authority (HA) Submodule

What is the HA Submodule?



The **Housing Authority (HA) Submodule** is a primary resource for HA location, staff, and inventory data. Accessible via the **Housing Inventory Module** in the Public and Indian Housing Information Center (PIC), this submodule contains the official listings for an HA's:

- Physical and Mailing Addresses
- Phone and Fax Numbers
- Assigned HUD Staff
- Contact Person Information (e.g. the **executive director's** email address)
- Occupancy Reports
- Historical Event Records
- Funding Data
- Performance Data

In addition, the **HA Submodule** provides the functionality to:

- Review/Approve/Reject Occupancy Reports online (for HUD).
- Generate customized reports on a variety of HA-related topics.

User Manual Objectives

In this manual, you will learn to:

- Access the **HA Submodule**.
- Perform all the submodule functions.
- Interpret the data contained in the submodule pages.

Note: Appendix A contains a quick reference guide for use as a submodule refresher.

Acknowledgements

The following HUD employees assisted in the creation of the **HA Submodule** User Manual:

- Dean Downs
- Suzanne Link
- David McMullin

Their professional attention to detail, teamwork, and specialized knowledge enhanced the value and clarity of this document.

HA Submodule Data Sources

In order to understand the information in the **HA Submodule**, it is important to know where the submodule draws its data from. This section provides the data sources for the main categories of information presented in the submodule. Refer to the topic-specific sections of this manual for more extensive data source information.

HA Staff-Supplied Data

HA staffs are responsible for supplying and updating the following information as necessary:

- HA Addresses
- HA Phone and Fax Numbers
- Contact Information for People with HA Roles
- Occupancy Report Submissions

HUD Staff-Supplied Data

Hub and Program Center (PC) staffs are responsible for supplying the following information:

- HUD Staff Assignments
- Temporary Office Designations (when needed)
- Occupancy Report Approvals or Rejections

Funding Data

The **HA Submodule** draws funding data from the HUD Central Accounting and Program System (HUDCAPS) and the Line of Credit Control System (LOCCS).

Inventory Data

The submodule draws Low Rent inventory data from PIC's **Development Submodule**. The Section 8 Housing inventory data comes from HUDCAPS.

Performance Data

The Real Estate Assessment Center supplies the Low Rent HA performance data in this submodule. SEMAP supplies the Section 8 performance data.

Other HA Information Resources

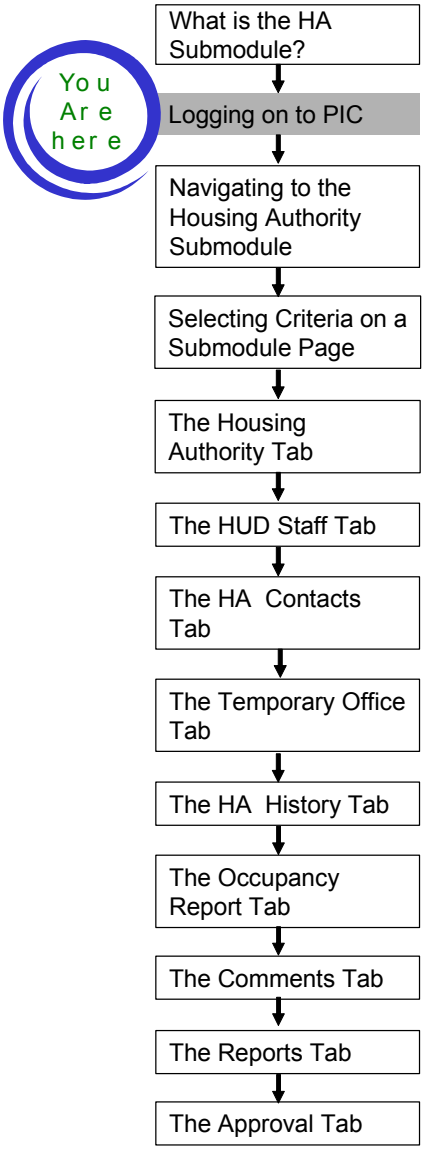
Other HA resources in the HUD Web space draw data from the **HA Submodule**.

The HA Profiles Page at https://pic.hud.gov/pic/haprofiles/haprofilelist.asp: This page provides information about HAs, such as contact phone and email, HA address, number of units, and additional information available to the public.

The PHA Contact Information Page at http://www.hud.gov/offices/pih/pha/contacts/: This page provides more general contact information about individual HAs, and is sorted by state.

The PIC Data Page at http://hudweb.hud.gov/po/p/systems/pic/picdata.htm: This page offers unit, funding, and contact information to download onto your CPU in spreadsheet form. The data is drawn weekly from PIC.

Logging on to PIC



Logging on to PIC is the first step toward accessing the **HA Submodule**.

You need a user ID and password to enter PIC. If you are a HUD employee and do not know your PIC user ID and password, contact your **PIC coach** to obtain the information.

To log on to PIC:

Step	Action/Result
1. Go to the **Public and Indian Housing (PIH) Home Page** at http://www.hud.gov/offices/pih/.	A Quick Find List is displayed at the bottom right side of the **PIH Home Page** (see Figure 1).
2. Scroll to PIC – PIH Information Center in the Quick Find list and highlight the entry with a mouse click.	

*Figure 1: The PIC – PIH Information Center entry highlighted in Quick Find list on the **PIH Home Page**.*

Step	Action/Result
3. Click the hyperlink titled **Go to this page**.	The **PIC Home Page** is displayed.
4. Click the **Logon to PIC** hyperlink located in the center of the screen. You can also click the **Logon to the PIC System** hyperlink in the Quick Access box (see Figure 2).	The PIH Information Center logon screen is displayed.
5. Type in your user ID and password in the appropriate text boxes on the screen.	
6. Click the button titled **Logon to PIC** or press the ENTER key.	The **PIC Main Navigation Page** is displayed.

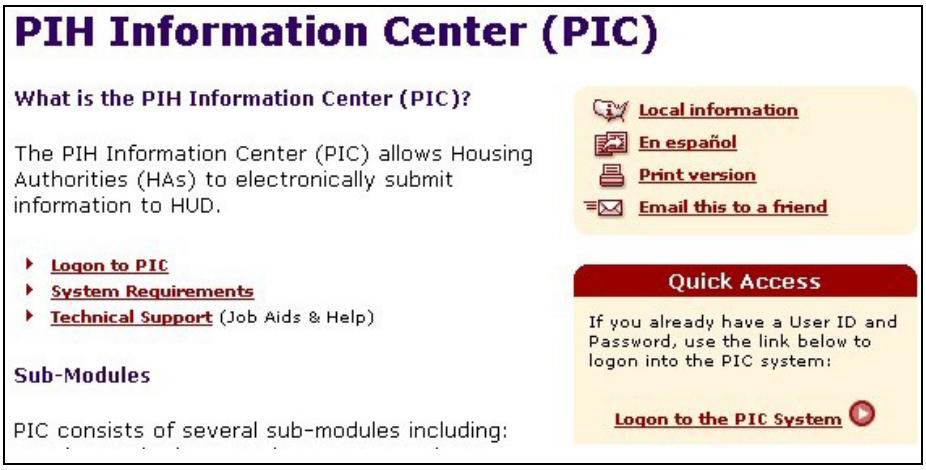
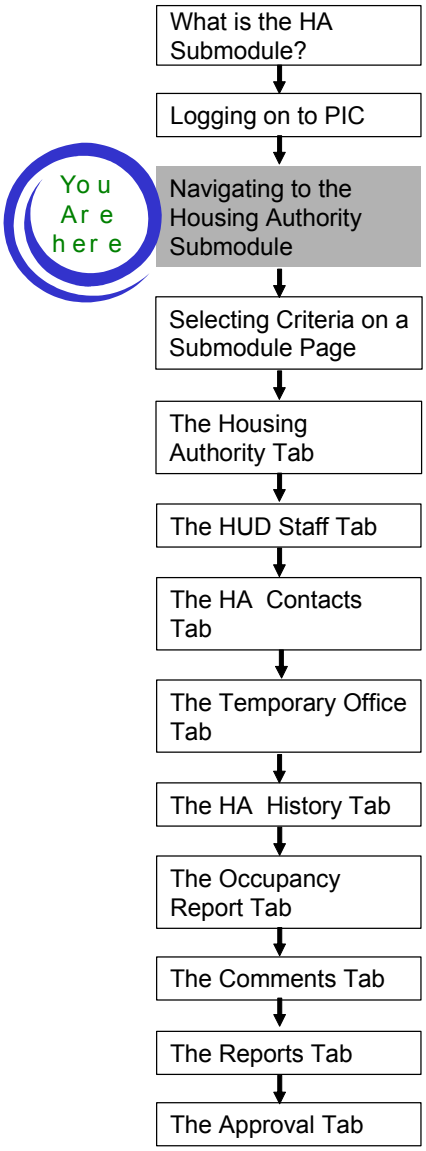


*Figure 2: The **PIC Home Page**.*

Navigating to the Housing Authority Submodule



Follow these steps to access the **HA Submodule** from the **PIC Main Navigation Page:**

Step	Action/Result
1. Move your mouse cursor over the **Housing Inventory Module** button.	Three submodules are displayed (see Figure 3): • **Housing Authority** • **Development** • **Demolition/Disposition** **Note:** Access to the other submodules depends on the role(s) assigned to you.
2. Click the **Housing Authority** hyperlink.	PIC displays the **HA List Page**.

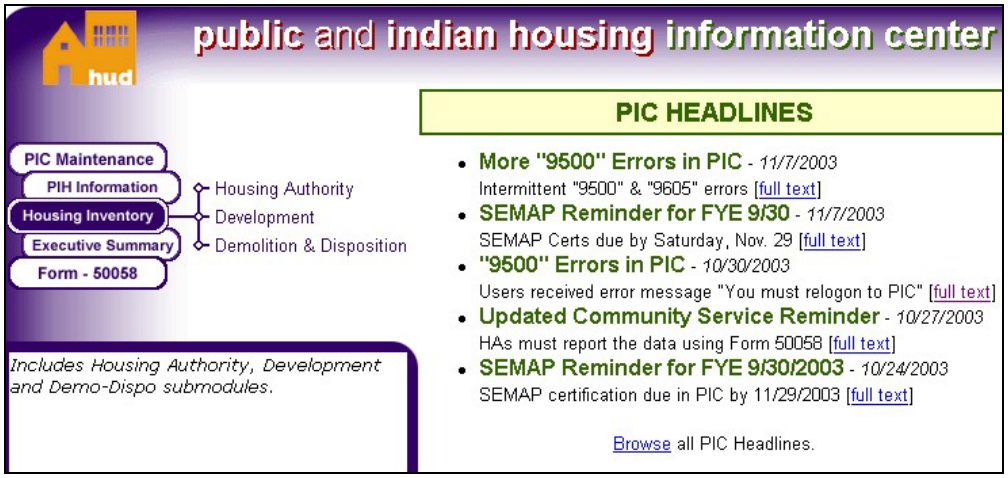
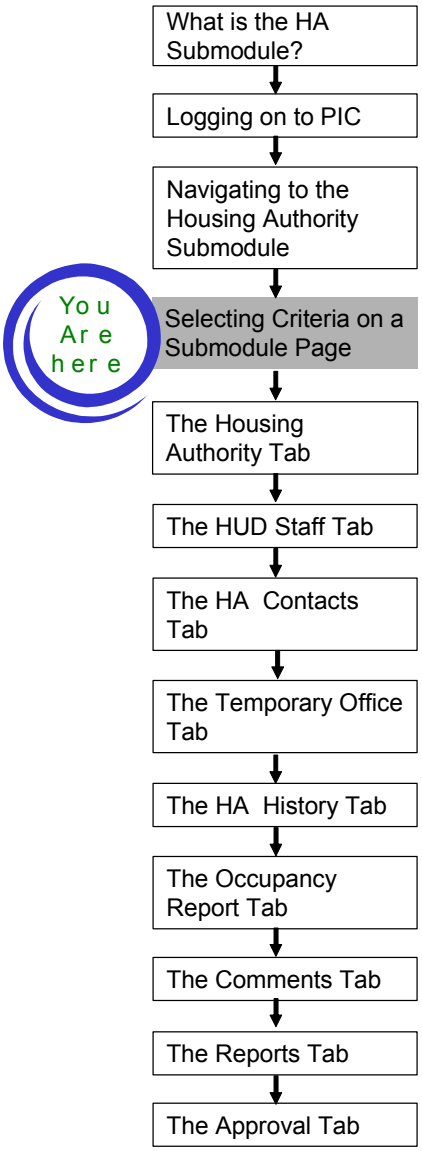


*Figure 3: The **PIC Main Navigation Page** with the **Housing Inventory Submodules** displayed.*

Selecting Criteria on a Submodule Page



PIC usefulness relies heavily on your ability to select the proper criteria for your purpose. PIC provides two main features for the selection and entering of data: dialog boxes and text boxes.

Selecting Information Using Dialog Boxes

For all the tabs in the submodule, PIC enables you to select information on the screen using dialog boxes (see Figure 4 for an example). Follow these steps to use a dialog box:

Step	Action/Result
1. Click the dialog box.	PIC displays a list of options.
2. Click the desired option.	PIC inserts the choice into the box.

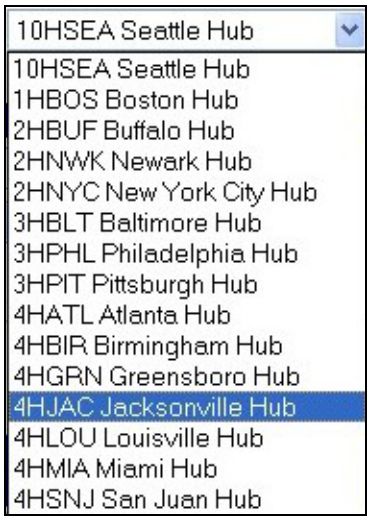


Figure 4: An example of a of a dialog box option list.

Entering Data Using Text Boxes

The other main method for criteria selection is the use of text boxes (see Figure 5 for an example). Follow these steps to use a text box.

Step	Action/Result
1. Click the text box.	PIC displays a cursor in the box.
2. Type the appropriate data in the box.	

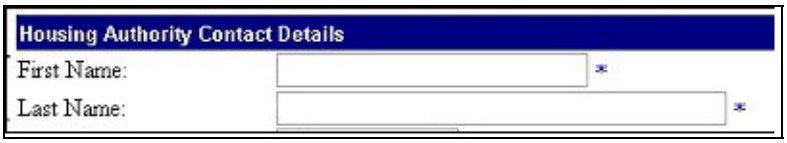
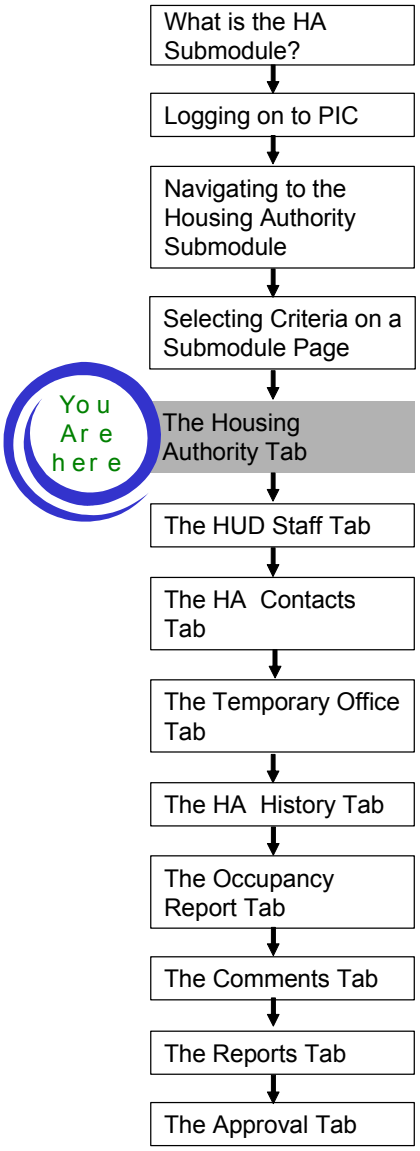


*Figure 5: Examples of text boxes in the **HA Submodule**.*

The Housing Authority Tab



Upon entering the submodule, you are presented with the **HA List Page**. This page is one of several subtabs in the Housing Authority Tab (see Figure 6). The others include:

- HA Details: A summary of an HA's contact and inventory data.
- HA Address: A display of an HA's physical and mailing addresses.
- HA Inventory: A summary of an HA's Low Rent and Section 8 units.
- HA Performance: A list of an HA's Low Rent Program performance score and status.
- HA Funding: A list of all the grants and funding sources for an HA's program(s).

Figure 6: The subtabs available in the Housing Authority Tab.

These other subtabs are only available after you select an HA to view on the **HA List Page**.

The HA List

The HA List Page is the start page for the **HA Submodule**. It enables you to pinpoint the HA you are looking for. The HA list also provides a summary of each HA you have access to.

Generating an HA List

This page presents all of the HAs you can access.

If you can access HAs in multiple field offices, follow these steps to generate an HA List:

Step	Action/Result
1. Click the hub containing the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division,** and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** dialog box.	PIC generates a list of HAs you have access to for the selected field office.

The HA List Search Filters

You can refine the HA List results using the Housing Authority Search Filters. These filters enable you to select the HA characteristics you want included in the list.

There are three filter types. The table below shows the filter and the options they contain.

Filter	Filter Options
Program Type	• Combined • Low Rent • Section 8
Activity Status	• Active • Inactive • All
Low Rent Size	• Extra Large (10,000+ units) • Large (1,250 – 9,999 units) • Medium High (500 – 1,249 units) • Medium Low (250 – 499 units) • Small (50 – 249 units) • Very Small (1 – 49 units)

Any combination of these filters can be applied to an HA List. Follow these steps to apply a filter:

Step	Action/Result
1. Click the desired filter's dialog box.	PIC displays the list of options for the selected filter.
2. Click the filter option you want applied to the list.	
3. Click the **Retrieve** button.	PIC removes the HA(s) that do have the filter characteristic(s). If there are no HAs that fit the selected filter option(s), PIC displays the following message: *HA Records not found.*

Note: If you click Low Rent in the **Program Type** dialog box, PIC displays a checkbox titled **And Combined**. Click the box if you want to include HAs with combined programs in the HA List. Do not click the box if you are looking for HAs with Low Rent programs only.

HA Filter Example

Joe works in the Louisville Hub Office. He has PIC access to HAs in all of the hub's field offices. He is working on a project and needs to find out how many active HAs associated with the Knoxville, TN, Program Center are Low Rent only and have between 250 and 500 units.

To get his information, Joe performs the following steps after accessing the **HA List Page:**

1. He clicks on the Knoxville Program Center entry in the **Field Office** dialog box to generate an HA List.
2. He clicks Low Rent in the **Program Type** dialog box.
3. He does not click the **And Combined** checkbox because he wants to search for Low Rent only.
4. He clicks Active in the **Activity Status** dialog box.
5. He clicks 250 – 499 in the **LR Size** dialog box.
6. He clicks the **Retrieve** button.

The HA List refreshes to show two entries: Harriman and Greeneville.

Information Presented in the HA List Table

The HA List Table provides a summary of the HAs associated with the selected field office. This summary includes the following:

- HA Code
- HA Name
- Temporary Office (if applicable)
- Program Type: Section 8, Low Rent, or Combined
- Fiscal Year End (FYE, for the HA): 03/31, 06/30, 09/30, 12/31
- Low Rent Units: Number of units for this program in the HA (drawn from the PIC **Development Submodule**).
- Section 8 Units: Number of units for this program in the HA (drawn from HUDCAPS).
- Activity Status: Active or Inactive

The default sort for the table is ascending HA Code. You can sort the list in ascending order by any of the columns (except Activity Status) by clicking the column heading. (Lowest to highest for numbers, A to Z for alphabetical categories, and earliest to latest for dates).

Click the Activity Status column heading to sort by descending alphabetical order (Y comes first, then N).

Selecting an HA Code from the HA List

The HA Code for each HA in the list is hyperlinked (see Figure 7). Click it to view the **Housing Authority Details Page** for the selected HA.

Records 1 to 100 of 103

HA Code ▲	HA Name ▲
TX001	Austin
TX006	San Antonio
TX007	Brownsville
TX008	Corpus Christi
TX011	Laredo
TX016	Del Rio
TX019	Eagle Pass
TX025	San Benito

Figure 7: The hyperlinked HA Codes in an HA List Table.

If the number of HAs in the list exceeds one page (generally more than 100 entries), a hyperlink titled **Next** is displayed at the bottom of the table. Click it to review the remaining records. After clicking the **Next** hyperlink, you can also click the **Previous** hyperlink to return to the previous page.

After selecting the HA from the table, you can view its information on all other submodule pages without having to identify it again. If you click another **HA Submodule** tab without selecting an HA from the list, PIC displays the information for the HA with the lowest chronological HA Code for the selected office.

Creating an HA Record

If you have the proper security access role, you can create a new HA record from the **HA List Page**.

Note: You can only create an HA record in PIC after the responsible governing authority legally forms the HA program and the Annual Contributions Contract (ACC) has been finalized.

After accessing the **HA List Page**, follow these steps to create an HA record:

Step	Action/Result
1. Click the **Create Housing Authority** hyperlink.	PIC displays the **Create a Housing Authority Page** (see Figure 8).
2. Enter the data for the following fields: • **HA Code*** • **HA Common Name*** • **HA Formal Name*** • **HA Program Type** • **HA Participant Type** • **HA FYE** • **Phone Number*** • **Fax Number** • **TTY Number** • **Web Page Address** • **Email Address**	The * designates a required field. You cannot save the HA information if you do not enter this data. For the **Program Type** dialog box, choose between Low Rent, Section 8, or Combined. For the **HA Participant Type** dialog box, choose either State Housing Authority or Public Housing Authority. For the **HA FY End** dialog box, choose between 03/31, 06/30, 09/30, or 12/31.
3. Click the **Save** button. You can also click the **Cancel** button to undo any inputs.	If saved, PIC returns to the HA List and displays the newly-created HA. If you click **Cancel**, PIC returns to the HA List.

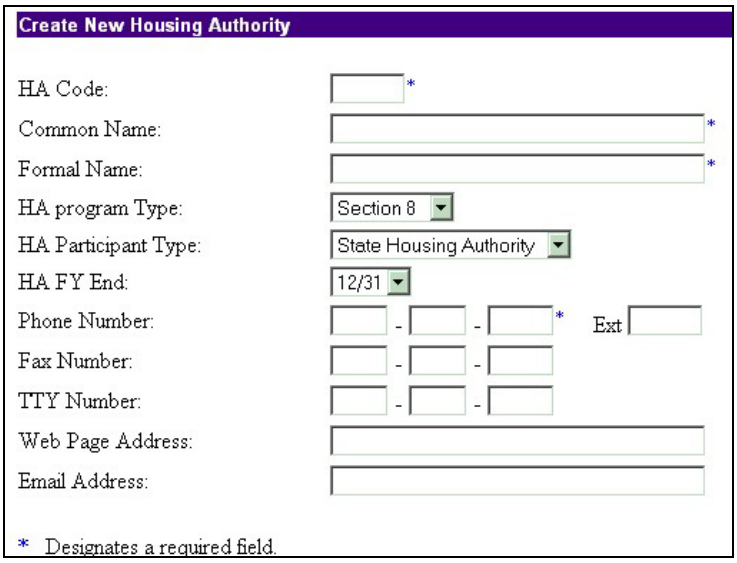


*Figure 8: The input fields on the **Create a Housing Authority Page**.*

HA Codes

HA Codes for the Low Rent, Public Section 8, and Combined programs follow a simple format. This format consists of:

- A post office abbreviation for the state or territory the HA is located in.
- A three digit number. The number should continue the numerical ascent of the previous HA Codes in the state or territory.

There are no spaces or other characters separating these two components. Use a zero for a placeholder where needed.

For example, the most recent HA Code assigned to a Delaware HA program listed above is DE005. If the state creates another HA for one of those program types, the new HA Code would be DE006.

The number should directly follow the most recent (highest) HA Code issued. PIC will not allow you to create a new record if the HA Code has been used before. Even codes for defunct HAs cannot be used.

Note: Statewide Section 8 HAs are an exception to this format. They still have the post office abbreviation, but their three-digit number starts with a “9.”

HA Details

After you click an **HA Code** hyperlink in the HA List, PIC presents the **HA Details Page**. If you are on another Housing Authority subtab, you can click the Details subtab to access this page.

Note: Clicking the List subtab returns you to the **HA List Page** and removes the subtabs.

This page displays specific contact and inventory information for the HA selected.

Information Presented on the HA Details Page

The header includes all of the following HA identifier information:

- HQ Division (national access users only)
- HQ Office (national access users only)
- Hub
- Field Office

The Housing Authority Details section includes:

- The **Modification Type** dialog box: See the **Modifying HA Details** section of this manual (page 19) for more information on this dialog box.
- HA Code
- Common Name
- Formal Name
- Activity Status
- HA Program Type
- HA FY End
- Phone Number
- Fax Number
- TTY Number
- Web Page Address: Entries in this field are hyperlinked. Click an address to visit the site.
- Email Address: Entries in this field are hyperlinked. Click an address to send a message to the addressee.
- Executive Director: Names in this field are hyperlinked. Click a name to view the person's information on the **HA Contact Page**.
- Board Chairperson: Names in this field are hyperlinked. Click a name to view the person's information on the **HA Contact Page**.
- Last Modified User: The last PIC user to enter the **Modify HA Details Page**. It does not necessarily mean the person made changes.
- Last Modified Date: The last date a user entered the **Modify HA Details Page**. It does not necessarily mean the last date changes were made. This date can also represent the last time PIC automatically updated data (e.g. updating a PHAS score using information drawn automatically from REAC).

The HA Unit Summary Information section includes two tables. PIC draws the data for both tables from the **Development Submodule**.

The first table displays the HA's dwelling and non dwelling unit totals by unit type, as well as the HA's unit occupancy status:

- Number of Dwelling Units
  - Family
  - Elderly
  - Total
- Number of Non Dwelling Units
  - Merged
  - Non Dwelling
  - Total
- Occupancy Status
  - Occupied
  - Vacant
  - Total

Note: If the vacant and occupied unit data is incorrect, a computing error may be the cause. Contact your **PIC coach** if this is the case.

The second table displays the HA's total units by number of bedrooms for each type:

- Elderly Units
  - 0 bedrooms
  - 1 bedroom
  - 2 bedrooms
  - 3 bedrooms
  - 4 bedrooms
  - 5+ bedrooms
  - Total
- Family Units
  - 0 bedrooms
  - 1 bedroom
  - 2 bedrooms
  - 3 bedrooms
  - 4 bedrooms
  - 5+ bedrooms
  - Total
- Total Units
  - 0 bedrooms
  - 1 bedroom
  - 2 bedrooms
  - 3 bedrooms
  - 4 bedrooms
  - 5+ bedrooms
  - Total
- Approved As Of Date: The date of the last approved building and unit data submission for the selected HA. PIC draws this data from the **Development Submodule**.

Modifying HA Details

If you have the proper security access role, you can modify some of the details presented on the page.

Note: Contact your **security administrator** if you want to gain access to this feature.

Follow these steps to edit HA details:

Step	Action/Result
1. Click the Modify HA Details entry in the **Modification Type** dialog box (see Figure 9).	PIC displays the **Modify HA Details Page**. The text boxes are populated with the existing data.
2. Edit the information for any of the following categories: • **Common Name*** • **Formal Name*** • **Phone Number*** • **Fax Number** • **TTY Number** • **Web Page Address** • **Email Address**	Only HUD Headquarters can edit the **HA Code**, **HA Program Type**, **Activity Status**, and **HA FY End** entries. The * designates a required field. You cannot save the contact information if you do not enter this data. Even though some fields are not required, **PIC coaches** strongly recommend that you input data for all the fields on this page and keep them up-to-date.
3. Click the **Save** button to enter the changes. You can also click the **Cancel** button to undo any changes you have made.	If saved, PIC displays an updated **HA Details Page**. If you click **Cancel**, PIC returns to the **HA Details Page**.

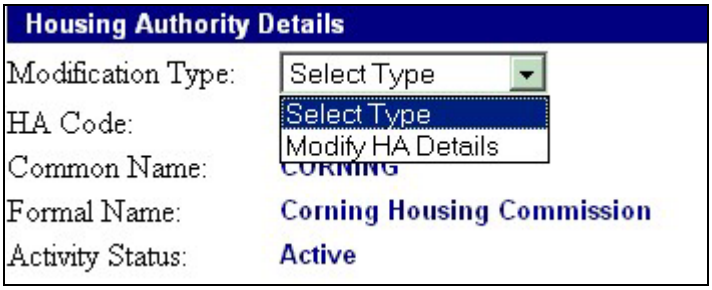


*Figure 9: The **Modification Type** dialog box in the **HA Details Page**.*

HA Address

Click the Address subtab in the Housing Authority Tab to access the **HA Address Page**.

Note: Clicking the List subtab returns you to the **HA List Page** and removes the subtabs.

The **HA Address Page** displays the official mailing and physical address for an HA. HA PIC users are responsible for keeping this page up-to-date.

Physical versus Mailing Address

A physical address represents the HA's location (example: In an emergency, the rescue squad would arrive at the HA's physical address).

If different from the physical address, a mailing address represents an alternate location where the HA's mail is delivered. (example: A PO Box address). A mailing address is only required if an HA's correspondence is not sent to its physical address.

PIC coaches strongly recommend always keeping these addresses up-to-date.

The default display for the page is the HA's physical address. Follow these steps to display the mailing address:

Step	Action/Result
1. Click the **Select Address Type** dialog box.	The dialog box displays a menu with two options: Mailing or Physical.
2. Click Mailing.	The page refreshes to present the mailing address (if available).

Information Presented on the HA Address Page

The header includes all of the following HA identifier information:

- HQ Division (national access users only)
- HQ Office (national access users only)
- Hub
- Field Office
- HA

The Address Information section contains the following HA physical or mailing address data:

- Address Line 1
- Address Line 2 (if needed)
- City/Locality
- County Name
- State
- Zip Code

PIC enters the following Additional Address Information section data automatically:

- Rural Route Code
- County Code
- Congressional District Code
- MSA Code
- Census Tract Code
- Centroid Match Code
- Entity Code
- Latitude
- Longitude
- Place Code
- Highway Contract Route Code
- State Numeric Code
- Locality Code
- MCD Code
- Block Code
- Geo Match Code
- Class Code

Modifying an HA Address

If you have the proper security access role, you can edit the information presented on the page.

Note: Contact your **security administrator** if you want to gain access to this feature.

Follow these steps to edit an HA Address:

Step	Action/Result
1. Select your choice between Physical and Mailing on the **HA Address Page**.	
2. Click the **Modify Address** hyperlink.	PIC displays the **Modify HA Address Page**. The fields are populated with the existing data.
3. Type the correct data into the appropriate text box. • **Address Line 1*** • **Address Line 2** • **County Name** • **City/Locality*** • **State*** • **Zip Code***	The * designates a required field. You cannot save the contact information if you do not enter this data. For the **State** dialog box, choose a state from the dialog box menu.
4. Click the **Save** button to enter the changes. You can also click the **Cancel** button to undo the changes	If saved, PIC refreshes to the newly-corrected **HA Address Page**. If you click Cancel, PIC returns to the **HA Address Page**.

HA Inventory

Click the Inventory subtab in the Housing Authority Tab to access the **HA Inventory Page**.

Note: Clicking the List subtab returns you to the **HA List Page** and removes the subtabs.

The **HA Inventory Page** provides a summary of development and unit data for the selected HA. PIC draws the Low Rent data from the **Development Submodule** and the Section 8 data from HUDCAPS.

There are no input fields on this page. Contact PICHelp for guidance on correcting the data presented here.

Information Presented in the HA Inventory Page

The header includes all of the following HA identifier information:

- HQ Division (national access users only)
- HQ Office (national access users only)
- Hub
- Field Office
- HA

The Inventory Detail section includes tables summarizing the inventory of the HA's program(s).

Low Rent Information tables present the following data categories:

- Number of Developments in Management
- Number of Units in Management
- Number of Developments in Development
- Number of Units in Development
- Total Number of Developments
- Total Number of Units

For Section 8 programs, the HA Inventory Page displays a table containing the following categories:

- Number of Increments for the Moderate Rehabilitation Grants
- Number of Units for the Moderate Rehabilitation Grants
- Number of Increments for the Voucher Grant
- Number of Units for the Vouchers Grant
- Total Number of Increments
- Total Number of Units

HA Performance

Click the Performance subtab in the Housing Authority Tab to access the **HA Performance Page**.

Note: Clicking the List subtab returns you to the **HA List Page** and removes the subtabs.

The **HA Performance Page** provides a summary of the selected HA's most recent Public Housing Assessment Score (PHAS).

There are no input fields on this page. Contact PICHelp for guidance on correcting the data presented here.

Performance Data for Section 8 HAs

The **HA Submodule** does not currently provide performance score data for Section 8 HAs. The functionality to do so will be installed at a later date.

If the HA has only a Section 8 program, PIC displays the following message when you click the Performance subtab: *This is a Section 8 HA. The functionality for reporting performance information for Section 8 HAs on this page will be implemented at a future date.*

Section 8 performance information is available, however, in an HA Profile Report (see page 78 for more information.)

Information Presented on the HA Performance Page

The header includes all of the following HA identifier information:

- HQ Division (national access users only)
- HQ Office (national access users only)
- Hub
- Field Office
- HA

The Performance List section includes a table that summarizes the HA's assessment scores. PIC draws the PHAS assessment data from the Real Estate Assessment Center (REAC).

The table displays the following data categories (see Figure 10):

- Assessment Date: The date REAC issued the assessment.
- Assessment Type: Currently, the only available entry for this column is PHAS. PIC does not display SEMAP scores here. The functionality is coming soon.
- Assessment Score: The PHAS score for the HA.
- Designation: HAs can receive a High Performer, Standard Performer, Troubled Performer, Substandard Physical Performer, Substandard Financial Performer, or Substandard Management Performer designation, depending on the score.
- Memorandum of Agreement (MOA) Event or Improvement Plan (IP) Event (if created)
- Temporary Office (if assigned)

Assessment Date ▼	Assessment Type ▲	Assessment Score ▼	Designation ▲	MOA Event or IP Event ▲	Temp Office ▲
10/29/2003	PHAS	94	High Performer	None Created	Not Assigned

Figure 10: The HA Performance Table.

Performance Designations

The following table summarizes the PHAS scoring ranges and their associated designations.

Designation	PHAS Scoring Range
High	90 – 100
Standard	60 – 89*
Troubled	59 and below

*A PHA that achieves a total PHAS score of less than 70 but not less than 60 is at risk of being designated as troubled.

In addition, An HA achieving less than 60% of the total points available in the PHAS physical, financial, or management assessment is considered a substandard physical, financial, or management performer.

HA Funding

Click the Funding subtab in the Housing Authority Tab to access the **HA Funding Page.**

Note: Clicking the List subtab returns you to the **HA List Page** and removes the subtabs.

The **HA Funding Page** presents all major funding sources for the selected HA. PIC draws the funding data from LOCCS and HUDCAPS.

There are no input fields on this page. Contact PICHelp for guidance on how to correct data in the table.

Information Presented in the HA Funding Page

The header includes all of the following HA identifier information:

- HQ Division (national access users only)
- HQ Office (national access users only)
- Hub
- Field Office
- Housing Authority

The Low Rent funding data table (if applicable) displays the following data for each formula grant listed (see Figure 11):

- Formula Grant Type: The type of grant the HA received.
- Fiscal Year Awarded
- Authorized Funds: The amount of the grant approved by HUD for each FY included in the table.
- Disbursed Funds: The amount of funds disbursed in LOCCS for each FY included in the table.
- Obligated Funds: The amount of funds obligated by the HA for a contract or purchase order for each FY included in the table.
- Expended Funds: Funds the HA has already spent for completed work for each FY included in the table.
- Authorized Funds Grant Total: The sum of the grant's authorized funds for all of the fiscal years included in the table.
- Disbursed Funds Grant Total: The sum of the grant's disbursed funds for all of the fiscal years included in the table.

Low-Rent As of 11/08/2003

Formula Grants	Fiscal Year	Authorized Funds	Disbursed Funds	Obligated Funds	Expended Funds
CFP	2003	$783,775		$48,000	
	2002	$952,587	$83,770	$919,587	$67,907
	2001	$1,003,505	$564,385	$1,003,505	$558,532
	2000	$983,324	$983,324	$983,324	$983,324
Grant Total		**$3,723,191**	**$1,631,478**		

*Figure 11: The Low Rent Funding Table for the **HA Funding Page**.*

The Section 8 funding data tables display the following details for the funding sources listed below (if applicable):

- Certificate/Voucher Funding
  - Fiscal Year Awarded
  - Authorized funds
  - Disbursed Funds
  - Totals
- Moderate Rehabilitation Funding
  - Fiscal Year Awarded
  - Authorized funds
  - Disbursed Funds
  - Totals
- Move to Work
  - Fiscal Year Awarded
  - Authorized funds
  - Disbursed Funds
  - Totals
- Single Room Occupancy
  - Fiscal Year Awarded
  - Authorized funds
  - Disbursed Funds
  - Totals

The Housing Authority Funding section (see Figure 12) is composed of several dialog boxes that help you refine the presented information.

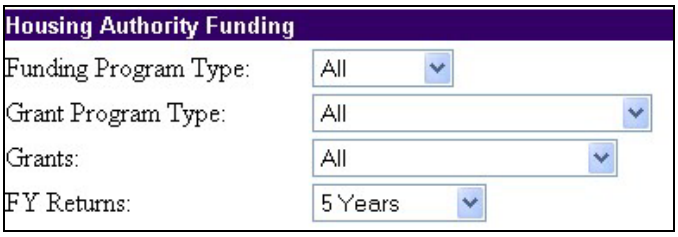


Figure 12: The dialog boxes displayed in the Housing Authority Funding section.

Follow these steps to refine the data presented on the page by program type:

Step	Action/Result
1. Click the **Funding Program Type** dialog box.	The dialog box displays a menu with four options: • All (default) • Low Rent • Section 8 • Combined.
2. Click the program you want the page to display.	The page refreshes to present the selected data. If there is no matching data for the criteria selected, PIC displays the following message: *No funding information available.*

Follow these steps to refine the data presented on the page by the grant program type:

Step	Action/Result
1. Click the **Grant Program Type** dialog box.	The dialog box displays a menu with the following options: • All (default) • Annual Budget Authority • Certificate/Voucher Funding • Competitive Grants • Formula Grants • Mod Rehab Funding • Move to Work • Single Room Occupancy Availability of these options varies for the HA selected.
2. Click the grant program you want the page to display.	The page refreshes to present the selected data. If there is no matching data for the criteria selected, PIC displays the following message: *No funding information available.*

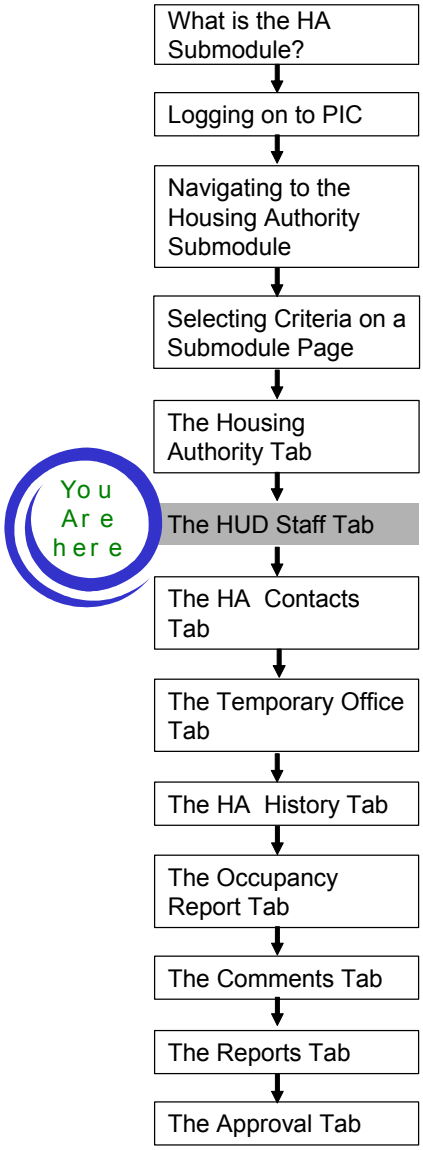
Follow these steps to refine the data presented on the page by the specific grant:

Step	Action/Result
1. Click the **Grant** dialog box.	The dialog box displays a menu with a list of all the grant choices. PIC's default display is all grants.
2. Click the grant you want the page to display (see Appendix B to view a list of all the grants available).	The page refreshes to present the selected data. If there is no matching data for the criteria selected, PIC displays the following message: *No funding information available.*

Follow these steps to refine the data presented on the page by the number of fiscal years included:

Step	Action/Result
1. Click the **FY Returns** dialog box.	The dialog box displays a menu with the following options: • Current Year • 2 Years • 3 Years • 4 Years • 5 Years (default) • 5+ Years
2. Click the number of years you want the page to display.	The page refreshes to present the selected data. If there is no matching data for the criteria selected, PIC displays the following message: *No funding information available.*

The HUD Staff Tab



Click the HUD Staff Tab to access the **HUD Staff Page**.

HUD field office staffs provide a resource for HAs. If a problem arises, the HA can contact the assigned field office staff person whose role covers the problematic area.

This page lists all the HUD field office staff assigned to a selected HA and their current role(s).

It is the field office's responsibility to keep this page up-to-date. If you are a field office PIC user with the proper security access role, you can use this page to assign HUD staff to an HA or remove a staff person from an assignment.

Selecting an HA to View

You can select an HA either on this page or on the **HA List Page**. After selecting the HA, you can view its information on all the other submodule tabs without having to identify it again.

Follow these steps to select a field office HA on the **HA List Page:**

Step	Action/Result
1. Identify the field office HA on the **HA List Page**.	
2. Click the HUD Staff Tab.	PIC refreshes to display the HUD staff assigned to the selected HA.

Follow these steps to select a field office HA on the **HUD Staff Page**.

Step	Action/Result
1. Click the hub containing the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** box (if applicable).	PIC refreshes to display the HUD staff assigned to the selected HA.
3. Click the desired HA in the **Housing Authority** dialog box.	PIC refreshes to display a list of HUD employees assigned to the selected HA.

Information Presented on the HUD Staff Page

The **HUD Staff Page** displays a table listing:

- The name of the HUD staff person assigned to the selected HA.
- The person's role.
- His/her effective start date.
- The Field Office Code for the office he/she works from.

The default sort for the table is by ascending alphabetical last name. Click the role column heading to sort the list by ascending alphabetical role.

Assigning or Removing HUD Staff Roles

From the **HUD Staff Page**, you can assign or remove HUD Staff roles.

Note: The availability of this feature depends on your security access role. Contact your **security administrator** to gain access to this feature.

Follow these steps to assign a role to a field office employee:

Step	Action/Result
1. Click the **Assign/Unassign** hyperlink on the **HUD Staff Page**.	PIC displays the **Staff Assign Roles Page**.
2. Click the staff person you want to assign in the **Available Staff** dialog box (see Figure 13).	**Note:** Only employees entered into the PERIS payroll system are available for assignment.
3. Click the desired role for the selected individual in the **Available Roles** dialog box (see Appendix C for a list of available roles.)	
4. Enter a date in the **Effective Start Date** text box. The date should be in the MM/DD/YYYY format (example: 09/24/2004).	
5. Click the **Right Arrow** button.	PIC displays the entry in the **Assigned Staff Roles** dialog box.
6. Click the **Save** button.	PIC displays the information in the table on the **HUD Staff Page**.

One person can be assigned more than one role. Simply repeat this process, but assign a new role to the individual.

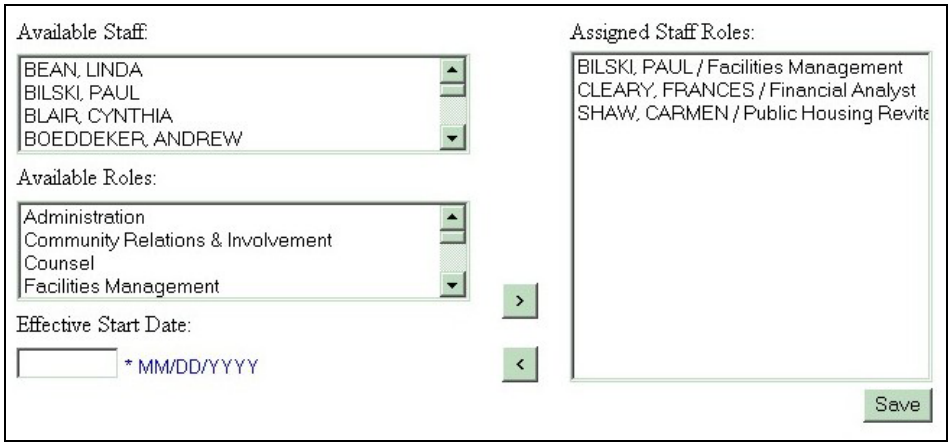
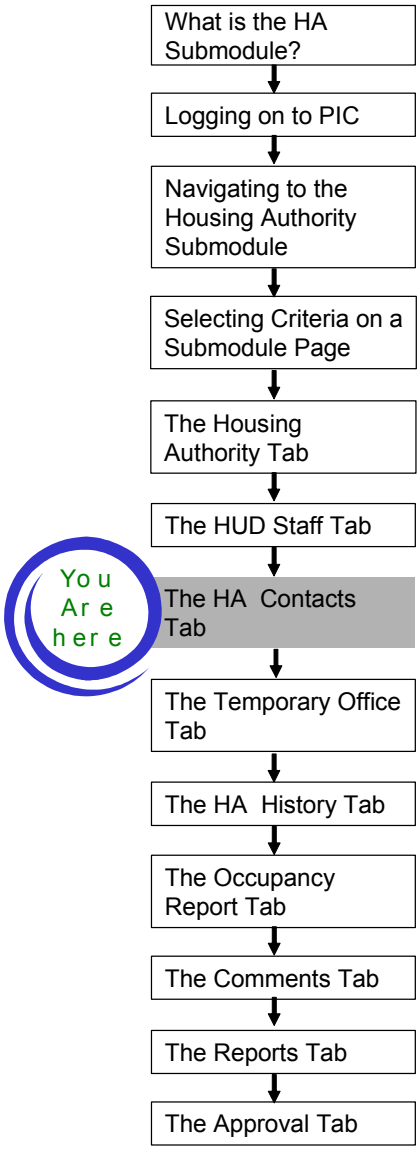


*Figure 13: The **Staff Assign Roles Page**.*

Follow these steps to remove a role:

Step	Action/Result
1. Click the **Assign/Unassign** hyperlink on the **HUD Staff Page**.	PIC displays the **Staff Assign Roles Page**.
2. Click the person and the role you wish to remove in the **Assigned Staff Poles** dialog box.	
3. Click the **Left Arrow** button.	The role is displayed in the available roles dialog box.
4. Click the **Save** button.	PIC removes the information from the table on the **HUD Staff Page**.

The HA Contacts Tab



There are three subtabs included in the HA Contacts Tab:

- **The HA Contact List Page** contains contact name, HA role, phone number, and email address information. This is the start page for the HA Contact Tab.
- **The Contact Details Page** contains Web site, fax number, and other data in addition to what is included on the Contact List. Also, users with the proper security access role can assign or remove HA roles on this page.
- **The HA Contact Address Page** contains the contact's physical and mailing addresses. Users with the proper security access role can edit the HA address information from this page.

The contact information presented in this tab is the primary HA contact resource for HUD's Office of Public and Indian Housing. It is the HA's responsibility to keep this page up-to-date. Keeping this information updated is paramount for ensuring the successful flow of HUD communications.

The HA Contact List

Click the HA Contact Tab to access the **HA Contact List Page**.

This page displays a list of all the identified contacts for the selected HA. It also displays any available phone numbers or email addresses for the contacts.

Selecting an HA to View

You can select an HA either on this page or on the **HA List Page**. After selecting the HA, you can view its information on all the other submodule tabs without having to identify it again.

Follow these steps to select a field office HA on the **HA List Page:**

Step	Action/Result
1. Identify the field office HA on the **HA List Page**.	
2. Click the HA Contacts Tab.	PIC refreshes to display the HA contacts assigned to the selected HA.

Follow these steps to select a field office HA on the **HA Contacts List Page**.

Step	Action/Result
1. Click the hub containing the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** box (if applicable).	
3. Click the desired HA in the **Housing Authority** dialog box.	PIC refreshes to display a list of HA contacts assigned to the selected HA.

Information Presented on the HA Contacts List Page

The HA Contact List is composed of a table that displays the following information (see Figure 14 for an example):

- Contact Name
- Role
- Phone Number
- Email Address

Records 1 to 16 of 16

Contact ▲	Role	Phone Number	Email
Beardsley, Richard	Assistant Executive Director, Miscellaneous	(602) 261-8035	richard.beardsley@phoenix.gov
Bilsten, Peggy	Board Member	(602) 262-7441	

Figure 14: An example of an HA Contact List.

The entries in the Contact Name and Email Address columns are hyperlinked.

- Click a **Contact Name** to view that person's contact details.
- Click an **Email Address** to send that person an email.

If the number of contacts exceeds one page, a hyperlink titled **Next** is displayed at the bottom of the table. Click it to view the remaining records. After clicking the **Next** hyperlink, you can also click a hyperlink titled **Previous** to return to the previous page.

Creating an HA Contact

If you have the proper security access role, you can add a contact to the list from the **HA Contacts List Page**.

Note: Contact your **security administrator** to gain access to this feature.

Follow these steps to add a contact:

Step	Action/Result
1. Click the **Create Contact** hyperlink.	PIC displays the **Create Contact Page**.
2. Enter the data for the following fields: • **First Name*** • **Last Name*** • **Salutation*** • **Phone Number*** • **Fax Number** • **TTY Number** • **Email Address** • **Role*** • **Effective Date*** (of the role assigned) • **Effective End Date** (of the role assigned)	For the **Salutation** dialog box, choose from the following: • Mr. • Mrs. • Ms. • Dr. For the **Role** dialog box, choose a role from the options menu. (See Appendix C for a complete list of available roles.) **Note: PIC coaches** encourage you to fill out as much of this data as possible (not just the required fields).
3. Click the **Save** button. You can also click the **Cancel** button to undo the entry.	If saved, PIC displays an updated HA Contact List. If you click **Cancel**, PIC returns to the previous HA Contact List.

HA Contact Details

Click a **Contact Name** hyperlink on the **HA Contact List Page** to access the **HA Contact Details Page** for the selected person.

It displays a more detailed view of the person's contact information than the HA Contact List. It also enables users with the proper security access (normally HA users) to edit the contact data, end existing HA contact roles, and create new contact roles.

Information Presented in the HA Contact Details Page

The header contains all the HA identifier information.

- HQ Division (national access users only)
- HQ Office (national access users only)
- Hub
- Field Office
- Housing Authority

The Housing Authority Contact Details section contains in-depth contact information for the person selected.

- First Name
- Last Name
- Salutation
- Phone Number
- Fax Number
- TTY Number
- Email Address: The Email Address entry is hyperlinked. Click it to send an email to the selected employee.

The Role Table (see Figure 15) contains all current and past roles for the person, plus the start and end dates of those roles (if applicable).

Role	Effective Date	Effective End Date
Assistant Executive Director	01/01/2002	
Miscellaneous	01/01/2002	

*Figure 15: The Role Table on the **HA Contact Details Page**.*

Modifying HA Contact Details

If you have the proper security access role, you can modify the details presented on the page.

Note: Contact your **security administrator** if you want to gain access to this feature.

Follow these steps to modify contact details:

Step	Action/Result
1. Click the **Modify Contact Details** hyperlink on the **HA Contact Detail Page**.	
2. Edit or update the following data: • **First Name*** • **Last Name*** • **Salutation*** • **Phone Number*** • **Fax Number** • **TTY Number** • **Email Address**	The * designates a required field. You cannot save the contact information if you do not enter this data. For the **Salutation** dialog box, choose from the following: • Mr. • Mrs. • Ms. • Dr. Even though some fields are not required, **PIC coaches** strongly recommend keeping all of this information up-to-date.
3. Click the **Save** button to update the entry. You can also click the **Cancel** button to undo any edits you have made.	The updated entry is displayed in the **HA Contact Details Page** and the **HA Contact List Page** if necessary. If you click **Cancel**, PIC returns to the previous **HA Contact Details Page**.

Adding or Ending Roles on the Modify HA Details Page

Many people involved with an HA change roles often. Examples include:

- Getting promoted.
- Leaving to work at another location.
- Making a lateral move to another role within the HA.

Follow these steps to add a role for the selected individual. The * designates a required field. You cannot save the contact information if you do not enter this data.

Step	Action/Result
1. Click the person you wish to assign a role to in the HA Contact List.	PIC displays the **HA Contact Details Page** for the selected individual.
2. Click the **Modify Contact Details** hyperlink.	PIC displays the **Modify Contact Details Page**.
3. Click the **Add Role** hyperlink on the page.	PIC refreshes the Role Table so you can add a new role (see Figure 16).
4. Click the new role* in the **Role** dialog box. See Appendix C for a complete list of available roles.	
5. Type a date in the in the **Effective Date*** text box. The date should be in the MM/DD/YYYY format (example: 10/09/2003).	
6. Click the **Save** button.	PIC refreshes the **HA Contact Details Page** to include the added role.

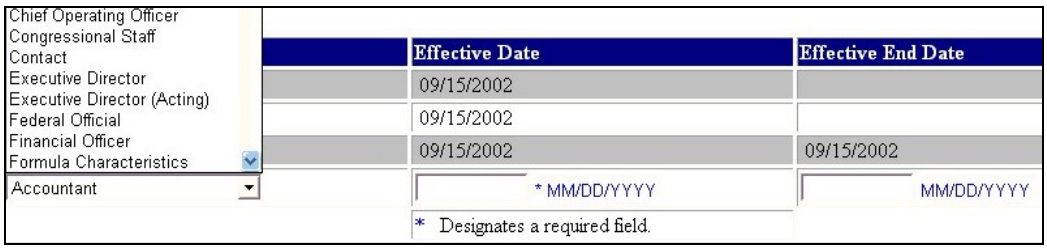


*Figure 16: The Add Role fields in the **Modify HA Details Page**.*

Follow these steps to conclude or terminate a role for the selected individual:

Step	Action/Result
1. Click the person you wish to assign a role to in the HA Contact List.	PIC displays the **HA Contact Details Page** for the selected individual.
2. Click the **Modify Contact Details** hyperlink.	PIC displays the **Modify Contact Details Page**.
3. Click the specific **Role** hyperlink in the Role Table.	PIC refreshes the Role Table so you can end a role.
4. Type in the Effective End Date.	
5. Click the **Save** button.	PIC refreshes the **HA Contact Details Page** to display the updated information. If the role ended anytime before the current date, it will not be listed as an active hyperlink.

HA Contact Address

Click the Address subtab on the **HA Contact Details Page** to access the **HA Contact Address Page**. It contains the physical and mailing address information for the selected contact.

Physical versus Mailing Address

A physical address represents the HA contact's location (example: In an emergency, the rescue squad would arrive at the HA contact's physical address).

If different from the physical address, a mailing address represents an alternate location where the HA contact's mail is delivered (example: A PO Box address). A mailing address is only required if correspondence is not sent to the contact's physical address.

PIC coaches recommend always keeping these addresses up-to-date.

The default display is the mailing address. Follow these steps to display the contact's physical address:

Step	Action/Result
1. Click the **Select Address Type** dialog box.	The dialog box displays a menu with two options: Mailing and Physical.
2. Click Physical.	The page refreshes to present the mailing address.

Information Presented on the HA Contact Address Page

The header includes the following HA identifier information:

- HQ Division (national access users only)
- HQ Office (national access users only)
- Hub
- Field Office
- HA

The Address Information section contains the following HA Contact physical or mailing address data:

- Address Line 1
- Address Line 2
- County Name
- City/Locality
- State
- Zip Code

Modifying an HA Contact Address

If you have the proper security access role, you can add to or edit the information presented on the page.

Note: Contact your **security administrator** if you want to gain access to this feature.

Follow these steps to edit an address:

Step	Action/Result
1. Select either the mailing or physical address on the **HA Contact Address Page**.	
2. Click the **Modify Address** hyperlink.	PIC displays the **Modify HA Contact Address Page** (see Figure 17). The fields are populated with existing data. If there is no existing data, the fields are blank.
3. Edit the information in the following fields as appropriate: • **Address Line 1*** • **Address Line 2** (if needed) • **County Name** • **City/Locality*** • **State*** • **Zip Code***	The * designates a required field. You cannot save the contact information if you do not enter this data. For the **State** dialog box, choose a state from the dialog box menu.
4. Click the **Save** button to submit the changes. You can also click the **Cancel** button to undo any changes you have made.	PIC refreshes to the **HA Address Page**. If you click **Cancel**, PIC returns to the previous **HA Contact Address Page**.

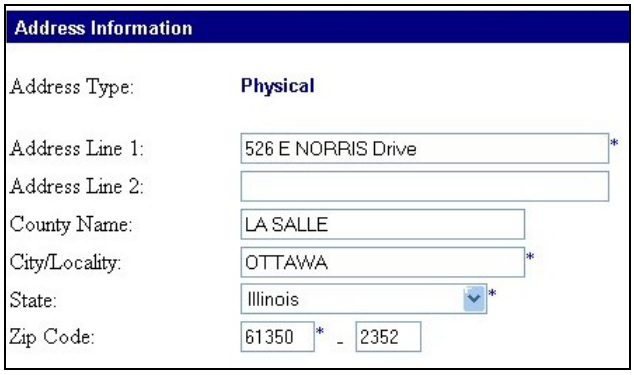
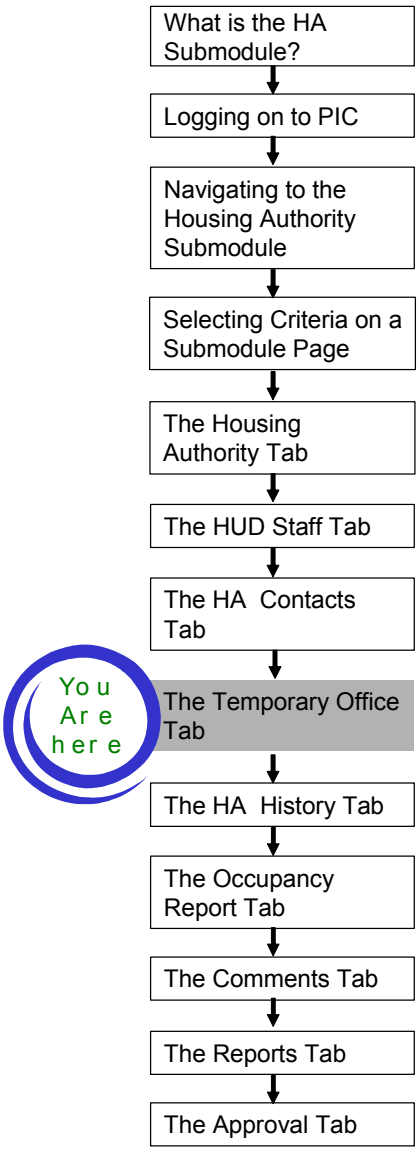


*Figure 17: The fields on the **Modify HA Contact Address Page**.*

The Temporary Office Tab



Click the Temporary Office Tab to access the **Temporary Office Page**.

For various reasons, HAs can be assigned to a temporary field office. Examples include the following situations:

- A natural disaster renders a field office inoperable.
- A field office loses staff and is unable to keep up normal operations.
- A problem arises that the current field office staff does not have the required expertise to deal with.

The assignment is based on resource availability, the particular skills needed to address a problematic issue, and other situation contingencies. It is the field office's responsibility to make these decisions and record them on this page.

The **Temporary Office Page** lists any current or historical temporary office assignments for the selected HA (if there are any), the reasons for the assignment, and the significant assignment dates.

Selecting an HA to View

You can select an HA either on this page or on the **HA List Page**. After selecting the HA, you can view its information on all the other submodule tabs without having to identify it again.

Follow these steps to select a field office HA on the **HA List Page:**

Step	Action/Result
1. Select the desired field office HA on the **HA List Page**.	
2. Click the Temporary Office Tab.	PIC refreshes to display the temporary office records for the selected HA.

Follow these steps to select a field office HA on the **Temporary Office Page:**

Step	Action/Result
1. Click the hub containing the desired field office in the **Hub** dialog box.	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** box.	
3. Click the desired HA in the **Housing Authority** dialog box.	PIC refreshes to display the temporary office records for the selected HA.

Information Presented on the Temporary Office Page

The Temporary Office Assignment List displays all of the assignments the selected HA received.

- Assigned To (name of field office)
- Effective Date
- Target End Date
- Actual End Date (if necessary)
- Reason (for the assignment)

PIC displays the following message if there are no temporary office assignments for the selected HA: *Did not find any temporary office assignments for this HA*.

Creating a Temporary Office Assignment

If you are a field office user with the proper security access role, you have the ability to create temporary office assignments for an HA in your jurisdiction.

Reasons for an assignment include:

- A Failing PHAS Score
  - An HA earns an overall PHAS score of 59.
  - An HA scores a 15 on the Physical Assessment.
- A Failing Memorandum of Agreement
  - An HA departs from the agreement it makes with its field office.
- A Failing SEMAP Score
  - An HA Earns a Troubled Designation from SEMAP.
- A Natural Disaster
  - The normal field office is rendered inoperable due to flooding.
- An Inhibiting Workload or Staffing Issue
  - Several people leave their jobs at once.
- A Failing Public Housing Management Assessment Program (PHMAP) Score
  - An HA earns a total weighted score of 45.

Note: PHAS replaced the PHMAP assessment. The PHMAP reason is still available for backlogging purposes.

Follow these steps to assign a temporary office. The * designates a required field. You cannot create the assignment if you do not enter this data.

Step	Action/Result
1. Click the **Create a Temporary Assignment** hyperlink on the **Temporary Office Page**.	PIC displays the **Create a Temporary Assignment Page** (see Figure 18).
2. Click the field office you want to assign the HA to in the **Assign To** dialog box.*	
3. Type a date (the date the assignment starts) in the **Effective Date** text box.* The date should be in the MM/DD/YYYY format.	
4. Type a date in the **Target End Date** text box (if applicable). The date should be in the MM/DD/YYYY format.	
5. Click one of the following reasons for the assignment in the **Reason for the Assignment** dialog box*: • Failed MOA • Failed PHAS • Failed PHMAP • Failed SEMAP • Natural Disaster • Workload/Staffing Issue	
6. Click the **Create** button to create the assignment. You can also Click the **Cancel** button to undo any assignment information entries.	If you click **Create**, PIC refreshes the **Temporary Office Page** with the new data. If you click **Cancel**, PIC returns to the **Temporary Office Page**.

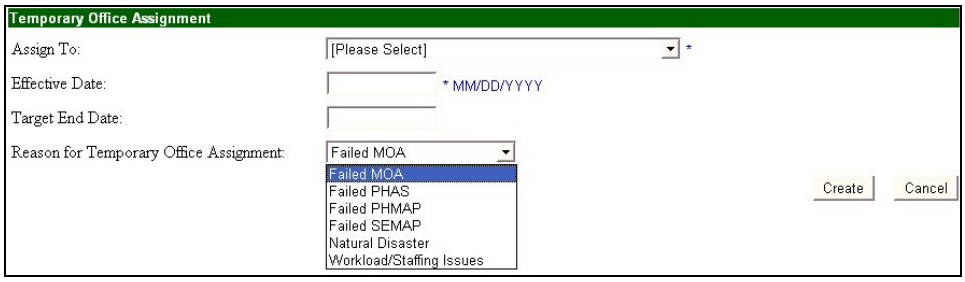
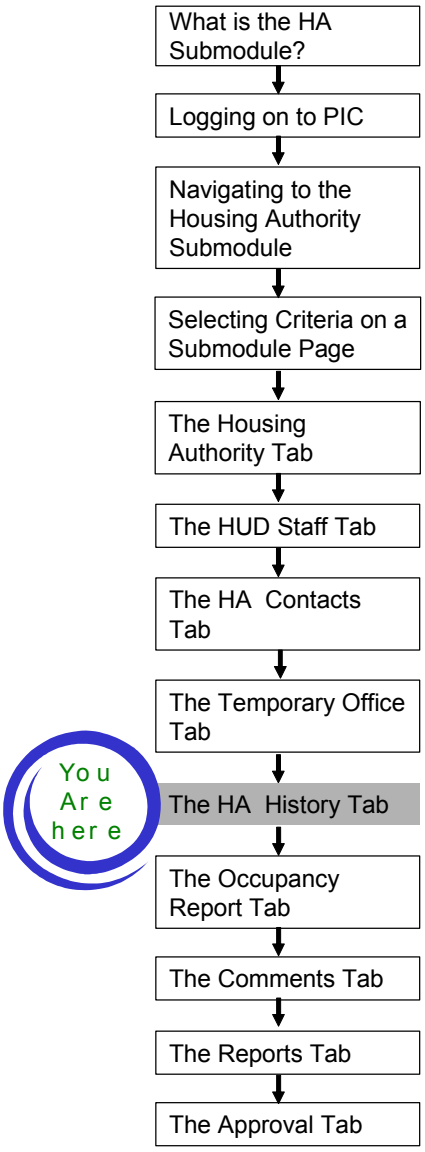


*Figure 18: The Create a Temporary Office fields. The **Reasons for Temporary Office Assignment** dialog box menu items are displayed.*

The HA History Tab



Click the HA History Tab to access the **HA History Page**.

This page draws from several sources to record and display significant events performed by the selected HA. The following table presents the events tracked on this page and the sources.

Event	Source
Activity Status Change	**HA Details Page**
Building/Unit Information Approval	**Development Submodule**
Executive Director Change	**HA Contact Page**
FY End Date Change	**HA Details Page**
FY End Date Correction	**HA Details Page**
HA Formal Name Change	**HA Details Page**
PHAS Designation Change	REAC
Program Type Change	**HA Details Page**
Program Type Code Correction	**HA Details Page**
SEMAP Designation Change	SEMAP

Selecting an HA to View

You can select an HA either on this page or on the **HA List Page**. After selecting the HA, you can view its information on all the other submodule tabs without having to identify it again.

Follow these steps to select a field office HA on the **HA List Page:**

Step	Action/Result
1. Select the desired field office HA on the **HA List Page**.	
2. Click the HA History Tab.	PIC refreshes to display the historical records for the selected HA.

Follow these steps to select a field office HA on the **HA History Page:**

Step	Action/Result
1. Click the hub containing the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** box (if applicable).	
3. Click the desired HA in the **Housing Authority** dialog box.	PIC refreshes to display the historical records for the selected HA.

History Filters

PIC provides filters to help refine your search for a particular historical event. The filters are displayed in the middle of the page (see Figure 19). You can choose either a specific event trigger (reason for the archive creation) or a specific date range. You can also use both filters on the same search.

Figure 19: The HA History filters.

Follow these steps to refine your search using an archive trigger:

Step	Action/Result
1. Click one of the following options from the **Trigger** dialog box (the trigger source): • Activity Status Change • Building/Unit Information Approval • Executive Director Change • FY End Date Change • FY End Date Correction • HA Formal Name Change • PHAS Designation Change • Program Type Change • Program Type Code Correction • SEMAP Designation Change	
2. Click the **Retrieve** button.	The Archive List redisplays to show only the records with the selected trigger.

Follow these steps to refine your search using a specific date range:

Step	Action/Result
1. Type the date range into the **Date** text boxes. The dates should be in the MM/DD/YYYY format (example: 09/24/2002 to 09/24/2003).	
2. Click the **Retrieve** button.	The Archive List redisplays to show only the records occurring within the dates specified.

Information Presented on the HA History Page

The Archive List is the **HA History Page's** main output (see Figure 20). The list consists of three columns:

- Archive Date: The date the event took place.
- Archive Trigger: The event.
- Last Update User: The person who entered the action or event in PIC.

Records 1 to 2 of 2

Archive Date ▼	Archive Trigger ▲	Last Update User
09/28/2003	Building/Unit Information Approval	TAWNIA TAYLOR
09/10/2001	Building/Unit Information Approval	TAWNIA TAYLOR

*Figure 20: The Archive List on the **HA History Page**.*

The default display is by descending chronological archive date. Click the Archive Trigger column heading to sort by ascending alphabetical trigger.

Click the hyperlinked **Archive Date** to view the specific HA details at the time of the archive trigger.

The HA History Details Page

Click an **Archive Date** hyperlink to access this page. It displays HA details at the time of the event.

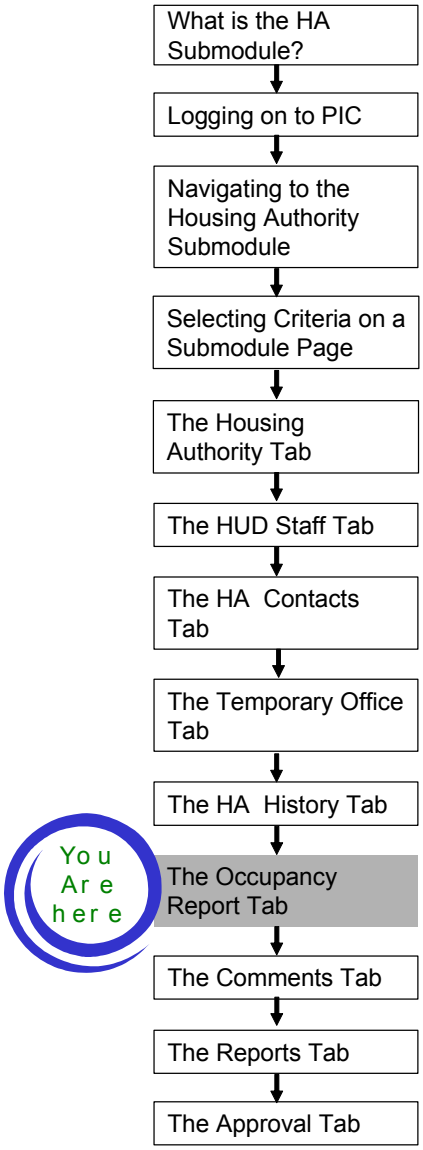
Note: This page is under review. In the future, the data will provide more information about the historical record.

The page contains the following data:

- Archive Record Trigger
- Creation Date
- HA Code
- Common Name
- Formal Name
- Organizational Assignment (if necessary)
- HA Program Type
- Activity Status
- HA Fiscal Year End
- Executive Director (name)
- Section 8 Increments
- Section 8 Units
- Low Rent Development Projects
- Low Rent Development Units
- Low Rent Management Projects
- Low Rent Management Units
- Low Rent Total Projects
- Low Rent Total Units
- Last Modified User

To get back to the **HA History Page**, click the **List** subtab at the top of the **HA History Page**.

The Occupancy Report Tab



Otherwise known as Form HUD-51234, an Occupancy Report is a vital source of Low Rent program housing data for HUD Headquarters. It is used to:

- Calculate percentages of families for which a Form-50058 has been submitted (number of occupied units versus number of Form-50058s submitted).
- Locate HAs in need of technical assistance.
- Identify and rationalize areas of vacancy.

The tab includes the following subtabs:

- **The Occupancy Report List:** This subtab displays the most recent Occupancy Report submission for the selected HA. It also enables users with the proper security access role to approve, reject, or modify the submission.
- **The Occupancy Report History:** This subtab provides a list of previously-approved Occupancy Reports for the selected HA. It also enables users with the proper security access role to delve into the occupancy history of specific developments.

PIC's default display is the **Occupancy Report List Page**.

Note: Section 8 HAs do not have developments and are not required to submit occupancy information.

Occupancy Report Submission Schedule

HUD requires HAs to submit Occupancy Reports in PIC six months prior to the start of the HA's fiscal year. The report shows the HA's occupancy at their FY midpoint.

In the Occupancy Report Tab, the FY midpoint is called the Report Period End Date. The following table displays the Report Period End Dates for HAs by fiscal year.

HA Fiscal Year Start Date	Report Period End Date
October 1	March 31
January 1	June 30
April 1	September 30
July 1	December 31
Example An HA with an FY beginning October 1, 2004, will report occupancy data as it is on March 31, 2005, for FY05.	

Note: HUD field offices encourage HAs to submit their Occupancy Reports as close to the Report Period End Date as possible. Ideally, HAs should not exceed one month past the date to submit the data.

If it is your job to review Occupancy Reports, do not approve any report with Report Period End dates in the future.

Additional reports can be submitted at the HA's discretion (example: a drastic shift in vacancy rate) or if technical assistance requires more occupancy monitoring (examples: Memorandum of Agreement or Improvement Plans). In these instances, the Report Period End Date should be worked out with the field office.

Complete and accurate sets of Occupancy Reports can show important trends and alert HUD and HA staff of the need for appropriate action. This process can lead to maximum occupancy and favorable performance scores for HAs.

The Occupancy Report List

Click the **Occupancy Report Tab** to access the **Occupancy Report List Page**.

If you are a Hub or PC user, the **Occupancy Report List Page** enables you to accept or reject submitted Occupancy Reports. Some users can also modify reports.

Check the submodule often to expedite the approval process. Approving Occupancy Report submissions on time can positively affect an HA's performance score.

Note: A system is in development that will notify you when an HA has submitted a report.

Selecting an HA to View

You can select an HA either on this page or on the **HA List Page**. After selecting the HA, you can view its information on all the other submodule tabs without having to identify it again.

Follow these steps to select a field office HA on the **HA List Page**:

Step	Action/Result
1. Select the desired field office HA on the **HA List Page**.	
2. Click the Occupancy Report Tab.	PIC refreshes to display the selected HA's Occupancy Report Submission.

Follow these steps to select a field office HA on the **Occupancy Report List Page:**

Step	Action/Result
1. Click the hub containing the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** box.	
3. Click the desired HA in the **Housing Authority** dialog box.	PIC refreshes to display the historical records for the selected HA.

Information Presented on the Occupancy Report List Page

The Housing Authority Occupancy section displays:

- The Report Period End Date
- The Status View: all records should be submitted for approval
- The Occupancy Data Table

The HA Occupancy Data Table displays all the data contained in a submitted Occupancy Report.

- Development Name
- Development Number
- Total Project Actual Contributions Contact (ACC) Units (a)
- Total Occupied Employee Units (b)
- Total Non Dwelling Units (c)
- Total Units Available for Occupancy (d = a minus b minus c)
- Total Vacant Units (e)
- Total Units Occupied by Tenants (f = d minus e)
- Status: Submitted for Approval

Total Units Available for Occupancy Formula Example

A development has 50 ACC units (a).

- Two units are occupied by employees (b).
- Another unit is Non Dwelling (c).

To find out the total units available for occupancy in this development (d), follow this formula: d = a - b - c.

Answer: 50 - 2 - 1 = 47 total units available for occupancy.

The green numbers along the top of each row indicate data from the last approved submission.

The entries in the Development Name column are hyperlinked if you have the security access role to edit open Occupancy Report data (see page 57 for more information).

In most cases, the sum of the total Project ACC Units in a report will match the following data:

- The Low Rent Units number on the **Housing Authority List Page**.
- The Total Unit Count plus Total Non Dwelling Units on the **HA Details Page**.
- The Total Units displayed on the **HA Inventory Page**.

If the numbers do not match, probable causes include:

- An outdated Occupancy Report draft. The data on the other pages is taken from the **Development Submodule** and is current. Occupancy Reports can be several years old. Check the Report Period End Date of the Occupancy Report draft.
- A system mistake. There may be an error calculating the numbers. If you believe this is the case, contact PICHelp for guidance.

The default sort for this table is ascending alphabetical development name. Click the Development Number column heading to sort by ascending alphanumeric development number.

Approving an Occupancy Report

The decision to accept, reject, or modify an Occupancy Report should be based on your knowledge of the HA's occupancy status. Independent sources such as the Vacancy/Occupancy and Unit Reports in the **Development Submodule** can give you a basis of knowledge concerning an HA's occupancy.

When you approve the Occupancy Report in PIC, you are:

- Acknowledging its receipt.
- Saying it does not contradict what the office already knows about the HA (e.g. the data is similar to the HA Plan).

You are not approving it for being precisely accurate (you do not have information available to you to do so).

Follow these steps to accept an Occupancy Report submission:

Step	Action/Result
1. Access the **Occupancy Report List Page**.	PIC displays an **Approve** and a **Reject** button at the bottom of the table.
2. Review the Occupancy Report information after selecting an HA.	
3. Click the **Approve** button if the submission is accurate.	The report is complete and may be viewed on the **Occupancy Report History Page** subtab. Upon reentering the **Occupancy Report** business function, the HA can begin the process of creating a new report.

Rejecting an Occupancy Report

Follow these steps to reject an Occupancy Report:

Step	Action/Result
1. Access the **Occupancy Report List Page**.	PIC displays an **Approve** and a **Reject** button at the bottom of the table.
2. Review the Occupancy Report information after selecting an HA.	There is an **Approve** and a **Reject** button at the bottom of the table.
3. Click the **Reject** button if you find errors.	A Reject column is displayed on the data table. It allows you to select the particular development entries you would like to reject.
4. Click the checkbox next to the development(s) with the erroneous data.	A check is displayed next to the selected development(s).
5. Click the button titled **Reject PD's**.	The status of the Occupancy Report changes back to Draft for the HA user. The HA then is responsible for correcting the rejected entries and resubmitting the information.

Modifying an Open Occupancy Report Draft

Occupancy levels in developments are not static. If you have the proper security access role, you can edit a report not yet submitted for approval.

Note: Contact your **security administrator** to gain access to this feature.

Follow these steps to modify an open Occupancy Report:

Step	Action/Result
1. Click the **Development Name** hyperlink of the development you want to edit on the Occupancy Report Data Table.	The page refreshes. The selected record is highlighted in yellow (see Figure 21).
2. Edit the information in any of the following text boxes: • **Total Occupied Employee Units** • **Total Non Dwelling Units** • **Total Vacant Units**	The system automatically calculates the **Total Units Available for Occupancy** and **Total Units Occupied by Tenant** textbox data based on the information you enter. **Note:** The **Total Vacant Units** category includes any unit vacant for any reason, including modernization or demolition and disposition. HUD HQ will know if the vacancy rate is affected by external factors.
3. Click the **Save Draft** button after reviewing all entries for accuracy. You can also click the **Cancel** button to erase any edit you have made.	PIC returns you to the **Occupancy Report List Page**. If you click **Cancel**, PIC returns to the previous report draft.
4. Repeat this process for another development if its information is erroneous.	

Development Name ▲	Dev. Number ▲	Projected ACC Units (a)	Occupied Employee Units (b)	Non Dwl. Units (c)	Available for Occupancy (d=a-b-c)	Vacant Units (e)	Occupied by Tenants (f=d-e)	Reason
CEDAR TERRAC NORTH	IA002002	48 48	0 0	0 0	48 48	0 1	48 47	Annual Submission
CEDAR TERRACE SOUTH	IA002001	80 80	0 0	0 0	80 80	0 3	80 77	Annual Submission

Figure 21: The fields available for editing in an Occupancy Data Table.

The Occupancy Report History

Click the History subtab on the **Occupancy Report List Page** to access the **Occupancy Report History Page** (see Figure 22).

Figure 22: The Occupancy Report History subtab.

It lists the previously approved Occupancy Reports for the selected HA. It also enables you to view specific development occupancy data included in the previous reports.

Selecting an HA to View

You can select an HA either on this page or on the **HA List Page**. After selecting the HA, you can view its information on all the other submodule tabs without having to identify it again.

Follow these steps to select a field office HA on the **HA List Page**:

Step	Action/Result
1. Select the desired field office HA on the **HA List Page**.	
2. Click the Occupancy Report Tab.	PIC refreshes to display the selected HA's Occupancy Report List.
3. Click the History subtab.	PIC displays the historical Occupancy Report records for the selected HA.

Follow these steps to select a field office HA on the **Occupancy Report History Page**:

Step	Action/Result
1. Click the hub containing the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** box (if applicable).	
3. Click the desired HA in the **Housing Authority** dialog box.	PIC refreshes to display the Occupancy Report List for the selected HA.
4. Click the History subtab.	PIC displays the historical Occupancy Report records for the selected HA.

Information Presented on the Occupancy Report History Page

The default view for the page is the Occupancy Submission History Report. This page lists the significant dates in an HA's Occupancy Report submission history.

The table on the page includes the following submission information:

- Report Period End Date
- Draft Start Date: The date the HA created the report.
- Submitted for Approval Date: The date the HA submitted the report to the field office for approval.
- Rejected Date (if applicable): The date the field office rejected the draft.
- Approval Date (if applicable): The date the field office approved the draft.

Occupancy Report Submission Histories for Individual Developments

Along with viewing the submission history for the HA, you can also view the development data for the HA's previously approved Occupancy Reports.

Follow these steps to view individual development data:

Step	Action/Result
1. Click the **Report Type** dialog box on the **Occupancy Report History Page**.	Two options are displayed: Housing Authority and Physical Developments.
2. Click Physical Developments.	PIC refreshes to display an Occupancy Submission History Report List for physical developments (see Figure 23). The list includes the following: • A column of checkboxes • Development Name • Development Number • Last Approved Occupancy Report Date The default sort for the Development Occupancy Submission History Table is descending alphabetical development name. Click the Development Number column heading to sort by ascending alphanumeric development number.
3. Click the checkbox next to the development(s) you want to review. To select all or remove all checks, click the **Select/Deselect All** checkbox.	A check is displayed in the box(es).
4. Click the button titled **Generate History Report**.	PIC displays the historical report(s) for the selected development(s).

	Development Name ▲	Development Number ▲	Last Approved Occupancy Report Date
☐	BRIARFIELD HOMES	MS001001	03/31/2001
☐	HATTIESBURG PUBLIC HOUSING	MS001003	03/31/2001
☐	ROBERTSON PLACE	MS001002	03/31/2001
☐	Select/Deselect All		

Generate History Report

Figure 23: Physical Development Occupancy Submission History Report List.

Information Presented in an Occupancy Submission History Report for Individual Developments

The Development Historical Occupancy Report contains the following data:

- Development Name
- Development Number
- Report Period End Date
- Total Project ACC Units (a)
- Total Occupied Employee Units (b)
- Total Non Dwelling Units (c)
- Total Units Available for Occupancy (d = a minus b minus c)
- Total Vacant Units (e)
- Total Units Occupied by Tenants (f = d minus e)
- Reason for the Submission

Total Units Available for Occupancy Formula Example

A development has 50 ACC units (a).

- Two units are occupied by employees (b).
- Another unit is Non Dwelling (c).

To find out the total units available for occupancy in this development (d), follow this formula: d = a - b - c.

Answer: 50 - 2 - 1 = 47 total units available for occupancy.

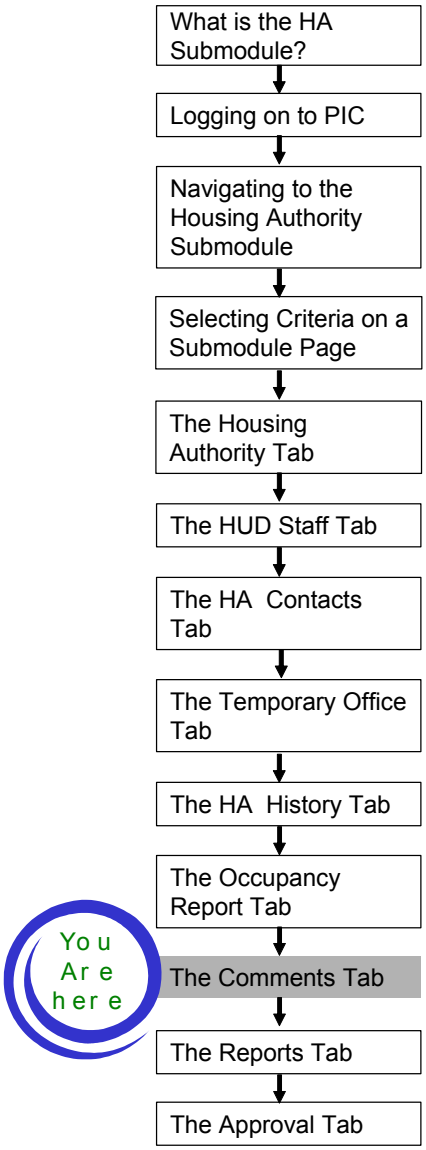
The default sort for the table is descending Report Period End Date.

- Click Development Name to sort the table in ascending alphabetic order by this topic.
- Click Development Number to sort the table in ascending alphanumeric order by this topic.

If the number of entries exceeds one page (generally more than 100 entries), a hyperlink titled **Next** is displayed at the bottom of the table. Click it to view the remaining records. After clicking the **Next** hyperlink, you can also click a hyperlink titled **Previous** to return to the previous page.

Click the **Back to Development List** hyperlink to return to the Development List.

The Comments Tab



Click the Comments Tab (see Figure 24) to access the **Comments List Page**.

*Figure 24: Some **HA Submodule** tabs. The Comments Tab is on the far right.*

There are two types of comments: General and Executive.

General Comments: Submitted by HA or field office users. These comments can be viewed by all users.

Executive Comments: Submitted by field office users only. These comments cannot be seen by HAs.

Comments can include:

- Tasks performed by an HA to address an issue.
- Actions recommended by a field office to correct an HA issue.
- Additional information or special conditions involved with an HA's operations.

The tab enables you to view these comments. If you have the proper security access role, you can also add, delete, or edit comments.

After you click the Comments Tab, PIC displays the **Comments List Page**.

The Comments List Page

This is the default page of the Comments Tab. It displays a list of previously submitted comments for the selected HA.

Selecting an HA to View

You can select an HA either on this page or on the **HA List Page**. After selecting the HA, you can view its information on all the other submodule tabs without having to identify it again.

Follow these steps to select a field office HA on the **HA List Page:**

Step	Action/Result
1. Select the desired field office HA on the **HA List Page**.	
2. Click the Comments Tab.	PIC refreshes to display the **Comments List Page** for the HA selected.

Follow these steps to select a field office HA on the **Comments List Page:**

Step	Action/Result
1. Click the hub containing the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** box (if applicable).	
3. Click the desired HA in the **Housing Authority** dialog box.	PIC refreshes to display the comments for the selected HA.

Sorting Comments

If you have the proper security access role, you can sort the comments with the **Sort By Comment Type** dialog box.

Note: Contact your **security administrator** if you want to gain access to this feature.

Follow these steps to sort the comments by comment type:

Step	Action/Result
1. Click the **Sort By Comment Type** dialog box (see Figure 25).	PIC displays two options: General and Executive.
2. Click the type of comment you wish to view.	
3. Click the desired HA in the **Housing Authority** dialog box.	The page refreshes to display the comment list with the type you selected listed first.

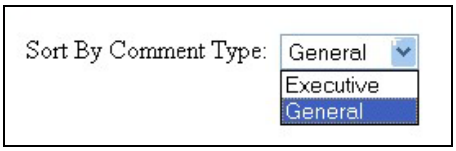


*Figure 25: The **Sort By Comment Type** dialog box.*

Information Presented on the Comments List Page

The comment records are displayed at the bottom of the **Comment List Page**. The records include the date the comment was created and the name of the creator.

Note: All information presented in the Comment List should be supported by facts and evidence.

If there are no comments to present, PIC displays this message: *HA comments not found.*

Deleting a Comment

If you have the proper security access role, you can delete a comment.

Note: Contact your **security administrator** if you want to gain access to this feature.

To delete a comment:

Step	Action/Result
1. Click the **Delete Comment** hyperlink next to the record you want to erase.	The comment is removed from the list.

Adding a Comment

If you have the proper security access role, you can add a comment to the list for the selected HA.

Note: Contact your **security administrator** if you want to gain access to this feature.

Follow these steps to add a comment:

Step	Action/Result
1. Click the comment type you want to submit in the **Comment Type** dialog box: General or Executive. This feature is available only to users who have the security access role to see both types of comments.	
2. Click the **Add Comment** hyperlink.	PIC displays the **Add Comment Page** containing a blank text box. The creation date field automatically inserts the current date.
3. Type the comment.	
4. Click the **Save** button. You can also click the **Cancel** button to undo any text additions.	If saved, PIC presents the comment in the Comment List. If you click **Cancel**, PIC returns to the previous Comment List.

Modifying a Comment

If you create a comment, PIC provides a 72-hour window after creation for modification and editing. The comments available to you for editing have a **Modify Comment** hyperlink next to them.

Follow these steps to modify a comment:

Step	Action/Result
1. Click the **Modify Comment** hyperlink for the comment you want to change.	PIC displays the **Modify Comment Page** with the selected comment in a text box.
2. Edit the comment.	
3. Click the **Save** button. You can also click the **Cancel** button to undo any changes.	If saved, PIC displays the edited comment in the Comment List. If you click **Cancel**, PIC returns to the previous Comment List.

The Reports Tab

What is the HA Submodule?
Logging on to PIC
Navigating to the Housing Authority Submodule
Selecting Criteria on a Submodule Page
The Housing Authority Tab
The HUD Staff Tab
The HA Contacts Tab
The Temporary Office Tab
The HA History Tab
The Occupancy Report Tab
The Comments Tab
You Are here
The Reports Tab
The Approval Tab

The subtabs in the Reports Tab enable you to generate the following reports (see Figure 26):

- HA Contact List: This report contains customized contact lists for an HA or field office.
- HA Profile: This report contains tailored HA profiles that include summaries of an HA's funding, inventory, performance, and more.
- HA: This report provides Capital Fund Report contact information for the selected HA.
- HA Summary: This report provides a detailed look at an HA's development and unit portfolio.
- Development Summary: This report provides contact and unit information for every development in an HA.
- Task Status: This report displays the FCR Status for a selected HA.

Figure 26: The subtabs available in the Reports Tab.

Note: The availability of these reports depends on your security access role. Contact your **security administrator** if you wish to gain access to a report you are missing.

PIC's default display is the **HA Contact List Report Page**.

The HA Contact List Report

Click the Reports Tab to access the **HA Contact List Report Page**. If you are on another Reports Tab subtab, you can also click the HA Contact List subtab to access the page.

An HA Contact List Report provides contact data for people involved with an HA or for the people involved with all HAs in a field office.

Generating an HA Contact List Report

You can generate an HA Contact List Report starting from either the **HA List Page** or the **HA Contact List Report Page**.

Follow these steps to generate a report starting from the **HA List Page:**

Step	Action/Result
1. Identify the field office or the HA to include in the report on the **HA List Page**.	
2. Click the Reports Tab after identifying the HA.	PIC refreshes to display the **HA Contact List Report Page** with the desired HA already identified.
3. Select the filters you want to include in the report (see page 70 for more information).	
4. Click the **Generate Report** button.	PIC generates a report for the selected HA or field office.

Follow these steps to generate a report starting from the **HA Contact List Report Page:**

Step	Action/Result
1. Click the hub that contains the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** box (if applicable).	
3. Click the desired HA in the **Housing Authority** dialog box.	PIC refreshes to display the **HA Contact List Report Page** with the selected HA.
4. Select the filters you want to include in the report (see page 70 for more information).	
5. Click the **Generate Report** button.	PIC generates a report for the selected HA or field office.

The Housing Contact Report Filters

The filters (see Figure 27) enable you to customize the report to specific aspects of the employees.

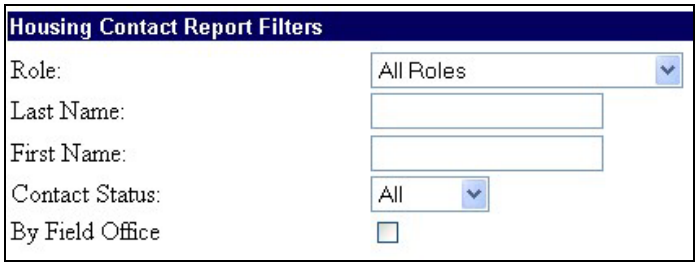


Figure 27: The HA Contact Report filters.

You can apply any combination of the following filters:

- Role: Use the **Role** dialog box to identify the specific role to include in the report. See Appendix C for a complete list of roles. The default selection is All Roles.
- Last Name: Type the desired name in the **Last Name** text box to identify a specific last name to include in the report.
- First Name: Type the desired name in the **First Name** text box to include a specific first name in the report.
- Contact Status: Use the **Contact Status** dialog box to select between the following options: Active, Inactive, or All (default).
- Field Office Scope: Click the **By Field Office** checkbox to widen the report's scope to include all the HA contacts in a field office.

Note: If you leave both the **First Name** and **Last Name** text boxes blank, the report includes all names.

Information Presented in an HA Contact List Report

An HA Contact List Report consists of one table that displays the following information for every contact person in the selected HA or field office:

- Housing Authority Name
- Contact Name
- Status
- Role
- Email
- Mailing Address
- Physical Address
- Phone Number
- Fax Number

This information is pulled from the HA Contacts Tab in the **HA Submodule**. If the information in the report is missing or erroneous, it has been entered incorrectly (or not at all) in the HA Contacts Tab.

You can sort the information in ascending or descending alphabetical order for any of the following columns: HA Name, Contact Name, Status, and Role.

- Click the **Up Arrow** next to the column heading to sort in ascending order. (A to Z)
- Click the **Down Arrow** next to the column heading to sort in descending order. (Z to A)

Each page of the report contains 50 entries. If the number of contacts exceeds one page, a hyperlinked list of numbers is displayed at the bottom of each page containing the number of report pages. You can either click the page number you want, or click the **Arrow** button to go to the next page (see Figure 28).

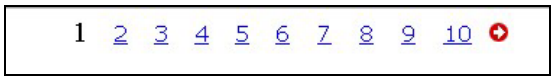


Figure 28: The page scrolling options on an HA Contact List Report.

The report pages are grouped by sets of 10 pages each. If there are more than 10 pages in the report, you can jump to another page set using the **Select Page Set** dialog box.

Follow these steps:

Step	Action/Result
1. Click the **Select Page Set** dialog box.	A list of page sets is displayed. Example: 1 – 10, 11 – 20, and so forth.
2. Click the page set you wish to view.	PIC displays the selected page set starting with the lowest page number in the set.

The Contact List Report screen contains two options for further use of the data (see Figure 29). The options are located on the top right side of the report screen.

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

Figure 29: The options available on the report for further use of the data.

The HA Profile Report

Click the HA Profile subtab on the **HA Contact List Report Page** to access the **HA Profile Report Page**.

An HA Profile Report presents a summary of the details, address, inventory, performance, and funding data for the HA selected.

Generating an HA Profile Report

You can generate an HA Profile Report starting from either the **HA List Page** or the **HA Profile Report Page**.

Follow these steps to generate a report starting from the **HA List Page:**

Step	Action/Result
1. Identify the field office HA to include in the report on the **HA List Page**.	
2. Click the Reports Tab after identifying the HA.	PIC refreshes to display the **HA Contact List Report Page**.
3. Click the HA Profile subtab.	PIC displays the **HA Profile Report Page** with the selected HA already identified.
4. Select the filters you want to include in the report (see page 75 for more information).	
5. Click the **Generate Report** button.	PIC generates an HA Profile Report for the selected HA.

Follow these steps to generate a report starting from the **HA Profile Report Page:**

Step	Action/Result
1. Click the hub that contains the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** dialog box (if applicable).	
3. Click the desired HA in the **Housing Authority** dialog box.	PIC refreshes to display the **HA Contact List Report Page** with the selected HA.
4. Select the filters you want to include in the report (See page 75 for more information).	
5. Click the **Generate Report** button.	PIC generates an HA Profile Report for the selected HA.

The Housing Profile Report Filters

After identifying the HA to view, you can select what you want to include in the report using filters.

Click a filter checkbox to include that category on the report (see Figure 30). You have five options:

- **Details:** This category provides basic program and contact information.
- **Address:** This category provides the HA's physical and mailing addresses.
- **Inventory:** This category displays a summary of unit totals for an HA's program(s).
- **Performance:** This category provides a summary history of the HA's performance scores.
- **Funding:** This category provides the different funding sources for the HA's program(s).

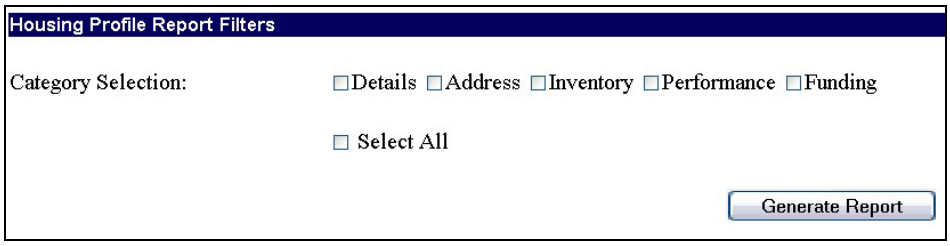


*Figure 30: The HA Profile Report filters. Click the **Generate Report** button after selecting the filters to include in the report.*

To select them all with one click, click the **Select All** checkbox.

Information Presented in an HA Profile Report

The header contains the HA's hub and field office information:

- HA Code
- Field Office
- Hub

After the header, the report contains a series of tables containing the selected filter categories.

HA Details

The HA Details Table contains the following data drawn from the **Housing Authority Tab** (see Figure 31):

- HA Code
- Common Name
- Formal Name
- Activity Status
- HA Program Type
- HA Fiscal year End
- Phone Number
- Fax Number
- TTY Number
- Web Page Address
- Email Address
- Executive Director
- Board Chairperson
- Last Modified User: The last PIC user to enter the **Modify HA Details Page**. It does not necessarily mean this person made any changes.
- Last Modified Date: The last time a PIC user entered the **Modify HA Details Page**. It does not necessarily mean the last time changes were made.

HA Details

HA Code:	PA001	**TTY:**	
Common Name:	HOUSING AUTH CITY OF PITTSBURG	**Web Page Address:**	
Formal Name:	HOUSING AUTH CITY OF PITTSBURGH	**Email Address:**	kinardk@hacp.org
Activity Status:	Active	**Executive Director:**	Keith Kinard
HA Program Type:	Combined	**Board Chair-Person:**	
HA FY End:	12/31	**Last Modified User:**	
Phone #:	(412) 456 5012 ext 0	**Last Modified Date:**	11/18/2003
FAX #:	(412) 456 5027		

Figure 31: The HA Details Table in an HA Profile Report.

HA Address

The HA Address Table contains the following data drawn from the **HA Address Page:**

- Physical Address Information
  - Address Line 1
  - Address Line 2
  - County Name
  - City/Locality
  - State
  - Zip Code
- Mailing Address Information
  - Address Line 1
  - Address Line 2
  - County Name
  - City/Locality
  - State
  - Zip Code

HA Inventory

The HA Inventory Table contains the following information for Low Rent programs. PIC draws the Low Rent inventory data from the **Development Submodule**.

- Developments in Management
- Units in Management
- Developments in Development
- Units in Development
- Total Number of Developments
- Total Number of Units

The HA Inventory Table contains the following information for Section 8 programs. PIC draws the Section 8 inventory data from HUDCAPS.

- Number of Increments by Grant Type
- Number of Units by Grant Type
- Total Number of Increments
- Total Number of Units

HA Performance

The HA Performance Table contains the following data for both Section 8 and Low Rent programs (see Figure 32):

- Assessment Date
- Assessment Type
- Assessment Score
- Designation
- MOA Event or IP (if applicable)
- Temporary Office (if applicable)

HA Performance					
Assessment Date	Assessment Type	Assessment Score	Designation	MOA Event or IP	Temp Office
01/18/2001	PHAS	66.0	Advisory	None Created	Not Assigned
SEMAP Information					
Assessment Date	Assessment Type	Assessment Score	Designation	MOA Event or IP	Temp Office
03/22/2001	SEMAP	85	Standard	None Created	Not Assigned

Figure 32: The Performance Table for an HA with Combined Programs.

PIC draws the Low Rent information from REAC and the Section 8 information from SEMAP.

HA Funding

The Low Rent HA Funding Table contains the following information drawn from LOCCS and HUDCAPS:

- Formula Grant
- HA Fiscal Year
- Authorized Funds
- Disbursed Funds
- Obligated Funds
- Expended Funds

The Section 8 funding table contains the following information:

- Certificate/Voucher
- HA Fiscal Year
- Authorized Funds
- Disbursed Funds

The HA Profile Report screen contains three options for further use of this data. The options are located on the top right side of the screen.

- Print Page: The report prints as a Web page.
- Download in Excel: The report downloads into a Microsoft Excel spreadsheet for further data manipulation.
- Download in Text Format: The report downloads into a .txt file (for use with Notepad or Wordpad) for further data manipulation.

The HA Report

Click the HA Report subtab in the Reports Tab to access **The HA Report Page**.

Note: Access to this report depends on security access role. Contact your **security administrator** if you want access to this report.

An HA Report provides a contact address and Capital Fund Report contact information for the selected HA.

Generating an HA Report

You can generate an HA report either on the **HA List Page** or the **HA Report Page**.

Follow these steps to generate a report starting from the **HA List Page:**

Step	Action/Result
1. Select the desired field office HA on the **HA List Page**.	
2. Click the Reports Tab after identifying the HA.	PIC refreshes to display the **HA Contact List Report Page**.
3. Click the HA Report subtab.	PIC displays the **HA Report Page** with data for the selected HA.

Follow these steps to generate a report starting from the **HA Report Page:**

Step	Action/Result
1. Click the hub that contains the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** box (if applicable).	
3. Click the desired HA in the **Housing Authority** dialog box.	PIC displays the **HA Report Page** with data for the selected HA.

Information Presented in an HA Report

After you select the HA to view, PIC displays the HA Report data below the **Housing Authority** dialog box. The information is split into three sections:

The Status section displays the status of the HA's current fiscal year capital fund submission.

- Started
- Not Started

The HA Address section displays the address where correspondence should be sent (see Figure 33). PIC draws the information from the HA Address subtab in this module.

- Address Type
  - Physical
  - Mailing
- Address Line 1
- Address line 2 (if needed)
- City
- County
- State
- Zip Code

Housing Authority Address	
Address Type:	Mailing
Address Line 1:	407 E BEND Street
Address Line 2:	
City:	DODGE CITY
County:	FORD
State:	KS Kansas
ZIP Code:	67801 - 2178

Figure 33: The HA Address section on an HA Report.

The Housing Authority Capital Fund Data Verification Contact section displays the contact information for the person responsible for the HA's Capital Fund Report submission. Most often, this is the HA's **executive director**. PIC draws this information from the HA Contacts Tab in this submodule.

- Contact Name
- Title
- Salutation
- Phone Number
- Fax Number
- Email Address

The HA Summary Report

Click the HA Summary subtab in the Reports Tab to access the **HA Summary Report Page**.

Note: Access to this report depends on security access role. Contact your **security administrator** if you want access to this report.

An HA Summary Report provides a comprehensive overview of the selected HA's development and unit portfolio.

Generating an HA Summary Report

You can generate an HA Summary Report starting from either the **HA List Page** or the **HA Summary Report Page**.

Follow these steps to generate a report starting from the **HA List Page:**

Step	Action/Result
1. Select the desired field office HA on the **HA List Page**.	
2. Click the Reports Tab after identifying the HA.	PIC refreshes to display the **HA Contact List Report Page**.
3. Click the HA Summary subtab.	PIC displays the **HA Summary Report Page** with the selected HA already identified.

Follow these steps to generate a report starting from the **HA Report Page:**

Step	Action/Result
1. Click the hub that contains the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** box (if applicable).	
3. Click the desired HA in the **Housing Authority** dialog box.	PIC displays the **HA Report Page** with data for the selected HA.

Information Presented in an HA Summary Report

After you select the HA in the **Housing Authority** dialog box, PIC displays the results in a series of tables.

The Development Information Table contains the following data for all the developments in the selected HA:

- Number of Dwelling Structures
- Number of Non Dwelling Structures
- Number of Scattered Site Developments
- Number of Non-Scattered Site Developments
- Total Number of Developments

The Program Type Table contains the number of developments in the HA with:

- Low Income Rental Programs
- Low Income/Fair Market Rent Programs
- Section 23 Bond Financed Programs
- Section 23 Leased Programs
- Turnkey III Programs

The Development Method Table contains the number of:

- Acquisition without Rehabilitation Developments
- Major Reconstruction of Obsolete Public Housing Projects (MROP) Developments
- New Construction Developments
- New Construction Turnkey Developments
- Conventional New Construction Developments
- Conventional Rehabilitation Developments
- Turnkey Rehabilitation Developments

The Structure Type table displays the number of:

- Elevator Structure Developments
- Mixed Type Developments
- Row or Townhouse-Style Developments
- Semi-Detached Developments
- Single-Family/Detached Developments
- Walkup/Multifamily Apartment Developments

The Current Unit Distribution lists the number of:

- Handicapped Units in the HA
- Employee Units in the HA
- Non Dwelling Units in the HA

The following tables list the number of units by unit type (Elderly, Family, Merged, and Non Dwelling) and by number of bedrooms (0 – 4+). See Figure 34 for an example.

- Acquisition Units
- Actual Deminimis Units: An actual Demo/Dispo event (removal from inventory) that involves either 5% of a development's units or five total units.
- Actual Demolition Units
- Actual Demolition/Disposition Units
- Actual Disposition Units
- Actual Eminent Domain Units: HUD units taken over by local government.
- Actual Home Ownership Sale Units
- Actual Hope VI Revitalization Units
- Actual Mandatory Conversion Units
- Conversion Increase Units
- Mutual Help Sale Units: Only applies to Indian Housing
- New Construction Units
- Proposed Deminimis Units: A proposed Demo/Dispo event (removal from inventory) that involves either 5% of a development's units or five total units.
- Proposed Demolition Units
- Proposed Demolition/Disposition Units
- Proposed Disposition Units
- Proposed Eminent Domain Units: HUD units proposed for a takeover by local government.
- Proposed Home Ownership Sale Units
- Proposed HOPE VI Revitalization Units
- Proposed Mandatory Conversion Units
- Replacement Units
- Turnkey Sales Units: An old home ownership program used by very few developments.

Actual Home Ownership Sale						
Type	0 Bedrooms	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Total
Elderly Unit	0	0	0	0	0	0
Family Unit	0	0	0	0	0	0
Merged Unit	0	0	0	0	0	0
Non Dwelling	0	0	0	0	0	0

Figure 34: A table showing the number of units by unit type and by number of bedrooms in an HA Summary Report.

The Development Summary Report

Click the Development Summary subtab in the Reports Tab to access the **Development Summary Report Page**.

The Development Summary Report provides basic data for each development in an HA. PIC draws the information for this report directly from the **Development Submodule**.

Note: Access to this report depends on your security access role. Contact your **security administrator** if you want access to this report.

Generating a Development Summary Report

For PIC users with access to multiple HAs, you can generate a report starting from either the **HA List Page** or the **Development Summary Report Page**.

Follow these steps to generate a report starting from the **HA List Page:**

Step	Action/Result
1. Follow the instructions for identifying a field office HA in the section titled the **HA List Page**.	
2. Click the Reports Tab after identifying the HA.	PIC refreshes to display the **HA Contact List Report Page**.
3. Click the Development Summary Report subtab.	PIC displays the **Development Summary Report Page**. The default display is the development listed first alphanumerically.
4. Click the **Development** dialog box.	PIC displays a list of developments in your HA.
5. Click the desired development.	PIC displays the summary data for the selected development.

For PIC users with access to multiple HAs, follow these steps to generate a report starting from the **Development Summary Report Page:**

Step	Action/Result
1. Click the hub that contains the desired field office in the **Hub** dialog box (if applicable).	**Note:** The **Select View**, **HQ Division**, and **HQ Office** dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the **Field Office** box (if applicable).	PIC refreshes to display the **HA Contact List Report Page**.
3. Click the desired HA in the **Housing Authority** dialog box.	PIC displays the **Development Summary Report Page**. The default display is the development listed first alphanumerically.
4. Click the **Development** dialog box.	PIC displays a list of developments in your HA.
5. Click the desired development.	PIC displays the summary data for the selected development.

Information Presented in a Development Summary Report

Under the **Development** dialog box, the page is separated into several sections. The following table lists the section and the information it contains.

Section	Information Presented
2000 Capital Fund Verification Development Summary	PIC does not currently populate this section with any data. It will draw information from the **Capital Fund Module** when the module comes online.
Development Profile	The following data is displayed: • Development Name • Program Type • Development Method • Acquisition Construction Date • Date of Full Availability (DOFA) • End of Initial Operating Period Date (EIOP) • Dwelling Structures • Non Dwelling Structures • Scattered Sites
Development Management Office Address	The following data is displayed for both physical and mailing addresses: • Address Line 1 • Address Line 2 • City • County • State • Zip Code
Development Resident Manager	The following data is displayed: • Name • Phone Number • Address • Fax Number • Email Address If no resident manager data is available, PIC displays the following message: *Contact Information not found*.
Current Unit Distribution	The following data is displayed: • Total Number of Handicapped Units • Total Number of Employee Units • Total Number of Non Dwelling Units

The Development Summary Report also includes a Unit Table. This table displays a count of the development's units by type (Elderly, Family, Merged, Non Dwelling) and by number of bedrooms (0 – 4+). See Figure 35 for an example.

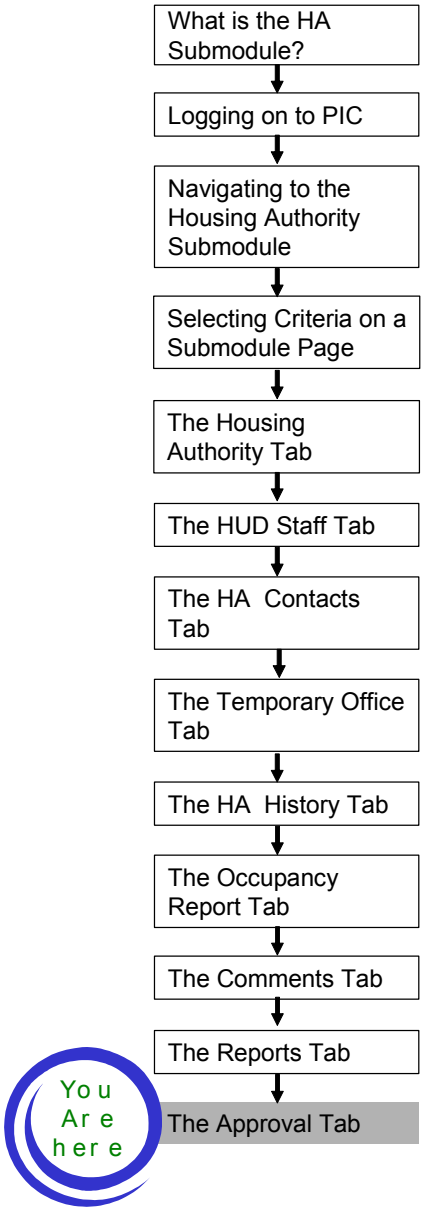
Type	0 Bedrooms	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Total
Elderly Unit	57	38	7	1	0	103
Family Unit	15	10	31	17	0	73
Merged Unit	0	0	0	0	0	0
Non Dwelling	0	0	0	0	0	0

Figure 35: The Unit Table in a Development Summary Report.

The Task Status Report

This report is a remnant of a previous PIC function. Even if you have access to this report, the data presented is no longer valid.

The Approval Tab



As of December 2003, the Approval Tab is not yet functional. When finished, it will provide the functionality to submit Capital Fund data (see Figure 36).

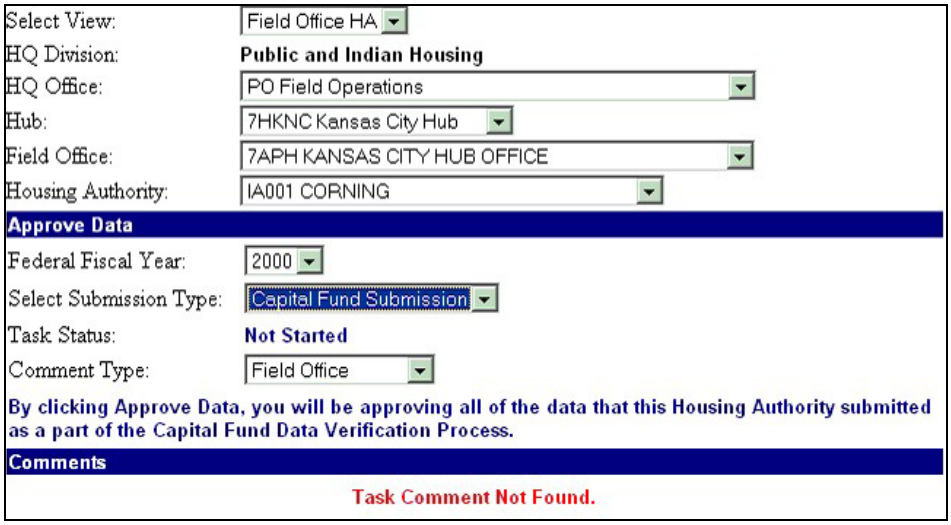


*Figure 36: The not-yet-functional **Approval Page**.*