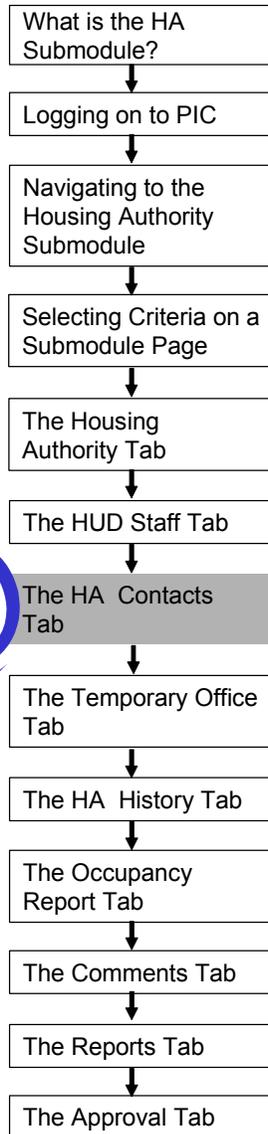


# The HA Contacts Tab



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 <b>HA List Page</b> .	
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 <b>Hub</b> dialog box (if applicable).	<b>Note:</b> The <b>Select View</b> , <b>HQ Division</b> , and <b>HQ Office</b> dialog boxes automatically input the correct information (national access users only).
2. Click the appropriate field office in the <b>Field Office</b> box (if applicable).	
3. Click the desired HA in the <b>Housing Authority</b> 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
<a href="#">Beardsley, Richard</a>	Assistant Executive Director, Miscellaneous	(602) 261-8035	<a href="mailto:richard.beardsley@phoenix.gov">richard.beardsley@phoenix.gov</a>
<a href="#">Bilsten, Peggy</a>	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 <b>Create Contact</b> hyperlink.	PIC displays the <b>Create Contact Page</b> .
2. Enter the data for the following fields: <ul style="list-style-type: none"> <li>• <b>First Name*</b></li> <li>• <b>Last Name*</b></li> <li>• <b>Salutation*</b></li> <li>• <b>Phone Number*</b></li> <li>• <b>Fax Number</b></li> <li>• <b>TTY Number</b></li> <li>• <b>Email Address</b></li> <li>• <b>Role*</b></li> <li>• <b>Effective Date*</b> (of the role assigned)</li> <li>• <b>Effective End Date</b> (of the role assigned)</li> </ul>	For the <b>Salutation</b> dialog box, choose from the following: <ul style="list-style-type: none"> <li>• Mr.</li> <li>• Mrs.</li> <li>• Ms.</li> <li>• Dr.</li> </ul> For the <b>Role</b> dialog box, choose a role from the options menu. (See Appendix C for a complete list of available roles.) <p><b>Note:</b> PIC coaches encourage you to fill out as much of this data as possible (not just the required fields).</p>
3. Click the <b>Save</b> button.  You can also click the <b>Cancel</b> button to undo the entry.	If saved, PIC displays an updated HA Contact List.  If you click <b>Cancel</b> , 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 <b>Modify Contact Details</b> hyperlink on the <b>HA Contact Detail Page</b> .	
2. Edit or update the following data: <ul style="list-style-type: none"><li>• <b>First Name*</b></li><li>• <b>Last Name*</b></li><li>• <b>Salutation*</b></li><li>• <b>Phone Number*</b></li><li>• <b>Fax Number</b></li><li>• <b>TTY Number</b></li><li>• <b>Email Address</b></li></ul>	<p>The * designates a required field. You cannot save the contact information if you do not enter this data.</p> <p>For the <b>Salutation</b> dialog box, choose from the following:</p> <ul style="list-style-type: none"><li>• Mr.</li><li>• Mrs.</li><li>• Ms.</li><li>• Dr.</li></ul> <p>Even though some fields are not required, <b>PIC coaches</b> strongly recommend keeping all of this information up-to-date.</p>
3. Click the <b>Save</b> button to update the entry.  You can also click the <b>Cancel</b> button to undo any edits you have made.	<p>The updated entry is displayed in the <b>HA Contact Details Page</b> and the <b>HA Contact List Page</b> if necessary.</p> <p>If you click <b>Cancel</b>, PIC returns to the previous <b>HA Contact Details Page</b>.</p>

## 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 <b>HA Contact Details Page</b> for the selected individual.
2. Click the <b>Modify Contact Details</b> hyperlink.	PIC displays the <b>Modify Contact Details Page</b> .
3. Click the <b>Add Role</b> 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 <b>Role</b> dialog box. See Appendix C for a complete list of available roles.	
5. Type a date in the in the <b>Effective Date*</b> text box. The date should be in the MM/DD/YYYY format (example: 10/09/2003).	
6. Click the <b>Save</b> button.	PIC refreshes the <b>HA Contact Details Page</b> to include the added role.

Chief Operating Officer Congressional Staff Contact Executive Director Executive Director (Acting) Federal Official Financial Officer Formula Characteristics Accountant	<table border="1"> <thead> <tr> <th>Effective Date</th> <th>Effective End Date</th> </tr> </thead> <tbody> <tr> <td>09/15/2002</td> <td></td> </tr> <tr> <td>09/15/2002</td> <td></td> </tr> <tr> <td>09/15/2002</td> <td>09/15/2002</td> </tr> <tr> <td>* MM/DD/YYYY</td> <td>MM/DD/YYYY</td> </tr> </tbody> </table>	Effective Date	Effective End Date	09/15/2002		09/15/2002		09/15/2002	09/15/2002	* MM/DD/YYYY	MM/DD/YYYY
Effective Date	Effective End Date										
09/15/2002											
09/15/2002											
09/15/2002	09/15/2002										
* MM/DD/YYYY	MM/DD/YYYY										

\* Designates a required field.

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:

<b>Step</b>	<b>Action/Result</b>
1. Click the person you wish to assign a role to in the HA Contact List.	PIC displays the <b>HA Contact Details Page</b> for the selected individual.
2. Click the <b>Modify Contact Details</b> hyperlink.	PIC displays the <b>Modify Contact Details Page</b> .
3. Click the specific <b>Role</b> 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 <b>Save</b> button.	<p>PIC refreshes the <b>HA Contact Details Page</b> to display the updated information.</p> <p>If the role ended anytime before the current date, it will not be listed as an active hyperlink.</p>

## 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 <b>Select Address Type</b> 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 <b>HA Contact Address Page</b> .	
2. Click the <b>Modify Address</b> hyperlink.	PIC displays the <b>Modify HA Contact Address Page</b> (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: <ul style="list-style-type: none"> <li>• <b>Address Line 1*</b></li> <li>• <b>Address Line 2</b> (if needed)</li> <li>• <b>County Name</b></li> <li>• <b>City/Locality*</b></li> <li>• <b>State*</b></li> <li>• <b>Zip Code*</b></li> </ul>	The * designates a required field. You cannot save the contact information if you do not enter this data.  For the <b>State</b> dialog box, choose a state from the dialog box menu.
4. Click the <b>Save</b> button to submit the changes.  You can also click the <b>Cancel</b> button to undo any changes you have made.	PIC refreshes to the <b>HA Address Page</b> .  If you click <b>Cancel</b> , PIC returns to the previous <b>HA Contact Address Page</b> .

Address Information

Address Type: **Physical**

Address Line 1: \*

Address Line 2:

County Name:

City/Locality: \*

State: \*

Zip Code: \* -

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