

How to Merge a Unit into Another Unit in PIC

A PHA might want to merge two or more smaller units into one larger unit to better match the demand in the local rental market. For example, two 0-bedroom units might be merged into one 1-bedroom unit. There are two parts to the task.

1. Increasing the number of bedrooms for the unit that will continue to exist. This can be done by an HA or HUD user.
2. Marking the unit that is ceasing to exist as a “Merged unit”, changing the bedroom count to zero, and changing the ACC indicator to No. *Sometimes this unit is referred to as a “ghost unit” to make it easier to understand that the unit no longer exists but the space is still there.* This can only be done by a HUD user.

Before you start your work in PIC it is a good idea to do two things:

1. **Document the “before” picture.** It is a good idea before beginning any work to print a copy of the Unit Detail Report, if you don’t already have one, to have a “before” snapshot for the units involved.
2. **Collect the information you will need.** A sample data collection model is included on the last page of this document. This asks for the minimum amount of information you will need. It can be a good idea to ask the PHA additional questions related to program rules and finances as well but those are not needed for the PIC data entry.

Step 1:

If there is a change in bedroom count for the unit that will continue to exist, either the PHA or HUD staff will need to change the number of bedrooms for that unit. The user will navigate to the Unit Details page for that unit, change the number of bedrooms, then single click on the Update Unit Details button. If the PHA does this step it is imperative that the HUD user completing step 2 of this process verify the bedroom count using the data collected.

Step 2:

To complete the process to mark the other unit(s) where the space is becoming part of the larger unit as a merged unit, a HUD user will complete the following steps.

1. In the Development sub module select the PHA and development number, if the PHA has more than one, on the Development Profile page.
2. Single click on the Unit tab to navigate to the Unit List page.
3. Single click on the unit number that needs to be marked as merged on the Unit List page. The Unit Details screen for that unit will appear.
4. Single click the “Unit Designation” link that appears in the screen print below.

Reports | Maintain Inventory | CAPFUND B&U Certification
 Development | Building | Unit | Submission | Approval
 Unit List | Building/Unit Data Transfer | Upload Error Report

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 PIC Main
 Housing Agency
 Development
 Inventory Removals
 Logoff

HQ Office: Public and Indian Housing
 HQ Division: PO Field Operations
 Hub: 7HKNC Kansas City Hub
 Field Office: 7DPH OMAHA PROGRAM CENTER
 Field Office HA: NE031 BLUE HILL
 Physical Development: NE031000001 WESTGATE MANOR

Unit Information
 Unit Number: 107
 Entrance Number: 1
 Door Number:
 Bedroom Count: *
 Unit Designation: General Occupancy [\[Modify\]](#)
 Unit Tenant Status: Vacant [\[Modify\]](#)
 Effective Date: 07/16/2012
 ACC Unit Indicator: Yes No
 Cap Fund Indicator: Yes No
 Building: 4
 Building Entrance Address: 705 WEST SEWARD
 Floor Number: *
 Submission Status Type: Initial Approval Completed
 Accessible Designation: Not Applicable [\[Modify\]](#)
 ACC Unit Indicator Date: 04/30/1965
 Op Fund Indicator: Yes No

Head of Family Details
 First Name: -
 Last Name: -
 Occupancy Date: -

[Update Unit Details](#)

5. A page will appear where you can select the new unit designation. Select “Merged Unit” from the New Unit Designation drop down box. You can also enter any comments you want that describe this change. For instance, you may state that unit __ is merging with unit __. Since this is not a required field you can also leave it blank. You won’t see the comments displayed in the system but they are saved to the database. You do not need to make a selection in the reason for change drop down box. Single click on the Save button to save the changes and be taken back to the Unit Details page for the unit.

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 Physical Development: NE031000001 WESTGATE MANOR

Unit Information
 Unit Number: 107 | Building - Entrance Number: 4.1
 Current Unit Designation: General Occupancy

New Unit Designation
 New Unit Designation:
 Reason for change in Unit Designation:
 Comments:
 The changes will be effective in the system immediately upon clicking "Save".

[Save](#) [Cancel](#)

6. You now can change the bedroom size for the unit to 0. Delete the current bedroom count and enter zero. Single click on the Update Unit Details button to save the change.

Reports Maintain Inventory CAPFUND B&U Certification
 Development Building **Unit** Submission Approval
 Unit List Building/Unit Data Transfer Upload Error Report

Wendylyn Hovendick
 PIC Main HQ Office: Public and Indian Housing
 HQ Division: PO Field Operations
 Hub: 7HKNC Kansas City Hub
 Housing Agency Field Office: 7DPH OMAHA PROGRAM CENTER
 Development Field Office HA: NE031 BLUE HILL
 Inventory Removals Physical Development: NE031000001 WESTGATE MANOR

Logoff Unit Information

Unit Number: 107 Building: 4
 Entrance Number: 1 Building Entrance Address: 705 WEST SEWARD
 Door Number: Floor Number: *
Bedroom Count: 1 Submission Status Type: Initial Approval Completed
 Unit Designation: Merged Unit [Modify] Accessible Designation: Not Applicable [Modify]
 Unit Tenant Status: -
 ACC Unit Indicator: Yes No ACC Unit Indicator Date: 04/30/1965
 Cap Fund Indicator: Yes No Op Fund Indicator: Yes No

Head of Family Details
 First Name: -
 Last Name: -
 Occupancy Date: -

Update Unit Details

7. A page will come up that will ask you for a reason for the change. In the reason for change drop down box select “Bedroom Count – Merged Units”. You can enter comments to be saved into the database, similar to what you entered for the Unit Designation change, if you wish but it is not required. Single click on the Save button. You will be taken back to the Unit Details page.

Unit Information
 Unit Number: 107 Building - Entrance Number: 4-1 Current ACC Unit Indicator Date: 04/30/1965

Unit Details Changes

Unit Details Field	Current Value	New Value	Reason for change in unit details	Comments
Bedroom Count	1	0	Bedroom Count - Merged Units	

Save Cancel

8. You now need to update the ACC indicator. Single click on the No radio button to the right of the ACC Unit Indicator label. A pop-up box will appear to let you know that this will also change the Op Fund and Cap Fund indicators. Single click on the OK button. The pop-up box will disappear. Single click on the Update Unit Details button to save the change.

The screenshot shows the PIC software interface with a confirmation dialog box overlaid. The dialog box contains the following text: "Changing the ACC indicator will cause the Op Fund and Cap Fund indicators to follow the change. Are you sure you want to make this change?" with "OK" and "Cancel" buttons.

The background interface shows the following information:

- Navigation:** Reports, Maintain Inventory, CAPFUND B&U Certification, Development, Building, Unit, Submission, Approval.
- Unit List:** Unit List, Building/Unit Data Transfer, Upload Error Report.
- User:** Wendalyn Hovendick, PIC Main, Housing Agency, Development, Inventory Removals, Logoff.
- Unit Information:**
 - HQ Office: Public and Indian Housing
 - HQ Division: PO Field Operations
 - Hub: 7HKNC Kansas City Hub
 - Field Office: 7DPH OMAHA PROGRAM CENTER
 - Field Office HA: NE031 BLUE HILL
 - Physical Development: NE
- Unit Details:**
 - Unit Number: 107
 - Entrance Number: 1
 - Door Number: [input field]
 - Bedroom Count: 0
 - Unit Designation: Merged Unit [Modify]
 - Unit Tenant Status: -
 - ACC Unit Indicator: Yes No
 - Cap Fund Indicator: Yes No
 - Building: 4
 - Entrance Address: 705 WEST SEWARD
 - Number: 1
 - Approval Status Type: Initial Approval Completed
 - Accessible Designation: Not Applicable [Modify]
 - ACC Unit Indicator Date: 04/30/1965
 - Op Fund Indicator: Yes No
- Head of Family Details:**
 - First Name: -
 - Last Name: -
 - Occupancy Date: -
- Buttons:** Update Unit Details

- On the page that appears select "Change In Use" from the reason for change drop down box. Similar to the previous steps, enter any comments you want saved to the database. You will need to enter the date the merge of the units was completed in mm/dd/yyyy format in the ACC Unit Indicator Change Date text box. Single click on the Save button to update the ACC, Op Fund, and Cap Fund indicators and the ACC Indicator Change Date.

The screenshot shows the "Unit Details Changes" section of the PIC software interface. It includes a table with the following data:

Unit Details Field	Current Value	New Value	Reason for change in unit details	Comments
ACC Unit Indicator	Y	N	Change In Use	

Below the table, there is a text box for "ACC Unit Indicator Change Date:" with a date format mask of *MM/DD/YYYY. A "Save" button is highlighted with a blue box.

- You will be returned to the Unit Details page. The changes will be reflected on the page. You will also see entries for the changes to unit designation and unit status at the bottom of the page under the Unit Status/Designations Change History heading.
- The PHA must review all of their building and unit data, not just the units involved in the merge, and submit it in PIC for field office approval under the Submission tab. Once the field office approves the building and unit data under the Approval tab the changes will become part of the official inventory for funding and historical purposes.

Note: The field office should not reject any of the developments unless there is something substantially in error. If any developments are rejected the data needs to be corrected right away and the PHA resubmit the building and unit data for approval. Any developments in rejected status are not included in official unit counts and may affect funding.

Sample Merged Unit Data Collection

The format below can be used to request information from PHAs on what units are involved, their characteristics, and effective date. This can be copy and pasted into an email and then once the responses are received back that information can be kept on file for documentation of what changes were made.

1. Unit numbers involved and their bedroom sizes before merging:
 - ✓ Unit ____ was a ____ bedroom
 - ✓ Unit ____ was a ____ bedroom
2. Unit number that will be used for occupancy and its new bedroom size:
 - ✓ The unit that remains that the tenant will enter through is unit ____ and it is now a ____ bedroom.
3. Date the merge was complete (units were considered one unit):
 - ✓ The units were considered one unit as of _____ (in mm/dd/yyyy format).

If the data for the previous configuration as provided above does not match what is in PIC the field office will work with the PHA to determine why there is a mismatch.

Notes: In situations where more than two units are merged please add the necessary line(s) under #1 keeping the same format. If more than two units are merged into two units – for instance 3 units are merged into 2 – please add additional line(s) to #1 and #2 keeping the same format. If this situation occurs and the work is completed on separate dates add another line under #3 keeping the same format.