

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT



**DISASTER INFORMATION SYSTEM (DIS)
APPLICATION**

SEPTEMBER 2010

USER GUIDE

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Introduction

1. Overview

This document is designed to assist users of the Disaster Information System (DIS) Application. DIS is designed to streamline the processing of families who lost their housing because of hurricanes or any types of disasters and to relocate families already in the HUD rental assistance programs. The application provides verification of family eligibility and allows data entry for their new or temporary housing assistance details.

2. Types of Users

The broad categories of users of the system include:

- a. Housing Authority Users (HA Users).
- b. HUD Users and HUD relocation assistance contractors
- c. Guest Users (Usually non-HUD and non-HA contract staff)
- d. Super Users – Users with special privileges.
- e. Administrators

When using the system, different users will be able to perform actions based on their assigned roles in the system. Access rights for each user type are described below:

Actions	HA User	HUD User	Guest User
1. Search for a family	Yes	Yes	Yes
2. Establish Eligibility (see note)	Yes	Yes	(No access)
3. Update family information	Submit/Modify	Submit/Modify	Read only
4. Record/Modify a family's Lease	Submit/Modify	Submit/Modify	(No access)
5. View DIS Reports	Read only	Read only	Read only
6. Rollback records	(No access)	Submit/Modify	(No access)
7. View Archives	Read only	Read only	Read only
8. Add New Households	Yes	Yes	Read only
9. Add HL-CPD Households	Yes	Yes	(No access)
10. Approve New Households	(No access)	Yes (Super Users Only)	(No access)
11. Super Admin Functionality	(No access)	Yes (Super Users Only)	(No access)

Table 1 – User Access Rights

Note: HA and HUD Users may determine eligibility depending on the IAA (Inter-Agency Agreement).

3. *What you need to Use the System*

- A valid User Id and password to the IMS system.
- Access to the DIS Application.
- An understanding of Disaster Information System.

Using the DIS System

1. Logon

a) Open an Internet Explorer browser window and go to one of the following URLs:

- <https://hudapps.hud.gov/ssmaster> (users with “H” IDs (e.g.H1234))
- https://hudapps.hud.gov/HUD_Systems (users with “M” or “C” IDs (e.g. M1234))

Note: *Bookmark the applicable link for future use*

b) Type in your User ID and Password and Click on ‘Login’.

The screenshot shows a web page titled "User Login". On the left side, there is a blue sidebar with the text "Secure Systems Single Sign On" and a small icon of a house. The main content area has a white background with a blue header containing "User Login" and "help | home". Below the header, there are two input fields: "User ID" and "Password". Below these fields are two buttons: "Login" and "Cancel". Underneath the buttons, there is a red warning message: "ATTENTION: This computer system, and all the systems associated with this system for User Authorization and Authentication, are protected by a computer security system; unauthorized access to these systems is not permitted; and usage may be monitored. NOTE: There is an inactivity timeout of 30 minutes. Please save your work periodically to avoid being logged out". At the bottom of the page, there is a footer with a house icon, the text "Content updated August 26, 2005", and contact information for the U.S. Department of Housing and Urban Development, including address, telephone, and TTY numbers. There are also links for "Home | Privacy Statement".

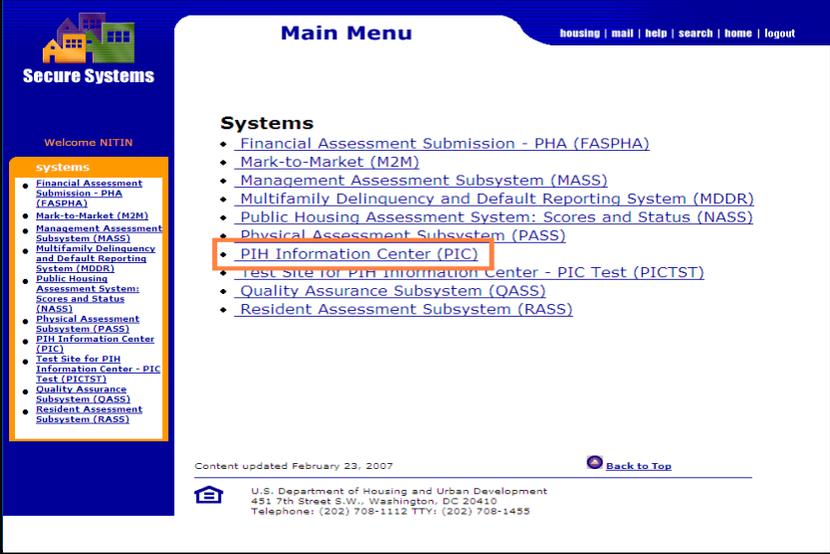
Figure 1 – User Logon

c) The Legal warning page is displayed.

Note: *Users must click the ‘Accept’ button on this page to continue using this system.*

d) Upon successful logon, you will be presented with a Sub-System list with links.

e) Select “**PIH Information Center (PIC)**” by clicking on the link with the same name.



The screenshot shows the 'Main Menu' of the Disaster Information System (DIS) application. The page has a blue header with the text 'Main Menu' and navigation links: 'housing | mail | help | search | home | logout'. On the left side, there is a sidebar with the 'Secure Systems' logo and a 'Welcome NITIN' message. Below this, a 'systems' menu lists various subsystems. The main content area, titled 'Systems', contains a list of links to different subsystems. The link for 'PIH Information Center (PIC)' is highlighted with a red rectangular box. At the bottom of the page, there is a footer with contact information for the U.S. Department of Housing and Urban Development.

Secure Systems

Welcome NITIN

systems

- Financial Assessment Submission - PHA (FASPHA)
- Mark-to-Market (M2M)
- Management Assessment Subsystem (MASS)
- Multifamily Delinquency and Default Reporting System (MDDR)
- Public Housing Assessment System: Scores and Status (NASS)
- Physical Assessment Subsystem (PASS)
- PIH Information Center (PIC)
- Test Site for PIH Information Center - PIC Test (PICTST)
- Quality Assurance Subsystem (QASS)
- Resident Assessment Subsystem (RASS)

Main Menu housing | mail | help | search | home | logout

Systems

- [Financial Assessment Submission - PHA \(FASPHA\)](#)
- [Mark-to-Market \(M2M\)](#)
- [Management Assessment Subsystem \(MASS\)](#)
- [Multifamily Delinquency and Default Reporting System \(MDDR\)](#)
- [Public Housing Assessment System: Scores and Status \(NASS\)](#)
- [Physical Assessment Subsystem \(PASS\)](#)
- [PIH Information Center \(PIC\)](#)
- [Test Site for PIH Information Center - PIC Test \(PICTST\)](#)
- [Quality Assurance Subsystem \(QASS\)](#)
- [Resident Assessment Subsystem \(RASS\)](#)

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U.S. Department of Housing and Urban Development
451 7th Street S.W., Washington, DC 20410
Telephone: (202) 708-1112 TTY: (202) 708-1455

Figure 2 – Subsystem List

2. Update User Profile – New Users Only

When a new User logs onto the PIC system, the User Profile screen is displayed. New Users are required to update their account information as described below (see the figure below).

- a) In the User Contact Information Section, enter first name, last name and select a Salutation from drop-down list.
- b) In the Mailing Address Section, enter mailing information in required fields (marked in asterisks).
- c) Click on the **Save** button at the bottom right of the screen. The Public and Indian Housing Information Center Screen is displayed.

The screenshot shows the 'User Profile' page in the PIC system. At the top, there are navigation links: HUD HOME, PIH HOME, Q & A, SEARCH / INDEX, and E-MAIL. The left sidebar contains a 'pic' logo and menu items: PIC Home, HA Profiles, and RCR Reports. The main content area is titled 'User Profile' and contains a form for updating user information. The form includes the following fields and values:

- UserID: david
- User Contact Information:
 - First Name: david
 - Last Name: david
 - Title:
 - Salutation: (None Selected) [dropdown]
- Mailing Address:
 - Address Type: Mailing Address
 - Address Line 1: [text box] *
 - Address Line 2: [text box]
 - City/Locality: [text box] *
 - County: [text box]
 - State: Alaska [dropdown]
 - Zip Code: [text box] * - [text box]
 - Phone Number: (0)- [text box]
 - Ext: [text box]
 - Fax Number: (0)- [text box]
 - Email Address: asd@sdsf.com

Figure 3 – Updating Profile for New Users

3. Navigate to DIS Application

- a) Once user is logged into the Public and Indian Housing Information Center Screen displayed (see the adjacent figure)

Note: Available options on the left menu are dependent on User access rights.

- b) On the left menu bar as shown in adjacent figure, Click on ‘DIS’ link under “PIH Information” title.

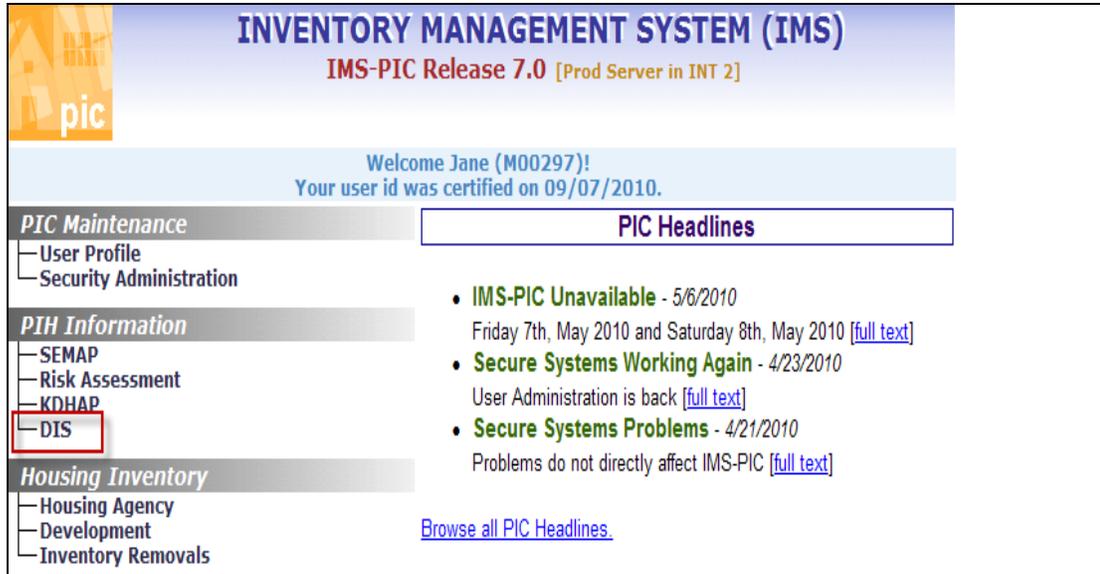


Figure 4 - Select PIH Information then DIS

4. Privacy Act Warning and Acceptance

- a) When user clicks on the DIS Submenu, the “Privacy Act (See the figure below) Statement and Compliance Notice” page is displayed.
b) Click “Agree” to launch DIS Application.

Note: Users MUST click the ‘Agree’ button on the Privacy Notice page to access the DIS System.

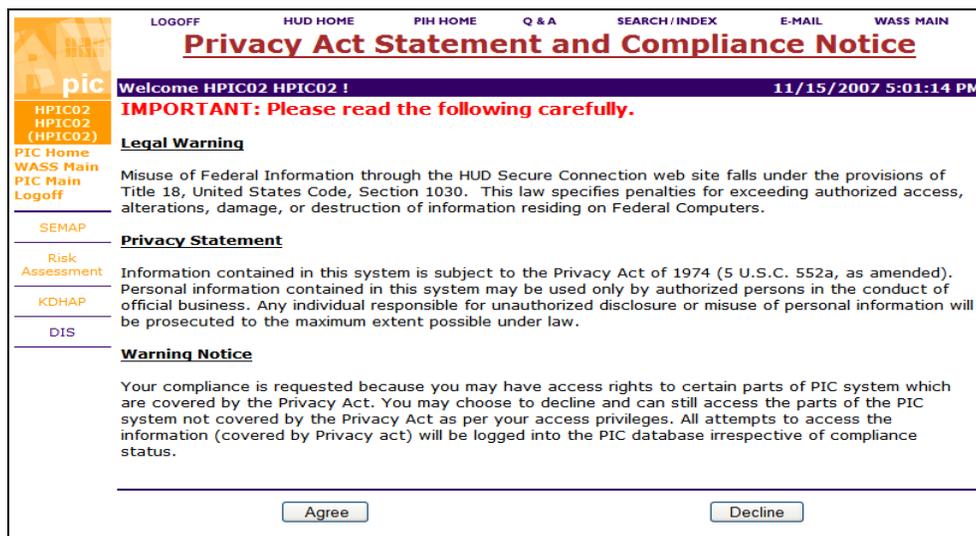


Figure 5 - Read Before Accepting

5. Searching For Household Assistance Records

After accepting the Privacy Act Notice, the Search for Household Assistance Details page opens as shown in the adjacent figure.

This screen can be used to search for Household Assistance Details using any one of the two choices listed below:

1. By Social Security Number (SSN)
2. By Information

When Searching By Information, Last Name and any of the following are required:

- First Name
- Date of Birth
- Sex

System Access – System security is role based so some functions may not be available to you. For a detailed explanation, please see [Section 1.2 Page 1 –“Types of Users”](#)

The screenshot shows the 'Search for Household Assistance details' page. At the top, there is a navigation bar with 'DIS Reports' and 'DVP Main'. Below this is a green header with 'Search Households', 'Assistance Details', and 'Add Households'. The main title is 'Disaster Information System (Ver 5.1)'. The search options are 'Search by SSN' and 'Search by Information'. The 'Search by SSN' section has an input field for 'SSN:' and a 'Search' button. The 'Search by Information' section has input fields for 'Last Name:' (marked as required), 'First Name:', 'Sex:' (a dropdown menu), and 'Date of Birth:' (with a date format 'mm/dd/yyyy' and a 'Search' button). There is also a 'Reset All' button. A note below the search fields states: 'Searching by information may take longer to retrieve the results as it may match several last names. To obtain faster results provide as many characters of the Last name and First name; as well as the Date of birth and gender where possible.' At the bottom, there are two links: 'View DIS User Manual.' and 'Click here to view/update details of households already assigned to PHA'.

Figure 6 - Search for Household Details

6. Select the Correct Household Record

- a) Search results appear in a table at the bottom of the screen (see figure below).

The screenshot shows the DIS application interface. At the top, there are navigation links: LOGOFF, HUD HOME, PIH HOME, Q & A, SEARCH / INDEX, E-MAIL, and WASS MAIN. Below these is a green header with 'DIS Reports' and sub-sections: Search Households, Assistance Details, and Add Households. A yellow banner states 'Disaster Information System (Ver 5.1) Total 1 record(s) found. Please scroll down to view the results.' Below this is a search form with two sections: 'Search by SSN' (with an SSN input field and a Search button) and 'Search by Information' (with Last Name, First Name, Sex, and Date of Birth input fields, each with a Search button, and a Reset All button). Below the search form, there are links: 'View DIS User Manual.' and 'Click here to view/update details of households already assigned to...'. A list of instructions follows:

- Click on the SSN link to View/Create Assistance Record.
- Asterisk (*): Marks families that are already assigned to a receiving PHA for assistance
- Hash (#): Marks families that were previously assisted in KDHP under H2,H3,H4,H5 and H6 sections of Multifamily program.
- (New): Marks families that are assigned newly either by new assignment or re-assignment or port out process to the PHA for assistance.

 At the bottom, a table displays search results. The table has columns: #, SSN, Disaster Number, FEMA ID, First Name, Last Name, Date of Birth, Sex, Pre-Disaster Apt, Pre-Disaster Street, Pre-Disaster City, Pre-Disaster State, Pre-Disaster Zip, Receiving PHA, Info, Status, Archived Data, and Pr Av. The first row shows:

#	SSN	Disaster Number	FEMA ID	First Name	Last Name	Date of Birth	Sex	Pre-Disaster Apt	Pre-Disaster Street	Pre-Disaster City	Pre-Disaster State	Pre-Disaster Zip	Receiving PHA	Info	Status	Archived Data	Pr Av
1	XXX-XX-0600*	1604	912248085	zofo	mlghirzs	6/18/1955	F		Im. vez wi1 7442	COLUMBUS	MS	34751	MS019	-	Active	View	A

Figure 7 - Click on the SSN to view/edit the record

- b) Review the list to find the correct record.
- c) Then click on the SSN link (the first field on the left side of the table) of the record to review or edit Assistance details.
- d) Search results will display the Disaster Number for each Household. This allows all records in multiple disasters to be displayed.
- e) Search results will distinctly mark Non-HUD families with text “Non-HUD” under the column “Info.”
- f) Search results will also display the status (Active/Inactive) of the household record under the column “Status”. Inactive household records cannot be modified.
- g) An asterisk next to an SSN indicates that the Household is already assigned to a Receiving PHA for assistance.

If a family does not appear in the search results, please verify that the search information is correct for the Head of Household. Only the Head of Household information can be used to retrieve Household Assistance details.

1 – Introduction

18	XXX-XX-0880	ILGDFMP	MWFVL					-	Active
19	XXX-XX-0609	ILGL	MWFVL				2003	-	Active
20	XXX-XX-0258	ILPNBRP	MWFVL				2065	-	Active
21	XXX-XX-8713	Ilzb	MwfvL				2576	-	Active
22	XXX-XX-2829	ILZB	MWFVL				9641	-	Active
23	XXX-XX-0601	IMCBMR	MWFVL				45	-	Active
24	XXX-XX-8845	IMCDWB	MWFVL			344 B BOHPUJIRX AZ L , PBW QOUFQEN LA 12063		-	Inactive

Figure 8 - Inactivate Household records cannot be modified

7. Eligibility Questionnaire

- a) Eligibility questionnaire may be displayed before the lease or assistance page if the eligibility for the selected household is not already established.
- b) See the Appendix section to learn how the DIS system determines the eligibility based on the answers provided. You may also click the link “How does Eligibility Questionnaire work?” displayed at the bottom of the Questionnaire page.
- c) Fill in the questionnaire and click “Submit Answers”.
- d) If the family is determined eligible, a link is provided to navigate to the “Lease Assistance” page as shown in the adjacent figure. Click on the link to bring up lease/assistance details page.

If the family is determined ineligible for assistance, the household record is also marked as inactive, it remains locked in its current state.

DIS Reports

Search Households
Assistance Details
Add Households

Disaster Information System (Ver 3.1)

Establish Eligibility for XXX-XX-0066

Eligibility Questionnaire

• Is the pre-disaster project available for occupancy?

Yes ...

◦ Does the family want to return to the unit previously occupied by them?

Yes ...

■ Is the family currently under lease through one of HUD's Disaster Housing Programs?

Yes ...

■ Can the current lease under such program be terminated?

Yes
[If Yes, the Family must return to the pre-disaster unit. No further assistance will be offered under DIS (Disaster Information System).]

No
[If No, the Family may be offered assistance under DIS (Disaster Information System).]

No
[The family, never assisted under one of HUD's Disaster Housing Programs, will not receive any further assistance under DIS (Disaster Information System).]

No ...

No
[If the pre-disaster unit is not available, the Family may be offered assistance under DIS (Disaster Information System).]

Click "Submit Answers" when done. If the family is eligible to receive the assistance under DIS system, you will be taken to the assistance/lease details page where more information to admit the family into Disaster Information System can be added or modified.

Figure 9 - Eligibility Questionnaire

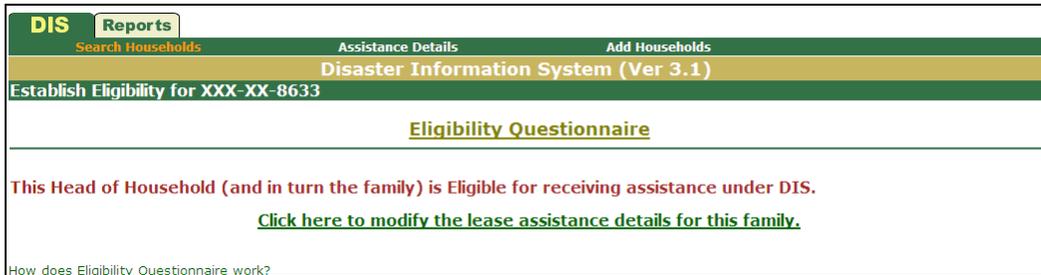


Figure 10 - Modify Lease Assistance Details link

8. Searching for Changed Households

If an household record has been changed for any reason and no longer exists in it's original state, it may not be found when searching and an error message will be displayed indicating the same.

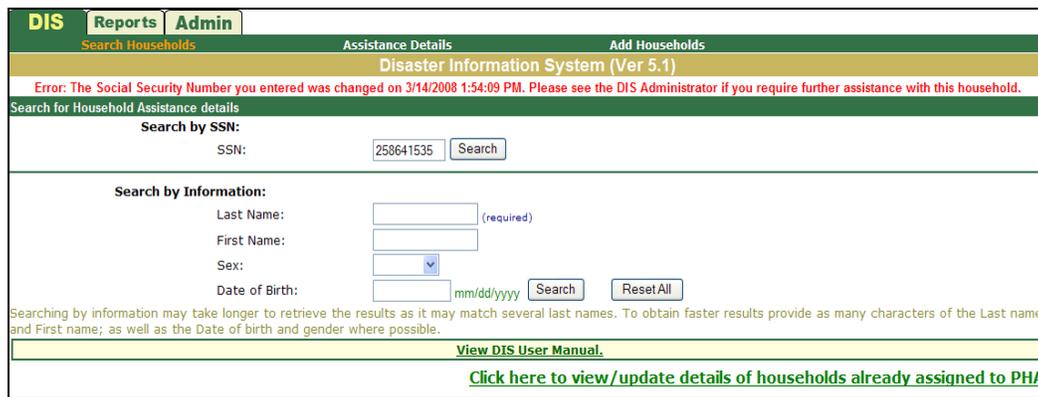


Figure 11 - Searching for Changed Households

9. Viewing/Editing Household Assistance Details

- 1) HA Determined Eligibility:
 - 'Yes' option must have been selected in Eligibility Questionnaire for the lease Details section to be displayed and modified.
- 2) Pre Disaster Program Types:
 - a. CE – Certification
 - b. DHAPK - DHAP-KATRINA
 - c. DHP-K - DHAP-KATRINA
 - d. HL - CPD: Continuum of Care (Homeless)
 - e. IKE01 - IKE – GUSTAV
 - f. IKEPH - IKE PUBLIC HOUSING
 - g. IKEVO - IKE VOUCHER FAMILY
 - h. MF - Multifamily
 - i. MR - Mod Rehab
 - j. NH - New Housing
 - k. OH - Displaced Other Federally Assisted Housing Family

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- l. PH - Displaced Public Housing Resident
- m. PHIKE – PUBLIC HOUSING IKE
- n. VO - Displaced Voucher Family
- o. VOIKE - VOUCHER IKE

*In Addition to the New Program Types listed above, DIS system has 10 more special program types for listed below for **Non-HUD** Families. These special program types **cannot** be selected in the View/Edit Household mode.*

- p. FE - Non-HUD Family
- q. FT - Non-HUD Families (Phase 2)
- r. F3 - Non-HUD Families (Phase 3)
- s. F4 - Non-HUD Families (Phase 2B)
- t. F5 - Non-HUD Families (Phase 2C)
- u. F6 - Non-HUD Families (Phase 2D)
- v. F7 - Non-HUD Families (Phase 2E)
- w. F8 - Non-HUD Families (Phase 2F)
- x. F9 - Non-HUD Families (Phase 2G)
- y. F10 – Non-HUD Families (Phase 2H)

FEMA Referral Date: <input type="text"/> (mm/dd/yyyy)		HUD DIS Load Date: <input type="text"/> (mm/dd/yyyy)	
Head of Household Name: ZKNFFMJWQ G MWFVL (First Name Middle Initial Last Name)			
Initial PHA (Code and Name): MS040 Mississippi Regional HA No. VIII		FEMA ID: <input type="text"/>	
Sex: F		Date of Birth: 01/10/1982 (mm/dd/yyyy)	
Disaster Program Code: 1604		HA Determined Eligible: <input type="radio"/> Yes <input checked="" type="radio"/> No	
Pre-Disaster Program Type:* PH - Displaced Public Housing Resident			
Contact Numbers (and comments): 2283520289		Alt: <input type="text"/>	
Pre-Disaster Address:			
Street Address: 5835 Hphomfvm Gi.		Apt No:	
City: Ymnf Yqvsq State: MS		Zip Code: 99212	
Mailing Address:			
Street Address: 5835 HPHOMFVM GI		Apt No:	
City: YMNf YQVSQ State: MS		Zip Code: 99212	
Receiving PHA Information: <input checked="" type="radio"/> Assign PHA now! <input type="radio"/> Assign PHA later! <input type="button" value="Port Out"/>			
HQ Office: PO Field operations		Hub: 4HJMS JACKSON HUB	
Field Office: 4GPH JACKSON HUB OFFICE		Housing Authority: MS040 Mississippi Regional HA No. VIII	
State: MS		Program Type: Combined	
Receiving PHA Contact Name: <input type="text"/>		Receiving PHA Email: <input type="text"/>	
Receiving PHA Contact Number: <input type="text"/>		Receiving PHA Fax Number: <input type="text"/>	
PHA New Assignment Date: <input type="text"/> (mm/dd/yyyy)			
New Program Type: PH - Public Housing		Bedroom Size: Prior* 3 Requested* <input type="text"/>	
Family members: Enter up to 14 more family member names here. Following fields are required for each valid entry			
Required fields: First Name, Last Name, Date of Birth, Gender and Citizenship Indicator			
# First Name* MI Last Name* SSN Date of Birth* Sex* Disbl Ind. Citizenship*			

Figure 12 - Edit Lease Assistance Details for HUD Families

- 3) Receiving PHA:
This information is required for the lease information to be displayed and modified
- 4) New Program Type (required if a 'Receiving PHA' is selected):
 - a. NV - DIS Voucher
 - b. PH - Public Housing
 - c. PI - Voucher Port In
 - d. VA - Voucher Absorbed
 - e. MF - Multi Family
 - f. HL - CPD Assistance
 - g. OT - Other Assistance
 - h. IKE01 – IKE-GUSTAV
 - i. NH – New Housing

*In Addition to the New Program Types listed above, DIS system has **1 more HUD and 10 Non-HUD special program types**. These special program types **cannot** be selected in the View/Edit Household mode:*

- j. AH-Affected Public Housing
 - k. DH-Non-HUD Family Assistance
 - l. DT-Non-HUD Family Assistance (Phase 2)
 - m. D3-Non-HUD Family (Phase 3)
 - n. D4-Non-HUD Family (Phase 4)
 - o. D5-Non-HUD Family (Phase 5)
 - p. D6-Non-HUD Family (Phase 6)
 - q. D7-Non-HUD Family (Phase 7)
 - r. D8-Non-HUD Family (Phase 8)
 - s. D9-Non-HUD Family (Phase 9)
 - t. D10-Non-HUD Family (Phase 10)
- 5) Bedroom Size (Prior and Requested):
 - 6) Family Members (if applicable):
 - 7) Total Number of Family Members:

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FEMA Referral Date: <input type="text"/> (mm/dd/yyyy)		HUD DIS Load Date: <input type="text"/> (mm/dd/yyyy)	
Head of Household Name: VLMC Z MWFVL (First Name Middle Initial Last Name)			
Initial PHA (Code and Name): FEMA FEMA Phase 2 Family		FEMA ID: 940817301	
Sex: F		Date of Birth: 09/07/1954 (mm/dd/yyyy)	
Disaster Program Code: 1604		HA Determined Eligible: <input checked="" type="radio"/> Yes <input type="radio"/> No	
Pre-Disaster Program Type: * FT - Non-HUD Families (Phase 2)			
Contact Numbers (and comments): 3380487420		Alt: 3387238396	
Pre-Disaster Address:			
Street Address: 135B BUXDL UJ		Apt No:	
City: BVZOPR		State: MS	
		Zip Code: 99237	
Mailing Address:			
Street Address: 316 4/3 WPGSCZSD HQ		Apt No:	
City: BVZOPR		State: MS	
		Zip Code: 99237	
Receiving PHA Information: <input checked="" type="radio"/> Assign PHA now! <input type="radio"/> Assign PHA later! <input type="button" value="Port Out"/>			
HQ Office:		PO Field operations	
Hub:		4HJMS JACKSON HUB	
Field Office:		4GPH JACKSON HUB OFFICE	
Housing Authority:		MS005 Biloxi Housing Authority	
State:		MS	
Program Type: Combined			
Receiving PHA Contact Name: TOM NOLAND		Receiving PHA Email: TVNOLAND@DATASYNC.COM	
Receiving PHA Contact Number: 2283747771		Receiving PHA Fax Number: 2284366585	
PHA New Assignment Date: <input type="text"/> (mm/dd/yyyy)			
New Program Type: DT - Non-HUD Family Assistance (Phase 2)		Bedroom Size: Prior* 1 <input type="button" value="v"/> Requested* 1 <input type="button" value="v"/>	
Family members: Enter up to 14 more family member names here. Following fields are required for each valid entry			
Required fields: First Name, Last Name, Date of Birth, Gender and Citizenship Indicator			
#	First Name*	MI	Last Name*
			SSN
			Date of Birth* Sex* Disbl Ind Citizenship*

Figure 13 - Edit Lease Assistance Details for Non-HUD Families

10. Updating Family Members Information

- Missing family members may be added to the system through the family member details section.
- Each valid entry must have First Name, Last Name, Date of Birth, Gender, and Citizenship status populated.
- First entry, reserved for Head of Household, cannot be modified.

Total number of family members includes the head of household.

Family members: Enter up to 14 more family member names here. Following fields are required for each valid entry
 Required fields: First Name, Last Name, Date of Birth, Gender and Citizenship Indicator

#	First Name*	MI	Last Name*	SSN	Date of Birth*	Sex*	Disbl Ind	Citizenship*
1	zivnzg	n	mvvit	xxx-xx-3138	09/12/1974	F	N	Y
2	mreir	g	mvvit	XXXXX9717	02/06/1997	M	No	Yes
3	zivnzq	z	mvvit	XXXXX7196	07/03/1993	F	No	Yes
4	wviuoz	v	mvvit	XXXXX4897	06/14/1996	M	No	Yes
5	zshvln	u	tmrp	XXXXX9135	05/27/2000	F	No	Yes
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								

Total Number of Family Members: 5 (count includes Head of Household)

Figure 14 - Edit Family Members Details

11. PHA Assignment

- a) Users may opt to assign PHA later. To do so, leave the record in its default state.
 - Or -
- a) Select **“Assign PHA Now!”** to fill out all PHA information. (See the figure below)
- b) To search for the PHA codes and organization details, click on the Link **“Click here to Search PHA Information”**

Receiving PHA Information: Assign PHA now! Assign PHA later!
[Click here to view the contact information of housing Authorities](#)

Figure 15 - Select Assign PHA Later to Save Record without a PHA

Receiving PHA Information: Assign PHA now! Assign PHA later!

HQ Office:
 Hub:
 Field Office: /
 Housing Authority:
 State:

Program Type:

[Click here to Search for PHA Information](#)

[Click here to view the contact information of housing Authorities](#)

Figure 16 - Select “Assign PHA Now!” to save record with a PHA

12. Searching for PHA by Name

- a) To search for **PHA by Name** type in the first few characters of PHA name and click search (See the adjacent figure). (At least 3 characters are required for successful search.)

Search PHA details

Please enter first few characters of PHA name and click "**Search PHA**" button to retrieve a list of matching PHAs. To select the details of desired PHA found within results, click "**Select this PHA**" button located next to the PHA Name. Click Cancel Button to return to the original page without selecting new PHA.

Please enter first few characters of PHA name to search for its details.
At least 3 characters are required

Figure 17 - Search for PHA

- b) Chose the appropriate match from the displayed list, and click "**Select this PHA**" button located next to it (see the adjacent figure).

When the "**Select this PHA**" button has been clicked, the PHA information is automatically populated in the main Household Assistance Details screen.

List of PHAs with name matching : Harris County

HARRIS COUNTY (Housing Authority of the County of Harris)	<input type="button" value=" << Select this PHA"/>
HQ Office: PO Field operations	
Hub: 4HATL Atlanta Hub	
Field Office: 4APH ATLANTA HUB OFFICE	
Housing Authority: GA161 HARRIS COUNTY	
State: GA Program Type: Low Rent	
Harris County Housing Authority (Harris County Housing Authority)	<input type="button" value=" << Select this PHA"/>
HQ Office: PO Field operations	
Hub: 6HFTW Fort Worth Hub	
Field Office: 6EPH HOUSTON PROGRAM CENTER	
Housing Authority: TX441 Harris County Housing Authority	
State: TX Program Type: Section 8	

Figure 18 - A List of PHAs with Names Matching the Search Text

Receiving PHA Information: Assign PHA now! Assign PHA later!

HQ Office: PO Field operations
 Hub: 4HATL Atlanta Hub
 Field Office: 4APH ATLANTA HUB OFFICE
 Housing Authority: GA161 HARRIS COUNTY
 State: GA Program Type: Low Rent

[Click here to Search for PHA Information](#)

[Click here to view the contact information of housing Authorities](#)

Figure 19 - PHA details populated back in the Assistance Details page

13. **Entering Lease Information (Not for Guest Users)**

The figures below shows the Lease Information Section located at the bottom of the form. Use this to record the lease assistance details.

*The Lease information Section of the form is **NOT** available to Guest users and will not display for Program types PH - Public Housing, MF - Multifamily, or OT- Other Assistance.*

HA Determined Eligible indicator must be set to 'Yes' before a User can enter Lease information for a Household receiving HUD Assistance.

HA Determined Eligible: Yes No

Figure 20 - HA Determine Eligibility Indicator

The Lease Details section is **not displayed** to a user when one or more of the following conditions are true:

- User does not have enough privileges to modify the lease details.
- User is of type "Guest User".

DIS Lease Record #: 04		Submit Data without Lease Information	
Payment Standard:*	\$ 645.00	Rent To Owner/Lease Rent:*	\$ 645.00
		Utility Allowance:*	\$ 107.00
Gross Rent:*	\$ 752.00	Total Tenant Payment:	\$ 430.00
HAP Total:	\$ 215.00	Utility Reimbursement:	\$ 0.00
New Unit Address:*	wldpirp h 4470	Apt #:	7453
		Actual Bedroom Size:*	2
City:*	HOUSTON	State:*	TX
		Zip Code:*	27477
<input type="checkbox"/> Monthly Lease	Owner Name:*	Owner TIN:*	887651487
HAP Contract Effective Date:*	06/01/2010	HAP Contract Termination Date:*	09/30/2010
		Program End Date:	9/30/2010
EOP Date:		EOP Reason:	-- Not Applicable --
		<input type="checkbox"/> Early Release Fee	
Max 250 characters (approx 4 lines) from the comment text will be saved. Comments: hw .410 lg wvtmzxsx gmflnz gmvrox wnz 932 lg wvtmzxsx gmflnz kzs 43/3/8 uuv mlrgzxrurgivxvi ozfmmz		Update Current Lease	Cancel
		Save As New Lease	
<< View Previous Lease Record		Lease History	Comment History

Figure 21 - Typical Lease Information Section for HUD Families

DIS Lease Record #: 01		Submit Data without Lease Information	
Payment Standard:*	\$ 843.00	FMR:*	\$ 590.00
		FEMA Payment:*	\$ 590.00
Rent To Owner/Lease Rent:*	\$ 590.00	HAP Total:	\$ 590.00
New Unit Address:*	gvvigh hvwive hlozk 5371	Apt #:	z21
		Actual Bedroom Size:*	1
City:*	LAS VEGAS	State:*	NV
		Zip Code:*	53356
<input type="checkbox"/> Monthly Lease	Owner Name:*	Owner TIN:*	335253242
HAP Contract Effective Date:*	12/01/2007	HAP Contract Termination Date:*	02/28/2009
		Program End Date:	8/31/2009
<input type="checkbox"/> IRT Exception	<input type="checkbox"/> Finder's Fee		
EOP Date:		EOP Reason:	-- Not Applicable --
<input checked="" type="checkbox"/> Family Contacted	<input checked="" type="checkbox"/> Family Agreed to Case Management	<input checked="" type="checkbox"/> Landlord Signed HAP Contract	
HQS Inspection Date:	11/27/2007	HQS Inspection Type:	Limited HQS
Tenant ID:	050998	PHA Tenant Remarks:	
LL_ADD1:		LL_ADD2:	
LL_CITY:		LL_STATE:	
LL_CNTY:		LL_PHONE:	
LL_FAX:		LL_EMAIL:	
LL_CONTACT:		Landlord Signed Certification:	<input checked="" type="checkbox"/>
Family Contacted for Transition:	<input checked="" type="checkbox"/>	Family Receiving Transition Assistance:	<input checked="" type="checkbox"/>
Family NOT eligible for HCV:	<input type="checkbox"/>	Family Signed Certification:	<input type="checkbox"/>
Max 250 characters (approx 4 lines) from the comment text will be saved. Comments:		Update Current Lease	Cancel
		Save As New Lease	
Lease History		Comment History	

Figure 22 - Lease information Section for Non-HUD families (First Lease)

DIS Lease Record #: 02			Submit Data without Lease Information		
Payment Standard:*	\$ 0.00	FMR:*	\$ 0.00	FEMA Payment:*	\$ 0.00
Rent To Owner/Lease Rent:*	\$ 0.00	HAP Total:	\$ 0.00		
New Unit Address:*			Apt #:		
City:*			State:*		
<input type="checkbox"/> Monthly Lease		Owner Name:*	Owner TIN:*		
HAP Contract Effective Date:*	03/01/2009	HAP Contract Termination Date:*			Program End Date:
<input type="checkbox"/> IRT Exception			<input type="checkbox"/> Mover Fee		
EOP Date:		EOP Reason: -- Not Applicable --			
<input type="checkbox"/> Family Contacted		<input type="checkbox"/> Family Agreed to Case Management		<input type="checkbox"/> Landlord Signed HAP Contract	
Tenant ID:	052298 PHA Tenant Remarks:				
LL_ADD1:	LL_ADD2:	LL_CITY:			
LL_CNTY:	LL_STATE:	LL_ZIP:			
LL_PHONE:	LL_FAX:	LL_EMAIL:			
LL_CONTACT:	Landlord Signed Certification:	<input type="checkbox"/>		Family Receiving Transition Assistance: <input type="checkbox"/>	
Family Contacted for Transition:	Family NOT eligible for HCV:	<input type="checkbox"/>		Family Signed Certification: <input type="checkbox"/>	
Max 250 characters (approx 4 lines) from the comment text will be saved.					
Comments:				Update Current Lease	
				Cancel	
				Save As New Lease	
<< View Previous Lease Record		Lease History		Comment History	

Figure 23 - Lease Information Section for Non-HUD Families (Second Lease)

DIS Lease Record #: 01			Submit Data without Lease Information		
Payment Standard:*	\$ 702.00	FMR:*	\$ 702.00	FEMA Payment:*	\$ 702.00
Rent To Owner/Lease Rent:*	\$ 750.00	HAP Total:	\$ 702.00		
Security Deposit:	\$ 0.00	Utility Deposit:	\$ 0.00		
New Unit Address:*	wi mviwmlu 4435	Apt #:	633	Actual Bedroom Size:*	
City:*	HOUSTON	State:*	TX	Zip Code:*	
<input type="checkbox"/> Monthly Lease		Owner Name:*	hgmvgizkz pozdwizly	Owner TIN:*	
HAP Contract Effective Date:*	12/01/2008	HAP Contract Termination Date:*	05/27/2010	Program End Date:	
<input type="checkbox"/> IRT Exception			EOP Reason: -- Not Applicable --		
Vacancy Payment: \$		Vacancy Payment Date:			
<input checked="" type="checkbox"/> Family Eligible for Continued Assistance		Continued Assistance Initial Eligibility Determination Date:			
		07/31/2009			
<input checked="" type="checkbox"/> Family Contacted		<input checked="" type="checkbox"/> Family Agreed to Case Management		<input checked="" type="checkbox"/> Landlord Signed HAP Contract	
HQS Inspection Date:		HQS Inspection Type:			
11/28/2008		Limited HQS			
Last Quarterly Eligibility Determination Date:		Next Quarterly Eligibility Determination Due Date:			
03/31/2010		06/29/2010			
<input type="checkbox"/> Unit Available					
Tenant ID:	410362636 PHA Tenant Remarks:				

Figure 24 - Top of Typical 1st Lease Page for DHAP-IKE Family

PREV_CNTY:	<input type="text"/>	CURR_CNTY:	<input type="text"/>	FEMA_CLC_LAST_RENTAL_AWARD_DATE:	<input type="text"/>
NEW_UNIT_CNTY:	<input type="text"/>	LL_ADD1:	9100 Fondren Rd	LL_ADD2:	<input type="text"/>
LL_CITY:	HOUSTON	LL_CNTY:	<input type="text"/>	LL_STATE:	TX
LL_ZIP:	77074	LL_PHONE:	7139888428	LL_FAX:	<input type="text"/>
LL_EMAIL:	<input type="text"/>	LL_CONTACT:	<input type="text"/>	FAM_SGN_CERT_LTR_REMN_DHAP:	<input type="checkbox"/>
FAM_SGN_CERT_LTR_REMN_DHAP_DATE:	<input type="text"/>				
Family Continued Eligibility Assessed:	<input checked="" type="checkbox"/>	30 Day Termination Payment Issued:	<input type="checkbox"/>		
Max 250 characters (approx 4 lines) from the comment text will be saved. Comments: <input type="text"/>				Update Current Lease	Cancel
				Save As New Lease	
Lease History	Comment History				

Figure 25 - End of Typical 1st Lease Page for DHAP-IKE Family

DIS Lease Record #: 02		Submit Data without Lease Information	
Payment Standard:*	\$ 1525.00	FMR:*	\$ 1271.00
Rent To Owner/Lease Rent:*	\$ 1250.00	HAP Total:	\$ 1250.00
New Unit Address:*	gh vhrflo 0001	Apt #:	<input type="text"/>
City:*	HARVEY	State:*	LA
<input type="checkbox"/> Monthly Lease	Owner Name:*	Owner TIN:*	530331010
HAP Contract Effective Date:*	11/01/2009	HAP Contract Termination Date:*	05/27/2010
<input type="checkbox"/> IRT Exception		Program End Date: 5/27/2010	
EOP Date:	<input type="text"/>	EOP Reason:	-- Not Applicable --
Vacancy Payment: \$	<input type="text"/>	Vacancy Payment Date:	<input type="text"/>
<input checked="" type="checkbox"/> Family Eligible for Continued Assistance	Continued Assistance Initial Eligibility Determination Date: 10/01/2009		
<input checked="" type="checkbox"/> Family Contacted	<input checked="" type="checkbox"/> Family Agreed to Case Management	<input checked="" type="checkbox"/> Landlord Signed HAP Contract	
HQS Inspection Date:	10/23/2009	HQS Inspection Type:	Limited HQS
Last Quarterly Eligibility Determination Date:	03/01/2010	Next Quarterly Eligibility Determination Due Date:	05/30/2010
<input type="checkbox"/> Unit Available			
Tenant ID:	<input type="text"/>	PHA Tenant Remarks:	<input type="text"/>

Figure 26 - After 1st Lease for DHAP-IKE (top)

PREV_CNTY:	<input type="text"/>	CURR_CNTY:	<input type="text"/>	NEW_UNIT_CNTY:	<input type="text"/>
LL_ADD1:	300 FOREST CENTER DR	LL_ADD2:	APT 13105	LL_CITY:	KINGWOOD
LL_CNTY:	<input type="text"/>	LL_STATE:	TX	LL_ZIP:	77339
LL_PHONE:	5042896308	LL_FAX:	<input type="text"/>	LL_EMAIL:	<input type="text"/>
LL_CONTACT:	<input type="text"/>	Security Deposit (Other Leases):	0	Utility Deposit (Other Leases):	0
Family Continued Eligibility Assessed:	<input checked="" type="checkbox"/>	30 Day Termination Payment Issued:	<input type="checkbox"/>		
Max 250 characters (approx 4 lines) from the comment text will be saved. Comments: <input type="text"/>				<input type="button" value="Update Current Lease"/> <input type="button" value="Cancel"/>	
				<input type="button" value="Save As New Lease"/>	
<input type="button" value="View Previous Lease Record"/>		<input type="button" value="Lease History"/>		<input type="button" value="Comment History"/>	

Figure 27 - After 1st Lease for DHAP-IKE (bottom)

<p>Following fields on the Lease information section are applicable only to the Non-HUD New Program Types (DH, DT, D3 through D10):</p> <ul style="list-style-type: none"> - IRT Exception, Date and Amount - Finder's Fee - Mover Fee - Security Deposit - Utility Deposit - Vacancy Payment - Vacancy Payment Date 	<p>Following fields on the Lease information section will not appear for the New Program Type : "AH – Affected Public Housing"</p> <ul style="list-style-type: none"> - Monthly Lease - EOP Date and Reasons. - Early Release Fee. - IRT Exception, Date and Amount - Finder's Fee And Mover Fee - Family Contacted Indicator - Family Agreed to Case Management Indicator - Landlord Signed HAP Contract Indicator - HQS Inspection Date
--	--

The following fields and indicators are only available on a Non-HUD Family Lease page.

Incremental Rent transition (IRT) Exception Indicator:

- Applicable only to the Non-HUD families.
- Select this checkbox to mark the household as an exception to the Incremental Rent transition.
- Corresponding date and amount must be provided if this indicator is selected.
- IRT Exception information can be carried over to the next lease if required.
- For DHAP-IKE families, the IRT exception date shall be greater than or equal to 05/01/2009 and must always be the first day of the month.

Finder's Fee Indicator:

- Applicable only to the very first lease for Non-HUD families.
- Select this checkbox to indicate that the PHA has assisted the Non-HUD family to find a suitable housing unit.

Mover Fee Indicator:

- Applicable only to the Non-HUD families.
- Select this checkbox to indicate that the PHA has helped household find a new unit due the problem with the first housing unit.
- Indicator appears on 2nd or subsequent leases after family has moved to new location.
- Mover Fee indicator cannot be selected if any one of the following is true:
 1. *Finder's fee is already applied for the selected Household on the first lease.*
 2. *Mover Fee is already applied for the selected household on one of the old leases.*
 3. *The current lease has the same unit address as on the last lease.*

Vacancy Payment Amount:

- The PHA enter a vacancy payment amount;
- The numeric \$ value shall not exceed 2 times the lease rent amount if there is ≥ 2 months difference between vacancy payment date and program end date; and
- Or the numeric value shall not exceed 1 month of the lease rent amount if the difference between the vacancy payment date and program end date is < 2 months.

Vacancy Payment Date:

- The PHA must enter a value in this field if the vacancy payment amount has a value.
- When the PHA enters date in this field, it must be equal to both the EOP and Lease Termination date.
- When the PHA enters valid values in both the vacancy payment amount and date field, the household status is set to 'Inactive' when the household details is saved.

Family Contacted Indicator:

- The PHA will check this box to indicate that the PHA has contacted the family.
- Once indicator is checked, it can only be changed by the System Administrator.

Family Agreed to Case Management Indicator:

- The PHA checks this box when the Family has agreed to Case Management.
- Once this indicator is check, it can only be changed by the System Administrator.

Landlord Signed HAP Contract Indicator:

- The PHA selects this box once the Landlord has signed and returned the HAP Contract. Once this indicator is checked, it can only be changed by the System Administrator.

HQS Inspection Date:

- The PHA enters date that the HQS Inspection was completed.
- Once this indicator is checked, it can only be changed by the System Administrator.

<input checked="" type="checkbox"/> Family Eligible for Continued Assistance	Continued Assistance Initial Eligibility Determination Date: 07/14/2009	
<input checked="" type="checkbox"/> Family Contacted	<input checked="" type="checkbox"/> Family Agreed to Case Management	<input checked="" type="checkbox"/> Landlord Signed HAP Contract
HQS Inspection Date: <input type="text"/>	HQS Inspection Type: -- Select Type -- <input type="button" value="v"/>	
Last Quarterly Eligibility Determination Date: 07/14/2010	Next Quarterly Eligibility Determination Due Date: 10/12/2010	

Figure 28 - Family Eligibility Indicators, Landlord Signed Indicators, HQS Inspection Date & Type and Quarterly Eligibility Dates

HQS Inspection Type:

- This field is only applicable to DHAP-IKE Households.
- When the PHA enters a HQS Inspection Date, the Inspection Type must be selected.

Family Eligible for Continued Assistance Indicator:

- This field is only applicable to DHAP-IKE Household
- PHA selects this field once they have determined that the family is eligible for continued assistance.

Continued Assistance Initial Eligibility Determination Date Field:

- This date field is only applicable to DHAP-IKE Household
- This field is displayed only when the Family Eligible for Continued Assistance Indicator is checked.

Last Quarterly Eligibility Determination Date:

- This date field is only applicable to DHAP-IKE Household
- This field is displayed only when the Family Eligible for Continued Assistance Indicator is checked.

Next Quarterly Eligibility Determination Due Date:

- This field is displayed only when the Family Eligible for Continued Assistance Indicator is checked.
- This field is automatically generated by the system is the **Higher of [Continued Assistance Initial Eligibility Determination Date, Last Quarterly Eligibility Determination Date] + 90 days.**

End of Participation (EOP):

- To end the family's participation in the Disaster Assistance Program, the PHA enters the End of Participation date when the family leaves the program, and must select a reason in the EOP Reason field. If PHA selects 'Other', an explanation must be provided in the comments section. No new leases are allowed after the family has been EOP'ed.

The screenshot shows a form with two fields: "EOP Date:" and "EOP Reason:". The "EOP Reason:" dropdown menu is open, displaying a list of reasons:

- Not Applicable --
- Deceased Head of Household
- Family does not agree to Case Management
- Family does not agree to move to HQS complaint unit
- Family does not agree to move to unit with participating landlord
- Family receiving duplicate assistance
- Family refused DHAP Assistance (Provide details in Comments section)
- Return Home
- Termination of Assistance for Violation of Family Obligations
- Unable to contact Family
- Other (Provide details in Comments section)

 Below the dropdown, the "EOP Reason:" field is set to "-- Not Applicable --". To the right of the form is a checkbox labeled "Early Release Fee".

Figure 29 - End of Participation Date and Reasons

Program End Dates:

- Program End Dates are determined by the combination of Disaster, Pre-Disaster Program Type and New Program as given in the adjacent table. All the leases must end on or before this date. Program End Dates are managed by the Business Rules.

Criteria	Program End Date
Pre-Disaster Program Type: MF, MR, PH, OH and HL	06/30/2008
Pre-Disaster Program Type: VO	12/31/2007
New Program Type: DH	02/28/2009
New Program Type: DT	02/28/2009
New Program Type: D3	02/28/2009
New Program Type: D4	02/28/2009
New Program Type: D5	02/28/2009
New Program Type: D6	02/28/2009
New Program Type: D7	02/28/2009
New Program Type: D8	02/28/2009
New Program Type: D9	02/28/2009
New Program Type: D10	02/28/2009
New program Type: AH	12/31/2006

Table 2 - Program End Dates

14. Creating New Lease Records/Viewing Previous Lease Records

- DIS will not allow any HAP Contract Effective Date prior to 2/1/2006.
- Make sure current Lease information is completely entered and is valid.
- In the Lease information section, enter information about new lease. Make sure the New HAP Contract Effective Date is greater than previous HAP Contract Termination Date.
- When all new lease details have been filled in, click on “**Save as New Lease**” button to save new information as next Lease record.
- To verify that the new lease was created bring up the assistance details screen again.

- f) At the bottom of the screen, an extra button with label “**View Previous Lease Record**” will be displayed.
- g) Click on “**View Previous Lease Record**” button to view previous lease records.

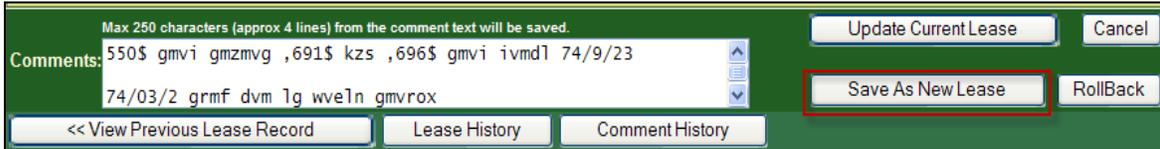


Figure 30 - Saving New Lease record

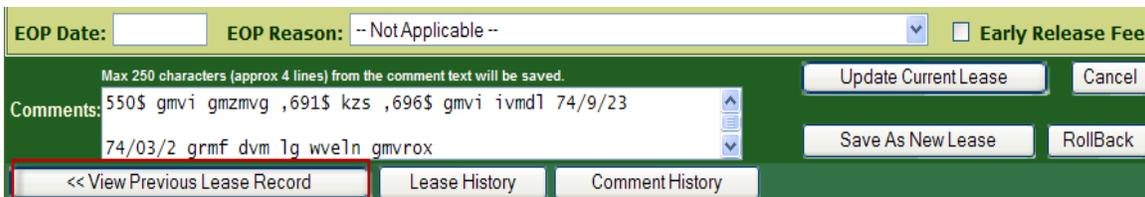


Figure 31 - Viewing Previous Lease Record

15. Viewing Lease History and Historical Comment Records

- a) At the bottom of the screen, an extra button labeled “**Lease History**” will be displayed.
- b) Click on the “**Lease History**” button to view household, member and transaction data, for the selected lease, by archive dates
 - i. On the new pop-up window, select an archive date via the “**History Date**” dropdown and click the “**View**” button
 - ii. Click the red “**X**” to close window
- c) At the bottom of the screen, a button labeled “**Comment History**” will be displayed.
 - i. Click the “**Comment History**” button and a pop-up window will open displaying all historical comments in chronological order
 - ii. Click the red “**X**” to close the window



Figure 32 - Lease History



Figure 33 - Viewing Lease History (Archive records)

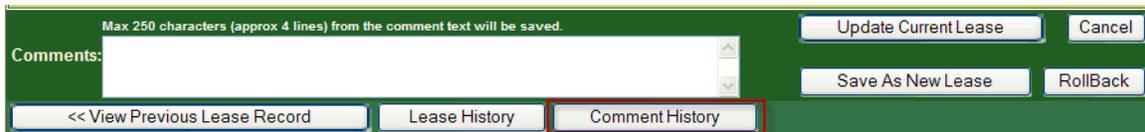


Figure 34 - Historical Comments (Comment History)

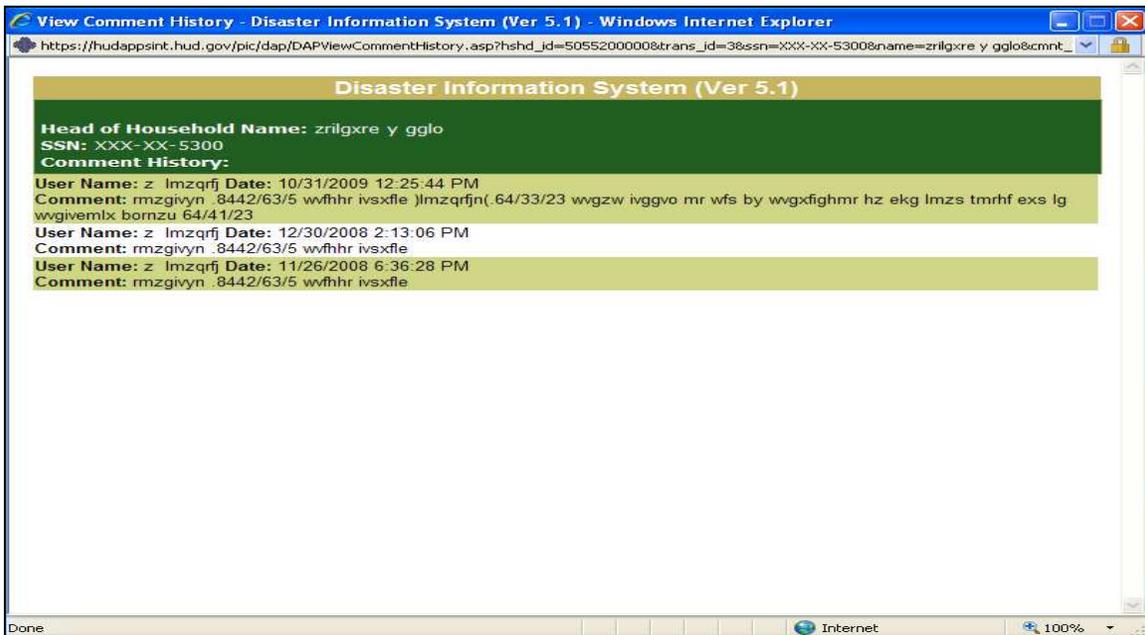


Figure 35 - Viewing Historical Comments (Comment History)

16. Fixing Input Errors in the Assistance Details Form

- a) When you press “**Update Current Lease** or **Save as New Lease**” on the main Assistance Details form, you may receive an error message “**Please correct x error(s) listed at the top of the page**” similar to adjacent figure.
- b) To fix this, scroll to the top of the page to view the list of errors. Fix all the errors and click the “**Update Current Lease**” or “**Save As New Lease**” again. Repeat until there are no further errors.



Figure 36 - Review the Errors at the Top of the Form

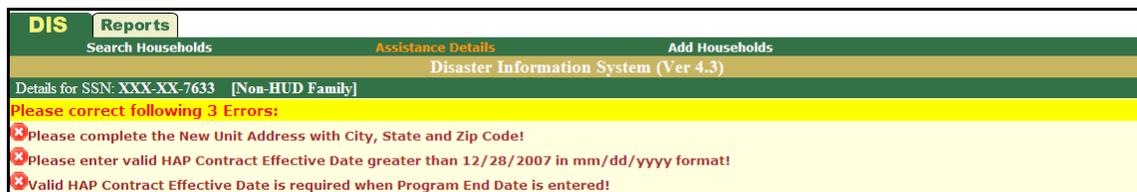


Figure 37 - Review and fix listed Errors in the Form

17. Rolling back Lease/Assistance Record (HUD Super Users Only)

- a) Rollback functionality can be used to clear erroneous assistance details or lease details.
- b) For Users with Rollback privileges, the Household Lease/Assistance details page will display “**Rollback**” button at the bottom of the page.
- c) Click this button to navigate to Rollback options.
- d) Rollback options page will display all the lease records available for the selected household.
- e) Users may choose to rollback either the most recent lease record or all of them. (The most recent lease record is displayed as the top row of the table with light brown background.)
- f) Click one of the Rollback buttons to rollback appropriate record. The status of rollback will be displayed at the bottom of the page.

Figure 38 - Rollback Lease and Assistance Records

Disaster Information System (Ver 3.1)									
Rollback Lease records for SSN: XXX-XX-0066									
Head of Household Name: MWFVL A YKXL		Sex: F							
Disaster Program Code: 1603									
Initial PHA (Code and Name):									
Date of Birth: 07/17/1917					HA Determined Eligibility: Y				
Requested record(s) were rolled back and archived. See the details of rolled back records at the bottom of the page.									
Rollback most recent record [# 3]			Rollback All Records			Cancel			
Lease / Assistance Transaction details:									
Lease Record Number	Payment Standard (\$)	Rent To Owner (\$)	Lease Start	Lease End	New Program Type	Receiving PHA	Port out?	Last Update Date-Time	Updated by (user id)
3 [Modify]	442.00	138.00	04/01/2006	06/30/2006	AH	MS057 HA MISSISSIPPI REGIONAL NO 7	N	Mar 23 2007 3:19PM	MB1070
2 [View]	442.00	181.00	03/01/2006	03/31/2006	AH	MS057 HA MISSISSIPPI REGIONAL NO 7	N	Mar 23 2007 3:18PM	MB1070
1 [View]	442.00	192.00	02/01/2006	02/28/2006	AH	MS057 HA MISSISSIPPI REGIONAL NO 7	N	Mar 23 2007 3:17PM	MB1070
Following record(s) were rolled back and archived.									
Lease Record Number	Payment Standard (\$)	Rent to Owner(\$)	Lease Start	Lease End	New Program Type	Receiving PHA	Last Update Date-Time	Updated by (user id)	
-4	-442.00	-135.00	-07/01/2006	-12/31/2006	AH	-MS057-HA MISSISSIPPI REGIONAL NO-7	-Mar-23-2007 3:19PM	-MB1070	

Figure 39 - Rollback Record Screen

18. Port Out

- a) Port out functionality is used to move a household from one Receiving PHA to Another.
- b) Only a HA user that belongs to the current Receiving PHA can perform Port Out.
- c) Port Out process involves following steps:
 1. Enter the lease termination date.
 2. Select the Port Out button.
Click "OK" to accept message on the pop-up "Are you sure you want to perform Port Out for this Household?"
 3. Reassign to a new PHA and enter appropriate comments in the comments section.
 4. Click on the "Port Out" button to complete the process.

Figure 40 – Port Out Button

- d) Port out process essentially creates additional blank lease with the new PHA.

- e) After successful port out current PHA user cannot edit the record. The record modification privileges are now with the new PHA users.

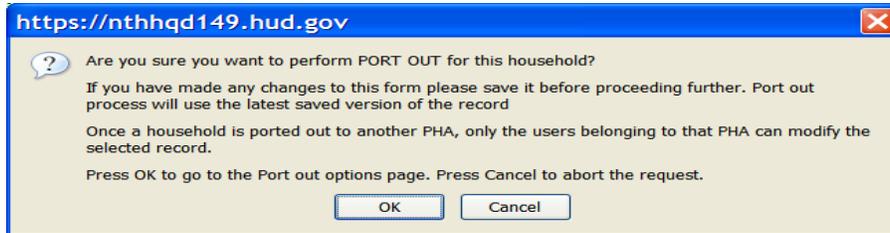


Figure 41 - Port Out Process Message Box

The screenshot shows a form with the following fields and values:

- Head of Household Name: JOHN SMITH (FirstName | Middle Initial | Last Name)
- Program: Disaster Supplemental Voucher Program
- Initial PHA (Code and Name): LA013 JEFFERSON PARISH HOUSING AUTHORITY
- Sex: M Date of Birth: 08/03/1970 (mm/dd/yyyy)
- Pre Disaster Program Type: VO - Displaced Voucher Family
- Current PHA:
 - HQ Office: PO Field operations
 - Hub: 6HNWO New Orleans Hub
 - Field Office: 6PH NEW ORLEANS HUB OFFICE
 - Housing Authority: LA001 New Orleans HA
 - State: LA Program Type: Combined
- New PHA:
 - HQ Office: PO Field operations
 - Hub: 4HATL Atlanta Hub
 - Field Office: 4APH ATLANTA HUB OFFICE
 - Housing Authority: GA199 SANDERSVILLE
 - State: GA Program Type: Low Rent
- Comments: Max 250 characters (approx 4 lines) from the comment text will be saved. Ported out as per households request.

 Buttons at the bottom are 'Port Out' and 'Cancel'.

Figure 42- Port Out Option Box

19. Viewing Records Already Assigned to a PHA

- a) To search for a record already updated and assigned to a PHA, click on the view and update details link at the bottom of the screen. Alternately, you can also select the link “Assistance Details” located at the top to view list of Households assisted by a PHA.
- b) The PHA Search screen displayed will be empty. Search and select for a PHA by clicking on the “**Search for PHA Information**” button.
- c) Select SSN link for the required record from the list displayed to view/edit the details of assistance.

#	SSN	FEMA ID	First Name	Last Name	Date of Birth	Sex	Pre-Disaster Apt	Pre-Disaster Street	Pre-Disaster City	Pre-Disaster State	Pre-Disaster Zip	Info	Status	Archived Data	Prior Unit Available
1	XXX-XX-5934 (New)		Tester	Tester	04/04/1973	M		1421 Prince Street Prince Street				Non-HUD	Active	View	Available
2	XXX-XX-0760	912011281	HKCR	KZFNVB	05/01/1900	M		388 Rblfszuv NI	Mnfegeu	LA	12517	Non-HUD	Active	View	Not Available
3	XXX-XX-7633	911938539	ABJWHJRW	MXOJLBDN	12/04/1984	F		1304 XIUAPANLA GU FVX C	PBW QOUFQEN	LA	12000	Non-HUD	Active	View	Not Available
4	XXX-XX-2589	912087194	VVGBCAQ	JKOVQ	06/21/1969	M		9403 BJFSAPRM NJC	YBMBHOKF	LA	12343	Non-HUD	Active	View	Not Available
5	XXX-XX-6960	940804179	KLNVHM	YKXDB	11/16/1974	M		823 GREFSNPQLA KRU	YBMBHOKF	LA	12342	Non-HUD	Active	View	Not Available
6	XXX-XX-0304	939513892	GNOFLRP	LZFMJM	07/13/1977	F		5686 YPWB WRECJKHO EMTE MVY V983	PBW QOUFQEN	LA	12000	Non-HUD	Active	View	Not Available
7	XXX-XX-939648144	939648144	NOQS	GL	03/11/1941	M		8736 YPWJW SKO	PBW QOUFQEN	LA	12003	Non-HUD	Active	View	Not Available

Figure 43 - Click on One of the SSN Links to View Records Assigned to PHA

20. Adding/Approving New Households

DIS provides a functionality to add new households to the system. Every new household added to the system needs to be approved by a HUD User with Super user rights.

- Click on the **“Add Households”** tab to access the Add/Approve New Household option.

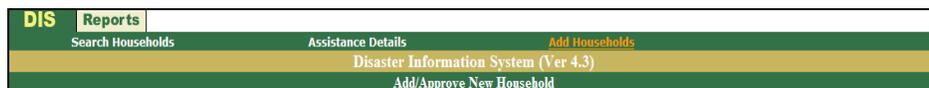


Figure 44 - Click on “Add Households” link to view the options

- Guest users** will be directly taken to the “Add Households” form. However, **Guest users** will not have privileges to add households.
- HA users** would typically see the top two buttons as indicated in the above figure.
- SUPER users** and **HUD users** would see all the options as displayed in the figure below.

The following pages describe the New Households Addition and Approval processes in details.

Super/HUD users HA users	<input type="button" value="Add New Households"/>	<p>Add new households to DVP system Use this action to add households to the system. All the households (except of type HL - CPD) must be approved before they appear in the system and provided assistance. Households with pre-disaster code "HL - CPD (Homeless)" do not need the formal approval as the PHA Verification and Screening process is enough to establish their eligibility for DVP system.</p>
	<input type="button" value="Update PHA Verification Details"/>	<p>Modify the PHA Verification and Screening results for HL - CPD households. This functionality is used for the households with pre-disaster program type "HL - CPD". It allows user to modify only the incomplete details of PHA Verification and Screening.</p>
	<input type="button" value="Approve/Reject Households"/>	<p>Approve or reject newly proposed households. This action allows user to search for households pending approval. You may choose to select any of the households from search results and approve or reject them. It also provides entire list of proposed households if you want to approve/reject multiple households at a time. Viewing the entire list may take long time depending upon the number of pending households.</p>
	<input type="button" value="Reset Rejected Households' Status"/>	<p>Reset the status of Rejected Households to "Pending" This action allows user to search for rejected households. You may choose to select any of the rejected households from search results and reset their status back to "Pending" (and in turn put them back into the Approval queue). It also provides entire list of rejected households if you want to reset multiple households at a time. Viewing the entire list may take long time depending upon the number of rejected households.</p>

Figure 45 - Add/Approve Households – Options

21. Entering New Household

- a) Click the “Add New Household” button from the previous screen to navigate to the new household data entry screen.

Guest users are directly taken to this screen when they click the page link “Add New Households”. However, Guest users will have “Read-Only” access on this page.

Disaster Information System (Ver 5.1)		
Add New Household		
Head Of Household Name: * Johnny Q Doe (First Name Middle Initial Last Name)		
Head of Household SSN: * 255678963	Sex: * Male	Disabled: * No
Date of Birth: * 12/21/1950 (mm/dd/yyyy)	Contact Number: () -	
Disaster Program Code: 1607 - Louisiana (HURRICANE RITA)	Citizenship: * Yes	Old Bedroom Size:
Pre-Disaster Street:		Apt #:
City:	State:	Zip Code:
Pre Disaster Program Type: * NH - New Housing		
Purpose: * OP - Other purpose (Please see comments)		
Point of Contact Name: * Jeff Jones		POC Contact Number/Email: * jjones@anydomain.com
Comments: Max 250 characters (approx. 5 lines) from the comment text will be saved. Add New Household		
		<input type="button" value="Add Household"/> <input type="button" value="Cancel"/>

Figure 46 - Add New Household Screen

- b) Pre Disaster Program Type field has 24 options to choose from as shown in the figure below:

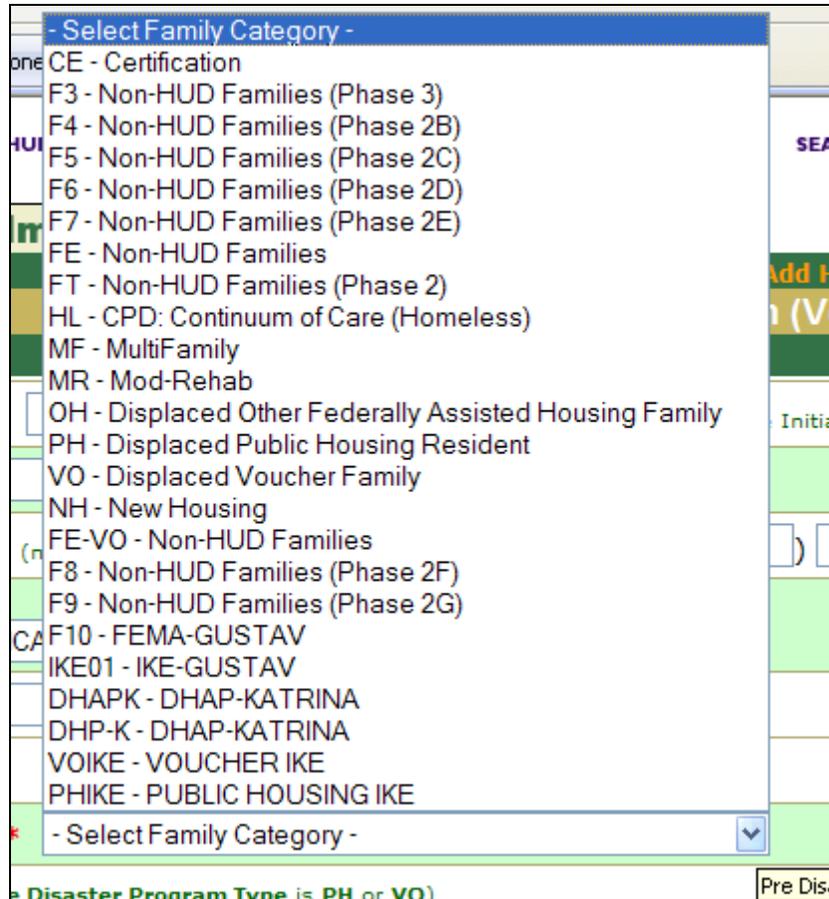


Figure 47 - Pre Disaster Program Types

- c) **Guest users** cannot add “HL-CPD (Homeless)”, so this option will not be displayed in the guest users’ screen.
- d) The Initial PHA is required when Program Types “PH” and “VO” are selected.
- e) The verifying PHA and the PHA verification and Screening Results are required when Program Type “HL-CPD” is selected. PHA verification options will appear on the screen as shown in adjacent figure when “HL-CPD” is selected.

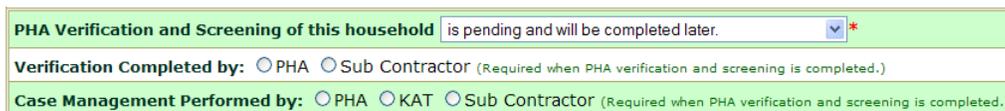


Figure 48 - PHA Verification and Screening results fields for HL-CPD households.

The process to add “HL-CPD” households is described in details on following pages.

- f) To add households with the other pre-disaster program types listed, enter the required data and click “**Add Household**” button. Correct any validation errors displayed at the top of the page and submit the data again.
- g) Household data submitted will be put into an approval queue and added to the system after **HUD Super user** approves it.

22. Entering Data for HL-CPD (Homeless) Households (HA/HUD/Super Users)

Only PHA users are authorized to add households with pre-disaster program type “HL-CPD”.

- a) HL-CPD household data entry requires three additional fields as shown in the adjacent figures along with Verifying PHA.

The screenshot shows a web form for entering household data. The 'Pre Disaster Program Type' dropdown is set to 'HL - CPD: Continuum of Care (Homeless)'. The 'Verifying PHA' section is highlighted with a red box and contains the following information: HQ Office: PO Field operations; Hub: 4HGRN Greensboro Hub; Field Office: 4FPH GREENSBORO HUB OFFICE; Housing Authority: NC011 Greensboro Housing Authority; State: NC; Program Type: Combined. Below this is a 'Search and Select PHA' button. The 'PHA Verification and Screening of this household' dropdown is set to 'is pending and will be completed later.'. At the bottom, there are radio button options for 'Verification Completed by' (PHA, Sub Contractor) and 'Case Management Performed by' (PHA, KAT, Sub Contractor).

Figure 49 - HL-CPD Options

- b) Users must indicate the status of PHA Verification and Screening process.
- c) HL-CPD households **DO NOT** follow the formal approval process required for all other Pre Disaster Program types.
- d) If the PHA verification and Screening results indicate that the household is eligible, the household is implicitly approved, the household data is immediately available for assistance.
- e) If the PHA verification and Screening results indicate that the household is ineligible, the household is implicitly rejected.
- f) Users can choose to enter the PHA verification results later. Those records would be held in pending status.
- g) The approval queue will display the pending HL-CPD records but would not allow the select them.
- h) The PHA verification details for pending HL-CPD households can be modified using the button “**Update PHA Verification Details**” available

on the main Add Households options page as shown in the adjacent figure.

Add/Approve New Household	
<input type="button" value="Add New Households"/>	<p>Add new households to DVP system Use this action to add households to the system. All the households (except of type HL - CPD) must be approved before they appear in the system and provided assistance. Households with pre-disaster code "HL - CPD (Homeless)" do not need the formal approval as the PHA Verification and Screening process is enough to establish their eligibility for DVP system.</p>
<input type="button" value="Update PHA Verification Details"/>	<p>Modify the PHA Verification and Screening results for HL - CPD households. This functionality is used for the households with pre-disaster program type "HL - CPD". It allows users to modify only the incomplete details of PHA Verification and Screening.</p>

Figure 50 - Update PHA Verification Details' Option

23. Approving or Rejecting New Household Record (HUD Super Users)

Approve/Reject Household functionality is only available to HUD Super users granted the authority to approve or reject the family addition.

- a) Select “**Approve/Reject Households**” from Main Add household options pages to navigate to the approval page.

<input type="button" value="Approve/Reject Households"/>	<p>Approve or reject newly proposed households. This action allows users to search for households pending approval. Users may choose to select any of the households from search results and approve or reject them. To approve/reject multiple households at a time, use this action to retrieve the entire list of proposed households. Viewing the entire list may take a long time depending on the number of pending households.</p>
--	---

Figure 51 - Approve/Reject Households Option

- b) Approval/Rejection page provides search functionality to search for pending households by SSN, First Name or Last Name.
- c) At least one of the following fields is required while searching the records:
 - SSN
 - Last Name
 - First Name.

Users can view all the pending households using button “**Show All Households Pending Approval**”. Retrieving all the pending records may take long time depending on the total number of pending records.

1 – Introduction

- d) If an SSN is entered, it must be 9-digit numeric value. For faster results enter at least 3 characters of First Name or last Name.

Approve or Reject a Household

To retrieve the list of proposed households matching specific criteria, please enter SSN or First Name or Last Name and click Search (at least one field is required). If SSN is entered, it must be a valid 9 digit numeric value. If First Name or Last Name is provided, make sure it is at least 3 characters long for faster search results.

To view the entire list of households(pending approval) click "Show all households pending approval". This option may take quite a while to display the list if there are lots of pending approvals.

Search proposed households (pending approval)

SSN:

Last Name:

First Name:

The records marked with 'Crossed out checkboxes' () indicate that the household's pre disaster program type is "HL - CPD". These records will be approved or rejected by the system accordingly after the PHA verification details are updated.

#	SSN	FULL NAME	DATE OF BIRTH	SEX	DSBLD?	DISASTER CODE	CITIZENSHIP	OLD PROGRAM	INITIAL PHA	OLD ADDRESS	PURPOSE
<input checked="" type="checkbox"/>	1 XXX-XX-8888	William Linus	02/19/1960	M	N	1607	Y	HL	DC001 D.C Housing Authority		OP
<input type="checkbox"/>	2 XXX-XX-9999	Abraham Lincoln	11/16/1948	M	N	1604	Y	PH	AR171 Greenwood Housing Authority	23 White House Washington DC 22222	HB

Figure 52 - Pending Household List

- e) To approve or reject a household, select the checkbox displayed next to the SSN number column in the search results and click appropriate button (“**Approve**” or “**Reject**”
- f) Pending “HL-CPD” records do not require formal approval. These records will have crossed out checkboxes, which cannot be selected.
- g) Press “**Cancel**” button to go back to the main options page.

24. Reset Rejected Households Status (Only for HUD and Super Users)

Only HUD Super users who have been granted the authority to approve or reject households can reset the status of the Add Household record.

- a) This functionality is used to reset the status of the rejected households back into the approval queue.
- b) Select “**Reset Rejected Households’ Status**” from Main Add household options pages to navigate to the “Reset status’ page.

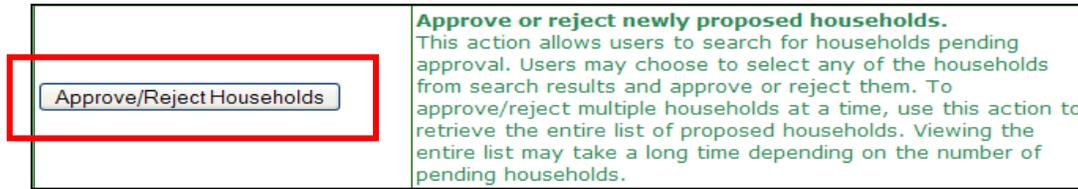


Figure 53 - Approve/Reject Households Option

- c) Search for rejected households by the 9-digit SSN or at least 3 characters of the First Name or Last Name. Click **“Search Rejected Households”**.
- d) Users can also view all the rejected households by clicking the **“Show All Rejected Households”** button.

Reset the status of Households to "Pending"

To retrieve the list of rejected households matching specific criteria, enter one of the following information: SSN, First Name or Last Name and the must be a valid 9 digit numeric value. If First Name or Last Name is provided, make sure it is at least 3 characters long for faster search results.

To view the entire list of rejected households, click "Show All Rejected Households" button. Viewing the entire list may take a long time depending on the number of households.

Search Rejected Households

SSN:

Last Name:

First Name:

#	SSN	FULL NAME	DATE OF BIRTH	SEX	DSBLD?	DISASTER CODE	CITIZENSHIP	OLD PROGRAM	INITIAL PHA	OLD ADDRESS	PURPOSE	COMMENTS
<input type="checkbox"/>	1 XXX-XX-9999	Abraham Lincoln	11/16/1948	M	N	1604	Y	PH	AR171 Greenwood Housing Authority	23 White House Washington DC 22222	HB	
<input type="checkbox"/>	2 XXX-XX-████	██████████	██████████	M	N			PH	LA001 New Orleans HA	██████████	HF	
<input type="checkbox"/>	3 XXX-XX-████	██████████	██████████	F	N			VO	LA001 New Orleans HA	██████████	OP	

HB - HOH of broken-up, formerly HUD-housed families (i.e., new HOH).
HF - HOH of formerly HUD-housed families not reported in PIC or TRACS.
OP - Other purpose (Please see comments).

Figure 54 - Rejected Households List

Retrieving all the records may take long time depending on the total number of rejected records.

- e) To reset a household, select a/the record returned in the search results and click **“Reset Status to [Pending]”**.
- f) Press **“Cancel”** button to go back to the main options page.

25. ***Modifying PHA Verifications Results for HL-CPD Households***

Only HUD Super Users who have been granted the authority to approve or reject households can update the status of PHA Verification Details.

1 – Introduction

- a) This functionality allows users to modify the PHA verification results of the newly added HL-CPD (Homeless) households.
- b) Click on “**Update PHA Verification Details**” button on the main page to navigate to HL-CPD households’ list page.



Figure 55 - Modify PHA Verification Details Option

- c) Select “Reset rejected households’ Status” from the Main Add household options pages to navigate to the ‘Reset status’ page.
- d) To search for the HL-CPD record, enter 9 digits SSN or least 3 characters of the Last Name or First Name. Click ‘Search “HL-CPD’ Household’.
- e) Users can also view all the rejected households using button “Show All HL-CPD Households”.

Retrieving all the records may take long time depending on the total number of records.

Update PHA Verification and Screening details for "HL - CPD" Households

To retrieve the list of "HL - CPD" households matching specific criteria, enter one of the following information: SSN, First Name or Last Name and the 'Search'. If SSN is entered, it must be a valid 9 digit numeric value. If First Name or Last Name is provided, make sure it is at least 3 characters long search results.

This page does not display the "HL - CPD" households for which the PHA Verification and Screening details are complete.

To view the entire list of "HL - CPD" households (with incomplete PHA Screening and Verification Details) click [Show All "HL - CPD" Households]. This may take quite a while to display the list if there are lots of households with incomplete verification details.

Search "HL - CPD" households

SSN:

Last Name:

First Name:

#	SSN	FULL NAME	DATE OF BIRTH	SEX	DSBLD?	DISASTER CODE	CITIZENSHIP	OLD PROGRAM	VERIFYING PHA	OLD ADDRESS	PURPOSE	COMMENTS	POINT OF CONTACT
<input type="radio"/>	1 XXX-XX-8888	William Linus	02/19/1960	M	N	1607	Y	HL	DC001 D.C Housing Authority		OP		Thomas Jefferson 555-4589856

HB - HOH of broken-up, formerly HUD-housed families (i.e., new HOH).
HF - HOH of formerly HUD-housed families not reported in PIC or TRACS.
OP - Other purpose (Please see comments).

Figure 56 - HL-CPD Households List

- f) This page displays only those “HL-CPD” records for which the PHA Verification and Screening details are incomplete.
- g) Select a record using radio button provided within search results and click on “**Modify PHA Verification Details**”.
- h) The Actual modification page allows changes in following three fields:
 - Verification Status
 - Verified By
 - Case Management By

The remaining household data will be presented as read-only.

- i) Press the “**Cancel**” button to abort the request and go back to the previous page.

Modify PHA Verification and Screening Results		
Head Of Household Name: XXX-XX-8888		
Head of Household SSN: William Linus	Sex: M	Disabled: N
Date of Birth: 02/19/1960	Citizenship: Y	Disaster Program Code: 1607 - Louisiana (RITA)
Pre Disaster Program Type: HL - CPD - Continuum of Care (Homeless)		
Verifying PHA:		
HQ Office:	PO Field operations	
Hub:	3HBLT Baltimore Hub	
Field Office:	3GPH WASHINGTON, DC PROGRAM CENTER	
Housing Authority:	DC001 D.C Housing Authority	
State:	DC	Program Type: Combined
PHA Verification and Screening of this household is completed and the household was found <please select>*		
Verification Completed by:* <input type="radio"/> PHA <input type="radio"/> Sub Contractor		
Case Management Performed by:* <input type="radio"/> PHA <input type="radio"/> KAT <input type="radio"/> Sub Contractor		
Purpose: OP - Other (Please enter description in comments section)		
Point of Contact: Thomas Jefferson 555-4589856		
Comments:		
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

Figure 57 - PHA Verification and Screening Details Changes

26. DIS Reports

- a) Click on the Report tab to open the Report Screen.
- b) There are two types of Reports available:
 - New Households Report
 - All Transaction Report



Figure 58 - Click on Report tab to Open Report Page

27. Running All Transaction Report

- a) Click on the Report tab.
- b) Click on the All Transaction Report at the top of the page.
- c) Click on **“Click here to Search and Select PHA”** to select the PHA to report on.
- d) Once the PHA is selected, select Disaster, Pre Disaster Program Type and New Program Type, with at least one of the dropdown options set to **“All”**.
- e) Check the desired boxes of the fields to view on the report.

Figure 59 - Transaction Report Filters

- f) When all the fields that should be in the report are added, click the **“Show Report”** button. The generated report will open in a new Browser window.
- g) Print, Save, or Copy the report as required.
- h) To go back to the DIS system, close the Report Window.
- i) The report can also be viewed as an excel spreadsheet. Click the **“Download into Excel”** button.

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#	SSN	Name	Date of Birth	Sex	PHA Determined Eligibility	Initial PHA	Payment Standard	Rent to Owner / Lease Rent	HAP Total	HAP Contract Effective Date	HAP Contract Termination Date	Receiving PHA Code	Receiving PHA Name	Pre Disaster Program Type
1	XXX-XX-0010	MKABBQGL DKNCHMLHUE	03/30/1975	Female	Yes	TRACS FHA MULTIFAMILY	1245	912	1062	07/15/2006	06/30/2007	TX441	Harris County Housing Authority	MF
2	XXX-XX-0010	MKABBQGL DKNCHMLHUE	03/30/1975	Female	Yes	TRACS FHA MULTIFAMILY	1287	1287	1287	07/01/2007	06/30/2008	TX441	Harris County Housing Authority	MF
3	XXX-XX-0023	LGOIGFP JZONB	12/06/1965	Female	Yes	LA001 New Orleans HA	990	650	715	02/01/2006	08/31/2006	TX441	Harris County Housing Authority	VO
4	XXX-XX-0023	LGOIGFP JZONB	12/06/1965	Female	Yes	LA001 New Orleans HA	743	664	719	09/01/2006	04/30/2007	TX441	Harris County Housing Authority	VO
5	XXX-XX-0027	JOOWISUKS G MKUERBB	11/13/1980	Female	Yes	TX023 Housing Authority of the City of Beaumont	1024	890	979	01/01/2007	06/30/2008	TX441	Harris County Housing Authority	PH
6	XXX-XX-0034	JOOWISUKS G BZQHB	07/27/1958	Female	Yes	LA001 New Orleans HA	743	625	743	02/01/2006	08/31/2006	TX441	Harris County Housing & Community Dev. Agency	PH
7	XXX-XX-0035	CVXYHMKL PBZFQM	03/17/1976	Female	Yes	LA001 New Orleans HA	990	990	990	02/01/2006	12/31/2007	TX441	Harris County Housing & Community Dev. Agency	VO
8	XXX-XX-0047	MKIIHMP IMJES	01/08/1970		Yes	LA001 New Orleans HA	1243	910	1060	03/15/2006	01/31/2007	TX441	Harris County Housing Authority	PH

Figure 60 - The New Report opened in a new browser window

#	SSN	Name	Date of Birth	Sex	PHA Deter	Initial PHA	Payment Standard	Gross Rent	Rent to Owner	Utility Allow	HAP Total	Utility Reir	Lease Eff	Lease Terma	Receiving
1	XXX-XX-0003	HKMIHXKL Y GTUIGGE	2/11/1960	Female	Yes	LA001 Nev	743	814	750	64	743	0	6/29/2006	5/31/2007	TX005
2	XXX-XX-0006	NVKAS YFUBBRRU	7/2/1979	Female	Yes	LA001 Nev	733	713	601	112	713	112	2/1/2006	9/6/2006	TX005
3	XXX-XX-0006	TNVDBB Z DVZRHZZN	4/26/1969	Female	No	LA001 Nev	0	0	0	0	0	0			TX005
4	XXX-XX-0007	WMZBBAP AMLWWSI	2/3/1966	Female	No	LA001 Nev	1232	1232	0	1232	1232	0			TX005
5	XXX-XX-0008	KVZECBJ LKTRQO	8/18/1966	Female	Yes	LA013 JEF	990	831	699	132	831	132	2/1/2006	9/30/2006	TX005
6	XXX-XX-0008	MKZOOZ MXXGME	12/16/1942	Female	Yes	LA001 Nev	743	743	635	108	743	0	2/1/2006	1/31/2007	TX005
7	XXX-XX-0011	MKIIHMP AMLWWSI	3/10/1967	Female	Yes	LA013 JEF	1232	1147	0	1147	0	0	2/1/2006	1/31/2007	TX005
8	XXX-XX-0013	DKJEF BKYNC	4/27/1948	Female	Yes	LA001 Nev	743	717	617	100	717	100	8/4/2006	7/31/2007	TX005
9	XXX-XX-0021	MBJVF YKGGSV	5/15/1979	Female	Yes	LA012 KEI	743	612	605	7	612	7	2/1/2006	12/31/2006	TX005
10	XXX-XX-0022	YKXDG I FBXYEQS	3/14/1957	Female	Yes	LA001 Nev	743	785	680	105	743	63	5/1/2006	4/30/2007	TX005
11	XXX-XX-0027	DMQECSE NBZRGV	9/14/1950	Male	No	LA001 Nev	0	0	0	0	0	0			TX005
12	XXX-XX-0043	YKVFV SMPBB	2/28/1974	Female	Yes	LA001 Nev	743	683	596	87	683	87	2/1/2006	8/31/2006	TX005
13	XXX-XX-0050	VMNNNQ DVZRHZZN	10/6/1947	Female	Yes	LA001 Nev	743	706	601	105	706	105	2/1/2006	1/31/2007	TX005
14	XXX-XX-0053	FNQIGFCVSP SKWWSH	9/29/1957	Female	Yes	LA001 Nev	743	601	601	0	601	0	2/1/2006	6/12/2006	TX005
15	XXX-XX-0054	ZMZNNQR SMPBB	5/6/1975	Female	Yes	LA001 Nev	612	471	471	0	471	0	2/1/2006	10/15/2006	TX005
16	XXX-XX-0055	ABNFHXP DKNCHMLHI	7/5/1980	Female	No	TRACS FH	0	0	0	0	0	0			TX005
17	XXX-XX-0055	VMNDG AMLWWSI	12/31/1975	Female	Yes	LA001 Nev	990	793	719	74	793	74	2/1/2006	11/30/2006	TX005
18	XXX-XX-0059	PBMVHB IBO	10/31/1974	Female	Yes	LA001 Nev	990	871	728	143	871	143	2/1/2006	7/31/2007	TX005
19	XXX-XX-0061	BKMDBZ Y DKVGM	5/13/1967	Female	No	LA172 CAI	0	0	0	0	0	0			TX005
20	XXX-XX-0065	KBWBSMR HKJWHZ	7/3/1959	Male	No	LA001 Nev	0	0	0	0	0	0			TX005
21	XXX-XX-0068	DVZFLZD G ZNVL	7/16/1984	Female	Yes	LA001 Nev	743	803	710	93	743	33	4/17/2006	3/31/2007	TX005
22	XXX-XX-0068	KMFES IKJY	2/25/1908	Male	Yes	LA001 Nev	743	673	580	93	673	93	2/1/2006	1/31/2007	TX005
23	XXX-XX-0069	KBANNOKL DKNCHML	3/7/1974	Female	Yes	LA001 Nev	990	990	693	297	990	297	2/1/2006	10/31/2006	TX005

Figure 61 - The Report as an excel spreadsheet

28. Running New Households Status Report

- a) To view the status of Newly Added Households click on the Reports tab.
- b) Then select the 'New Household Report' link.
- c) Under "Select View" user has the options to view any of the following reports:
 - Approved Records
 - Rejected Records
 - Pending Records
- d) Then click "View Report" button.

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- e) Report can also be downloaded into Excel by clicking on “Download into Excel” button.

DIS		Reports										
All Transaction Report					New Households Report							
Disaster Information System												
New Households Status												
Select View: Rejected Records <input type="button" value="View Report"/> <input type="button" value="Download into Excel"/>												
Rejected Records. (2197)												
#	SSN	Full Name	Date of Birth	Sex	Dsbld?	Disaster Code	CitizenShip?	Pre Disaster Program	Initial PHA	Old Apt	Old Street	Old City
1	XXX-XX-1665	zwmlilb n wmvhmdlq	06/22/1966	F	N	1605		VO	AL002 MOBILE		ghzv .iw wlldoovy 2398	vilwlvsg
2	XXX-XX-8532	tmfsk n zs	10/28/1966	F	N	1603		VO	LA013 JEFFERSON PARISH HOUSING AUTHORITY	z	szzvy szgf 8103	bgrx vtwriy
3	XXX-XX-2199	wmzs mrnzqmvv	10/27/1947	M	N	1603		HL			gvvigh vkizszo 1253	hmzvoil dvm
4	XXX-XX-8965	vivnrsv x mmbd	03/13/1983	F	N	1603		HL			pizkzi 338	hmzvoil dvm
5	XXX-XX-1608	mvvifzn v bvelxxn	03/23/1961	F	Y	1605		VO	AL202 MOBILE COUNTY		vez grnfnh 0789	voryln
6	XXX-XX-4031	givyli q mzhzvn	11/29/1968	M	N	1603		OH) ivgovsh (gvvigh knzx 106	hmzvoil dvm
7	XXX-XX-9126	hroobsk mmznvklx	03/18/1941	F	N	1603	Y	OH			.gh vxmvvmkvvwmr 2103	hmzvoil dvm

Figure 62 - New Households Status Report

System Admin Functionality

29. Data Corrections (DIS Administrators or Super Users Only)

- a) Select “Admin” tab from the top of the list to access the DIS Admin options page.
- b) The page lists various data correction options:
 - **Activate/Inactivate Household Record:** This functionality allows you to activate or inactivate a household record.
 - **Correct Household Information:** This functionality allows you to modify the following household fields: Name, Gender, Date of Birth, Disaster program Code, Pre-Disaster Address, Initial PHA and Old Program Type. To correct the SSN please use the action provided below.
 - **Correct Household SSN:** Use this action to correct the erroneous Social Security Number of a household.
 - **Replace head of household:** Use this action to replace head of household (for a leased up family) by selecting existing family member.
 - **Modify Eligibility Questionnaire.**
 - **Change Pre Disaster Program Type:** This functionality allows Admin users to change the HUD Family or Household to a Non-HUD Family with New Program Type “FE” and “FT”.
 - **Add or Change FEMA Information:** Use this function to Add or Update the FEMA ID, HUD Load and FEMA Referral Dates

Data Corrections	Bulk Inserts/Updates	Business Rule Templates	Dynamic Data Fields	Bulk Upload Dynamic Data
Disaster Information System (Ver 5.1)				
DIS Admin Tasks - Data Corrections				
Activate/Inactivate Household Record	Modify the status of a household record in DIS system Use this action to Modify the status of a household record. This functionality allows you to activate or inactivate a household record.			
Correct Household Information	Correct the information of a household in DIS system Use this action to correct the erroneous information of a household. This functionality allows you to modify the following fields: Name, Gender, Date of Birth, Disaster program Code, Pre-Disaster Address, Initial PHA and Old Program Type. To correct the SSN please use the action provided below.			
Correct Household SSN	Correct the SSN of a household in DIS system Use this action to correct the erroneous Social Security Number of a household.			
Replace Head of Household	Replace Head of Household Use this action to replace a head of household (for a leased up family) with existing family member.			
Modify Eligibility Questionnaire	Modify Eligibility Questionnaire Use this action to modify the Eligibility Questionnaire.			
Change Pre Disaster Program Type	Change Pre Disaster Program Type of a household in DIS system Use this action to convert HUD-Family to Non HUD-Family by changing the Pre Disaster Program Type.			
Add or Change FEMA Information	Add and update FEMA information in the DIS system Use this action to update the FEMA ID, HUD Load or FEMA Referral Dates for a specific household.			

Figure 63 - DIS Admin Data Correction Options

30. *Activate/Inactivate Household Record*

- a) Select “**Activate/Inactivate Household Record**” function from the Admin page.
- b) Search a household for status modification on the Search page.
- c) Select a household.
- d) Modify the household record status and Click “**Submit**”.
- e) To view historical comments, click the “**Comment History**” button

Modify Household Record Status

This household record is currently Active

Change Status: Active ▼

Comments: Active
Inactive

Submit
Close
Comment History

Household Information for SSN: XXX-XX-9795

Head of Household Name: zigrm n mrlwiz	
Sex: F	Date of Birth: 05/19/1982
Initial PHA: FEMA FEMA-IKE	
Pre Disaster Program Type: IKE01 - IKE-GUSTAV	
Pre-Disaster Address Details	
Pre-Disaster Street: gh vpzo 7332	
Pre-Disaster Apt:	Pre-Disaster City: LAKE CHARLES
Pre-Disaster State: LA	Pre-Disaster Zip code: 34847
Mailing Address Details	
Mailing Street: gh hhl n 4373	
Mailing Apt:	Mailing City: LAKE CHARLES
Mailing State: LA	Mailing Zip Code: 34847
Lease Details	
New Program Type: IKE01 - IKE-GUSTAV	
Receiving PHA: LA004 Lake Charles HA	
New unit Street: gh hhl n 4373	
New unit Apt:	New unit City: LAKE CHARLES
New unit State: LA	New unit Zip Code: 34847

Figure 64 - Activate/Inactivate Household Screen

Figure 65 - Activate/Inactivate Comment History

Activate/Inactivate Household Comments		
User Name:	r ozdgpz	Date: Nov 2 2009 3:02PM
Comments:	FAMILY IS DHAP-IKE ELIGIBLE	
User Name:	m tmzd	Date: Oct 6 2009 7:50PM
Comments:	FAMILY IS DHAP-IKE ELIGIBLE	
User Name:	m tmzd	Date: Oct 6 2009 7:50PM
Comments:	FAMILY IS DHAP-IKE ELIGIBLE	
User Name:	m tmzd	Date: Oct 6 2009 3:55PM
Comments:	FAMILY IS DHAP-IKE ELIGIBLE	
User Name:	o tmzls	Date: Aug 31 2009 11:51AM
Comments:	TRANSACTION_AUTO_GENERATED	
User Name:	g oovmshfy	Date: Aug 5 2009 3:24PM
Comments:	TRANSACTION_AUTO_GENERATED	
User Name:	z mlcrw	Date: Jul 15 2009 2:32PM
Comments:	TRANSACTION_AUTO_GENERATED	
User Name:		Date: Mar 19 2009 9:27PM
Comments:	TRANSACTION_AUTO_GENERATED	
User Name:	g oovmshfy	Date: Feb 25 2009 2:53PM
Comments:	TRANSACTION_AUTO_GENERATED	
User Name:		Date: Feb 19 2009 8:46PM

Figure 66 - Viewing Activate/Inactivate Historical Comments

Note: For a household that was inactivated through the eligibility questionnaire, record activation is a two-step process.

- f) Activate the household record through “Activate/Inactivate Household Record” Admin function.
- g) Reset the eligibility questionnaire through “Modify Eligibility Questionnaire” Admin function.

31. Correct Household Information

- Select “**Correct Household Information**” function from the Admin page.
- Search a household for information correction on the search page.
- Select a household to modify the information.
- Modify the household data and Click “**Save Updated Household Information**”.
- If validation errors are displayed correct the errors with valid inputs and save again.

Note: The following fields cannot be corrected or changed using this functionality:

- Pre Disaster Program Type
- Disaster Program Code

There is limited Change Pre Disaster Program Type functionality using “Change Pre Disaster Program Type” in [Section 3.37 Page 41: Change Pre –Disaster Program Types to Non-HUD.](#)

DIS Admin Tasks - Correct Household Information	
Modify the field values and click submit to update the data. SSN can not be modified through this screen.	
Head of Household SSN:	xxx-xx-6741
Head Of Household Name:*	bwmziy o hwizsxi (First Name Middle Initial Last Name)
Sex:*	Female
Disabled?:	No
Date of Birth:	06/14/1989 (mm/dd/yyyy)
Pre Disaster Program Type:*	IKE01 - IKE-GUSTAV
MultiFamily Category:	- N/A - Applicable only if "Pre Disaster Program Type" is MultiFamily.
Citizenship:	Yes
Old Bedroom Size:	1
Initial PHA Code:	FEMA Required when "Pre Disaster Program" type is PH or VO. For MultiFamiily (only) TRACS is accepted.
FEMA ID:*	410347943
Old Address(Pre Disaster)	The residence address of this household before he/she was displaced by disaster.
Street:	gh sg83 7043
Apt #:	
City:	mlvo mzh
State:	TX
Zip Code:	51977
Old Contact Number:	(832) 9766692
Mailing Address(Pre Disaster)	Temporary residence address for this household after he/she was displaced by disaster.
Street:	098 cly lk
Apt #:	
City:	uuroxzy
State:	TX
Zip Code:	63977
Current Contact Number:	(713) 2537745
Disaster Program Code:	1791 - Texas (HURRICANE IKE)
<input type="button" value="Reset"/> <input type="button" value="Submit Updated Household Information"/> <input type="button" value="Cancel"/>	

Figure 67 - Correct Household Information Screen

32. Correct Household SSN

- a) Select “**Correct Household SSN**” function from the Admin page.
- b) Search a household for SSN correction on the search page.
- c) Select a household to modify the SSN.
- d) Enter the new SSN value and click “**Submit Corrected SSN**”.
- e) If validation errors are displayed correct the errors with valid inputs and save again.
- f) To view historical comments, click the “**Comment History**” button

Correct Household SSN

Move the mouse pointer over ssn to unmask it temporarily.

Current SSN: XXX-XX-9795 **Corrected SSN:**

Comments: Enter comments if any.. (max 3 lines of text accepted)

Household Information

Head of Household Name: zigrm n mrlwiz

Sex: F	Date of Birth: 05/19/1982
Initial PHA: FEMA FEMA-IKE	
Pre Disaster Program Type: IKE01 - IKE-GUSTAV	

Pre-Disaster Address Details

Pre-Disaster Street: gh vpzo 7332

Pre-Disaster Apt:	Pre-Disaster City: LAKE CHARLES
Pre-Disaster State: LA	Pre-Disaster Zip Code: 34847

Mailing Address Details

Mailing Street: gh hhlN 4373

Mailing Apt:	Mailing City: LAKE CHARLES
Mailing State: LA	Mailing Zip Code: 34847

Lease Details

New Program Type: IKE01 - IKE-GUSTAV

Receiving PHA: LA004 Lake Charles HA

New unit Street: gh hhlN 4373

New unit Apt:	New unit City: LAKE CHARLES
New unit State: LA	New unit Zip Code: 34847

Figure 68 - Correct Household SSN Screen

Figure 69 - Correct Household SSN Comment History

Correct Household SSN Comments		
User Name: r ozdgpz	Date: Nov 2 2009 3:02PM	Comments: FAMILY IS DHAP-IKE ELIGIBLE
User Name: m tmzd	Date: Oct 6 2009 7:50PM	Comments: FAMILY IS DHAP-IKE ELIGIBLE
User Name: m tmzd	Date: Oct 6 2009 7:50PM	Comments: FAMILY IS DHAP-IKE ELIGIBLE
User Name: m tmzd	Date: Oct 6 2009 3:55PM	Comments: FAMILY IS DHAP-IKE ELIGIBLE
User Name: o tmzls	Date: Aug 31 2009 11:51AM	Comments: TRANSACTION_AUTO_GENERATED
User Name: g oovmshfy	Date: Aug 5 2009 3:24PM	Comments: TRANSACTION_AUTO_GENERATED
User Name: z mlcrw	Date: Jul 15 2009 2:32PM	Comments: TRANSACTION_AUTO_GENERATED
User Name:	Date: Mar 19 2009 9:27PM	Comments: TRANSACTION_AUTO_GENERATED
User Name: g oovmshfy	Date: Feb 25 2009 2:53PM	Comments: TRANSACTION_AUTO_GENERATED
User Name:	Date: Feb 19 2009 8:46PM	

Figure 70 - Viewing Correct Household SSN Historical Comments

33. Replace Head of Household

- a) Select “**Replace Head of Household**” function from main Admin page.
- b) Search a household of a family for which to replace the Head of the family.
- c) Select a household.
- d) Select a new Head of household from existing family members and click “Submit New Head of Household”.
- e) If validation errors are displayed, correct the errors and save again.
- f) To view historical comments, click the “**Comment History**” button

Replace Head of Household	
<p>This family has only one member (Current Head of Household). <input type="button" value="Cancel"/> <input type="button" value="Comment History"/></p>	
<hr/>	
Current Household Information	
Head of Household Name: zigrm n mrlwiz	
Sex: F	Date of Birth: 05/19/1982
Initial PHA: FEMA FEMA-IKE	
Pre Disaster Program Type: IKE01 - IKE-GUSTAV	
Pre-Disaster Address Details	
Pre-Disaster Street: gh vpzo 7332	
Pre-Disaster Apt:	Pre-Disaster City: LAKE CHARLES
Pre-Disaster State: LA	Pre-Disaster Zip Code: 34847
Mailing Address Details	
Mailing Street: gh hhl n 4373	
Mailing Apt:	Mailing City: LAKE CHARLES
Mailing State: LA	Mailing Zip Code: 34847
Lease Details	
New Program Type: IKE01 - IKE-GUSTAV	
Receiving PHA: LA004 Lake Charles HA	
New Unit Street: gh hhl n 4373	
New Unit Apt:	New Unit City: LAKE CHARLES
New Unit State: LA	New Unit Zip Code: 34847

Figure 71 - Replace Head of Household



Figure 72 - Replace Head of Household Comment History



Figure 73 - Viewing Replace Head of Household Historical Comments

34. Modify Eligibility Questionnaire

- a) Select “**Modify Eligibility Questionnaire**” function from the Admin page.
- b) Search a household for Eligibility Questionnaire correction on the Search page.
- c) Select a household to modify the information.
- d) Select “**Reset Eligibility Questionnaire**” to open the questionnaire for PHA users.
- e) Select “**Correct Eligibility Questionnaire**” to correct eligibility status.
- f) Click “**Submit Corrected Questionnaire**” button to save the changes.
- g) If validation errors are displayed correct the errors with valid inputs and save again.

Admin functions - Correct Eligibility Questionnaire for XXX-XX-7563

Select correction option:

Reset Eligibility Questionnaire. (This option allows PHA user to correct the questionnaire.)

Correct Eligibility Questionnaire. (This option allows you to correct the questionnaire.)

- ◆ **Is the pre-disaster project available for occupancy?**
 - Yes ...**
 - ◇ **Does the family want to return to the unit previously occupied by them?**
 - Yes ...**
 - **Is the family currently under lease through one of HUD's Disaster Housing Programs?**
 - Yes ...**
 - **Can the current lease under such program be terminated?**
 - Yes**
[If Yes, the Family must return to the pre-disaster unit. No further assistance will be offered under DIS (Disaster Information System)].
 - No**
[If No, the Family may be offered assistance under DIS (Disaster Information System).]
 - No**
[The family, never assisted under one of HUD's Disaster Housing Programs, will not receive any further assistance under DIS (Disaster Information System).]
 - No ...**
 - No**
[If the pre-disaster unit is not available, the Family may be offered assistance under DIS (Disaster Information System).]

Figure 74 - Correct Eligibility Questionnaire Form

35. Change Pre Disaster/New Program Types to Non-HUD

NOTE: The Change Pre Disaster/Program Type functionality can also be accomplished using the Bulk Upload Insert/Update function.

- a) Select “**Change Pre Disaster Program Type**” function from the admin page.
- b) Search for a HUD household to change Pre Disaster Program Type.
- c) Select a household to modify the information.
- d) Click on the “New Pre Disaster Program Type” dropdown.
- e) Select one of the following options:
 1. FE – Non-HUD Families
 2. FT – Non-HUD Families (Phase 2)
 3. F3 – Non-HUD Families (Phase 3)
 4. F4 – Non-HUD Families (Phase 2B)
 5. F5 – Non-HUD Families (Phase 2C)
 6. F6 – Non-HUD Families (Phase 2D)
 7. F7 – Non-HUD Families (Phase 2E)
 8. F8 – Non-HUD Families (Phase 2F)
 9. F9 – Non-HUD Families (Phase 2G)
 10. F10 – Non-HUD Families (Phase 2H)
- f) Click “**Submit**” to save the changes.
- g) If validation errors are displayed correct the errors with valid inputs and save again.

DIS		Reports	Admin
Data Corrections	Bulk Inserts/Updates	Business Rule Templates	Dynamic Data Fields
Bulk Upload Dynamic Data			
Disaster Information System (Ver 5.1)			
DIS Admin Tasks - Change Pre Disaster Program Type of a Household			
Convert HUD Family Type to Non-HUD (FEMA) Family Type			
Modify the field values and click 'Submit'. SSNs cannot be modified on this screen.			
Head of Household SSN:	xxx-xx-1192		
Head Of Household Name:	<input type="text" value="bsglilw"/>	<input type="text" value="i"/>	<input type="text" value="hgivyli"/> (First Name Middle Initial Last Name)
Pre Disaster Program Type:*	VO - Displaced Voucher Family		
New Pre Disaster Program Type:*	-- Select Pre Disaster Program Type --		
New Program Type:	<input type="button" value="v"/>		
FEMA ID:	<input type="text" value="931185571"/> (Only FEMA ID)		
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>			

Figure 75 - Change Pre Disaster Program Type

36. Add or Change FEMA Information

NOTE: The FEMA ID is the only REQUIRED item on this screen. It will be pre-populated if it currently exists on the household record in the database.

- a) Select “Add or Change FEMA Information” function from main Admin page.
- b) Search a head of household to add or update FEMA related information
- c) Enter FEMA Referral Date and/or HUD DIS Load Date in mm/dd/yyyy format
- d) Enter valid FEMA ID
- e) Click on the “Submit Updated Household Information” button

The screenshot shows a web form titled "DIS Admin Tasks - Update FEMA ID, HUD Load and FEMA Referral Dates". The form contains a message: "Modify the field values and click submit to update the data. SSN can not be modified through this screen." Below the message are four input fields: "Head of Household SSN" with the value "xxx-xx-9795", "FEMA Referral Date" with the value "10/24/2008" and a format hint "(mm/dd/yyyy)", "HUD DIS Load Date" with the value "10/27/2008" and a format hint "(mm/dd/yyyy)", and "FEMA ID:*" with the value "392470930". At the bottom of the form are two buttons: "Submit Updated Household Information" and "Cancel".

DIS Admin Tasks - Update FEMA ID, HUD Load and FEMA Referral Dates	
Modify the field values and click submit to update the data. SSN can not be modified through this screen.	
Head of Household SSN:	xxx-xx-9795
FEMA Referral Date:	10/24/2008 (mm/dd/yyyy)
HUD DIS Load Date:	10/27/2008 (mm/dd/yyyy)
FEMA ID:*	392470930
Submit Updated Household Information Cancel	

Figure 76 - Add or Update FEMA ID, HUD LOAD & FEMA Referral Dates

37. Bulk Inserts/Updates

- a) Select the Admin Tab then click on the “Bulk Inserts/Updates” link on the top of the page.
- b) The page has 3 sections:
 - **Bulk Data Add/Update Options:** This functionality allows you to upload excel or CSV files to insert new records or update existing data in the DIS Household, Member or Transaction tables.
 - **Check Status of Uploaded files:** This functionality allows you to see the status of uploaded files.
 - **Download File Templates:** Use this action to download excel or CSV Templates to enter data to insert new or update existing DIS Household, Member or Transaction records.

The screenshot shows the 'Admin' section of the DIS application. The main menu includes 'DIS', 'Reports', and 'Admin'. Under 'Admin', there are sub-sections: 'Data Corrections', 'Bulk Inserts/Updates', 'Business Rule Templates', and 'Dynamic Data Fields'. The 'Bulk Inserts/Updates' section is active, displaying 'DIS Admin Tasks - Bulk Data Additions and Updates through data file uploads'.

Under 'Bulk Data Add/Update Options:', there are six radio button options:

- Add New Household Records
- Add New Member Records
- Add New Transaction Records
- Update Household Information
- Update Member Information
- Update Transaction Information

A button labeled 'Proceed to File Upload >>' is located below these options.

Below this is a section titled 'Check Status of Uploaded Files' with a button labeled 'Status of Uploaded Files >>'.

The 'Download File Templates' section contains a table with the following data:

Template Name	Template Type
Add New Household Records	Excel Template CSV Template
Add New Member Records	Excel Template CSV Template
Add New Transaction Records	Excel Template CSV Template
Update Household Information	Excel Template CSV Template
Update Member Information	Excel Template CSV Template
Update Transaction Information	Excel Template CSV Template

Figure 77 - Bulk Inserts/Updates

38. Bulk Upload – Download File Templates

- a) To download an excel or CSV template, go down to the “Download File Template” section, under “Template Name” choose the type of file template needed from the list:
 1. Update Household Information
 2. Update Member Information
 3. Update Transaction Information
 4. Add New Household records
 5. Add New Member records
 6. Add New Transaction records
- b) Select corresponding Excel or CSV “Template Type” for the Template Name selected.
- c) Save the Template to the local C: drive.
- d) Enter all necessary information for the Household, Member or Transaction records being updated or inserted.

Note: For all Bulk Adds and Updates the following columns in are yellow and are required in the respective templates:

1. Add New/Update Household Records:
 - ssn_head (HOH SSN)
 - dstr_num (Disaster Number)
 - old_family_category (Pre Disaster Program Type)
 - fema_id (FEMA ID)
2. Add New/Update Member Records:
 - ssn_head (HOH SSN)
 - mbr_number (Member Number)
 - dstr_num (Disaster Number)
3. Add New/Update Transaction Records
 - ssn_head (HOH SSN)
 - dstr_num (Disaster Number)
 - rec_pha_ind (Receiving PHA Indicator)
 - new_program_type (New Program Type)
 - transaction_id (Transaction ID)

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	ssn_head	dstr_num	mbr_last_name	mbr_first_name	mbr_m_initial	mbr_dob	mbr_sex	disability_ind	citizenship_ind	old_bdr_count	mf_family_type	mf_family_desc	old_family_category
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
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26													
27													
28													
29													

Figure 78 - Bulk Upload Add/Update Household Excel Template

39. Bulk Upload – Bulk Data Add/Update Options

- a) To upload an excel or CSV template, go to the “**Bulk Data Add/Update Options**” Select one of the following:
 1. Update Household Information
 2. Update Member Information
 3. Update Transaction Information
 4. Add New Household records
 5. Add New Member records
 6. Add New Transaction records
- b) The Data file uploads pages opens.
- c) Click on “**Browse**” button to select the file to be uploaded.

Note: This type of upload will only update values that are “NULL”. To overwrite existing values check the “Blind Updates?” box.

- d) Click on “**Upload File**” button.

The screenshot displays the 'Bulk Data File Upload' interface. At the top, there is a navigation bar with 'DIS', 'Reports', and 'Admin' tabs. Under the 'Admin' tab, several sub-menus are listed: 'Data Corrections', 'Bulk Inserts/Updates', 'Business Rule Templates', 'Dynamic Data Fields', and 'Bulk Upload Dynamic Data'. The main content area is titled 'DIS Admin Tasks - Bulk Data Insertion and Corrections through data file uploads'. In the center, there is a 'FILE UPLOAD' section with a green button labeled 'Add New Household Records'. Below this button, there is a 'Select File:' label, a text input field, and a 'Browse...' button. At the bottom of the form, there are 'Upload File' and 'Cancel' buttons. A link '<< Back to Main page' is located at the bottom right of the page.

Figure 79 - Bulk Data File Upload

For more detailed instruction on Bulk Upload/Update Functionality, please refer to [Appendix B on page 85](#) of this User Guide

40. Bulk Upload – Check Status of Uploaded Files

- a) To check the status of uploaded files go to the “**Check Status of Uploaded Files**” section.
- b) Click on the “**Status of Uploaded Files >>**” button, the File upload Status page opens up.

c) The Status page displays the status of all uploaded files in the following Columns:

- **File Name:** Click on this link to download or view the original file uploaded.
- **Admin Task:** Informs users the type of task requested.
- **File Status:** Informs users about the file status:
 1. File is pending further processing
 2. File has been uploaded and processed successfully
 3. Invalid file uploaded

DIS	Reports	Admin	Data Corrections	Bulk Inserts/Updates	Business Rule Templates	Dynamic Data Fields	Bulk Upload Dynamic Data
Disaster Information System (Ver 5.1)							
DIS Admin Tasks - Bulk Data Additions and Updates through data file uploads							
<< Back to Main page							
Bulk Data Add/Update File Upload Status							
Pages: 1 2 3 Next >>							
#	File Name	Admin Task	File Status	Upload Date Time	Upload User	Percent Completed	Detailed Report
1	DEV - RQ0140 - Add Trans - Chen.xls	Add New Transaction Records	File has been uploaded and processed successfully.	8/3/2010 12:53:46 PM	HPIC02	100%	View / Download
2	DEV - RQ0140 - Add Member - Chen.xls	Add New Member Records	File has been uploaded and processed successfully.	8/3/2010 12:51:29 PM	HPIC02	100%	View / Download
3	DEV - RQ0140 - Add Household - Chen.xls	Add New Household Records	File has been uploaded and processed successfully.	8/3/2010 12:26:18 PM	HPIC02	100%	View / Download
4	RQ0140 - Update Trans - Chen.xls	Update Transaction Information [Blind Updates]	File has been uploaded and processed successfully.	7/29/2010 12:21:51 PM	HPIC02	100%	View / Download
14	UPD_MEM_Details.xls	Update Member Information [Blind Updates]	File is being processed.	7/17/2010 12:56:38 AM	HPIC06	100%	-
15	UPD_MEM_Details.xls	Update Member Information [Blind Updates]	File is being processed.	7/17/2010 12:50:53 AM	HPIC06	100%	-
16	Add_New_HOH_records.xls	Add New Household Records	File has been uploaded and processed successfully.	7/17/2010 12:18:57 AM	HPIC06	100%	View / Download
17	Add_New_HOH_records.xls	Add New Household Records	File has been uploaded and processed successfully.	7/17/2010 12:02:46 AM	HPIC06	100%	View / Download
18	Add_New_Member_Records.xls	Add New Member Records	File has been uploaded and processed successfully.	7/16/2010 11:55:18 PM	HPIC06	100%	View / Download
19	UPD_MEM_Details.xls	Update Member Information [Blind Updates]	File has been uploaded and processed successfully.	7/16/2010 11:35:48 PM	HPIC06	100%	View / Download
20	NoFemaID_226Families.xls	Update Household Information [Blind Updates]	File has been uploaded and processed successfully.	7/6/2010 10:38:49 AM	HPIC09	100%	View / Download
21	test_updmem.xls	Update Member Information [Blind Updates]	File has been uploaded and processed successfully.	6/25/2010 12:37:42 PM	HPIC06	100%	View / Download
22	Banks_trans_upd.xls	Update Transaction Information [Blind Updates]	File has been uploaded and processed successfully.	6/25/2010 11:54:25 AM	HPIC06	100%	View / Download
23	Banks_trans_upd.xls	Update Transaction Information [Blind Updates]	File has been uploaded and processed successfully.	6/25/2010 11:42:22 AM	HPIC06	100%	View / Download
24	DEV - RQ0140 - Update Members - Jones.xls	Update Member Information [Blind Updates]	Invalid file uploaded.	6/25/2010 2:55:58 PM	HPIC01	100%	-

Figure 80 - Different Types of File Status

- **Detail Report View:** Click on this link to view detailed status report. This opens up the File Details screen which the following columns:
 1. Record Num.
 2. Record Status which will be 'Processed' or 'Exception'.
 3. Error Description which gives the description of the Exception error.
- **Detail Report Download:** Click on this link to download the Detailed Status Report for a particular file in an excel spreadsheet format.

DIS	Reports	Admin
Data Corrections	Bulk Inserts/Updates	Business Rule Templates
	Dynamic Data Fields	Bulk Upload Dynamic Data
Disaster Information System (Ver 5.1)		
DIS Admin Tasks - Bulk Data Additions and Updates through data file uploads		
<< Back to File List page		
File Name: <i>Add_New_HOH_records.xls</i> Request Type: <i>Add New Household Records</i> Total Records: 5		
Record Num	Record Status	Error Description
1	Processed	
2	Processed	
3	Processed	
4	Processed	
5	Exception	Head of Household SSN already exists in the system.

Figure 81 - Bulk Addition/Updates

For more detailed instruction on Bulk Upload/Update Functionality, please refer to [Appendix B on page 85](#) of this User Guide

41. Business Rules Template

- a) Select the Admin Tab, click on the “**Business Rules Template**” link on the top of the page.
- b) The page list 4 options:
 1. **Add New Disaster:** This action is used to add a new disaster to the DIS System.
 2. **Add Pre or New Program Type:** This action is used to add a Pre Disaster or New Program Type.
 3. **Associate Pre or New Program Type:** This action is used to map or associate a Pre Disaster Program Type with a New Program Type.
 4. **Set/Edit Business Rules for Pre and New Program Types:** This action is used to set the business rules or options for a Pre Disaster and New Program Type combination.

DIS	Reports	Admin
Data Corrections	Bulk Inserts/Updates	Business Rule Templates
Disaster Information System (Ver 5.1)		
DIS Admin Tasks - Business Rule Templates		
Add New Disaster		Add New Disaster to DIS System Use this action to add a new disaster to the DIS System.
Add Pre or New Program Type		Add Pre Disaster or New Program Type in DIS System Use this action to add a Pre Disaster or New Program Type to the DIS System.
Associate Pre or New Program Types		Associate Pre Disaster Program with New Program Type in DIS System Use this action to map or associate a Pre Disaster Program Type with a New Program Type.
Set/Edit Business Rules for Pre and New Program Types		Set Business Rules for Pre and New Program Types in DIS System Use this action to set the business rules or options for a Pre Disaster or New Program Type, or edit the existing business rules any Pre Disaster and New Program Type combination.

Figure 82 - Main page for Business Rules Template

42. Add New Disaster

- Select the Admin Tab, click on the 'Business Rules Template' business link on the top of the page.
- Click on the 'Add Pre or New Program Type' button on the Business Rules Template page.
- Click on the 'Add New Disaster' link on the top right corner of the page.

DIS	Reports	Admin		
Data Corrections	Bulk Inserts/Updates	Business Rule Templates		
Disaster Information System (Ver 5.1)				
Disaster List				
Add New Disasters				
Disaster ID	Disaster No	Disaster Name	Affected State	Disaster Date
1	0000	HURRICANE KATRINA	LA	8/31/2005
1	1551	HURRICANE KATRINA	DU	8/31/2005
1	1603	HURRICANE KATRINA	LA	8/31/2005
1	1604	HURRICANE KATRINA	MS	8/31/2005
1	1605	HURRICANE KATRINA	AL	8/31/2005
2	1606	HURRICANE RITA	TX	8/31/2005
2	1607	HURRICANE RITA	LA	8/31/2005
2	1609	HURRICANE RITA	DU	8/31/2005
3	1786	HURRICANE IKE	LA	8/31/2005
3	1791	HURRICANE IKE	TX	8/31/2005
3	1792	HURRICANE IKE	LA	8/31/2005
4	1794	Hurricane Gustav	MS	9/22/2008
5	2010	Hurricane in Nevada	NV	5/5/2010
5	2011	Hurricane in Nevada	AZ	5/5/2010

Figure 83 - Disaster List Page

- Enter all necessary information:
Note: You cannot use a Disaster Name that already exists on the Disaster List page.
- If the value entered in the "No. of States Affected" field is more than 1, a pop-up box is displayed, "Do you want to proceed?" Click "OK" button to continue.
- Enter the states affected and the desired Disaster code for each state.

g) Click **“Save”** to create the new disaster.

DIS		Reports		Admin	
Data Corrections		Bulk Inserts/Updates		Business Rule Templates	
				Dynamic Data Fields	
				Bulk Upload Dynamic Data	
Disaster Information System (Ver 5.1)					
New Disaster Definition					
Disaster Name:	<input type="text"/>				
Description:	<input type="text"/>				
Disaster Date:	<input type="text"/> (mm/dd/yyyy)				
No. of States Affected:	<input type="text" value="1"/>				
State:	Disaster Code:				
<input type="text"/>	<input type="text"/>				
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

Figure 84 - Add New Disaster

43. Add Pre or New Program Type

- a) Select the Admin Tab, click on the **“Business Rules Template”** business link on the top of the page.
- b) Click on the **“Add Pre or New Program Type”** button on the Business Rules Template page.
- c) Enter a Program Type code and Program Type Name.
- d) Select one of the two applicable Program Types:
 - **Pre Disaster Program Type:** Click on the **“Pre Disaster Program Type”** radio button to create a Pre Disaster Program Type.
 - **New Program Type:** If this program type is selected, the ‘Select Family Type’ and the ‘Select PHA Type Code’ options are disabled.

DIS		Reports		Admin	
Data Corrections		Bulk Inserts/Updates		Business Rule Templates	
				Dynamic Data Fields	
				Bulk Upload Dynamic Data	
Disaster Information System (Ver 5.1)					
New Program Type Definition					
Program Type Code:	<input type="text"/>				
Program Type Name:	<input type="text"/>				
Select Program Type Indicator:	<input type="radio"/> Pre Disaster <input type="radio"/> New				
Select Family Type:	<input type="radio"/> FEMA <input type="radio"/> HUD <input type="radio"/> NONE				
Select PHA Type Code:	<input type="radio"/> Combined <input type="radio"/> Low Rent <input type="radio"/> Section 8 <input type="radio"/> TRACS				
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

Figure 85 - Add Pre or New Program Type

e) Select Family Type: Family types can be as follows:

- **FEMA:** The Pre Disaster Program Type for this family type will set as FEMA.
 - **HUD:** The Pre Disaster Program Type for this family type will set as HUD.
 - **NONE:** There are no pre-defined formulas for the NONE family type.
- f) Select a PHA Type Code: This option is only available if Family type is “HUD” or “NONE”. This option will be grayed out for FEMA Family Type.
- g) Click **“Save”** to create a new Pre Disaster or New Program Type.

44. Associate Pre and New Program Types

- a) Select the Admin Tab, click on the **“Business Rules Template”** business link on the top of the page.
- b) Click on the **“Associate Pre and New Types”** button on the **“Business Rules Template”** business link on the top of the page.
- c) From the dropdown list the select the following:
- i. The Disaster to associate the Pre Disaster and New Program Type to.
 - ii. The Pre Disaster Program Type to be associated.
 - iii. The New Program Type to be associated.
- d) Click **“Save”** to associate the Disaster, Pre Disaster and New Program Types selected above.

DIS	Reports	Admin
Data Corrections	Bulk Inserts/Updates	Business Rule Templates
		Dynamic Data Fields
		Bulk Upload Dynamic Data
Disaster Information System (Ver 5.1)		
Associate Pre Disaster Program with New Program Type		
Select Disaster:	-- Select a Disaster --	
Select Pre Disaster Program:	-- Select Pre Disaster Program Type --	
Select New Program Type:	-- Select New Program Type --	
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>

Figure 86 - Associate Pre and New Program Type

45. Set Business Rules for Pre and New Program Types

- a) Select the Admin tab, and then click on the **“Business Rules Templates”** business Link at the top of the page.
- b) Click on the **“Set/Edit Business Rules for Pre and New Program Types”** on the on the **“Business Rules Template”** page.
- c) From the dropdown list select the Disaster, Pre Disaster and New Program combination to set the Business Rules for.
- d) **Lease Information Required Indicator:**
- If this option is **checked**, the Disaster, Pre Disaster and New Program Type combination selected above will display Lease information section on the Household Details page.

- If the option is **unchecked**, the Disaster, Pre and New Program Type combination selected above will **NOT** display lease information on the Household details page. The Remaining options on the Set Business Rules page will be grayed out.

DIS		Reports	Admin
Data Corrections	Bulk Inserts/Updates	Business Rule Templates	Dynamic Data Fields
Bulk Upload Dynamic Data			
Disaster Information System (Ver 5.1)			
Set/Edit Business Rules for Pre and New Program Types			
Select Disaster:	-- Select a Disaster --		
Select Pre Disaster Program:	-- Select Pre Disaster Program Type --		
Select New Program Type:	-- Select New Program Type --		
<input type="checkbox"/> Lease Information Required			
Is Eligibility Questionnaire required?	<input type="radio"/> Yes <input type="radio"/> No		
Available for Selection on Screen?	<input type="radio"/> Yes <input type="radio"/> No		
Select Family Type (HAP Formula):	<input type="radio"/> HUD <input type="radio"/> FEMA <input checked="" type="radio"/> None <small>HUD formula includes Payment Standard, Tenant Rent, Utility Allowance, Actual Rent to Owner, Total Tenant Payment and Utility Reimbursement and FEMA formula includes Payment Standard, FMR, FEMA Payment, Lease Rent</small>		
Select Applicable Lease Amount Fields:	<input type="checkbox"/> Payment Standard <input type="checkbox"/> Rent To Owner/Lease Rent <input type="checkbox"/> Utility Allowance <input type="checkbox"/> Gross Rent <input type="checkbox"/> Total Tenant Payment <input type="checkbox"/> FMR <input type="checkbox"/> FEMA Payment <input type="checkbox"/> HAP Total <input type="checkbox"/> Utility Reimbursement <input type="checkbox"/> Utility Deposit <input type="checkbox"/> Security Deposit		
Keep Lease Date fields locked?	<input type="radio"/> Yes <input type="radio"/> No <small>Lease Date fields include Lease Effective Date and Lease End Date</small>		
Keep Lease Unit Address fields locked?	<input type="radio"/> Yes <input type="radio"/> No <small>Lease Unit Address fields include New Unit Address, and Monthly Lease Indicator</small>		
Program Begin Date:	<input type="text"/> (mm/dd/yyyy)		

Figure 87 - Lease Information is NOT checked (Top view)

Program End Date:	<input type="text"/> (mm/dd/yyyy)
End of Participation fields applicable?	<input type="radio"/> Yes <input type="radio"/> No <small>EOP fields include EOP Date, EOP Reasons and Early Release Fee Indicator</small>
Port-out allowed?	<input type="radio"/> Yes <input type="radio"/> No
Other applicable data entry fields:	<input type="checkbox"/> Owner Name <input type="checkbox"/> Owner TIN <input type="checkbox"/> IRT Exception <small>(Date, Amount and Comments)</small> <input type="checkbox"/> Finder Fee <input type="checkbox"/> Mover Fee <input type="checkbox"/> Family Contacted Indicator <input type="checkbox"/> Family Agreed to Case Management Indicator <input type="checkbox"/> Landlord Signed HAP Contract Indicator <input type="checkbox"/> HQS Inspection Date <input type="checkbox"/> Tenant ID <input type="checkbox"/> PHA Tenant Remarks <input type="checkbox"/> Family Eligible for Continued Eligibility Indicator <small>(Includes Continued Assistance Initial Eligibility Determination Date, Last Quarterly Eligibility Determination Date and Next Quarterly Eligibility Determination Due Date fields)</small> <input type="checkbox"/> Unit Available Indicator <small>(Includes Family Notified of Prior Unit Availability Indicator and Date Family Notified of Prior Unit Availability fields)</small> <input type="checkbox"/> Vacancy Payment <small>(Includes Vacancy Payment Amount and Vacancy Payment Date fields)</small> <input type="checkbox"/> HQS Inspection Type
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 88 - Lease Information is NOT checked (Bottom view)

- e) **Is Eligibility Questionnaire Required?:** This field determines if the Disaster, Pre Disaster and New Program Combination would go through the Eligibility Questionnaire to determine Household eligibility.
 - If “Yes” is selected, all households assigned to this combination need to go through the eligibility questionnaire to determine eligibility.
 - If “No” is selected, all households assigned to this combination would NOT need to go through the eligibility questionnaire to determine eligibility.
- f) **Available for Selection on Screen:** This field determines if the Pre Disaster or New Program Type selected for combination would be available for selection on the Household Details page.
 - If “Yes” is selected, the Pre Disaster and New Program Types would be available for selection on the Household Details pages in the program type dropdown list.
 - If “No” is selected, the Pre Disaster and new Program Types fields will only display these program types selection above, fields be locked and grayed out.
- g) **Select Family Type (HAP Formula):** This field determines what family type the Disaster, Pre Disaster and New Program Type combination will be set to and which HAP formula would apply for to this Family Type:
 - **HUD:** If this option is selected, the fields applicable to calculate the HUD HAP formula are automatically checked. The user can also select other fields that not automatically checked. All selected fields would be displayed on the Household Lease page.

Select Family Type (HAP Formula):	<input checked="" type="radio"/> HUD <input type="radio"/> FEMA <input type="radio"/> None <small>HUD formula includes Payment Standard, Tenant Rent, Utility Allowance, Actual Rent to Owner, Total Tenant Payment and Utility Reimbursement and FEMA formula includes Payment Standard, FMR, FEMA Payment, Lease Rent</small>
Select Applicable Lease Amount Fields:	<input checked="" type="checkbox"/> Payment Standard <input checked="" type="checkbox"/> Rent To Owner/Lease Rent <input checked="" type="checkbox"/> Utility Allowance <input checked="" type="checkbox"/> Gross Rent <input checked="" type="checkbox"/> Total Tenant Payment <input type="checkbox"/> FMR <input type="checkbox"/> FEMA Payment <input checked="" type="checkbox"/> HAP Total <input checked="" type="checkbox"/> Utility Reimbursement <input type="checkbox"/> Utility Deposit <input type="checkbox"/> Security Deposit

Figure 89 - HUD (Family Type) HAP Formula

- **FEMA:** If this option is selected, the fields applicable to calculate the FEMA HAP formula are automatically checked. The user can also select other fields that not automatically checked. All selected fields would be displayed on the Household Lease page.

Select Family Type (HAP Formula):	<input type="radio"/> HUD <input checked="" type="radio"/> FEMA <input type="radio"/> None <small>HUD formula includes Payment Standard, Tenant Rent, Utility Allowance, Actual Rent to Owner, Total Tenant Payment and Utility Reimbursement and FEMA formula includes Payment Standard, FMR, FEMA Payment, Lease Rent</small>
Select Applicable Lease Amount Fields:	<input checked="" type="checkbox"/> Payment Standard <input checked="" type="checkbox"/> Rent To Owner/Lease Rent <input type="checkbox"/> Utility Allowance <input type="checkbox"/> Gross Rent <input type="checkbox"/> Total Tenant Payment <input checked="" type="checkbox"/> FMR <input checked="" type="checkbox"/> FEMA Payment <input checked="" type="checkbox"/> HAP Total <input type="checkbox"/> Utility Reimbursement <input type="checkbox"/> Utility Deposit <input type="checkbox"/> Security Deposit

Figure 90 - FEMA (Family Type) HAP Formula

- **NONE:** There are no pre-defined HAP formulas for this option or family type. All the fields are available for the user to define and select and would be displayed on the Household Lease page.

Select Family Type (HAP Formula):	<input type="radio"/> HUD <input type="radio"/> FEMA <input checked="" type="radio"/> None <small>HUD formula includes Payment Standard, Tenant Rent, Utility Allowance, Actual Rent to Owner, Total Tenant Payment and Utility Reimbursement and FEMA formula includes Payment Standard, FMR, FEMA Payment, Lease Rent</small>
Select Applicable Lease Amount Fields:	<input type="checkbox"/> Payment Standard <input type="checkbox"/> Rent To Owner/Lease Rent <input type="checkbox"/> Utility Allowance <input type="checkbox"/> Gross Rent <input type="checkbox"/> Total Tenant Payment <input type="checkbox"/> FMR <input type="checkbox"/> FEMA Payment <input type="checkbox"/> HAP Total <input type="checkbox"/> Utility Reimbursement <input type="checkbox"/> Utility Deposit <input type="checkbox"/> Security Deposit

Figure 91 - NONE Family Type

- h) **Keep Lease Date fields locked?:** This field determines if the Lease Date fields will be locked on the Household lease page:

- If “**Yes**” is selected, the Lease date fields will be locked or grayed out and will NOT be available for edit on the Household lease page.
 - If “**No**” is selected, the Lease date fields will be available for edit on the Household lease page.
- i) **Keep Lease Unit Address fields locked?:** This field determines if the Unit Address fields will be locked on the Household lease page:
- If “**Yes**” is selected, the Unit Address fields will be locked or grayed out and will NOT be available for edit on the Household lease page.
 - If “**No**” is selected, the Unit Address fields will be available for edit on the Household lease page.
 - Program Begin Date: Enter the Program Begin Date in **mm/dd/yyyy** format for the Disaster and Program association selected above. The HAP Contract Effective date for this association cannot be less than the Program Begin Date.
- j) **Program End Date:** Enter the Program End Date in mm/dd/yyyy format for the Disaster and Program association selected above. The HAP Contract Termination Date for this association cannot be greater the Program End Date. The Program End Date will also be displayed on the Household Lease page.
- k) **End of Participation fields applicable?:** This field determines if the Disaster and Program Types association will show the End of Participation fields on the Household Lease page.
- If “**Yes**” is selected, The End of Participation Fields **will be** displayed on the Household Lease page for the Disaster/Program Types association.
 - If “**No**” is selected, the End of Participation Fields **will NOT** be displayed on the Household Lease page for this Disaster/Program Types association.
- l) **Port-out allowed?:** This field determines if the Disaster/Program Types association will display the Port out option on the Household Lease page.
- If “**Yes**” is selected, the Port-out button will be displayed on the Household Details page.
 - If “**No**” is selected, the Port-out button will NOT be displayed on the Household Details page.

Keep Lease Date fields locked?	<input type="radio"/> Yes <input type="radio"/> No <small>Lease Date fields include Lease Effective Date and Lease End Date</small>
Keep Lease Unit Address fields locked?	<input type="radio"/> Yes <input type="radio"/> No <small>Lease Unit Address fields include New Unit Address, and Monthly Lease Indicator</small>
Program Begin Date:	<input type="text"/> (mm/dd/yyyy)
Program End Date:	<input type="text"/> (mm/dd/yyyy)
End of Participation fields applicable?	<input type="radio"/> Yes <input type="radio"/> No <small>EOP fields include EOP Date, EOP Reasons and Early Release Fee Indicator</small>
Port-out allowed?	<input type="radio"/> Yes <input type="radio"/> No

Figure 92 - Business Rules Options

- m) **Other applicable data entry fields:** This option determines which fields in this section will be displayed on the Household Lease page for the Disaster/Program Types association. The fields selected in the section is also affected by the Family Type (HAP Formula) selected above.
- i. **FEMA:** If FEMA HAP formula is selected above, the same options are automatically checked as they required for this Family Type.
- Family Contacted Indicator
 - Family Agreed to Case Management Indicator
 - Landlord Signed HAP Contract Indicator

Select Family Type (HAP Formula):	<input type="radio"/> HUD <input checked="" type="radio"/> FEMA <input type="radio"/> None <small>HUD formula includes <i>Payment Standard, Tenant Rent, Utility Allowance, Actual Rent to Owner, Total Tenant Payment</i> and <i>Utility Reimbursement</i> and FEMA formula includes <i>Payment Standard, FMR, FEMA Payment, Lease Rent</i></small>
--	---

Other applicable data entry fields:	<input type="checkbox"/> Owner Name <input type="checkbox"/> Owner TIN <input type="checkbox"/> IRT Exception <small>(Date, Amount and Comments)</small> <input type="checkbox"/> Finder Fee <input type="checkbox"/> Mover Fee <input checked="" type="checkbox"/> Family Contacted Indicator <input checked="" type="checkbox"/> Family Agreed to Case Management Indicator <input checked="" type="checkbox"/> Landlord Signed HAP Contract Indicator <input type="checkbox"/> HQS Inspection Date <input type="checkbox"/> Tenant ID <input type="checkbox"/> PHA Tenant Remarks <input type="checkbox"/> Family Eligible for Continued Eligibility Indicator <small>(Includes <i>Continued Assistance Initial Eligibility Determination Date, Last Quarterly Eligibility Determination Date</i> and <i>Next Quarterly Eligibility Determination Due Date</i> fields)</small> <input type="checkbox"/> Unit Available Indicator <small>(Includes <i>Family Notified of Prior Unit Availability Indicator</i> and <i>Date Family Notified of Prior Unit Availability</i> fields)</small> <input type="checkbox"/> Vacancy Payment <small>(Includes <i>Vacancy Payment Amount</i> and <i>Vacancy Payment Date</i> fields)</small> <input type="checkbox"/> HQS Inspection Type
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 93 - Other applicable data entry fields for FEMA Family Type

- ii. **HUD and NONE:** If the HUD or NONE Family type is selected above, no fields are pre-defined for the family type. However, 'Family Contacted Indicator' has to be checked to select either the 'Family Agreed to Case Management Indicator' or 'Landlord Signed HAP Contract Indicator' or both.

Select Family Type (HAP Formula):	<input checked="" type="radio"/> HUD <input type="radio"/> FEMA <input type="radio"/> None <small>HUD formula includes <i>Payment Standard, Tenant Rent, Utility Allowance, Actual Rent to Owner, Total Tenant Payment</i> and <i>Utility Reimbursement</i> and FEMA formula includes <i>Payment Standard, FMR, FEMA Payment, Lease Rent</i></small>
--	---

Select Family Type (HAP Formula):	
<input type="radio"/> HUD <input type="radio"/> FEMA <input checked="" type="radio"/> None	
<small>HUD formula includes <i>Payment Standard, Tenant Rent, Utility Allowance, Actual Rent to Owner, Total Tenant Payment</i> and <i>Utility Reimbursement</i> and FEMA formula includes <i>Payment Standard, FMR, FEMA Payment, Lease Rent</i></small>	
Other applicable data entry fields:	<input type="checkbox"/> Owner Name <input type="checkbox"/> Owner TIN <input type="checkbox"/> IRT Exception <small>(Date, Amount and Comments)</small> <input type="checkbox"/> Finder Fee <input type="checkbox"/> Mover Fee <input type="checkbox"/> Family Contacted Indicator <input type="checkbox"/> Family Agreed to Case Management Indicator <input type="checkbox"/> Landlord Signed HAP Contract Indicator <input type="checkbox"/> HQS Inspection Date <input type="checkbox"/> Tenant ID <input type="checkbox"/> PHA Tenant Remarks <input type="checkbox"/> Family Eligible for Continued Eligibility Indicator <small>(includes <i>Continued Assistance Initial Eligibility Determination Date, Last Quarterly Eligibility Determination Date</i> and <i>Next Quarterly Eligibility Determination Due Date</i> fields)</small> <input type="checkbox"/> Unit Available Indicator <small>(includes <i>Family Notified of Prior Unit Availability Indicator</i> and <i>Date Family Notified of Prior Unit Availability</i> fields)</small> <input type="checkbox"/> Vacancy Payment <small>(includes <i>Vacancy Payment Amount</i> and <i>Vacancy Payment Date</i> fields)</small> <input type="checkbox"/> HQS Inspection Type
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 94 - Other applicable data entry fields for HUD and NONE Family Types

- n) Click **“Save”** to set the business rules for the selected Disaster/Program Types association.

46. *Edit Business Rules for Pre and New Program Types*

- a) Select the Admin Tab, click on the “**Business Rules Template**” business link on the top of the page.
- b) Click on the “**Set/Edit Business Rules for Pre and New Program Types**” on the “**Business Rules Template**” page.
- c) From the dropdown list select the Disaster, Pre Disaster and New Program Type association to edit the Business Rules. Once the selection is made, the page displays the current settings for the Disaster-Program Types association. Most of the options maybe unavailable for edit based on the following:
 - If no data exists for the selected Disaster-Program Types association (i.e. if no household has been added to this Disaster-Program Types association), then all the fields will be available for edits. Make the necessary edits and click “**Save**” to submit the corrections.

DIS		Reports		Admin	
Data Corrections		Bulk Inserts/Updates		Business Rule Templates	
		Dynamic Data Fields		Bulk Upload Dynamic Data	
Disaster Information System (Ver 5.1)					
Set/Edit Business Rules for Pre and New Program Types					
Select Disaster:	-- Select a Disaster --				
Select Pre Disaster Program:	-- Select Pre Disaster Program Type --				
Select New Program Type:	-- Select New Program Type --				
<input checked="" type="checkbox"/> Lease Information Required					
Is Eligibility Questionnaire required?	<input type="radio"/> Yes <input type="radio"/> No				
Available for Selection on Screen?	<input type="radio"/> Yes <input type="radio"/> No				
Select Family Type (HAP Formula):	<input type="radio"/> HUD <input type="radio"/> FEMA <input checked="" type="radio"/> None <small>HUD Formula includes Payment Standard, Tenant Rent, Utility Allowance, Actual Rent to Owner, Total Tenant Payment and Utility Reimbursement and FEMA formula includes Payment Standard, FMR, FEMA Payment, Lease Rent</small>				
Select Applicable Lease Amount Fields:	<input type="checkbox"/> Payment Standard <input type="checkbox"/> Rent To Owner/Lease Rent <input type="checkbox"/> Utility Allowance <input type="checkbox"/> Gross Rent <input type="checkbox"/> Total Tenant Payment <input type="checkbox"/> FMR <input type="checkbox"/> FEMA Payment <input type="checkbox"/> HAP Total <input type="checkbox"/> Utility Reimbursement <input type="checkbox"/> Utility Deposit <input type="checkbox"/> Security Deposit				
Keep Lease Date fields locked?	<input type="radio"/> Yes <input type="radio"/> No <small>Lease Date fields include Lease Effective Date and Lease End Date</small>				
Keep Lease Unit Address fields locked?	<input type="radio"/> Yes <input type="radio"/> No <small>Lease Unit Address fields include New Unit Address, and Monthly Lease Indicator</small>				
Program Begin Date:	<input type="text"/> (mm/dd/yyyy)				
Program End Date:	<input type="text"/> (mm/dd/yyyy)				
End of Participation fields applicable?	<input type="radio"/> Yes <input type="radio"/> No <small>EOP fields include EOP Date, EOP Reasons and Early Release Fee Indicator</small>				
Port-out allowed?	<input type="radio"/> Yes <input type="radio"/> No				
Other applicable data entry fields:	<input type="checkbox"/> Owner Name <input type="checkbox"/> Owner TIN <input type="checkbox"/> IRT Exception <small>(Date, Amount and Comments)</small> <input type="checkbox"/> Finder Fee <input type="checkbox"/> Mover Fee <input type="checkbox"/> Family Contacted Indicator <input type="checkbox"/> Family Agreed to Case Management Indicator <input type="checkbox"/> Landlord Signed HAP Contract Indicator <input type="checkbox"/> HQS Inspection Date <input type="checkbox"/> Tenant ID <input type="checkbox"/> PHA Tenant Remarks <input type="checkbox"/> Family Eligible for Continued Eligibility Indicator <small>(Includes Continued Assistance Initial Eligibility Determination Date, Last Quarterly Eligibility Determination Date and Next Quarterly Eligibility Determination Due Date fields)</small> <input type="checkbox"/> Unit Available Indicator <small>(Includes Family Notified of Prior Unit Availability Indicator and Date Family Notified of Prior Unit Availability fields)</small> <input type="checkbox"/> Vacancy Payment <small>(Includes Vacancy Payment Amount and Vacancy Payment Date fields)</small> <input type="checkbox"/> HQS Inspection Type				
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Figure 95 - Edit Business Rules (All fields available)

- If data exists for the selected Disaster-Program Types association (i.e. if one or more households have been added using this Disaster Program Types association), then all the fields will be grayed out except the Program Begin and End Date fields. Make the necessary edits to the Program Dates and then click **“Save”** to submit the corrections.

DIS		Reports	Admin
DVP Main	Data Corrections	Bulk Inserts/Updates	Business Rule Templates
Dynamic Data Fields		Bulk Upload Dynamic Data	
Disaster Information System (Ver 5.1)			
Set/Edit Business Rules for Pre and New Program Types			
Select Disaster:	HURRICANE KATRINA		
Select Pre Disaster Program:	FE - Non-HUD Families		
Select New Program Type:	DH - Non-HUD Family Assistance		
<input checked="" type="checkbox"/> Lease Information Required			
Is Eligibility Questionnaire required?	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Available for Selection on Screen?	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Select Family Type (HAP Formula):	<input type="radio"/> HUD <input checked="" type="radio"/> FEMA <input type="radio"/> None <small>HUD formula includes Payment Standard, Tenant Rent, Utility Allowance, Actual Rent to Owner, Total Tenant Payment and Utility Reimbursement and FEMA formula includes Payment Standard, FMR, FEMA Payment, Lease Rent</small>		
Select Applicable Lease Amount Fields:	<input checked="" type="checkbox"/> Payment Standard <input checked="" type="checkbox"/> Rent To Owner/Lease Rent <input type="checkbox"/> Utility Allowance <input type="checkbox"/> Gross Rent <input type="checkbox"/> Total Tenant Payment <input checked="" type="checkbox"/> FMR <input checked="" type="checkbox"/> FEMA Payment <input checked="" type="checkbox"/> HAP Total <input type="checkbox"/> Utility Reimbursement <input type="checkbox"/> Utility Deposit <input type="checkbox"/> Security Deposit		
Keep Lease Date fields locked?	<input type="radio"/> Yes <input checked="" type="radio"/> No <small>Lease Date fields include Lease Effective Date and Lease End Date</small>		
Keep Lease Unit Address fields locked?	<input type="radio"/> Yes <input checked="" type="radio"/> No <small>Lease Unit Address fields include New Unit Address, and Monthly Lease Indicator</small>		
Program Begin Date:	9/1/2005 (mm/dd/yyyy)		
Program End Date:	8/31/2009 (mm/dd/yyyy)		
End of Participation fields applicable?	<input checked="" type="radio"/> Yes <input type="radio"/> No <small>EOP fields include EOP Date, EOP Reasons and Early Release Fee Indicator</small>		
Port-out allowed?	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Other applicable data entry fields:	<input checked="" type="checkbox"/> Owner Name <input checked="" type="checkbox"/> Owner TIN <input checked="" type="checkbox"/> IRT Exception <small>(Date, Amount and Comments)</small> <input checked="" type="checkbox"/> Finder Fee <input checked="" type="checkbox"/> Mover Fee <input checked="" type="checkbox"/> Family Contacted Indicator <input checked="" type="checkbox"/> Family Agreed to Case Management Indicator <input checked="" type="checkbox"/> Landlord Signed HAP Contract Indicator <input checked="" type="checkbox"/> HQS Inspection Date <input checked="" type="checkbox"/> Tenant ID <input checked="" type="checkbox"/> PHA Tenant Remarks <input type="checkbox"/> Family Eligible for Continued Eligibility Indicator <small>(Includes Continued Assistance Initial Eligibility Determination Date, Last Quarterly Eligibility Determination Date and Next Quarterly Eligibility Determination Due Date fields)</small> <input type="checkbox"/> Unit Available Indicator <small>(Includes Family Notified of Prior Unit Availability Indicator and Date Family Notified of Prior Unit Availability fields)</small> <input type="checkbox"/> Vacancy Payment <small>(Includes Vacancy Payment Amount and Vacancy Payment Date fields)</small> <input checked="" type="checkbox"/> HQS Inspection Type		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Figure 96 - Edit Business Rules (Most fields grayed out)

47. Add Dynamic Data fields

- a) Select the Admin tab and then click on the “**Dynamic Data Fields**” business link at the top of the page to open the Dynamic Data entry page.



Figure 97 - Dynamic Field Data Entry Fields

- b) Click on the “**Add / Modify / Delete New Dynamic Fields**’ button to display the “**New Dynamic Fields list**” page.
- c) Click on the ‘Add New Dynamic Field’ link at the top right corner of the page to display the New Dynamic Field Definition page.

Field ID	Field Name	Field Type Code	Min Value	Max Value	Default Value	Current Date Indr	Edit/Delete/Remove Association
1	PREV_CNTY	Text		50			Edit / Delete / Remove Association
2	CURR_CNTY	Text		50			Edit / Delete / Remove Association
5	FEMA_CLC_LAST_RENTAL_AWARD_DATE	DATE					Edit / Delete / Remove Association
6	NEW_UNIT_CNTY	Text		50			Edit / Delete / Remove Association
7	LL_ADD1	Text		50			Edit / Delete / Remove Association
8	LL_ADD2	Text		50			Edit / Delete / Remove Association

Figure 98 - New Dynamic Fields list page

- d) There are seven (7) types of Dynamic fields that can be created:
 1. **Date:** To create a dynamic Date field, select the “**Date**” radio button. Enter the following information:
 - **New Field Name.**
 - **Default Date** (Optional): Enter in mm/dd/yyyy format. This value will be automatically pre-populated into the dynamic fields on the Household Lease page.
 - **Min Allowed Date:** Enter the minimum allowed date in mm/dd/yyyy format.
 - **Max Allowed Date:** Enter the maximum allowed date in mm/dd/yyyy or this field can be set to current date by selecting the ‘Current Date’ checkbox.
 - Click “**Save New Field Definition**” button to save the new dynamic field.

The screenshot shows a web form titled "New Dynamic Field Definition". It has a green header bar with the title. Below the header, there are several sections:

- New Field Name:** A text input field.
- Field Type:** A section with the text "Select field type to modify business edits." and a row of radio buttons: Date, Numeric, Text, Indicator, Memo, Dropdown, and Radio Button.
- Default Date:** A text input field with a red placeholder "(mm/dd/yyyy)".
- Min Allowed Date:** A text input field with a red placeholder "(mm/dd/yyyy)".
- Max Allowed Date:** A text input field with a red placeholder "(mm/dd/yyyy)" followed by the text "or Current Date:" and an unchecked checkbox.

 At the bottom of the form, there are two buttons: "Save New Field Definition" and "Cancel".

Figure 99 - Create Dynamic **Date** field

- Numeric:** To create a dynamic Numeric field, select the “**Numeric**” radio button. Enter the following information:

 - **New Field Name.**
 - **Default Value** (Optional): Enter a rounded value e.g. 999999. This value will be automatically pre-populated into the dynamic field on the Household Lease page.
 - **Min Allowed Value:** Enter the rounded maximum value allowed.
 - **Max Allowed Value:** Enter the rounded maximum value allowed.
 - Click “**Save New Field Definition**” button to save the new dynamic field.

The screenshot shows a web form titled "New Dynamic Field Definition". It has a green header bar with the title. Below the header, there are several sections:

- New Field Name:** A text input field.
- Field Type:** A section with the text "Select field type to modify business edits." and a row of radio buttons: Date, Numeric, Text, Indicator, Memo, Dropdown, and Radio Button.
- Default Value:** A text input field with a red placeholder "(Enter the rounded value for Money Fields - Ex:99999)".
- Min Allowed Value:** A text input field with a red placeholder "(Enter the rounded value for Money Fields - Ex:99999)".
- Max Allowed Value:** A text input field with a red placeholder "(Enter the rounded value for Money Fields - Ex:99999)".

 At the bottom of the form, there are two buttons: "Save New Field Definition" and "Cancel".

Figure 100 - Create Dynamic **Numeric** field

- Text:** To create a dynamic Text field, select the “**Text**” radio button. Enter the following information:

 - **New Field Name.**
 - **Default Text.** (Optional) Enter a text would be automatically pre-populated into the dynamic field on the Household Lease page.
 - **Max Text Length:** The length of the text can be 1-255 characters.
 - Click “**Save New Field Definition**” button to save the new dynamic field.

New Dynamic Field Definition	
New Field Name:	<input type="text"/>
Field Type: <small>Select field type to modify business edits.</small>	<input type="radio"/> Date <input type="radio"/> Numeric <input checked="" type="radio"/> Text <input type="radio"/> Indicator <input type="radio"/> Memo <input type="radio"/> Dropdown <input type="radio"/> Radio Button
Default Text:	<input type="text"/>
Max Text Length:	<input type="text"/>
<input type="button" value="Save New Field Definition"/> <input type="button" value="Cancel"/>	

Figure 101 - Create Dynamic **Text** field

- Indicator:** To create a dynamic Indicator field, select the “**Indicator**” radio button. Enter the following information:
 - **New Field Name.**
 - **Default Value:** Check ‘Selected’ field if you want this dynamic field automatically checked on the Household Lease page. If uncheck, this field will appear uncheck by default on the Household Lease page.
 - Click “**Save New Field Definition**” button to save the new dynamic field.

New Dynamic Field Definition	
New Field Name:	<input type="text"/>
Field Type: <small>Select field type to modify business edits.</small>	<input type="radio"/> Date <input type="radio"/> Numeric <input type="radio"/> Text <input checked="" type="radio"/> Indicator <input type="radio"/> Memo <input type="radio"/> Dropdown <input type="radio"/> Radio Button
Default Value:	<input type="checkbox"/> Selected
<input type="button" value="Save New Field Definition"/> <input type="button" value="Cancel"/>	

Figure 102 – Create Dynamic **Indicator** field

- Memo:** To create a dynamic Memo field, select the “**Memo**” radio button. Enter the following information:
 - **New Field Name.**
 - **Default Text:** Enter the text that you want displayed as the dynamic field.
 - Click “**Save New Field Definition**” button to save the new dynamic field.

New Dynamic Field Definition	
New Field Name:	<input type="text"/>
Field Type: <small>Select field type to modify business edits.</small>	<input type="radio"/> Date <input type="radio"/> Numeric <input type="radio"/> Text <input type="radio"/> Indicator <input checked="" type="radio"/> Memo <input type="radio"/> Dropdown <input type="radio"/> Radio Button
Default Text:	<input type="text"/>
<input type="button" value="Save New Field Definition"/> <input type="button" value="Cancel"/>	

Figure 103 – Create Dynamic **Memo** field

6. **Dropdown:** To create a dynamic Dropdown field, select the “**Dropdown**” radio button. Enter the following information:
- **New Field Name.**
 - **Dropdown Value:** Enter the 1st value that you want displayed in the dropdown box. (e.g.: Female).
 - **Code:** Enter the 1st code/value you want to associate the 1st dropdown value with. (e.g.: 1).
 - **Default Selected** checkbox: Check this box **ONLY** if this is the value you want displayed on the Lease page as the default when the Dropdown field is displayed.
 - Click “**Save Dropdown Value**” button to save the new dynamic field with the code and value combinations. This will be displayed in the vertical box.

NOTE: To add additional dropdown values, continue to enter the **Dropdown Value and its associated Code and click the “Save Dropdown Value” button. When finished, click the “Close” button.**

The screenshot shows a web form titled "New Dynamic Field Definition". It has a light green header bar with the title. Below the header, there are several sections:

- New Field Name:** A text input field.
- Field Type:** A section with the text "Select field type to modify business edits." and a row of radio buttons: Date, Numeric, Text, Indicator, Memo, **Dropdown** (which is selected), and Radio Button.
- Dropdown Value:** A text input field.
- Code:** A text input field.
- Default Selected:** A checkbox.
- Buttons:** "Save Dropdown Value" (highlighted in blue), "Close", "Save New Field Definition", and "Cancel".

Figure 104 - Create Dynamic **Dropdown** field

7. **Radio Button:** To create a dynamic Radio Button field, select the “**Radio Button**” radio button. Enter the following information:
- **New Field Name.**
 - **Radio Button Description.**
 - **Code:** Enter the code to be associated with the radio button.
 - **Default Selected** checkbox: Check this box **ONLY** if this is the value you want displayed on the Lease page as the default when the Radio Button field is displayed.
 - Click the “**Save Radio Button**” button to save the new dynamic field.

Figure 105 – Create Dynamic **Radio Button** field

48. *Modify Dynamic Data fields*

- a) Select the Admin tab, and then click on the “**Dynamic Data Fields**’ business link at the top of the page to open the Dynamic Data entry page.
- b) Click on the “**Add / Modify / Delete New Dynamic Fields**” button to display the “**New Dynamic Fields list**” page.
- c) Search for the dynamic field to be edited. The “**Edit**” should be displayed on the Edit / Delete / Remove Association column. If not displayed, it is based on the following:
 - **No data exists** for the selected Dynamic Field (i.e. this dynamic field has NOT been saved for any household on the Lease page) and then the dynamic field **will be** available for edits.
 - **Data exists** for the selected Dynamic Field (i.e. this dynamic field has been saved for any household on the Lease page) and then the dynamic field **will NOT** be available for edits.

New Dynamic Fields List							
							Add New Dynamic Field
Field ID	Field Name	Field Type Code	Min Value	Max Value	Default Value	Current Date Indr	Edit/Delete/Remove Association
1	PREV_CNTY	Text		50			Edit / Delete / Remove Association
2	CURR_CNTY	Text		50			Edit / Delete / Remove Association
5	FEMA_CLC_LAST_RENTAL_AWARD_DATE	DATE					Edit / Delete / Remove Association
6	NEW_UNIT_CNTY	Text		50			Edit / Delete / Remove Association
55	Family Continued Eligibility Assessed	Indicator					Edit / Delete / Remove Association
56	30 Day Termination Payment Issued	Indicator					Edit / Delete / Remove Association

Note:
 Click on the **Edit** link to modify the Dynamic Field properties
 Click on the **Delete** link to remove the Dynamic Field permanently from DIS System
 Click on the **Remove Association** link to remove the Dynamic Field association with Disaster and Program Types

Figure 106 – Edit Dynamic Fields

- d) If the “**Edit**” link is available, select it to display the “**Edit Dynamic Field Definition**” page. Note that the data type of a dynamic field cannot be changed

(e.g. a dynamic date field type cannot be change to a dynamic numeric field type). The “Field Type” option will always be locked.

The screenshot shows the 'Edit Dynamic Field Definition' form in the Disaster Information System (Ver 5.1). The form is titled 'Edit Dynamic Field Definition' and has a green header. The navigation tabs include 'Data Corrections', 'Bulk Inserts/Updates', 'Business Rule Templates', 'Dynamic Data Fields', and 'Bulk Upload Dynamic Data'. The form contains the following fields and options:

- New Field Name:** FEMA_CLC_LAST_RENTAL_AWARD_DATE
- Field Type:** Select field type to modify business edits. Options: Date, Number/Amount, Text, Indicator (Checkbox), Memo, Dropdown, Radio Button
- Default Date:** (mm/dd/yyyy)
- Min Allowed Date:** (mm/dd/yyyy)
- Max Allowed Date:** (mm/dd/yyyy) or Current Date
- Buttons:** Update Dynamic Field values, Cancel

Figure 107 - Edit Dynamic field Definition

- e) Make the necessary changes to the dynamic field values and click the “**Update Dynamic Field values**” button to submit the corrections.
- f) To edit the values for the **Dropdown** and **Radio Button** dynamic fields, follow the instructions on the page.

The screenshot shows the 'Edit Dynamic Field Definition' form in the Disaster Information System (Ver 5.1) for a dropdown field. The form is titled 'Edit Dynamic Field Definition' and has a green header. The navigation tabs include 'DIS', 'Reports', 'Admin', 'Data Corrections', 'Bulk Inserts/Updates', 'Business Rule Templates', 'Dynamic Data Fields', and 'Bulk Upload Dynamic Data'. The form contains the following fields and options:

- New Field Name:** JJ Dropdown
- Field Type:** Select field type to modify business edits. Options: Date, Number/Amount, Text, Indicator (Checkbox), Memo, Dropdown, Radio Button
- Dropdown Value:** **Code:** Default Selected
- Select Dropdown Value to Modify:** (a - 12, b - 24)
- Buttons:** Update Dynamic Field values, Cancel
- Instructions:**
 - Add Dropdown values - Instructions**
 1. Enter Value in *Dropdown Value* text field
 2. Enter Code in *Code* text field
 3. Click on *Add/Delete Dropdown Value* Button
 - Edit Dropdown values - Instructions**
 1. Select a value from *Dropdown values* box
 2. Update the value in *Dropdown value text field*
 3. Click on *Update Dynamic Field values* Button
 - Delete Dropdown values - Instructions**
 1. Select a value from *Dropdown values* box
 3. Click on *Add/Delete Dropdown Value* Button

Figure 108 - Edit **Dropdown** and **Radio Button** Dynamic field Values

49. Associate New Fields with Program Types

- Select the Admin tab and then click on the “**Dynamic Data Fields**” business link at the top of the page to open the Dynamic Data entry page.
- Click on the “**Associate New Fields with Program Type**” button.
- Select the Disaster from the dropdown list.
- Select the Program (PRE-NEW) to associate the dynamic data fields to from the dropdown list. Once this selection is made, all dynamic fields available for association are displayed below in the “**Select applicable (new) dynamic data fields and their options**” section of the screen. Dynamic fields can be link to as many Disaster/Program Types associations as possible. Simply select the Program (Pre New) to be linked to.

DIS	Reports	Admin
Data Corrections	Bulk Inserts/Updates	Business Rule Templates
		Dynamic Data Fields
		Bulk Upload Dynamic Data
Disaster Information System (Ver 5.1)		
Associate New Fields with Program Type		
Select Disaster:	1 - HURRICANE KATRINA	
Select Program (PRE - NEW):	F3 - D3	
Select applicable (new) Dynamic data fields and their options		
<input type="checkbox"/>	PREV_CNTY	
<input type="checkbox"/>	CURR_CNTY	
<input type="checkbox"/>	NEW_UNIT_CNTY	
<input type="checkbox"/>	Grant Agreement Indicator	
<input type="checkbox"/>	FAM_SGN_CERT_LTR_REMN_DHAP	
<input type="checkbox"/>	FAM_SGN_CERT_LTR_REMN_DHAP_DATE	
<input type="checkbox"/>	Family is Preassigned?	
<input type="checkbox"/>	Security Deposit (Other Leases)	
<input type="checkbox"/>	Utility Deposit (Other Leases)	
<input type="checkbox"/>	Family Continued Eligibility Assessed	
<input type="checkbox"/>	MY AMOUNT	
<input type="checkbox"/>	JJ Dropdown	
<input type="checkbox"/>	JJ Test Date	
<input type="checkbox"/>	JJ Text	
Save New Dynamic Field		Cancel

Figure 109 – Associate Fields with Program Type

- Click on the Dynamic field to be associated to the Program Types and the options for that dynamic field are displayed.
- Select the applicable options. There are three options to select:
 - Field must be valued?:** If this option is checked, then on the Household Lease page, this field must have a value to save the Lease.
 - Permanently lock this field:** If this option is checked, then this field will be locked or grayed out on the Household Lease page. Note that if the both the

- “Permanently lock this field” and the “Field must be valued?” options are selected, then a default value must already exist for this field.
3. **This Field is applicable to:** There are three choices for this option:
 - **First Lease Only:** When this option is selected, then the dynamic field will be display on the first lease.
 - **All leases EXCEPT the first lease:** When this option is selected, then the dynamic field will only be displayed from the second lease.
 - **All leases (No exceptions):** When this option is selected, then the dynamic field will show up for all leases.
 - g) Click on the “**Save New Dynamic field**” button to save the dynamic field to the Program Types association.

The screenshot shows a dialog box titled "Select Dynamic field options" with a yellow background. It contains four sections, each for a different field type:

- Dynamic Date Field:**
 - Dynamic Date Field
 - Field must be valued?
 - Permanently lock this field.
 - This Field is applicable to:
 - First Lease Only
 - All leases EXCEPT the first lease
 - All leases (No Exceptions)
- Dynamic Numeric Field:**
 - Dynamic Numeric Field
 - Field must be valued?
 - Permanently lock this field.
 - This Field is applicable to:
 - First Lease Only
 - All leases EXCEPT the first lease
 - All leases (No Exceptions)
- Dynamic Text Field:**
 - Dynamic Text Field
 - Field must be valued?
 - Permanently lock this field.
 - This Field is applicable to:
 - First Lease Only
 - All leases EXCEPT the first lease
 - All leases (No Exceptions)
- Dynamic Indicator Field:**
 - Dynamic Indicator Field
 - Field must be valued?
 - Permanently lock this field.
 - This Field is applicable to:
 - First Lease Only
 - All leases EXCEPT the first lease
 - All leases (No Exceptions)

At the bottom of the dialog box, there are two buttons: "Save New Dynamic Field" and "Cancel".

Figure 110 - Select Dynamic field options

50. Delete Dynamic Data fields

- a) Select the Admin tab and then click on the “**Dynamic Data fields**” business link at the top of the page to open the Dynamic Data entry page.
- b) Click on the “**Add / Modify / Delete New Dynamic Fields**” button to display the “**New Dynamic Fields list**” page.
- c) Search for the dynamic field to be edited. The “**Delete**” should be displayed on the Edit / Delete / Remove Association column. If not displayed, it is based on the following:
 - **No data exists** for the selected Dynamic Field (i.e. this dynamic field has NOT been saved for any household for the specific Disaster/Program Types association) and then the dynamic field **will be** available to delete.
 - **Data exists** for the selected Dynamic Field (i.e. this dynamic field does HAS any saved records the specific Disaster/Program Types association), then the dynamic field **will NOT** be available delete.

- To delete a dynamic field permanently, select the “Delete” link and respond to the pop-up window question.

New Dynamic Fields List							
							Add New Dynamic Field
Field ID	Field Name	Field Type Code	Min Value	Max Value	Default Value	Current Date Indr	Edit/Delete/Remove Association
1	PREV_CNTY	Text		50			Edit / Delete / Remove Association
2	CURR_CNTY	Text		50			Edit / Delete / Remove Association
5	FEMA_CLC_LAST_RENTAL_AWARD_DATE	DATE					Edit / Delete / Remove Association
6	NEW_UNIT_CNTY	Text		50			Edit / Delete / Remove Association
55	Family Continued Eligibility Assessed	Indicator					Edit / Delete / Remove Association
56	30 Day Termination Payment Issued	Indicator					Edit / Delete / Remove Association

Note:
 Click on the [Edit](#) link to modify the Dynamic Field properties
 Click on the [Delete](#) link to remove the Dynamic Field permanently from DIS System
 Click on the [Remove Association](#) link to remove the Dynamic Field association with Disaster and Program Types

Figure 111 - Delete Dynamic Field List

6		Edit / Delete / Remove Association
7		Edit / Delete / Remove Association
8		Edit / Delete / Remove Association
9		Edit / Delete / Remove Association
		Edit / Delete / Remove Association

The dynamic field has been deleted successfully.	
New Dynamic Fields List	
Add New Dynamic Field	

Figure 112 - Deleting a Dynamic field

51. Remove Dynamic Data field Associations

- Select the Admin tab and then click on the “**Dynamic Data fields**” business link at the top of the page to open the Dynamic Data entry page.
- Click on the “**Add / Modify / Delete New Dynamic Fields**” button to display the “**New Dynamic Fields list**” page.
- Search for the dynamic field whose association is to be removed. The “**Remove Association**” link should be displayed on the Edit / Delete / Remove Association column.
- To remove a dynamic field from association with a specific disaster and program type, click the “**Remove Association**” link and then select the disaster and program type combination.

Delete Field Associations

Dynamic Field Name:	NEW_UNIT_CNTY
Program Types Association (PRE – NEW)	
<input type="checkbox"/>	F10 - D10 (Hurricane Gustav)
<input type="checkbox"/>	IKE01 - IKE01 (HURRICANE IKE)
<input type="checkbox"/>	DHP-K - IKE01 (HURRICANE IKE)
<input type="checkbox"/>	VOIKE - IKE01 (HURRICANE IKE)
<input type="checkbox"/>	PHIKE - IKE01 (HURRICANE IKE)

Disaster Information System (Ver 5.1)

 **Record Deleted Successfully.**

[<< Back to 'DIS Admin Tasks - Dynamic Data Entry Fields' page.](#)

Figure 113 – Deleting Dynamic Field Association

52. Bulk Upload Dynamic Field Data Values

- a) Select the Admin Tab and then click on the “**Bulk Upload Dynamic Data**” business link on the top of the page.
- b) The page has 3 sections:
 - **Bulk Data Add/Update Dynamic Field Values Options:** This functionality allows you to upload Excel files to add new values or update existing data values in the Dynamic Fields.
 - **Check Status of Uploaded files:** This functionality allows you to see the status of uploaded files.
 - **Download File Templates:** Use this action to download excel templates to enter data to add new or update existing dynamic field data values.

Download File Templates	
Template Name	Template Type
Add New Dynamic Field Values	Excel Template
Update Dynamic Field Values Information	Excel Template

Figure 114 – Dynamic Data Field Values Bulk Adds/Updates

53. Bulk Upload Dynamic Field Data Values – Download File Templates

- a) To download an excel template, go down to the “**Download File Templates**” section, under “**Template Name**” choose the type of template required from the list:
 - Add New Dynamic Field Values
 - Update Dynamic Field Values Information
- b) Select corresponding excel “**Template Type**” for the “**Template Name**” selected.

The “**Download Dynamic Field Values Template**” page opens with additional instructions that must be precisely followed for the upload to work.

Special Instructions

1. Click on the "Download Dynamic Fields Template" button
2. Open the template by clicking "Open" button on the pop up window
3. Please save the template by selecting "Save As" option from the "File" menu
4. Select Save as type "Microsoft Excel 97-Excel 2003 & 5.0/95 Workbook" and save the template in a desired folder by clicking "Save" button
5. Please enter the Dap Field values Information
6. Save the file with the data and choose again the save as type "Microsoft Excel 97-Excel 2003 & 5.0/95 Workbook" and close
7. Upload the saved data spreadsheet through the application

Figure 115 - Dynamic Data Field Values Bulk Adds/Updates

NOTE: The excel templates are generated based on the dynamic fields that are pre-associated with the Disaster, Pre-Disaster Program and New Program Type combinations.

For additional detailed instructions on the Dynamic Data Field Values Bulk Upload Functionality, please refer to [Appendix C on page 92](#) of this User Guide

- c) Select Disaster / Pre Disaster Program / New Program Type
- d) If no dynamic fields are selected to be associated with the combination selected, the template will not be downloaded or opened.

Special Instructions

1. Click on the "Download Dynamic Fields Template" button
2. Open the template by clicking "Open" button on the pop up window
3. Please save the template by selecting "Save As" option from the "File" menu
4. Select Save as type "Microsoft Excel 97-Excel 2003 & 5.0/95 Workbook" and save the template in a desired folder by clicking "Save" button
5. Please enter the Dap Field values Information
6. Save the file with the data and choose again the save as type "Microsoft Excel 97-Excel 2003 & 5.0/95 Workbook" and close
7. Upload the saved data spreadsheet through the application

Figure 116 - No Dynamic Field Pre-Associated

- e) If there are existing dynamic fields pre-associated with the combination selected, select the "Download Dynamic Fields Template" button and follow the **SPECIAL INSTRUCTIONS**.

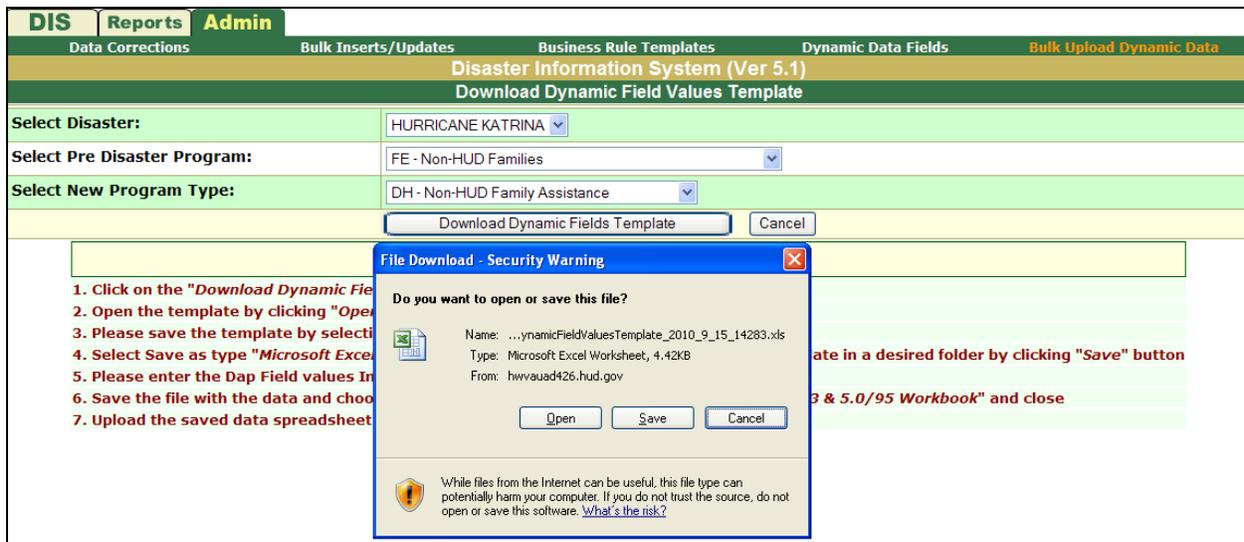


Figure 117 - Template Download with Dynamic Fields Pre-Associated

NOTE: The excel templates are generated based on the dynamic fields that are pre-associated with the Disaster, Pre-Disaster Program, and New Program Type combinations.

	A	B	C	D	E	F	G	H	I
1	Disaster Name	HURRICANE KATRINA (1)							
2	Pre Disaster Program Type	2 (F3)							
3	New Program Type	16 (D3)							
4	PGM Type ID	10	Save as Excel 97-2003 Workbook						
5	ssn_head	dstr_num	transaction_id	Lease Amount ~ 1	Sex ~ 20	Prasad Memo ~ 23	Prasad Radio Button ~ 25	Name Dropdown ~ 33	
6									
7									
8									

Figure 118 - Dynamic Field Excel Template

54. Bulk Upload Dynamic Field Data Values – Add/Update Dynamic Field Values Options

- a) To upload an excel template, go to the “Bulk Data Add/Update Dynamic Field Values Options” and select one of the following options:
 - Add New Dynamic Field Values
 - Update Dynamic Field Values Information
- b) Click on the “Proceed to File Upload” button.
- c) The File Upload page opens.
- d) Click on the “Browse” button to select the file to be uploaded.

Note: This type of upload will only update values that are “NULL”. To overwrite existing values check the “Blind Updates?” box.

e) Click on “Upload File” button.

*** Please note the Excel Template Instructions that must be followed for the add and/or update of the dynamic data field values to work.

The screenshot shows the 'Admin' tab selected in the top navigation bar. The main content area is titled 'DIS Admin Tasks - Bulk Dynamic Field values Data Insertion and Corrections through data file uploads'. Underneath, there is a 'FILE UPLOAD' section with a green-bordered box containing the text 'Add New Dynamic Field Values'. Below this is a 'Select File:' label followed by an empty text input field and a 'Browse...' button. At the bottom of this section are two buttons: 'Upload File' and 'Cancel'. Below the main content area is a yellow-bordered box titled 'Excel Template - Instructions' with a '<< Back to Main page' link to its right. The instructions are as follows:

1. The Household must have a *Transaction (Lease)* Information in DIS!
2. Upload only with *Latest(Current) Transaction Id*!
3. The current Lease must have *Disaster Number, Old Family Category and New Program Type's* combination!
4. If User Add/Updating value to the Dropdown/Radio button, the *Dropdown/Radio Button* value must match with any one of the List Items!

Figure 119 - Dynamic Bulk Data Field Values Add/Update File Options

For additional detailed instructions on the Dynamic Data Field Values Bulk Upload Functionality, please refer to [Appendix C on page 92](#) of this User Guide

55. Bulk Upload Dynamic Field Data Values – Check Status of Uploaded Files

- To check the status of uploaded files go to the “**Check Status of Uploaded Files**” section.
- Click on the “**Status of Uploaded Files >>**” button, the File Upload Status page opens up.
- The Status page displays the status of all uploaded files in the following columns:
 - **File Name:** Click on this link to download or view the original file uploaded.
 - **Admin Task:** Informs users the type of task requested.
 - **File Status:** Informs users about the file status:
 1. File is pending further processing
 2. File has been uploaded and processed successfully
 3. Invalid file uploaded
 - **Upload Date Time:** Displays date and time the upload took place.
 - **Upload User:** ID of the person that uploaded the file.
 - **Percent Completed:** File processing percentage.
 - **Detailed Report View:** Click on this link to view a detailed status report.

DIS Reports Admin <small>Public and Indian Housing Information Center</small> Bulk Inserts/Updates Business Rule Templates Dynamic Data Fields Bulk Upload Dynamic Data							
Disaster Information System (Ver 5.1)							
DIS Admin Tasks - Bulk Dynamic Field Values Data Additions and Updates through data file uploads							
<< Back to Main page							
Bulk Data Dynamic Field Values Add/Update File Upload Status							
#	File Name	Admin Task	File Status	Upload Date Time	Upload User	Percent Completed	Detailed Report
1	DEV - RQ0140 - Upd DynamicFieldValues 2 - JJ.xls	Update Dynamic Field Values Information [Blind Updates]	File has been uploaded and processed successfully.	8/5/2010 11:18:18 AM	HPIC02	100%	View / Download
2	RQ0140 - UpdDynamicFieldValues - Prasad.xls	Update Dynamic Field Values Information [Blind Updates]	File has been uploaded and processed successfully.	8/3/2010 1:38:56 PM	HPIC06	100%	View / Download
3	upd_dynamic_prasad(1).xls	Update Dynamic Field Values Information [Blind Updates]	File has been uploaded and processed successfully.	8/3/2010 1:32:36 PM	HPIC06	100%	View / Download
4	upd_dynamic_prasad.xls	Update Dynamic Field Values Information [Blind Updates]	File has been uploaded and processed successfully.	8/2/2010 11:56:05 PM	HPIC06	100%	View / Download
5	upd_dynamic_prasad.xls	Update Dynamic Field Values Information [Blind Updates]	File has been uploaded and processed successfully.	8/2/2010 11:42:06 PM	HPIC06	100%	View / Download

Figure 120 - Dynamic Bulk Data Field Values Add/Update File Options

- Detail Report View:** This opens up the “**File Details**” screen which has the following columns:
 - Record Num:** this is the record number in the upload file
 - SSN**
 - Dynamic Field:** this is the dynamic field being processed
 - Record Status:** this will be “**Processed**” or “**Exception**”
 - Error Description:** the long description of the “**Exception**” error

DIS Reports Admin <small>Public and Indian Housing Information Center</small> Bulk Inserts/Updates Business Rule Templates Dynamic Data Fields Bulk Upload Dynamic Data				
Disaster Information System (Ver 5.1)				
DIS Admin Tasks - Bulk Dynamic Field Values Data Additions and Updates through data file uploads				
<< Back to File List page				
File Name: <i>RQ0140_-_UpdDynamicFieldValues_-_Prasad.xls</i>				
Request Type: <i>Update Dynamic Field Values Information [Blind Updates]</i>				
Total Records: <i>15</i>				
Record Num	SSN	Dynamic Field	Record Status	Error Description
1	XXX-XX-8723	LL_ADD1	Processed	
2	XXX-XX-8723	LL_ADD2	Processed	
3	XXX-XX-8723	LL_CITY	Processed	
4	XXX-XX-8723	LL_CNTY	Processed	
5	XXX-XX-8723	LL_STATE	Processed	
6	XXX-XX-8723	LL_ZIP	Processed	
7	XXX-XX-8723	LL_PHONE	Processed	
8	XXX-XX-8723	LL_FAX	Processed	
9	XXX-XX-8723	LL_EMAIL	Processed	
10	XXX-XX-8723	LL_CONTACT	Exception	Dynamic Field Name is not associated with Disaster and Program types combination!
11	XXX-XX-8723	Landlord Signed Certification	Processed	
12	XXX-XX-8723	Family Receiving Transition Assistance	Processed	
13	XXX-XX-8723	Family Contacted for Transition	Processed	
14	XXX-XX-8723	Family NOT eligible for HCV	Processed	
15	XXX-XX-8723	Family Signed Certification	Processed	

Figure 121 - Dynamic Bulk Data Field Values File View

- **Detail Report Download:** Click on this link to download the Detailed Status Report in an excel spreadsheet format.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Record #	SSN Head	Record Status	Error Description								
2	1	698728933	Processed									
3	2	698728933	Processed									
4	3	698728933	Processed									
5	4	698728933	Processed									
6	5	698728933	Exception	Dynamic field value does not match with the List items! Enter a valid Dynamic Field list item!								
7	6	698728933	Exception	Cannot update dynamic field value for this lease. We can update only for first lease.								
8	7	698728933	Exception	Dynamic field value does not match with the List items! Enter a valid Dynamic Field list item!								
9	8	698728933	Processed									
10	9	698728933	Exception	Dynamic field value does not match with the List items! Enter a valid Dynamic Field list item!								
11	10	698728933	Exception	Cannot update dynamic field value for this lease. We can update only for first lease.								
12	11	698728933	Exception	Cannot update dynamic field value for this lease. We can update only for first lease.								
13	12	698728933	Exception	Dynamic field value does not match with the List items! Enter a valid Dynamic Field list item!								

Figure 122 - Dynamic Bulk Data Field Values File Download

For additional detailed instructions on the Dynamic Data Field Values Bulk Upload Functionality, please refer to [Appendix C on page 92](#) of this User Guide

Appendix A – Eligibility Questionnaire

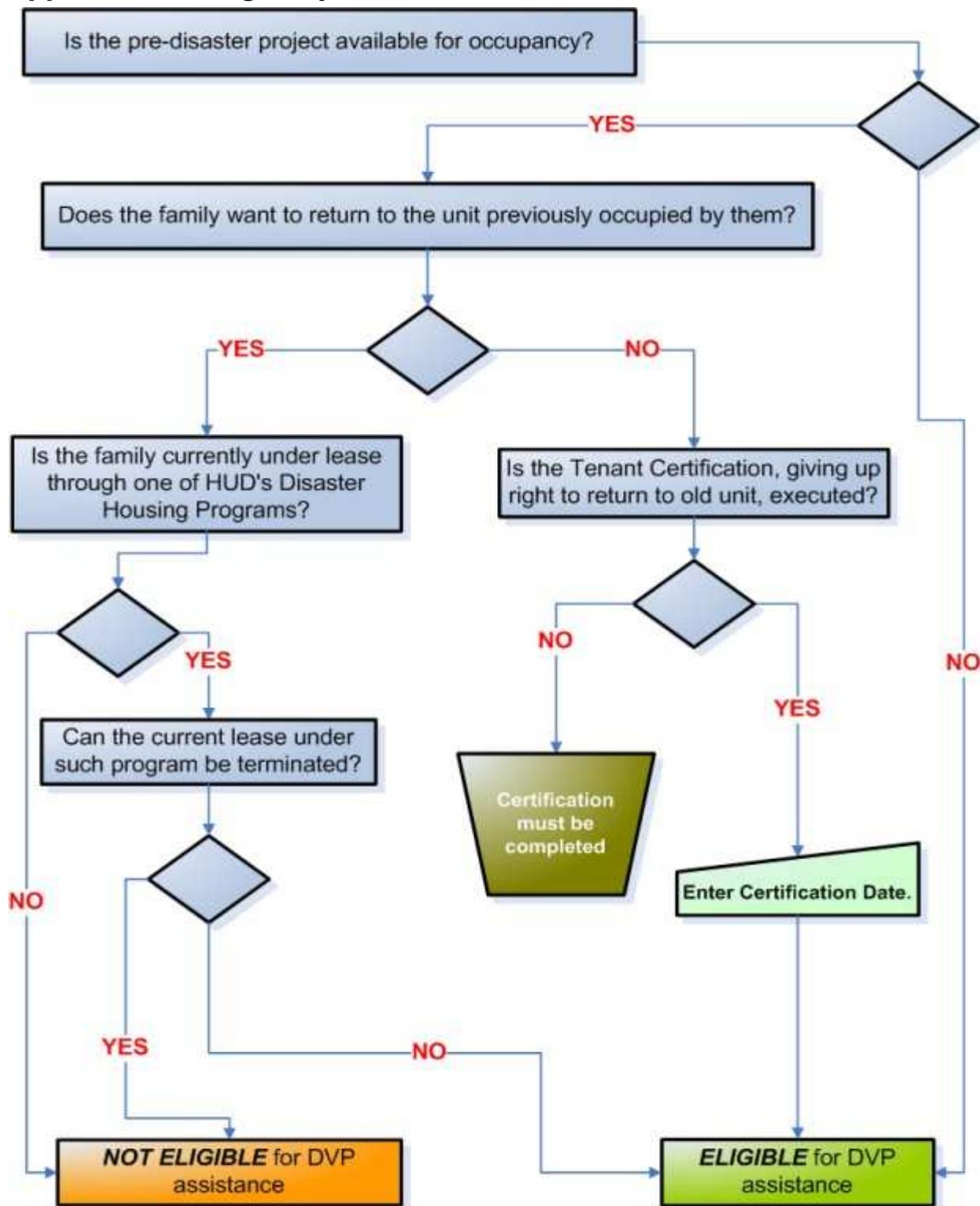


Figure 123 - Eligibility Questionnaire

Appendix B – Bulk Uploads and Updates

1. Bulk Inserts/Updates:

The Bulk Inserts/Updates page group functionality includes the following three functionalities:

- **Bulk Data Add/Update Options:**
This functionality allows you to upload Excel or CSV files to insert new or correct existing data into DIS Head of Household, Member and Transaction tables.
- **Check Status of Uploaded Files:**
This functionality allows you to see the status of all uploaded files. A detailed report containing the status of each record from the uploaded files will be generated for each uploaded files. The user can view or download the detailed status report.
- **Download File Templates:**
This functionality will allow you to download Excel or CSV templates to enter data to add new or correct existing DIS Head of Household, Member and Transaction records.

Template Name	Template Type
Add New Household Records	Excel Template CSV Template
Add New Member Records	Excel Template CSV Template
Add New Transaction Records	Excel Template CSV Template
Update Household Information	Excel Template CSV Template
Update Member Information	Excel Template CSV Template
Update Transaction Information	Excel Template CSV Template

Figure 124 - Bulk Upload Main page

1.1. Steps to Download File Templates:

- To download an Excel or CSV template, go down to the “**Download File Template**” section.
- Under “**Template Name**” choose the type of template from the list:
 1. Add New Household Records
 2. Add New Member Records
 3. Add Transaction Records
 4. Update Household Information
 5. Update Member Information
 6. Update Transaction Information
- Select corresponding Excel or CSV “**Template Type**” for the Template Name selected.
- Save the file template in local C: drive.

1.2. Steps to Upload Files:

- To upload an Excel or CSV template, go to the “**Bulk Data Insertion/Correction options**”.
- Select one following options:
 1. Add New Household Records
 2. Add New Member Records
 3. Add New Transaction Records
 4. Update Household Information
 5. Update Member Information
 6. Update Transaction Information
- The Data file upload page opens.
- Click on ‘Browse’ button to select the file to be uploaded.

Note: *This type of upload will only update values that are “NULL”. To overwrite existing values check the ‘Blind Updates?’ checkbox.*

- Click on “**Upload File**” button.

The screenshot displays the 'FILE UPLOAD' interface within the Disaster Information System (Ver 5.1). The navigation menu includes 'DIS', 'Reports', and 'Admin'. The 'Admin' menu is expanded, showing options like 'Data Corrections', 'Bulk Inserts/Updates', 'Business Rule Templates', 'Dynamic Data Fields', and 'Bulk Upload Dynamic Data'. The main heading is 'DIS Admin Tasks - Bulk Data Insertion and Corrections through data file uploads'. The central area contains a green 'Update Household Information' button, a file selection field with a 'Browse...' button, an unchecked 'Blind Updates?' checkbox, and 'Upload File' and 'Cancel' buttons. A '<< Back to Main page' link is located at the bottom right.

Figure 125 – Bulk Upload Update

2. Bulk Upload – Bulk Data Add / Update Options

Below are the general instructions for Bulk Upload Add / Update process:

- The data **must** be entered in consecutive rows in either the Excel or CSV file templates.
- Any data following the first blank row will be ignored by the bulk upload process.
- All dates must be entered in **mm/dd/yyyy** format. Do not forget to change the format of the date value cells from Text format into Date format.
- Columns marked in **light yellow** background are required and must be entered for each valid row.

- Do not enter any data into the gray area of the worksheet (i.e. far right of the worksheet). It will be ignored by the bulk upload process and may cause unintended results after processing.
- The data worksheet is formatted with different colors to provide guidance to users. Color formatting of the worksheet has no significance for data processing.
- User may choose to keep or delete the Instructions worksheet. It is ignored by the upload process.

2.1 Bulk Data Add:

The users must follow the requirements below to upload the files into the DIS using Bulk Upload process:

a. **Add New Household records:**

Enter all the necessary information in the “**Add New Household**” template.

- The Social Security Number of Head of Household must be a 9-digit SSN.
- The Disaster Number is mandatory and must exist as valid disaster.
- The Old Family Category is mandatory and must exist as associated with the disaster.
- The FEMA ID is mandatory and must NOT be an existing FEMA ID on a household record.
- All the indicator cell values such as active indicator, disability indicator, citizenship indicator etc., must be valued either “**Y**” or “**N**” in the template.

b. **Add New Member records:**

Enter all the necessary information in the “**Add New Member**” template.

- The Social Security Number of Head of Household must be a 9-digit SSN.
- The Member number is a mandatory field. The Head of Household must have member number value is equal to “**1**” and followed by the members in the family. The range of member number should not exceed the number **15**.
- The Disaster Number is mandatory and must exist as valid disaster.

c. **Add New Transaction records:**

Enter all the necessary information in the “**Add New Transaction**” template.

- The Social Security Number of Head of Household must be a 9-digit SSN.
- The Disaster Number is mandatory and must exist as valid disaster.

- The Transaction Id is a mandatory field. The value must be numeric and should be greater than “0”.
- The receiving PHA indicator is a mandatory field. The value must be numeric and should be either “0” or “1”. When there is a receiving PHA assigned to the family the value of this indicator should be “1” else the value should be “0”.
- All the other indicator cell values such as ported_out_ind, early_release_ind, pha_asst_indr, moved_fee_indr, intake_ind etc., in the Transaction template must be valued either “Y” or “N”.

2.2 Bulk Data Update:

The table below illustrates the business logic behind the “Blind Update” corrections while uploading the template into the DIS System:

Spreadsheet	Production Database	Blind Update Flag	Update Results
Null/Blank	Null/Blank/Valued	Not checked	No Update
Valued	Null/Blank	Not checked	Update
Valued	Valued	Checked	Update
Valued	Valued	Not checked	No Update

The following fields **cannot** be updated using the Bulk-upload functionality:

- Disaster Number
- Pre-Disaster Program Type
- New Program Type

The users must follow the requirements below to upload the Update files into the DIS using Bulk Upload process:

a. Update Household Information:

Enter all the necessary values in the “Update Household Information” template to correct or update the existing values in DIS:

- The Social Security Number of Head of Household must be a 9-digit SSN.
- The Disaster Number is mandatory and must exist as valid disaster.
- The Old Family Category is mandatory and must exist as associated with the disaster.
- The FEMA ID is mandatory and should not be an existing FEMA ID on a household record.

- b. **Update Member Information:**
Enter all the necessary values in the “**Update Member Information**” template to correct or update the existing values in DIS:
- The Social Security Number of Head of Household must be a 9-digit SSN.
 - The Member number is a mandatory field. The Head of Household must have member number value is equal to “1” and followed by the members in the family. The range of member number should not exceed the number 15.
 - The Disaster Number is mandatory and must exist as valid disaster.
- c. **Update Transaction Information:**
Enter all the necessary values in the “**Update Transaction Information**” template to correct or update the existing values in DIS:
- The Social Security Number of Head of Household must be a 9-digit SSN.
 - The Disaster Number is mandatory and must exist as valid disaster.
 - The Transaction Id is a mandatory field. The value must be numeric and should be greater than “0”.
 - The receiving PHA indicator is a mandatory field. The value must be numeric and should be either “0” or “1”. When there is a receiving PHA assigned to the family the value of this indicator should be “1” else the value should be “0”.

2.3 Bulk Upload – Check Status of Uploaded Files

To check the status of uploaded files go to the “**Check Status of Uploaded Files**” section.

- a. Click on the “**Status of Uploaded Files >>**” button, the File upload Status page opens up.
- b. The Status page displays the status of all uploaded files in the following Columns:
- **File Name:** Click on this link to download or view the original file uploaded.
 - **Admin Task:** Informs users the type of task requested.
 - **File Status:** Informs users about the file status:
 1. File is pending further processing
 2. File has been uploaded and processed successfully
 3. Invalid file uploaded
 - **Detail Report View:** Click on this link to view detailed status report. This opens up the File Details screen which the following columns:
 1. Record Num
 2. Record Status which will be ‘Processed’ or ‘Exception’.

3. Error Description which gives the description of the Exception error

- **Detail Report Download:** Click on this link to download the Detailed Status Report for a particular file in an excel spreadsheet format.

DIS		Reports	Admin					
Data	Corrections	Bulk Inserts/Updates		Business Rule Templates	Dynamic Data Fields	Bulk Upload Dynamic Data		
DWP Reports		Disaster Information System (Ver 5.1)						
DIS Admin Tasks - Bulk Data Additions and Updates through data file uploads								
<< Back to Main page								
Bulk Data Add/Update File Upload Status								
Pages: 1 2 3 Next >>								
#	File Name	Admin Task	File Status	Upload Date Time	Upload User	Percent Completed	Detailed Report	
1	DEV - RQ0140 - Add Trans - Chen.xls	Add New Transaction Records	File has been uploaded and processed successfully.	8/3/2010 12:53:46 PM	HPIC02	100%	View / Download	
2	DEV - RQ0140 - Add Member - Chen.xls	Add New Member Records	File has been uploaded and processed successfully.	8/3/2010 12:51:29 PM	HPIC02	100%	View / Download	
3	DEV - RQ0140 - Add Household - Chen.xls	Add New Household Records	File has been uploaded and processed successfully.	8/3/2010 12:26:18 PM	HPIC02	100%	View / Download	
4	RQ0140 - Update Trans - Chen.xls	Update Transaction Information [Blind Updates]	File has been uploaded and processed successfully.	7/29/2010 12:21:51 PM	HPIC02	100%	View / Download	
5	RQ0140 - Update Member - Chen.xls	Update Member Information [Blind Updates]	File has been uploaded and processed successfully.	7/29/2010 12:21:16 PM	HPIC02	100%	View / Download	
6	RQ0140 - Update Household - Chen.xls	Update Household Information [Blind Updates]	File has been uploaded and processed successfully.	7/29/2010 12:20:09 PM	HPIC02	100%	View / Download	
7	RQ0140 - Add Trans - StPierre.xls	Add New Transaction Records	File has been uploaded and processed successfully.	7/29/2010 11:29:21 AM	HPIC02	100%	View / Download	
8	RQ0140 - Add Member - StPierre.xls	Add New Member Records	File has been uploaded and processed successfully.	7/29/2010 11:25:53 AM	HPIC02	100%	View / Download	
9	RQ0140 - Add Household - StPierre.xls	Add New Household Records	File has been uploaded and processed successfully.	7/29/2010 11:22:04 AM	HPIC02	100%	View / Download	
10	Add New HOH Brenna.xls	Add New Household Records	File has been uploaded and processed successfully.	7/29/2010 10:59:15 AM	HPIC02	100%	View / Download	
11	RQ0140 - Add Trans - Chen.xls	Add New Transaction Records	File has been uploaded and processed successfully.	7/29/2010 10:44:34 AM	HPIC02	100%	View / Download	
12	RQ0140 - Add Member - Chen.xls	Add New Member Records	File has been uploaded and processed successfully.	7/29/2010 10:42:42 AM	HPIC02	100%	View / Download	
13	Add New HOH Eugene.xls	Add New Household Records	File has been uploaded and processed successfully.	7/29/2010 10:38:16 AM	HPIC02	100%	View / Download	
14	UPD MEM Details.xls	Update Member Information [Blind Updates]	File is being processed.	7/17/2010 12:56:38 AM	HPIC06	100%	-	
15	UPD MEM Details.xls	Update Member Information [Blind Updates]	File is being processed.	7/17/2010 12:50:53 AM	HPIC06	100%	-	

Figure 126 - Bulk Upload File Status Page

Appendix C – Bulk Upload Dynamic Field Data Values

1. Dynamic Data Field Values Bulk Adds/Updates

The Dynamic Field Data Values Bulk Upload page includes the following three functionalities:

- Bulk Data Add/Update Dynamic Field Values Options**
 This functionality allows you to upload Excel files to insert new or correct existing data values into the pre-established and pre-associated dynamic fields.
- Check Status of Uploaded Files**
 This functionality allows you to see the status of uploaded files. A detailed report contains the status of each record from the uploaded files will be generated for each uploaded files. The user can view or download the detailed status report.
- Download File Templates**
 This functionality will allow you to download Excel templates for data entry into the dynamic fields.

Download File Templates	
Template Name	Template Type
Add New Dynamic Field Values	Excel Template
Update Dynamic Field Values Information	Excel Template

Figure 127 - Dynamic Data Field Values Bulk Upload Main page

1.1 Steps to Download File Templates

- To download an Excel template, go down to the “**Download File Template**” section.
- Under “**Template Name**” choose the type of template from the list:
 - Add New Dynamic Field Values

2. Update Dynamic Field Values

- Select corresponding Excel “**Template Type**” for the Template Name
- The “**Download Dynamic Field Values Template**” page opens with additional instructions that must be followed for the upload to work successfully.
- Select Disaster / Pre Disaster Program / New Program Type combination.

NOTE: The Excel templates are generated based on the dynamic fields that are pre-associated with the Disaster/Pre-Disaster Program/New Program Type combinations.

- If no dynamic fields have been associated with the Disaster/Pre Disaster Program/New Program Type combination selected, an error will be presented and the template will not be downloaded or opened.

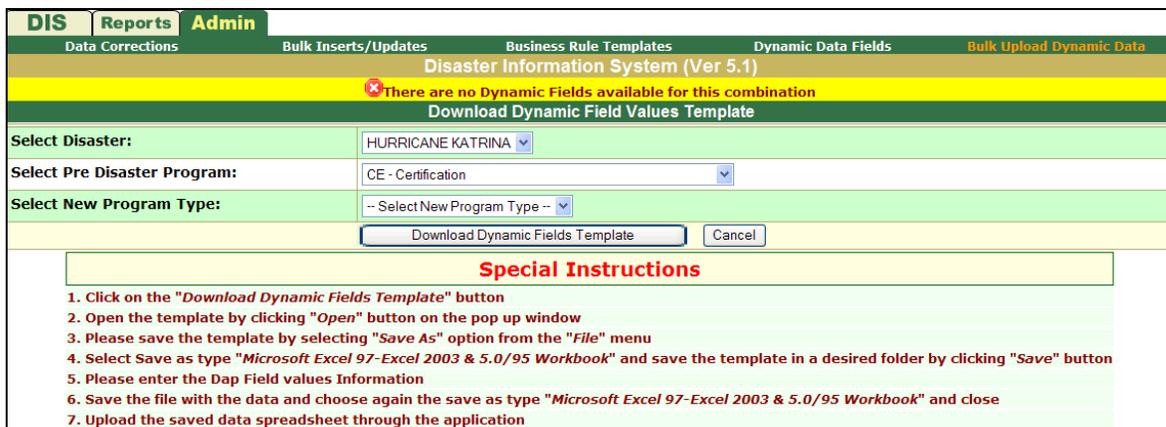


Figure 128 - Dynamic Data Field Values Bulk Upload Error

- Open the template spreadsheet.
- Using the “**Save As**” option from the File menu option, select Save As Type: “Microsoft Excel 97-Excel 2003 & 5.0/95 Workbook”.
- Enter the data values into the corresponding columns following the rules.
 1. The Household must have at least one (1) Lease/Transaction in DIS;
 2. Upload information for the latest (current) Lease/Transaction Number;
 3. The current Lease must be for the Disaster / Pre-Disaster / New Program Type combination; and

4. If adding or updating values to Dropdown or Radio Button dynamic fields, the entered value must match one already in the list.

- Save the file with the data, and again choose the “Save As Type”: “Microsoft Excel 97-Excel 2003 & 5.0/95 Workbook”.
- Close the file.

1.2. Steps to Upload Files

- To upload the excel file template, go to the “**Bulk Data Add/Update Dynamic Field Values Options**”.
- Select one following:
 1. Add New Dynamic Field Values
 2. Update Dynamic Field Values Information
- Select/Click the “Proceed to File Upload” button
- The Data file upload page opens.
- Click on ‘Browse’ button to locate and select the file to be uploaded.
- Click on ‘Upload File’ button.

The screenshot shows the 'FILE UPLOAD' section of the application. It includes a navigation bar with 'DIS', 'Reports', and 'Admin' tabs. Below the navigation bar, there are several menu items: 'Data Corrections', 'Bulk Inserts/Updates', 'Business Rule Templates', 'Dynamic Data Fields', and 'Bulk Upload Dynamic Data'. The main heading is 'Disaster Information System (Ver 5.1)'. Below this, the page title is 'DIS Admin Tasks - Bulk Dynamic Field values Data Insertion and Corrections through data file uploads'. The main content area has a heading 'FILE UPLOAD' and a sub-heading 'Add New Dynamic Field Values'. There is a 'Select File:' input field with a 'Browse...' button, and 'Upload File' and 'Cancel' buttons below it. At the bottom, there is a section titled 'Excel Template - Instructions' with four numbered instructions and a '<< Back to Main page' link.

Figure 129 - Dynamic Data Field Values Bulk Upload Main page

Below are the general instructions for the Dynamic Data Bulk Upload Add/Update process:

- Enter the data in consecutive rows in the excel template file template.
- Any data following the first blank row will be ignored by the bulk upload process.
- All dates must be entered in **mm/dd/yyyy** format.

- The data worksheet is formatted with different colors to provide guidance to users. Color formatting of the worksheet has no significance for data processing. Do not enter any data into the yellow areas of the worksheet. It will be ignored by the bulk upload process and may cause unintended results during processing.
- Users may choose to keep or delete columns not needing update. (**See the Dynamic Data Field Update rules below for using the Blind Update option.**)

2. Bulk Dynamic Data Field Values Additions

The users **must** follow the hierarchy below to upload the files into the DIS using Bulk Upload process:

Add New Dynamic Field Values: Enter all the necessary information in the Dynamic Field Values template:

1. The Household must have at least one (1) Lease/Transaction existing in DIS;
2. The Social Security Number of Head of Household must be valued and should be a valid existing 9 digits SSN;
3. Upload information for the latest (current) Lease/Transaction Number;
4. The current Lease must be for the Disaster / Pre-Disaster / New Program Type combination;
5. The Disaster Number must correspond to the Disaster in the Dynamic Field Values template page; and
6. If adding or updating values to Dropdown or Radio Button dynamic fields, the entered value must match one already in the list.

3. Bulk Dynamic Data Field Values Updates

The table below illustrates the business logic behind the “Blind Update” corrections while uploading the template into the DIS System:

Spreadsheet	Production Database	Blind Update Flag	Update Results
Null/Blank	Null/Blank/Valued	Not checked	No Update
Valued	Null/Blank	Not checked	Update
Valued	Valued	Checked	Update
Valued	Valued	Not checked	No Update

Figure 130 - Blind Update logic

The following fields cannot be added or updated using the Dynamic Data Field Values Bulk Upload functionality:

- Disaster Number
- Pre-Disaster Program Type
- New Program Type

4. Bulk Dynamic Data Field Values – Check Status of Uploaded Files

- To check the status of uploaded files go to the “Check Status of Uploaded Files” section.
- Click on the “Status of Uploaded Files >>” button, the “Bulk Data Dynamic Field Values Add/Update File Upload Status” page opens up.

DIS Reports Admin Public and Indian Housing Information Center Data Corrections							
Bulk Inserts/Updates		Business Rule Templates		Dynamic Data Fields		Bulk Upload Dynamic Data	
Disaster Information System (Ver 5.1)							
DIS Admin Tasks - Bulk Dynamic Field Values Data Additions and Updates through data file uploads							
<< Back to Main page							
Bulk Data Dynamic Field Values Add/Update File Upload Status							
#	File Name	Admin Task	File Status	Upload Date Time	Upload User	Percent Completed	Detailed Report
1	DEV - R00140 - Upd DynamicFieldValues 2 - JJ.xls	Update Dynamic Field Values Information [Blind Updates]	File has been uploaded and processed successfully.	8/5/2010 11:18:18 AM	HPIC02	100%	View / Download
2	R00140 - UpdDynamicFieldValues - Prasad.xls	Update Dynamic Field Values Information [Blind Updates]	File has been uploaded and processed successfully.	8/3/2010 1:38:56 PM	HPIC06	100%	View / Download
3	upd_dynamic_prasad(1).xls	Update Dynamic Field Values Information [Blind Updates]	File has been uploaded and processed successfully.	8/3/2010 1:32:36 PM	HPIC06	100%	View / Download
4	upd_dynamic_prasad.xls	Update Dynamic Field Values Information [Blind Updates]	File has been uploaded and processed successfully.	8/2/2010 11:56:05 PM	HPIC06	100%	View / Download
5	upd_dynamic_prasad.xls	Update Dynamic Field Values Information [Blind Updates]	File has been uploaded and processed successfully.	8/2/2010 11:42:06 PM	HPIC06	100%	View / Download

Figure 131 - Status of Dynamic Field Data Values Uploads

- The Status page displays information on all uploaded files in the following columns:
 1. **File Name:** Click on this link to download or view the original uploaded file.
 2. **Admin Task:** Informs users of the type of task requested.
 3. **File Status:** Informs users about the file status:
 - a. **File is pending further processing**
 - b. **File has been uploaded and processed successfully**
 - c. **Invalid file uploaded**
 4. **Upload Date Time:** Displays date and time file was uploaded.
 5. **Upload User:** ID of the person that uploaded the file.
 6. **Percent Complete:** Displays the file processing percentage complete.
 7. **Detail Report View:** This opens a processing results screen with the following columns of information:
 - a. Record Num

- b. SSN
- c. Dynamic Field
- d. Record Status - will be "Processed" or "Exception"
- e. Error Description which gives the complete description of the Exception error

DIS		Reports	Admin	
Data Corrections		Bulk Inserts/Updates		
		Business Rule Templates		
		Dynamic Data Fields		
		Bulk Upload Dynamic Data		
Disaster Information System (Ver 5.1)				
DIS Admin Tasks - Bulk Dynamic Field Values Data Additions and Updates through data file uploads				
<< Back to File List page				
File Name: RQ0140_-_UpdDynamicFieldValues_-_Prasad.xls				
Request Type: Update Dynamic Field Values Information [Blind Updates]				
Total Records: 15				
Record Num	SSN	Dynamic Field	Record Status	Error Description
1	XXX-XX-8723	LL_ADD1	Processed	
2	XXX-XX-8723	LL_ADD2	Processed	
3	XXX-XX-8723	LL_CITY	Processed	
4	XXX-XX-8723	LL_CNTY	Processed	
5	XXX-XX-8723	LL_STATE	Processed	
6	XXX-XX-8723	LL_ZIP	Processed	
7	XXX-XX-8723	LL_PHONE	Processed	
8	XXX-XX-8723	LL_FAX	Processed	
9	XXX-XX-8723	LL_EMAIL	Processed	
10	XXX-XX-8723	LL_CONTACT	Exception	Dynamic Field Name is not associated with Disaster and Program types combination!
11	XXX-XX-8723	Landlord Signed Certification	Processed	
12	XXX-XX-8723	Family Receiving Transition Assistance	Processed	
13	XXX-XX-8723	Family Contacted for Transition	Processed	
14	XXX-XX-8723	Family NOT eligible for HCV	Processed	
15	XXX-XX-8723	Family Signed Certification	Processed	

Figure 132 - Dynamic Field Data Values Detail Report

8. **Detail Report Download:** Click on this link to download the Detailed Report for a particular file into an excel spreadsheet format.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Record #	SSN Head	Record Status	Error Description								
2	1	698728933	Processed									
3	2	698728933	Processed									
4	3	698728933	Processed									
5	4	698728933	Processed									
6	5	698728933	Exception	Dynamic field value does not match with the List items! Enter a valid Dynamic Field list item!								
7	6	698728933	Exception	Cannot update dynamic field value for this lease. We can update only for first lease.								
8	7	698728933	Exception	Dynamic field value does not match with the List items! Enter a valid Dynamic Field list item!								
9	8	698728933	Processed									
10	9	698728933	Exception	Dynamic field value does not match with the List items! Enter a valid Dynamic Field list item!								
11	10	698728933	Exception	Cannot update dynamic field value for this lease. We can update only for first lease.								
12	11	698728933	Exception	Cannot update dynamic field value for this lease. We can update only for first lease.								
13	12	698728933	Exception	Dynamic field value does not match with the List items! Enter a valid Dynamic Field list item!								
14												

Figure 133 - Dynamic Field Data Values File Detail Report Download