

WHAT'S NEW?



IREMS 2.2

Overview

This document provides information on the issues included in **iREMS** release 2.2.

The **What's New** addresses new issues identified by users or the iREMS development team. These items may include functionality or feature changes. There are also explanations for modifications or improvements instituted to maintain system performance.

The **Policy/Regulations** section addresses any business rule highlights, announcements, or changes that are necessary to maintain accurate property portfolios.

ASSET MANAGEMENT

My Events

An **Event Notification** has been added for when an existing loan, switches from source system status active to inactive. The assigned PM will receive the notification. The notification will state: *“Your loan\capital advance status has been terminated”*. This event is a financing based event. It applies to all loans from: **DAP, MARS, FHASL, LAS/NLS, and PAS.**

My Properties (558)	My Events (406)	My Troubled Properties (170)	Open EH&S Items (0)	Open Management Reviews (0)	Open Project Actions (5)	Advanced Search
My Events for ANA PECKUTT Records 1 to 40 of 406						
Search: <input type="text" value="Property Name"/> <input type="button" value="Go"/>						
<input type="button" value="Remove Checked Events"/>						
<input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/>						
<input type="checkbox"/>	Property Name	Identifier	Notification Date	Description		
<input type="checkbox"/>	NORTH PARK APTS, PHASE II	11335249	02/07/2013	Your loan/capital advance status has been terminated.		
<input type="checkbox"/>	CHAI MANOR	800020759	01/23/2013	AFS Submission Received - Referred to Housing (Compliance)		
<input type="checkbox"/>	CHRISTIAN VILLAGE	800020772	01/07/2013	Physical Inspection Released		

Portfolio Dashboard DEC Referrals DEC Report & Narratives Financial Statements Financing Management Reviews Occupancy Physical Inspections	Financing List	Financing Detail	Status History						
	Financing List								
	FHA Number	SOA/Group Type	Field Office Status	Active	Business Phase	Under Management	Pipeline	Primary Financing Instrument	In Delinquency or Default
	11335249	22104 NC/SR	Under Management - Active	No	Terminated	No	No	1	N

Workload Management

➤ Project Action Detail

If there are any open DEC referrals already on a property, and a MFH Referral *“Critical Data Missing”* is closed, **iREMS** does not create another DEC referral *“Administrative Review Required”* upon the closure of the project action. **iREMS** should do nothing in this instance. Only **FASS** should create the referral (if one is needed after the owner re-submits).

Financial Statements

➤ Detail

There are properties (such as nursing homes) that are managed by a Housing entity called **OHP** (Office of Healthcare Programs). A stored procedure has been added that **FASS** can call when they wish to have the project action "AFS Letter Sent to Owner & Response Due" referred to **OHP** instead of **MFH**. On the **Financial Statement Detail** page the field "Referred To (MFH or DEC)" has been changed to "Referred To (MFH, DEC or OHP)". The field "Date Reviewed (MFH or DEC if Applicable)" has been changed to "Date Reviewed (MFH, DEC or OHP if Applicable)".

Owner Annual Financial Statement Detail

Related Project Actions

TIN: 943286122
 Submission FYE: 09/30/2011
 Submission Type: AUD-A133 (Non-coop)
 Date Due: 12/29/2011
 Extended Due Date (if Applicable):
 Date Received: 01/19/2012
 Number of Compliance Flags - Assessed: 1
 Number of Compliance Flags - Not Assessed: 0
 Reason Compliance Not Assessed by FASS: (if Applicable)
 Performance Value: 53.000
 Performance Color: Red
 Reason Performance Not Assessed by FASS: (if Applicable)
 Number of Management Conditions: 0
 Management Conditions Description (if Applicable):
 Date FASS Letter Sent: 05/29/2012
 Response Due Date: 06/28/2012
 Referred To (MFH, DEC or OHP): MFH
 Date Referred: 05/29/2012
 Date Reviewed (MFH, DEC or OHP if Applicable): 08/17/2012
 Submission Status: Active
 Date Owner Response Received: 08/18/2012
 Plan Required: Yes No
 Plan Approved: Yes No Not Applicable
 Closed Date: 08/18/2012
 Non-Filer Email Date: 01/08/2012
 Non-Filer DEC Referral Date:
 Comments:

Financial Statements - Detail page

Property ID: 800075942 Name: BANCROFT SENIOR HOMES
 Contract/FHA#: 121EE108 Active Status: Y Watch List: N Troubled Status: Not Troubled DEC Status: NONE

Project Action List

Project Actions 1 to 1 of 1

Action	Responsible Person	Role	Type of Plan	Start Date	Target Completion Date	Amended Target Date	Closed Date	Related Referral ID
1 AFS Letter Sent to Owner & Response Due	MORRIS ANGEL	PM	H	05/29/2012	06/28/2012		08/18/2012	

Related Project Action

Management Reviews

➤ Management Review Detail

Workload Management

➤ Project Action Detail

When an assigned user updates or changes the “*Person/Role Responsible for Review*” on the **Management Review Detail** page, the “*Person/Role responsible for Action*” will be changed on all **Related Project Actions**. This changed name will display on the **Project Action List** page and on the **Project Action Detail** page.

When the user updates a “*Person/Role responsible for Action*” on a **Project Action Detail** page, the related **Management Review Detail** will update the “*Person/Role Responsible for Review*”.

The user is allowed to correct the “*Response Due Date*” for a Management Review on the **Management Review Detail** page if the Management Review is not closed. If the review has only one open related Project Action, the system will allow an update to the “*Target Completion Date*” on the **Project Action List** and **Project Action Detail** pages.

Management Review Detail – Related Project Actions
(Saved with Responsible to Review, Owner Response Due = Yes, and Response Due Date entered)

Action	Responsible Person	Role	Type of Plan	Start Date	Target Completion Date	Amended Target Date	Closed Date	Related Referral ID
1 Management Review Sent to Owner & Response Due	JEAN CASS	BPM		02/06/2013	02/15/2013			

Project Action List
(Shows Responsible Person, Target Completion Date)

Project Action Detail
(User Changed Responsible for Action, enters Closed Date)

Management Review Detail
(System changed Responsible for Review and Closed Date (not editable))

On the **Management Review Detail** page, the user creates a **Project Action** where the “*Owner Response Due*” is “**Yes**” and the “*Response Due Date*” is entered. When the Related Project Action is completed, the assigned user adds the “*Closed Date*”. In the **Management Reviews** section the “*Closed Date*” date is not editable and can only be closed through the related Project Action. This closed date is also not editable when the “*Owner Response Due*” is “**Yes**” and is changed to “**No**”.

There are several warning boxes when changing from “**Yes**” to “**No**” or “**No**” to “**Yes**” in the *Owner Response Due* field.

Management Review List | Management Review Detail

Management Review Detail Save successful (x) Save Reset Delete

Scheduled Date: 03/05/2013
Review Type: Management Review Only
Person/Role Responsible for Review: JEAN CASS - Role:BPM
Performed Date: 03/05/2013
Report Date:
Owner Response Due: Yes No
Response Due Date:
Response Received Date:
Closed Date:
Overall Rating:

Management Review Detail
(User saved with Owner Response Due = No)

Management Review List | Management Review Detail

Management Review Detail Save Reset Delete

Scheduled Date: 03/05/2013
Review Type: Management Review Only
Person/Role Responsible for Review: JEAN CASS - Role:BPM
Performed Date: 03/05/2013
Report Date:
Owner Response Due: Yes
Response Due Date:
Response Received Date:
Closed Date: 03/15/2013
Overall Rating: Above Average

Message from webpage
Owner Response Due indicator cannot be switched to "Yes" when Closed Date is set. Click OK to clear the Closed Date or Cancel to return without clearing the date.
OK Cancel

Management Review Detail
(User changes Owner Response Due to Yes and enters Closed Date)

Management Review List | Management Review Detail

Management Review Detail Save successful (x) Save Reset Delete Related Project Actions

Scheduled Date: 03/05/2013
Review Type: Management Review Only
Person/Role Responsible for Review: JEAN CASS - Role:BPM
Performed Date: 03/05/2013
Report Date: 03/15/2013
Date Report Date Entered: 03/26/2013
Owner Response Due: Yes No
Response Due Date: 03/22/2013
Response Received Date:
Closed Date:
Overall Rating: Above Average

Management Review Detail
(User changes Owner Response Due to Yes and enters Response Due Date)

The screenshot shows the 'Management Review Detail' form. At the top right, there are buttons for 'Save', 'Reset', 'Delete', and 'Related Project Actions'. The 'Related Project Actions' button is circled in red. A warning message box is overlaid on the form, stating: 'When there is a related Project Action, the Owner Response Due indicator cannot be set to No for a review. If existing value of Yes was set in error, delete this review and create a new review instead.' The form fields include: Scheduled Date: 03/05/2013; Review Type: Management Review; Person/Role: JEAN C; Responsible for Review: JEAN C; Performed Date: 03/01/2013; Report Date: 03/21/2013; Date Report Date Entered: 03/27/2013; Owner Response Due: Yes (selected); Response Due Date: 03/22/2013; Response Received Date: (empty); Closed Date: (empty); Overall Rating: Above Average.

Management Review Detail
(User changed Owner Response Due to No)

The screenshot shows the 'Management Review Detail' form. A warning message box is overlaid on the form, stating: 'Response Due Date is required when Report Date is populated and the Response Due Indicator equals Yes!'. The form fields include: Scheduled Date: 03/01/2013; Review Type: Management Review; Person/Role: JEAN C; Responsible for Review: JEAN C; Performed Date: 03/01/2013; Report Date: 03/21/2013; Date Report Date Entered: 03/27/2013; Owner Response Due: Yes (selected); Response Due Date: (empty); Response Received Date: (empty); Closed Date: (empty); Overall Rating: (empty).

Management Review Detail
(User changes Owner Response Due to Yes)

Occupancy

- Type and Occupancy Eligibility

Summaries

- Summary
- Consolidated Print Screen

IREMS has reinstated the “*Client Group Type*” and “*Client Group Name*” in the **Occupancy** section, the **Summaries** section and on the **Consolidated Screen Print** page.

Within the **Occupancy** section and the *Type and Occupancy Eligibility* tab, just under '*Occupancy Eligibility Restriction*' a new section named “*Client Group*” has been added. In this section, there is a field named *Client Group* with a drop down that contains the various types and names of groups. Every choice displays two columns: “*Client Group Type*” and “*Client Group*”

Name". The client group selected should match the selection in the active survey (if there is one) and vs. versa. If one is updated and they don't match types a warning message is produced.

Within the **Summaries** section and the **Summary** tab, just under 'Building and Unit Information', a new section named 'Client Group Information' has been added with one read-only field named "Client Group". It displays the client group type and name selected on the **Occupancy** section.

On the **Consolidated Screen Print** page, if a user checkmarks either 'Print All Housing Screens' or 'Occupancy', a new subsection named "Client Group" will fall directly under "Occupancy Eligibility Restriction". The consolidated print screen will display the data that appears on the **Occupancy** section.

Users who have update rights to the Client Group information will be 'PM', 'BPM' and 'SPM' who are assigned to the property, as well as all assigned PBCAs. PBCA users should only update the client group if it does not match the survey they have entered. All other users will have view rights only.

The screenshot shows a web application interface for 'Occupancy - Type and Occupancy Eligibility'. On the left is a navigation menu with options like 'PortfolioDashboard', 'DEC Referrals', 'Occupancy', and 'Logout'. The main content area has several tabs: 'Type and Occupancy Eligibility', 'Units and Narratives', 'Housing for Disabled Survey List', 'Current Review/ Cover Sheet', 'Section I Occupancy', 'Section II Accessible Units', 'Section III Program Accessibility', and 'Final Submission'. The 'Type and Occupancy Eligibility' tab is active. It contains a 'Property Information' section with an 'Initial Occupancy Date' field set to '02/26/1972' and a 'Property Type' section with various checkboxes. Below that is the 'Occupancy Eligibility Restriction' section, which has a table with columns for 'Original (MFH Survey)' and 'Current (MFH Survey)'. The 'Client Group' dropdown menu is circled in red and shows 'Elderly-Wholly Elderly Housekeeping' selected. Below that is the 'Income Restrictions' section with another table.

Occupancy Eligibility Restriction (View only)	
	Original (MFH Survey) / Current (MFH Survey)
Exclusively Elderly	<input checked="" type="checkbox"/> / <input type="checkbox"/>
Exclusively Disabled	<input type="checkbox"/> / <input type="checkbox"/>
Elderly & Disabled	<input type="checkbox"/> / <input checked="" type="checkbox"/>
Family (No Eligibility Restriction)	<input type="checkbox"/> / <input type="checkbox"/>

Income Restrictions (Check all that apply)	
	Original / Current
Extremely Low Income	<input type="checkbox"/> / <input type="checkbox"/>
Very Low Income	<input type="checkbox"/> / <input type="checkbox"/>
Low Income	<input type="checkbox"/> / <input type="checkbox"/>

Occupancy - Type and Occupancy Eligibility

This is a close-up of the 'Client Group' dropdown menu. The title is 'Client Group (Choose applicable row)'. The dropdown arrow is highlighted with a red arrow. The list of options includes: 'Disabled-Chronically Mentally Ill', 'Disabled-Human Acq. Immunodeficiency Virus', 'Disabled-Partially physically handicapped', 'Disabled-Wholly developmentally disabled', 'Disabled-Wholly physically disabled', 'Disabled-Wholly physically handicapped', 'Elderly-Assisted Living Care', 'Elderly-Elderly', 'Elderly-Partially eld - hskpg & congregate', 'Elderly-Partially elderly congregate', 'Elderly-Partially elderly handicapped', 'Elderly-Sec207 elderly hsg. - hsg act of 56', 'Elderly-Wholly Elderly Housekeeping', 'Elderly-Wholly elderly - hskpg & congregat', 'Elderly-Wholly elderly congregate', 'Family-Family & Elderly', 'Family-Indv. families - not eld/ handicap', 'Health Care-General Care', 'Health Care-Intermediate Care Facility', and 'Health Care-Skilled Care Facility'.

Occupancy - Type and Occupancy Eligibility – Client Group drop down

<ul style="list-style-type: none"> Portfolio/Dashboard DEC Referrals DEC Report & Narratives Financial Statements Financing Management Reviews Occupancy Physical Inspections Property Attributes Property Participants Risk Management Servicing Summaries Workload Management Security Administration DEC Portfolio Reviews DEC Workload Queues Secure Systems Logout 	Summary Summary Narrative Consolidated Screen Print																								
	Building Count: 1 Initial Occupancy Date: 02/26/1972																								
	<table border="1"> <thead> <tr> <th>Unit Type</th> <th># Total Units</th> </tr> </thead> <tbody> <tr><td>0</td><td>107</td></tr> <tr><td>1</td><td>51</td></tr> <tr><td>2</td><td>1</td></tr> <tr><td>3</td><td>0</td></tr> <tr><td>4</td><td>0</td></tr> <tr><td>5</td><td>0</td></tr> <tr><td>6</td><td>0</td></tr> <tr><td>7</td><td>0</td></tr> <tr><td>8</td><td>0</td></tr> <tr><td>9</td><td>0</td></tr> <tr> <td>Total Units</td> <td>159</td> </tr> </tbody> </table>	Unit Type	# Total Units	0	107	1	51	2	1	3	0	4	0	5	0	6	0	7	0	8	0	9	0	Total Units	159
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Client Group Information Client Group: Elderly - Wholly Elderly Housekeeping																									
Property Status Active Status: Y																									

Summaries - Summary

Summary	Summary Narrative	Consolidated Screen Print															
Property Information Initial Occupancy Date: 02/26/1972																	
Property Type (Check all that apply) <input type="checkbox"/> Apartments <input type="checkbox"/> Assisted Living <input type="checkbox"/> Board & Care <input type="checkbox"/> Condominiums <input type="checkbox"/> Co-op <input type="checkbox"/> Group Home <input type="checkbox"/> Group Practice(Healthcare) <input type="checkbox"/> Hospital(Healthcare) <input type="checkbox"/> Intermediate Care <input type="checkbox"/> Mobile Home Park <input type="checkbox"/> Nursing/ICF <input type="checkbox"/> Nursing/Skilled Care <input type="checkbox"/> Single Room Occupancy(SRO)	Occupancy Eligibility Restriction (View only) <table border="1"> <thead> <tr> <th></th> <th>Original (MFH Survey)</th> <th>Current (MFH Survey)</th> </tr> </thead> <tbody> <tr> <td>Exclusively Elderly</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Exclusively Disabled</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Elderly & Disabled</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Family (No Eligibility Restriction)</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>			Original (MFH Survey)	Current (MFH Survey)	Exclusively Elderly	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Exclusively Disabled	<input type="checkbox"/>	<input type="checkbox"/>	Elderly & Disabled	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Family (No Eligibility Restriction)	<input type="checkbox"/>	<input type="checkbox"/>
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Summaries – Consolidated Screen Print

Property Participants

- Current Owner Detail
- Owner History Narrative List

Summaries

- Summary Detail
- Consolidated Screen Print

Contract Processing

- Assistance Contracts
 - Assistance Contract List

All project owners and agents, receiving monthly rental assistance, are required to register with Dun & Bradstreet and obtain a Data Universal Numbering System (DUNS) Number.

An entity gets one DUNS number to identify their company/business name. However, one company can do business with HUD under multiple TAX IDs and therefore can have multiple participant records. However, a DUNS number is "location" specific so if a company has multiple locations, each location may have a different DUNS number. If these multiple locations are using the same federal TAX_ID, they could be the same participant. This means that one participant could have multiple "active" DUNS numbers. The owner needs to provide the DUNS number associated with the award when they registered.

Owners and Agents submit the DUNS number to TRACS via the MAT therefore the DUNS number will be tied to a contact and owner. iREMS will receive the DUNS number during the nightly from TRACS, store the number and display on the following pages:

Property Participants	Current Owner /Contact	Current Owner Detail
	Owner History /Narratives	Owner List/History
Summaries	Summary	Current Owner
	Consolidated Screen Print	Current Owner Detail Owner List/History
Assistance Contracts	Assistance Contract List	

Current Owner Detail

Name: Lakeview Housing, Inc. TIN: 942916437
 Phone: (707)463-1975
 Street: 499 Leslie Street Fax: (707) 463-2252
 E-Mail: lgoforth@rchdc.org
 City: Ukiah
 U.S. State or Territory: CALIFORNIA
 Foreign State or Territory:
 Country: USA
 U.S. Zip Code: 95482
 Foreign Postal Code:
 Standardization Status: 100% Overall probable correctness
 Source System: APPS
 Company Type: Non-Profit
 Owner Legal Structure: Corporation
 DUNS #: 942916437
 Owner Fiscal Year End Date: (mm/dd) 10/31
 Date Deed Recorded: 09/30/1987
 Date Owner Assumed
 Financial Responsibility (FASS): 09/30/1987

Property Participants - Current Owner Detail

Owner List/History

Owner Name	Owner TIN	DUNS #	Date Owner Assumed Financial Responsibility (FASS)	FASS Ownership Expiration Date	FYE	Company Type	Legal Structure
Lakeview Housing, Inc.	942916437	942916437	09/30/1987		10/31	Non-Profit	Corporation
Clearlake Housing Corporation	880112019		01/31/1900	09/29/1987	10/31	Non-Profit	Corporation

Owner/Field Office Contact Narrative: Ownership

Summary Narrative: Ownership

Property Participants - Owner List/History

<ul style="list-style-type: none"> Portfolio/Dashboard DEC Referrals DEC Report & Narratives Financial Statements Financing Management Reviews Occupancy Physical Inspections Property Attributes Property Participants Risk Management Services Summaries Workload Management Security Administration DEC Portfolio Reviews DEC Workload Queues Secure Systems Logout 	Summary	Summary Narrative	Consolidated Screen Print									
	IRP List											
	<table border="1"> <thead> <tr> <th>Non-Insured Number</th> <th>Previous Associated Financing</th> <th>Current Associated Financing</th> </tr> </thead> <tbody> <tr> <td colspan="3">Current Owner</td> </tr> <tr> <td colspan="3"> Name: Lakeview Housing, Inc. TIN: 942916437 Title: Phone: (707)463-1975 Street: 499 Leslie Street Fax: (707) 463-2252 City: Ukiah E-Mail: lgoforth@rchdc.org U.S. State or Territory: CA Foreign State or Territory: Country: USA U.S. Zip Code: 95482 - Foreign Postal Code: Standardization Status: 100% Overall probable correctness DUNS #: </td> </tr> </tbody> </table>			Non-Insured Number	Previous Associated Financing	Current Associated Financing	Current Owner			Name: Lakeview Housing, Inc. TIN: 942916437 Title: Phone: (707)463-1975 Street: 499 Leslie Street Fax: (707) 463-2252 City: Ukiah E-Mail: lgoforth@rchdc.org U.S. State or Territory: CA Foreign State or Territory: Country: USA U.S. Zip Code: 95482 - Foreign Postal Code: Standardization Status: 100% Overall probable correctness DUNS #:		
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Summaries - Current Owner

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Owner Contact																										
Name: W. T. Howland Phone: 707-463-1975 Title: Chairman of Board Fax: 707-463-2252 Street: 499 Leslie St Pager/Cell Phone: E-Mail: City: Ukiah U.S. State or Territory: CALIFORNIA Foreign State or Territory: Country: USA U.S. Zip Code: 95482 - 5506 Foreign Postal Code: Standardization Status: 100% Overall probable correctness																										
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Consolidated Screen Print - Current Owner Detail \ Owner List History

The screenshot shows the 'Assistance Contract List' interface. At the top, there are tabs for 'Assistance Contract List', 'Assistance Contract Status', 'Assistance Contract Detail', 'Current Contract Administrator/ Contact', and 'Contract Administrator History'. Below the tabs is a table with columns: 'Contract #', 'Current Contract Status', 'TRACS Contract Status', 'Program', 'Disc Type', 'Exp Date', 'Staged', 'Contract Authority', and 'Budget Authority'. The first row contains the value 'CA39T851018' for Contract # and 'Active - Active' for Current Contract Status. Below the table, there are several form fields: 'First Contract or Stage Expiration Date Pursuant to MAHRA:', 'DUNS Number:' (circled in red), 'Does Owner Participate in LHPRA/ELHPA?' with radio buttons for 'Yes', 'No', and 'Unconfirmed', 'Discuss Preservation:', and 'Owner/Field Offices Contacts Narrative: Assistance Contracts'.

Assistance Contracts - Assistance Contract List

Property Attributes

➤ Buildings

The “*MSA Code*” and the “*MSA Name*” fields are displayed when a user selects the primary Property Address record from the list of property addresses under the **Building** tab. **MSA** stands for Metropolitan Statistical Area. **IREMS** has added the “*CBSA Code*” and “*CBSA Name*” to the **Building** screen. **CBSA** stands for Core Based Statistical Area. The new system will eventually replace the MSA system; however both systems MSA and CBSA will display during the transition time period. If the “*Automated GEO Code*” is selected as “Manual” the “*CBSA Code*” and the “*CBSA Name*” will be editable with all the **Geocode Information**.

When a property’s primary Property Address is standardized online, the *Federal Congressional District (USPS)* code will display in the **Congressional District** field. The *Congressional District* code displayed before and it was incorrect.

The screenshot shows the 'Buildings' tab in the 'Property Address' form. The 'Address' section includes fields for 'Street' (124 Turk Street), 'Street2', 'City' (San Francisco), 'U.S. State or Territory' (CALIFORNIA), 'Foreign State or Territory', 'Country' (USA), 'U.S. Zip Code' (94102-3926), and 'Foreign Postal Code'. There are also radio buttons for 'Mailing Address for the Property' (Yes/No) and 'Automated GEO Code' (Automated/Manual). The 'Address Standardization' is shown as 100% Overall probable correctness. The 'Geocode Information: (Automated)' section is circled in red and includes: 'County Code: 075', 'County Name: San Francisco', 'Census Tract: 012500', 'MSA Code: 7360', 'MSA Name: San Francisco, CA PMSA', 'CBSA Code: 41884', 'CBSA Name: San Francisco-San Mateo-Redwood City, CA Met', 'County Subdivision Code: 92799', 'County Subdivision Name: CA-12 (113)', 'State House District: 00', 'State Senate District: 00', 'Place Based City: SAN FRANCISCO', and 'Longitude/Latitude: -122.411511/37.783128'.

Geocode Information (Automated)

The screenshot shows the 'Buildings' form in IREMS. The 'Property Address' section includes fields for Street (3700 PACIFIC AVE), City (LIVERMORE), State (CALIFORNIA), and U.S. Zip Code (94550-1487). The 'Geocode Information (Manual)' section includes fields for County Code (001), County Name (Alameda), Census Tract (451501), CBSA Code (36084), CBSA Name, MSA Code (3775), MSA Name (Oakland, CA PMSA), County Subdivision Code (91660), County Subdivision Name, Congressional District (15), State House District (00), State Senate District (00), Place Based City (Livermore), and Longitude/Latitude (-121.75251/37.676292). A red circle highlights the CBSA Code field.

Geocode Information (Manual)

Servicing

➤ Reserve Tracking

IREMS has added a new indicator in the **Servicing** section under the **Reserve Tracking** tab. At the top of the **Reserve for Replacement Balance and Deposit List** there is a “Reserve Account Required?” field added with a “Yes or No” radio button. In addition, a “Reserve Account Effective Date” field has been added with a date entry box. The Project Manager assigned to the property would be responsible for setting this “Yes/No” indicator, and the Date to show the date they set the indicator. A **Save** button displays in the top right hand corner of the **Reserve Tracking** screen for the PM to confirm/complete their action.

A Standard Red error message will appear at the top of the screen stating “Reserve Account Required: Is a Required Field” when a PM does not select a radio button for the Reserve Account Required Indicator when the Date was updated/set and clicks on **Save**.

A Standard Red error message will appear at the top of the screen stating “Reserve Account Effective Date: Is a Required Field” when a PM does not enter in a Reserve Account Effective Date when the Indicator (even if they set the indicator to ‘No’) was updated/set and clicks on **Save**.

The setting of the indicator will NOT be saved if you receive either of the two above error messages. Therefore, a date is required in order to save your changes.

A confirmation message box will display when the PM selects the “Yes”/“No” indicator and saves a date. The message reads: “You have entered *mm/dd/year* as the date the Reserve Indicator has been updated/set, is this Correct?” The user will click “OK” or “Cancel”.

Associations to Property | Reserve Tracking | Use Restriction List | IRP List | Other Public Subsidies List

Reserve Account Required?: Yes No

Reserve Account Effective Date:

Reserve for Replacement Balance and Deposit List

Displaying records 1 to 6 of 6

Monthly Deposit Effective Date	Monthly Deposit Amount (most recent entered amount)	Suspend Start Date	Suspend End Date
11/01/2011	1050.00		
07/01/2011	1001.00		
07/01/2010	998.00		
07/01/2009	980.00		

Reserve Tracking - Reserve Account Required

Associations to Property | Reserve Tracking | Use Restriction List | IRP List | Other Public Subsidies List

Reserve Account Required?: Is a required field.
Reserve Account Effective Date: Is a required field.

Reserve Account Required?: Yes No

Reserve Account Effective Date:

Reserve for Replacement Balance and Deposit List

Displaying records 1 to 5 of 5

Reserve Tracking – Saved without clicking Yes or No

Associations to Property | Reserve Tracking | Use Restriction List | IRP List | Other Public Subsidies List

Reserve Account Effective Date: Is a required field.

Reserve Account Required?: Yes No

Reserve Account Effective Date:

Reserve for Replacement Balance and Deposit List

Displaying records 1 to 5 of 5

Reserve Tracking – Saved with No selected but no date

Associations to Property | Reserve Tracking | Use Restriction List | IRP List | Other Public Subsidies List

Reserve Account Effective Date: Is a required field.

Reserve Account Required?: Yes No

Reserve Account Effective Date:

Reserve for Replacement Balance and Deposit List

Reserve Tracking – Saved with Yes requested but no date

Associations to Property | Reserve Tracking | Use Restriction List | IRP List | Other Public Subsidies List

Reserve Account Required?: Yes No

Reserve Account Effective Date: 03/05/2013

Message from webpage: You have entered 03/05/2013 as the date the Reserve Indicator has been updated/set, is this Correct?

Reserve for Replacement Balance and Deposit List

Monthly Deposit Effective Date	Monthly Deposit amount (most recent entered amount)	Suspend Start Date	Suspend End Date
11/01/2011	1050.00		
07/01/2011	1001.00		
07/01/2010	998.00		
07/01/2009	980.00		
07/01/2008	960.00		
01/01/2006	935.42		

Reserve Tracking – Yes is selected and date is entered

Message from webpage

? You have entered 03/05/2013 as the date the Reserve Indicator has been updated/set, is this Correct?

OK Cancel

Reserve Tracking - Reserve Account Required- Confirmation message

Associations to Property | Reserve Tracking | Use Restriction List | IRP List | Other Public Subsidies List

Save Successful (x)

Reserve Account Required?: Yes No

Reserve Account Effective Date: 03/05/2013

Reserve for Replacement Balance and Deposit List

Displaying records 1 to 8 of 8

Reserve Tracking - Reserve Account Required- Save Successful

Subsidy Administration

Contract Processing

➤ Function Detail

- Rents
- Final Review

Previously, the Contract Processing and Rent Adjustments had one effective date. It was the *Rent Effective Date*. This date was used for the rent and utility allowance effective dates. In reality, the utility allowance effective dates do not always coincide with the effective date of the rents.

The **Contract Processing Renewal**, **Amend Rents** and **Rent Adjustment** functionality has been modified to add the *Utility Allowance Effective Date* field that will initially come from **TRACS**. This new date field will be added to the **Rent** and the **Final Review** screens. The *Utility Allowance Effective Date* has been added for all options 1-5 and the Rent Adjustments details screen for AAF, Budget, OCAF rent adjustments and manual corrections. The field will be editable so users can update, if needed.

The Utility Allowance field is tied to the Utility Allowance Effective date field. Therefore, if the utility allowance amount changes then there must be a new utility allowance effective date entered. If a date is not entered when the amount has been changed, an error message will display and the change will not be saved. This works the same way if a new utility allowance date is entered without a change to the utility allowance amount. Once the utility allowance amount and date have been changed, the Utility Allowance Change indicator is automatically set to 'Yes' and comments must be entered in the Utility Allowance Comments text box. If comments are not entered when the Change Indicator is 'Yes' an error message will display alerting you that the record will not be saved without comments. After comments are entered and the save button is selected, the record will be saved. The *Utility Allowance Effective Date* will be locked when the renewal is locked.

Any changes made to the Utility Allowance amount and effective date will be passed to **ARAMS** once the record is locked. **ARAMS** will pass this information to **TRACS** and both **TRACS** and **iREMS** will be in sync.

Contract Processing / List Function / Contract Selection Function Detail

Dates and Comments Comparability Study Selection Budget Selection OCAF Rents Final Review Save Reset

Rents

Surviving Contract: CA39T851018 Stage: N/A
Function Type: Renewal Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
Effective Date: 07/01/2013 ARAMS Status:

Add New Rent Record Overlay Rents with Current Rents from TRACS

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
0	9	690		700		700
1	4	950		963		963
1	23	950		963		963
Rent Potentials						
Monthly		31860		32301		32301
Annual		382320		387612		387612

Renewal Rent Effective Date: 07/01/2013

Monthly Reserve for Replacement Deposit Amount (most recently entered amount): 1050.00
Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF): 14.70
Monthly Reserve for Replacement Deposit Amount (Sum of the Two Lines Above): 1064.70

Dispute/Appeal Comments:

Rents Final for Contract Exhibit: Yes No

Rents Final for Contract Exhibit Date:

Utility Allowance Changed Comments :

Utility Allowance Changed: No

Rents - with no Utility Allowance Changed

Calculated Renewal Rent Detail

Save Delete Reset Close

Unit Type: 0 Unit/Bedroom Type Description:

Number of Units: 9

Current Contract Rent at Expiration: 690

Current Utility Allowance (if separate from rent): 28

Comparable(HUD92273) Rent:

OCAF Adjusted Rent: 700

Budget Based Rent: 0

Budget Based Utility Allowance (if separate from rent): 0

Energy Adjustment Amount Applied to Final Rent: 0

Renewed Rent: 0

Renewed Utility Allowance (if separate from rent): 32

Utility Allowance Effective Date: 08/01/2012

Calculated Renewal Rent Detail – with a Renewed Utility Allowance Change and therefore a Renewed Utility Allowance Effective Date

Contract Processing List Function / Contract Selection Function Detail

Dates and Comments Comparability Study Selection Budget Selection OCAF Rents Final Review

Rents Save Reset

Surviving Contract: CA39T851018 Stage: N/A
 Function Type: Renewal Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
 Effective Date: 07/01/2013 ARAMS Status:

Add New Rent Record Overlay Rents with Current Rents from TRACS

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
0	9	690		700		700
1	4	950		963		963
1	23	950		963		963
Rent Potentials						
Monthly		31860		32301		32301
Annual		382320		387612		387612

Renewal Rent Effective Date: 07/01/2013

Monthly Reserve for Replacement Deposit Amount (most recently entered amount): 1050.00
 Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF): 14.70
 Monthly Reserve for Replacement Deposit Amount (Sum of the Two Lines Above): 1064.70

Dispute/Appeal Comments:

Rents Final for Contract Exhibit: Yes No

Rents Final for Contract Exhibit Date:

Utility Allowance Changed Comments:

Utility Allowance Changed: Yes No

Rents - Utility Allowance Changed indicated sets to Yes when a change has been made to the Utility Allowance and Utility Allowance Effective Date

Contract Processing List Function / Contract Selection Function Detail

Dates and Comments Comparability Study Selection Budget Selection OCAF Rents Final Review

Rents Save Reset

Surviving Contract: CA39T851018 Stage: N/A
 Function Type: Renewal Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
 Effective Date: 07/01/2013 ARAMS Status:

Add New Rent Record Overlay Rents with Current Rents from TRACS

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
0	9	690		700		700
1	4	950		963		963
1	23	950		963		963
Rent Potentials						
Monthly		31860		32301		32301
Annual		382320		387612		387612

Renewal Rent Effective Date: 07/01/2013

Utility Allowance Comments cannot be null when the utility allowance changed indicator is Yes

Rents – attempting to save without comments in the Utility Allowance Changed Comments textbox

Utility Allowance Comments cannot be null when the utility allowance changed indicator is Yes

Sample of message

Contract Processing List	Function / Contract Selection	Function Detail	903	903
1	23	950	963	963
Rent Potentials				
Monthly		31860	32301	32301
Annual		382320	387612	387612

Renewal Rent Effective Date: 07/01/2013

Monthly Reserve for Replacement Deposit Amount (most recently entered amount): 1050.00
 Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF): 14.70
 Monthly Reserve for Replacement Deposit Amount (Sum of the Two Lines Above): 1064.70

Dispute/Appeal Comments:

Rents Final for Contract Exhibit: Yes No

Rents Final for Contract Exhibit Date:

Utility Allowance Changed Comments : Owner's Utility allowance need to be updated

Utility Allowance Changed: Yes

Rents - with Comments entered for Utility Allowance Changed

Also note that on the *Calculated Renewal Rent Detail* pop-up, the user can enter a 4 digit number as the *Number of Units* for any unit type.

Calculated Renewal Rent Detail

Save Delete Reset Close

Unit Type: 0

Number of Units: ←

Current Contract Rent at Expiration: 690

Current Utility Allowance (if separate from rent): 28

Comparable(HUD92273) Rent:

OCAF Adjusted Rent: 700

Budget Based Rent: 0

Budget Based Utility Allowance (if separate from rent): 0

Energy Adjustment Amount Applied to Final Rent:

Renewed Rent:

Renewed Utility Allowance (if separate from rent):

Utility Allowance Effective Date: 08/01/2012

Unit/Bedroom Type Description:

Contract Processing

➤ Function/Contract Selection

When the user selects the **ADD** button on the **Contract Processing List** screen, the **Function/Contract selection** page will display to enter in a new Contract renewal record. If the Owner has **not** submitted a request to renew the contract, the user will enter in the surviving contract, HUD policy, Fiscal Year, Contract Function, Contract Action Selection and "No Owner Response" within the *Processing Status* drop down list. The dates requested at the bottom of the page will no longer display and the action/option does not have to be selected at this time. When the user hits the **SAVE** button, the "Saved Successful" message will display but the user will not be able to complete any of the other data until the package is received from the owner.

If a user enters in a Renewal record, and selects a *Processing Status* other than, "No Owner Response", all dates must be completed and an action/option selected on the **Function/Contract selection** page. If not, the error message will still display. When dates are completed and saved, the user can then go into the Function Detail tab to fill in the Renewal Contract details.

Note: If the user goes back into the **Function/Contract selection** screen, and changes the *Processing Status* back to "No Owner Response" and saves the record; the recorded dates are automatically removed and the data saved on the Function Detail screens will be deleted immediately.

The screenshot shows the 'Function/Contract Selection' screen. The 'Processing Status(if applicable):' dropdown is set to 'No Owner Response', which is circled in red. Other fields include Contract # CA39M000215, Stage N/A, Expiration Date 07/31/2029, and Contract Function MAHRA Renewal or Short-Term Renewal.

Function Contract Selection – with "No Owner Response"

The screenshot shows the 'Function/Contract Selection' screen after saving. A yellow 'Save Successful (x)' message is displayed. The 'Processing Status(if applicable):' dropdown is now set to 'Option Selected - In Process'. Additional date fields are visible, such as 'Date Owner Signed Submission' (03/08/2013) and 'Date Complete Package Received from Owner' (03/15/2013).

Function Contract Selection – with "Option Selected – in Process"

Contract Processing

➤ Function Detail

- Rents

In **Contract Processing** under the **Function Detail**, **Rents** tab, the wording of "Monthly Increase to the Reserve for Replacement Account" has been changed to "Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF)". A new field called "Monthly Reserve for Replacement Deposit Amount (Sum of the two lines above)" has been added.

The amount listed in the *Monthly Reserve for Replacement Deposit Amount* must display the original amount of the renewal and must be view only. The increase to the Reserve for Replacement monthly account should only be done AFTER the renewal/amend rents is finalized.

The three fields will appear on all Amend Rents options. They will also appear on all Renewal options **except** Option 1a, Option 1b, Option 3a and Option 3b. These renewal options do not have OCAF adjustment options. These fields are:

- Monthly Reserve for Replacement Deposit Amount (most recently entered amount):* **Existing**
- Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF):* **Modified**
- Monthly Reserve for Replacement Deposit Amount (Sum of the Two Lines Above):* **New**

Contract Processing / Function / Function Detail

Dates and Comments / Comparability Study Selection / Budget Selection / OCAF / Rents / Final Review

Rents [Save] [Reset]

Surviving Contract: CA39L000117 Stage: N/A
 Function Type: Renewal Action: FY 2012 - 2: Request Renewal Without Restructuring at or Below Comparable Rents
 Effective Date: 06/01/2012 ARAMS Status: Posted

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
1	12	553	1141	565		565
2	18	649	1358	663		663
3	2	734	1684	749		749
4	1	925	2010	842		842
Rent Potentials						
Monthly		20611	43514	21054		21054
Annual		247332	522168	252648		252648

Renewal Rent Effective Date: 06/01/2012

Monthly Reserve for Replacement Deposit Amount (most recently entered amount): 3795.00

Monthly Increase to the Reserve for Replacement Account (as adjusted by OCAF): 79.70

Monthly Reserve for Replacement Deposit Amount (Sum of the Two Lines Above): 3874.70

Date Sent to OAH: (If rents determined by HUD/CA to be over Comparable) []

Reason sent to OAH: []

Date Review Results Received from OAH: []

OAH Results: []

Dispute/Appeal Comments:

Rents Final for Contract Exhibit: Yes

Rents Final for Contract Exhibit Date: 06/21/2012

Utility Allowance Changed Comments: []

Utility Allowance Changed: No

Contract Processing

➤ Function Detail

- Comparability Study Selection
- Budget Selection

A *Fiscal Year* column has been added to the **Comparability Study Selection** screens for *Renewals* Option 1a; Option 1b; Option 2: Option 3a; Option 4 and Option 5b. A *Fiscal Year* column has been added to the **Comparability Study Selection** screens for *Amend Rents* for Option 1a; Option 1b; Option 2 and Option 4 and Option 5b.

A *Fiscal Year* column has been added to the **Budget Selection** screens for *Renewals* and *Amend Rents* for Option 2, Option 4 and Option 5b.

The Fiscal Year column will identify the year of the Budget or Comparability Study records, eliminating the confusion of what action goes with which particular record.

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | Comparability Study Selection | Budget Selection | OCAF | Rents | Auto OCAF Letter | Final Review

Comparability Study Selection

Surviving Contract: CA392976201
Function Type: Amend Rents
Effective Date: 07/01/2012

Stage: N/A
Action: FY 2012 - 2: Request Renewal Without Restructuring at or Below Comparable Rents
ARAMS Status:

Comparability Study Required? Yes

Type of Alternative to Comparability Study Used:

Comparability Study:

Select	Fiscal Year	Date Appraiser Signed HUD	Source	Execution Date of First Related Renewal	Auto OCAF Created	Unit Type	Comparable Rent
<input checked="" type="checkbox"/>	2012	03/03/2011	Owner	05/15/2012	No	1	1241
						2	1458

Comparability Study Selection - Amend Rents

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | Comparability Study Selection | Budget Selection | OCAF | Rents | Final Review

Comparability Study Selection Save Reset

Surviving Contract: CA39M000138
Function Type: Renewal
Effective Date: 03/01/2015

Stage: N/A
Action: FY 2013 - 2: Request Renewal Without Restructuring at or Below Comparable Rents
ARAMS Status:

Comparability Study Required? Yes No Alternative Unconfirmed

Type of Alternative to Comparability Study Used:

Comparability Study:

Select	Fiscal Year	Date Appraiser Signed HUD	Source	Execution Date of First Related Renewal	Auto OCAF Created	Unit Type	Comparable Rent
<input checked="" type="checkbox"/>	2013	11/30/2009	Owner	11/30/2012	Yes	1	1065

Comparability Study Selection - Renewal

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | Comparability Study Selection | Budget Selection | OCAF | Rents | Final Review

Budget Selection

Surviving Contract: CA390265201
Function Type: Renewal
Effective Date: 04/01/2011

Stage: N/A
Action: FY 2011 - 4: Request Renewal for Projects Exempt from OAHF
ARAMS Status:

Renewal Budget Required? Yes
Renewal Budget Type: Standard Renewal Budget

Renewal Budget:

Select	Fiscal Year	Date Approved by HUD	Budget Based Rents % Increased	Unit Type	Budget Based Rent
<input checked="" type="checkbox"/>	2011	02/28/2011	8.42	1	1249
				2	1549
				2	1549

Budget Selection - Renewal

Select	Fiscal Year	Date Approved by HUD	Budget Based Rents % Increased	Unit Type	Budget Based Rent
<input checked="" type="checkbox"/>	2011	01/13/2011	6.00	1	1272
				2	1578
				2	1578

Budget Selection – Amend Rents

Comparability Studies

- Comparability Study List

Contract Processing

- Function Detail
 - Comparability Study Selection

On the *Comparability Study List* and the *Comparability Study Selection* within **Contract Processing** if there is a renewal that is associated to the comp study and that renewal is associated to a pending contract (ARAMS status at the top of the renewal past the status of ‘PEND’), IREMS will display the pending contract execution date in the table column called “*Execution Date of First Related Renewal*”.

If there is a renewal that is associated to the comparability study but the renewal is not associated to any pending contract the “*Execution Date of the First Related Renewal*” will be blank.

Fiscal Year	Date Appraiser Signed HUD 92273	Source	Execution Date of First Related Renewal	Auto OCAF Created	Unit Type	Comparable Rent
2013	02/08/2011	Owner		Yes	1	1083.00
					2	1266.00
					3	1554.00
2012	02/08/2011	Owner	06/20/2012	Yes	1	1059.00
					2	1238.00
					3	1519.00
2011	02/08/2011	Owner	04/28/2011	No	1	1035.00
					2	1210.00
					3	1485.00

**Comparability Study List – 2013 Renewal is not associated to a pending contract
- 2012 Renewal is associated to a pending contract**

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | **Comparability Study Selection** | Budget Selection | OCAF | Rents | Final Review

Comparability Study Selection Save | Reset

Surviving Contract: CA39L000323 Stage: N/A
 Function Type: Renewal Action: FY 2013 - 2: Request Renewal Without Restructuring at or Below Comparable Rents
 Effective Date: 06/01/2013 ARAMS Status:

Comparability Study Required? Yes No Alternative Unconfirmed

Type of Alternative to Comparability Study Used:

Comparability Study:

Select	Fiscal Year	Date Appraiser Signed HUD 92273	Source	Execution Date of First Related Renewal	Auto OCAF Created	Unit Type	Comparable Rent
<input checked="" type="checkbox"/>	2013	02/08/2011	Owner		Yes	1	1083
						2	1286
						3	1554

[Dates and Comments](#) | [Comparability Study Selection](#) | [Budget Selection](#) | [OCAF](#) | [Rents](#) | [Final Review](#)

Comparability Study Selection – Fiscal Year 2013

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | **Comparability Study Selection** | Budget Selection | OCAF | Rents | Auto OCAF Letter | Final Review

Comparability Study Selection Save | Reset

Surviving Contract: CA39L000323 Stage: N/A
 Function Type: Amend Rents Action: FY 2013 - 2: Request Renewal Without Restructuring at or Below Comparable Rents
 Effective Date: 06/01/2013 ARAMS Status: Posted

Comparability Study Required? Yes No Alternative Unconfirmed

Type of Alternative to Comparability Study Used:

Comparability Study:

Select	Fiscal Year	Date Appraiser Signed HUD 92273	Source	Execution Date of First Related Renewal	Auto OCAF Created	Unit Type	Comparable Rent
<input checked="" type="checkbox"/>	2012	02/08/2011	Owner	06/20/2012	Yes	1	1059
						2	1238
						3	1519

[Dates and Comments](#) | [Comparability Study Selection](#) | [Budget Selection](#) | [OCAF](#) | [Rents](#) | [Auto OCAF Letter](#) | [Final Review](#)

Comparability Study Selection – Fiscal Year 2012

Contract Processing

➤ Function Detail

- **Dates and Comments**

When a user creates a renewal, the expiration date is not editable and is calculated from the effective date and term entered. Once the record is saved, a user can update the term or expiration date to anything they want, in which the expiration date may not match the term. This is okay if a contract is effective in the middle of the month and the user wants to align the expiration to the end of the month.

When the user clicks the save button on the **Dates and Comments** screen the system determines if the difference of the Effective and Expiration dates match the term. In addition, the system will calculate the number of days that the difference is off by.

iREMS has added a warning message when the user attempts to save a renewal contract processing record, where the effective date plus the term do not equal the expiration date.

The warning will state the following *“The Term and Expiration Date do NOT match up on this Contract process. The difference between the Effective date and Expiration date is [number] days [less than or greater than] the term. This could cause an error in TRACS/ICON. Please check the term, blank out the expiration date and SAVE again”*

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | Comparability Study Selection | Input Rents | Eligibility | Rents | Final Review

Dates and Comments Save Reset

Surviving Contract: IN36L000047 Stage: N/A
Function Type: Renewal Action: FY 2013 - 1a: Mark-Up-To-Market Eligibility

Effective Date: []

Renewal Contract: []

Contract/Stage Date Information

Contract Effective Date: []

Length of Contract in Months: 12

Contract Expiration Date: 06/30/2015

Reason for Short-term Renewal: []

Decision Comments: []

Dates and Comments - with 2015 date

Message from webpage

The Term and Expiration Date do NOT match up on this Contract process. The difference between the Effective date and Expiration date is [364] of days [greater than] the term. This could cause an error in TRACS/ICON. Please check the term, blank out the expiration date and SAVE again

OK

Dates and Comments – example of message box

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | Comparability Study Selection | Input Rents | Eligibility | Rents | Final Review

Dates and Comments Save Successful (x) Save Reset

Surviving Contract: IN36L000047 Stage: N/A
Function Type: Renewal Action: FY 2013 - 1a: Mark-Up-To-Market Eligibility

Effective Date: 07/01/2013 ARAMS Status:

Renewal Contract: Basic Renewal Contract

Contract/Stage Date Information

Contract/Stage Renewal Execution Date: []

Contract Effective Date: 07/01/2013

Length of Contract in Months: 12

Contract Expiration Date: 06/30/2014

Reason for Short-term Renewal: []

Decision Comments: []

Dates and Comments – date changed to 2014 and Saved

Contract Processing

➤ Function Detail

- Rents

iREMS has been modified so when the user finalizes a Renewal record (of any option) or an Amend Rents record(of any option), two messages will display. To finalize the renewals or amend rents record, the user will select the “Yes” that follows “*Rents final for Contract Exhibit*” and the first message “*Processing Status will be set to Completed*” will display. After clicking the OK button for renewals the second message will display, “*This Renewal record is now complete; please initiate your funding request procedures.*” For amend rents records the second message will display “*This Amend Rents Only Rent Increase is now complete; please initiate your funding request procedures.*”

Contract Processing / Function / Contract Selection / Function Detail

Rents

Surviving Contract: FL293073201 Stage: N/A
 Function Type: Renewal Action: FY 2013 - 2: Request Renewal Without Restructuring at or Below Rents
 Effective Date: 03/04/2016

Message from webpage: Processing Status will be set to 'Completed'

HUD Approved Rent: OCAF Adjusted

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
1	149	783	796	796		796
Rent Potentials						
Monthly		116667		118604		118604
Annual		1400004		1423248		1423248

Renewal Rent Effective Date: 03/04/2016

Rents – Renewal Rents final (1st message)



Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | Comparability Study Selection | Budget Selection | OCAF | Rents | Final Review

Rents Save Successful (x) Save Reset

Surviving Contract: FL293073201 Stage: N/A
 Function Type: Renewal Action: FY 2013 - 2: Request Renewal Without Restructuring at or Below
 Effective Date: 03/04/2016

Add New Rent Record

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	Comparable (HUD 92273) Rent	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
1	149	783		796		796
Rent Potentials						
Monthly		116667		118604		118604
Annual		1400004		1423248		1423248

Renewal Rent Effective Date: 03/04/2016

Message from webpage

⚠ This Renewal record is now complete; please initiate your funding request procedures.

OK

Rents – Renewal Rents Final (2nd message)

Windows Internet Explorer

⚠ This Renewal record is now complete; please initiate your funding request procedures.

OK

PortfolioDashboard | Assistance Contracts | Contract Processing | Comparability Studies | Renewal Budgets | Secure Systems | Logout

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | Comparability Study Selection | Budget Selection | OCAF | Rents | Auto OCAF Letter | Final Review

Rents Save Reset

Surviving Contract: CA39R000027 Stage: N/A
 Function Type: Amend Rents Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
 Effective Date: 08/01/2013 ARAMS Status:

Add New Rent Record

HUD Approved Rent: OCAF Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
1	4	635	650		650
2	15	735	752		752
3	19	878	898		898
Rent Potentials					
Monthly		30247	30942		30942
Annual		362964	371304		371304

Renewal Rent Effective Date: 08/01/2013

Message from webpage

⚠ Processing Status will be set to 'Completed'

OK

Rents – Amend Rents Final (1st message)

Surviving Contract: CA39R000027
Function Type: Amend Rents
Effective Date: 08/01/2013

Stage: N/A
Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF
ARAMS Status:

Message from webpage
This Amend Rents Only Rent Increase is now complete; please initiate your funding request procedures.

Calculated Renewal Rents:

Unit Type	# of Units	Current Contract Rent at Expiration	OCAF Adjusted Rent	Budget-based Rent	Renewed Rent
1	4	635	650		650
2	15	735	752		752
3	19	878	898		898
Rent Potentials					
Monthly		30247	30942		30942
Annual		362964	371304		371304

Renewal Rent Effective Date: 08/01/2013

Rents – Amend Rents Final (2nd message)

Message from webpage
This Amend Rents Only Rent Increase is now complete; please initiate your funding request procedures.

OK

Assistance Contracts

- Assistance Contract List
- Assistance Contract Detail

Contract Processing

- Function/Contract Selection
- Function Detail

The Energy Performance Program (EPC) is a new program within HUD’s multifamily housing group. This program is available for options 1a, 1b, 2, 4 and 5b. These options while in the EPC Term will not be a part of auto OCAF. However, Options 3 and 5a are not eligible for the EPC program; they will remain in auto OCAF.

This program is in compliance with one of HUD’s strategic objectives: 'expand access to and availability of decent, affordable rental housing'. One of the key strategies of accomplishing this goal is to increase the energy efficiency of household appliances and lighting. This way, savings in energy costs can be used by HUD to provide additional housing.

If an owner makes energy improvements that affect utility bills that HUD provides direct annual assistance for, this new program allows for a time period in which the owner captures these savings so they can repay the capital required to make the improvements.

HUD requires that the owner contracts with a company to install energy efficient utilities in agreed upon multifamily properties. The contractor has guaranteed to lower a certain amount of energy consumption for each property where this is done. The actual utilities that qualify will be specified at a later date.

The 2500 units participating in the EPC Pilot will receive an energy savings adjustment (ESA) based on their projected energy savings, which will allow these properties to pay off the capital costs associated with energy conservation measures that they install.

The savings will be realized over an estimated period of 8-12 years for each property. The energy adjusted effective and expiration dates will be at the contract level. One contract on the property can have energy efficient entries and another not.

An overview of some of the details and system changes are as follows:

- Contract. PRAC owners will remain under their current contracts. Section 8 owners will enter a new 20 year HAP contract and sign the preservation exhibit that maintains the years remaining on their existing contract, and enter the new 20 year HAP renewal into iREMS.
- Year 1 Adjustment. Year 1 is defined the first rent anniversary date equal to or after the EPC Retrofit Completion date.
- Year 2 Adjustment. Year 2 is defined the second rent anniversary date equal to or after the EPC Retrofit Completion date.
 - Option 1a&1b will realize their savings in the iREMS system in year 1 & 2 (as described above) in a new rent increase screen. Option 2, 4 and 5b will realize their savings through the budget entries in year 1 & 2.
- OCAF. Year 3 to end of the EPC Term. Operating Cost Adjustment Factor (OCAF), or a similar rate, will be applied to the total rent, including the ESA (energy savings adjustment).
- Contract Rider. A rider will be placed on the property contract that allows for these adjustments and requires the ESA is removed when the EPC contract term or amortization period ends.
- Junior Lien. HUD will allow a junior lien to be place on the property.
- Incentive Payments. Owners will be able to request an incentive payment annually for up to 15% of the projected savings amount from an escrow account they set up, if savings are greater than required to pay applicable debt service and measurement and verification costs.
- End of Term Adjustment: Option 1a, 1b, &2 will submit an RCS and renew rents to RCS. Option 4 and 5b will have the ESA (energy savings adjustment) removed from the debt service reserve line item in the budget worksheet.
- Threshold Requirements:
 - The sum of the annual debt service and measurement and verification fee, if applicable, will be at least 80% of the projected savings amount.
 - Owners will also be required to agree to replace any of the ECMs with equal or higher performing ones from an energy consumption basis after the ESRA contract terminates for the term remaining on the contract.

Identifying and Entering Contracts in the Energy Performance Program (EPC):

Contract #	Current Contract Status	TRACS Contract Status	Program	Doc Type	Exp Date	Staged	EPC Enrollment	Contract Authority	Budget Authority
CA390079003	Active - Active	Active	Sec 8 NC	HAP	11/30/2028	N	N	514584.00	17119539.00

Assistance Contract List screen: A new column for “EPC Enrollment” has been added.

Contract Number: CA390079003 TRACS Contract Status: Active
 Program Type: Sec 8 NC Status Update: Automatic Manual
 Contract Administered By: PBCA Current Contract Status: Active - Active

Stages

Stage Number	Stage Effective Date	Stage Expiration Date	TRACS Status	Next Expiring
Staged [N]				

Energy Performance Contract

Energy Performance Contract Enrollment Indicator: Yes No

Assistance Contract Status screen: A new “Energy Performance Contract” section has been added. The “Energy Performance Contract Enrollment Indicator” is defaulted to “No”. When “Yes” is selected, a new “Energy Performance Contract Details” section will display:

Energy Performance Contract Details Save Reset Back

Contract Number: CA390079003

Energy Performance Contract Effective Date:

Energy Performance Contract Term (Years):

Energy Performance Contract Expiration Date:

Energy Performance Retrofit Completion Date:

Energy Performance Contract Total Debt Amount:

Energy Performance Contract Annual Debt Amount:

Energy Performance Contract Total Project Savings Amount:

Energy Performance Contract Annual Project Savings Amount:

Energy Performance Contract 47.5% of Annual Project Savings Amount:

Energy Performance Contract Yearly Savings Tracking Indicator: Yes No

The page above displays the new fields that are requested for the EPC contracts: All fields are required to be entered at the moment a contract is in the EPC program except the “*Energy Performance Retrofit Completion Date*” which will be completed when the retrofits are completed. This field is important because it starts the 1st and 2nd year’s savings mark.

- The “Energy Performance Contract Effective Date”, “Energy Performance Contract Term”, and “Energy Performance Retrofit Completion Date” will be editable.
- The “Energy Performance Contract Expiration Date” field will be calculated and displayed.
- The “Energy Performance Contract Total Debt Amount” and “Energy Performance Contract Total Project Savings Amount” will be editable.
- The “Energy Performance Contract Annual Debt Amount”, “Energy Performance Contract Annual Project Savings Amount” and “Energy Performance Contract 47.5% of Annual Project Saving Amount” fields will be calculated and displayed.
- The “Energy Performance Contract Yearly Savings Tracking Indicator” is applicable for options 4 and 5b only) - If the EPC Yearly Savings Trackign Indicator is set to ‘Yes’ the EPC Yearly Savings screen will display for entry years.. Each year will be updated on a yearly basis. The final year may be used in the Final Year’s Adjustment.

Assistance Contract List	Assistance Contract Status	Assistance Contract Detail	Current Contract Administrator/ Contact	Contract Administrator History
--------------------------	----------------------------	----------------------------	---	--------------------------------

Energy Performance Contract Details Back

Contract Number: CA390079003
 Energy Performance Contract Effective Date: 12/01/2013
 Energy Performance Contract Term (Years): 12
 Energy Performance Contract Expiration Date: 11/30/2025
 Energy Performance Retrofit Completion Date:
 Energy Performance Contract Total Debt Amount: 126000
 Energy Performance Contract Annual Debt Amount: 10500
 Energy Performance Contract Total Project Savings Amount: 145000
 Energy Performance Contract Annual Project Savings Amount: 12083
 Energy Performance Contract 47.5% of Annual Project Savings Amount: 5739
 Energy Performance Contract Yearly Savings Tracking Indicator: No 

The page above displays the saved *Energy Performance Contract Details* page (when “No” is selected for the “Energy Performance Contract Yearly Savings Tracking Indicator” field.

Assistance Contract List	Assistance Contract Status	Assistance Contract Detail	Current Contract Administrator/ Contact	Contract Administrator History
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Energy Performance Contract Details Save Reset Back

Contract Number: CA39H113089
 Energy Performance Contract Effective Date: 08/01/2013
 Energy Performance Contract Term (Years): 10
 Energy Performance Contract Expiration Date: 07/31/2023
 Energy Performance Retrofit Completion Date:
 Energy Performance Contract Total Debt Amount: 100000
 Energy Performance Contract Annual Debt Amount: 10000
 Energy Performance Contract Total Project Savings Amount: 50000
 Energy Performance Contract Annual Project Savings Amount: 5000
 Energy Performance Contract 47.5% of Annual Project Savings Amount: 2375
 Energy Performance Contract Yearly Savings Tracking Indicator: Yes No 

Energy Performance Contract Yearly Savings

Note: Year 1 is the Annual Project Savings x 47.5%, Year 2 is the Annual Project Savings x 95%, Year 3 is Year 2 Savings x that year's OCAF, Year 4 is Year 3 Savings x that year's OCAF, etc.

Year	Adjustment Amount
1	0
2	0
3	0
4	0
5	0
6	0
7	0
8	0
9	0
10	0

The page above displays the saved **Energy Performance Contract Details** page (when “Yes” is selected for the “Energy Performance Contract Yearly Savings Tracking Indicator” field).

Assistance Contract List	Assistance Contract Status	Assistance Contract Detail	Current Contract Administrator/ Contact	Contract Administrator History
--------------------------	----------------------------	----------------------------	---	--------------------------------

Assistance Contract Status

Contract Number: CA390079003 TRACS Contract Status: Active
 Program Type: Sec 8 NC Status Update: Automatic
 Contract Administered By: PBCA Current Contract Status: Active - Active

Stages

Staged [N]

Stage Number	Stage Effective Date	Stage Expiration Date	TRACS Status	Next Expiring
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Energy Performance Contract

Energy Performance Contract Enrollment Indicator: Yes 

EPC Effective Date	EPC Term (Years)	EPC Expiration Date	EPC Retrofit Completion Date	EPC Yearly Saving
12/01/2013	12	11/30/2025		N

The page above displays the *Assistance Contract Status* page after the EPC Details have been saved. The “Energy Performance Contract Enrollment Indicator” is “Yes”.

Contract Processing for EPC Contracts (Amend Rents Only Records):
(Using Option 1b as a sample - Year 1 adjustment)

Assistance Contract List	Assistance Contract Status	Assistance Contract Detail	Current Contract Administrator/ Contact	Contract Administrator History
--------------------------	----------------------------	----------------------------	---	--------------------------------

Energy Performance Contract Details Save Reset Back

Contract Number: CA39M000136
 Energy Performance Contract Effective Date: 02/01/2009
 Energy Performance Contract Term (Years): 12
 Energy Performance Contract Expiration Date: 01/31/2021
 Energy Performance Retrofit Completion Date: 02/01/2011
 Energy Performance Contract Total Debt Amount: 126000
 Energy Performance Contract Annual Debt Amount: 10500
 Energy Performance Contract Total Project Savings Amount: 149000
 Energy Performance Contract Annual Project Savings Amount: 12417
 Energy Performance Contract 47.5% of Annual Project Savings Amount: 5898
 Energy Performance Contract Yearly Savings Tracking Indicator: Yes No

Assistance Contract List	Assistance Contract Status	Assistance Contract Detail	Current Contract Administrator/ Contact	Contract Administrator History
--------------------------	----------------------------	----------------------------	---	--------------------------------

Assistance Contract Status Save Reset

Contract Number: CA39M000136 TRACS Contract Status: Active
 Program Type: LMSA Status Update: Automatic Manual
 Contract Administered By: PBCA Current Contract Status: Active - Active

Stages

Staged [N]

Stage Number	Stage Effective Date	Stage Expiration Date	TRACS Status	Next Expiring
--------------	----------------------	-----------------------	--------------	---------------

Energy Performance Contract

Energy Performance Contract Enrollment Indicator: Yes

EPC Effective Date	EPC Term (Years)	EPC Expiration Date	EPC Retrofit Completion Date	EPC Yearly Saving
02/01/2009	12	01/31/2021	02/01/2011	N

(confirm that contract is listed as a EPC)

Contract Processing List | Function / Contract Selection | Function Detail

Function/Contract Selection Save Reset

Contract(s) and/or Stage(s):

Select	Contract #	Stage	Expiration Date at Contract/Stage Expiration	Original Contract Effective Date Prior to October 1981?
<input checked="" type="checkbox"/>	CA39M000136	N/A	01/31/2031	N

Combine Contracts and/or Stages: Yes No Not Applicable

Surviving Contract: CA39M000136

HUD Policy: User Guide

Fiscal Year: 2012

Contract Function: MAHRA Amend Rent Increases

Contract Action Selection: 1b: Discretionary Authority Eligibility Mark-Up-To-Market

Processing Status(if applicable): Option Selected - In Process

Date Owner Signed Submission: 01/02/2012

Date Owner Submission Package Initially Received: 01/09/2012

Date Complete Package Received from Owner: 01/10/2012

Is the Owner Debarred or Suspended? Yes No Unconfirmed

Does the Owner Have Material Violations? Yes No Unconfirmed

(enter Function Contract Selection)

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | Rent Increase | Rents | Final Review Save Reset

Dates and Comments

Surviving Contract: CA39M000136
Function Type: Amend Rents
Effective Date: 02/01/2012

Stage: N/A
Action: FY 2012 - 1b: Discretionary Authority Eligibility Mark-Up-To-Market
ARAMS Status:

Amend Rents Dates

Amend Rents Effective Date: 02/01/2012

Amend Rents Expiration Date: 02/01/2013

Energy Performance Contract Indicator: Yes

Contract/Stage Date Information

Contract/Stage Renewal Execution Date:

Contract Effective Date: 02/01/2011

Length of Contract in Months: 240

Contract Expiration Date: 01/31/2031

Decision Comments:

(enter Dates and Comments)

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | Rent Increase | Rents | Final Review Save Reset

Rent Increase

Surviving Contract: CA39M000136
Function Type: Amend Rents
Effective Date: 02/01/2012

Stage: N/A
Action: FY 2012 - 1b: Discretionary Authority Eligibility Mark-Up-To-Market
ARAMS Status:

Rent Increase Calculations

Annual Rent Potential for all Section 8 Units Included in the Current Process: 2855520.00

Energy Performance Contract Adjustment (47.5% of Annual Projected Utility Savings): 5898.00

Rent Increase Factor: 1.002

[Dates and Comments](#) | [Rent Increase](#) | [Rents](#) | [Final Review](#)

(1st and 2nd Year's Savings New Increase Screen-confirm Rental Increase)

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | Rent Increase | Rents | Final Review

Rents [Save] [Reset]

Surviving Contract: CA39M000136 | Stage: N/A
Function Type: Amend Rents | Action: FY 2012 - 1b: Discretionary Authority Eligibility Mark-Up-To-Market
Effective Date: 02/01/2012 | ARAMS Status:

[Add New Rent Record] [Overlay Rents with Current Rents from TRACS]

HUD Approved Rent: **EPC Adjusted**

Calculated Renewal Rents:

Unit Type	# of Units	Current Gross Rent at Expiration	EPC Adjusted Gross Rent	Renewed Gross Rent
0	132	1303	1306	1306
1	46	1434	1437	1437
Rent Potentials				
Monthly		237960	238494	238494
Annual		2855520	2861928	2861928

Renewal Rent Effective Date: 02/01/2012

Approved by Housing HQ Date:

Rents Final for Contract Exhibit: Yes No

Rents Final for Contract Exhibit Date:

Utility Allowance Changed Comments:

Utility Allowance Changed: No

EPC Adjusted has been added to drop-down
(select *EPC Adjusted* – Select *Yes* for *Rents Final for Contract Exhibit* and *SAVE*)

Contract Processing List | Function / Contract Selection | Function Detail

Calculated Renewal Rents:

Unit Type	# of Units	Current Gross Rent at Expiration	EPC Adjusted Gross Rent	Renewed Gross Rent
0	132	1303	1306	1306
1	46	1434	1437	1437
Rent Potentials				
Monthly		237960	238494	238494
Annual		2855520	2861928	2861928

Renewal Rent Effective Date: 02/01/2012

Approved by Housing HQ Date:

Rents Final for Contract Exhibit: Yes No

Rents Final for Contract Exhibit Date:

Utility Allowance Changed Comments:

Utility Allowance Changed: No

Message from webpage: Processing Status will be set to 'Completed'

(select *OK*)

Contract Processing List | Function / Contract Selection | Function Detail

Dates and Comments | Rent Increase | Rents | Final Review

Rents [Save Successful (x)] [Save] [Reset]

Surviving Contract: CA39M000136 | Stage: N/A
Function Type: Amend Rents | Action: FY 2012 - 1b: Discretionary Authority Eligibility Mark-Up-To-Market
Effective Date: 02/01/2012

[Add New Rent Record]

HUD Approved Rent: EPC Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Gross Rent at Expiration	EPC Adjusted Gross Rent	Renewed Gross Rent
0	132	1303	1306	1306
1	46	1434	1437	1437
Rent Potentials				
Monthly		237960	238494	238494
Annual		2855520	2861928	2861928

Renewal Rent Effective Date: 02/01/2012

Message from webpage: This Amend Rents Only Rent Increase is now complete; please initiate your funding request procedures.

(select *OK*)

Contract Processing / Function / Contract Selection / Function Detail

Dates and Comments / Rent Increase / Rents / Final Review

Rents Save Reset

Surviving Contract: CA39M000136 Stage: N/A
 Function Type: Amend Rents Action: FY 2012 - 1b: Discretionary Authority Eligibility Mark-Up-To-Market
 Effective Date: 02/01/2012 ARAMS Status:

Add New Rent Record Overlay Rents with Current Rents from TRACS

HUD Approved Rent: EPC Adjusted

Calculated Renewal Rents:

Unit Type	# of Units	Current Gross Rent at Expiration	EPC Adjusted Gross Rent	Renewed Gross Rent
0	132	1303	1306	1306
1	46	1434	1437	1437
Rent Potentials				
Monthly		237960	238494	238494
Annual		2855520	2861928	2861928

Renewal Rent Effective Date: 02/01/2012
 Approved by Housing HQ Date:
 Rents Final for Contract Exhibit: Yes No
 Rents Final for Contract Exhibit Date: 04/15/2013
 Utility Allowance Changed Comments:
 Utility Allowance Changed: No

(this is the saved *Rents* screen)

The pages above displays the new screens that are requested for the EPC contracts – *Amend Rents for Option 1b*. The individual pages are slightly different for each option. For example, option 2 and 4 will display budget based selection screens and have the user realize the savings directly in the budget pulled into the amend rents for the 1st and 2nd year.

Contract Processing for EPC Contracts (Amend Rents Only Records):
(Using Option 4 as a sample for Final year)

Portfolio Dashboard / Assistance Contacts / Contract Processing / Contract Selection / Function Detail

Function/Contract Selection Save Reset Delete

Contract(s) and/or Stage(s):

Select	Contract #	Stage	Expiration Date at Contract/Stage Expiration	Original Contract Effective Date Prior to October 1981?
<input checked="" type="checkbox"/>	KY360013020	N/A	08/31/2022	N

Combine Contracts and/or Stages: No

Surviving Contract: KY360013020
 HUD Policy: User Guide
 Fiscal Year: 2013
 Contract Function: MAHRA Amend Rent Increases
 Contract Action Selection: 4: Request Renewal for Projects Exempt from OAHF
 Processing Status(if applicable):
 Date Owner Signed Submission: 04/17/2013
 Date Owner Submission Package Initially Received: 04/17/2013
 Date Complete Package Received from Owner: 04/17/2013
 Is the Owner Debarred or Suspended? Yes No Unconfirmed
 Does the Owner Have Material Violations? Yes No Unconfirmed

(enter Function Contract Selection)

(enter Dates and Comments)

Select	Fiscal Year	Date Approved by HUD	Budget Based Rents % Increased	Unit Type	Budget Based Rent
<input checked="" type="checkbox"/>	2013	04/17/2013	5.00	1	381
				2	489
				3	642

(mark "Yes" for Renewal Budget Required)

Annual Rent Potential for all Section 8 Units Included in the Current Process:	246084.00
Annual Budget-Based Rent Potential for Section 8 Units Included in the Current Process:	258264.00
Annual Rent Potential for all Non-Expiring Section 8 Units (Not Included in the Current Process):	0.00
Annual Rent Potential Non-Section 8 Units:	0.00
Annual Project Rent Potential:	246084.00
Expiring Section 8 Portion of Total Rent Potential:	1.00
Annual Project Debt Service:	24466.43
Note: Already includes MIP amount	
Annual Expiring Section 8 Share of Debt Service:	24466.43
Escalated Value of EPC Adjustment as of Final year of the EPC Loan:	7150.00
Annual Expiring Section 8 Rent Potential Less Expiring Section 8 Share of Debt Service:	214467.57
Annual Expiring Section 8 Rent Potential Attributed to Operation Multiplied by the Published OCAF (2.600%):	220043.73
OCAF Adjusted Contract Rent Potential:	244510.16
Lesser of OCAF or Budget-Based Rent Potential:	244510.16
Rent Increase Factor (Based upon Lesser of OCAF vs. Budgets):	0.994

(view and save the OCAF page)

Note, there is a “Escalated Value of EPC Adjustment as of Final year of the EPC Loan” field on this OCAF page. In addition, Option 5b final year will have the final year’s savings entered in the EPC Yearly savings screen on the new OCAF screen if the prior year’s rent increase were all OCAF Adjusted. Option 5b new OCAF screen will display a zero for the final year’s savings amount if the prior year’s rent increase were all budget increase. Option 5b will display what ever the user entered into the final year’s savings amount if the prior year’s rent increases were a mix of rent increase type, and a warning message will display to ensure the correct final year’s savings amount is used.

The screenshot shows the 'Rents' section of the OCAF system. It includes a navigation bar with tabs for 'Contract Processing List', 'Function / Contract Selection', and 'Function Detail'. Below this are sub-tabs for 'Dates and Comments', 'Budget Selection', 'OCAF', 'Rents', and 'Final Review'. The 'Rents' sub-tab is active, showing a 'Save' and 'Reset' button.

Contract details include: Surviving Contract: KY360013020, Function Type: Amend Rents, Effective Date: 09/01/2013, Stage: N/A, Action: FY 2013 - 4: Request Renewal for Projects Exempt from OAHF, and ARAMS Status.

Buttons for 'Add New Rent Record' and 'Overlay Rents with Current Rents from TRACS' are present. The HUD Approved Rent is set to 'OCAF Adjusted'.

The 'Calculated Renewal Rents' table is as follows:

Unit Type	# of Units	Current Contract Rent at Expiration	OCAF Adjusted Rent	Renewed Rent
1	24	363	361	361
2	24	466	463	463
3	1	611	607	607

Below the table, 'Rent Potentials' are shown for Monthly (20507 / 20383) and Annual (246084 / 244596). The Renewal Rent Effective Date is 09/01/2013. There are fields for 'Dispute/Appeal Comments', 'Rents Final for Contract Exhibit' (Yes/No), 'Rents Final for Contract Exhibit Date', 'Utility Allowance Changed Comments', and 'Utility Allowance Changed' (No).

(select type of HUD Approved Rent – click on Yes for Rents Final for Contract Exhibit and SAVE)

The different pages are displayed in the Contract Processing chapter of the User’s Guide.

Please note that option 3a, 3b and 5a are not eligible for the EPC program.

Database Changes

MPRD

Enhanced iREMS by adding the REAC last inspection released date to the MPRD active_property table.

Enhanced iREMS by adding the demo closing date and the OAHP/OMHAR mark to market restructure date to the MPRD active_property table.

HEREMS

A new database table has been added to herems called nls_irems_extract. This new table holds all NLS loans, including loan with numbers longer than 8 characters. The loans longer than 8 characters do not display in iREMS, and they will not display in iREMS going forward, however they will be in the database table. This new table is for query/reporting purposes only.

Previously, when **TRACS** created a new property in **iREMS** and **TRACS** did not have a name for the property, it created a property in **iREMS** with no name. **iREMS** has been modified to look in specific new areas for a property name, and if no name is available it will default to inserting the contract number for the property name.

Each time a new contract (most are PRACs) is added to **TRACS** and it is tied to a financing instrument that exists in **iREMS**, the new contract will go to the existing property that the financing is attached to through a look up table.