



**MARK-TO-MARKET (M2M)
RELEASE 7.0.1
ONLINE SYSTEM
OAHF USERS GUIDE**

for the

U.S. Department of Housing and Urban Development (HUD)
Office of Affordable Housing Preservation
(OAHF)



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**Mark-to-Market (M2M)
RELEASE 7.0.1
Online System
OAHF Users Guide
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1 M2M SYSTEM RELEASE 7.0.1 INTRODUCTION

Mark-to-Market (M2M) RELEASE 7.0.1 is a secured online HUD web application developed by the Department of Housing and Urban Development's (HUD) Office of Affordable Housing Preservation (OAHP) to support OAHP and its Participating Administrative Entities (PAEs) in the collection and tracking of data relative to expiring Section 8 contracts within the Mark-to-Market Program.

1.1 M2M Program Goals and Objectives

M2M RELEASE 7.0.1 introduces modifications to the existing system modules and properties going through the M2M Program processes by facilitating data collection and report generation of the following:

- ◆ Assigned assets to PAEs
- ◆ Critical dates tracking for M2M processes assigned to PAEs
- ◆ Deal restructure plan forms submission and closing data
- ◆ Reporting for PAE management
- ◆ Monitoring and auditing tools for OAHP
- ◆ Other information relevant to the M2M Program
- ◆ Accommodate the progressive requirements of the M2M Program administrators

1.2 Business Functions

RELEASE 7.0.1 is designed to support M2M Program objectives by performing and centralizing the following functions:

- ◆ Assignment of eligible Section 8 property contracts to PAEs for the various renewal processes
- ◆ Tracking of assigned properties through the process or "pipeline" (tracking properties, assessment, due diligence, dates, etc.)
- ◆ Providing PAEs an online system to submit restructuring plan forms to OAHP; and support OAHP and its business partners in documenting and reporting on M2M Properties
- ◆ Reporting on the progress and performance of PAEs and their assigned properties. Provide OAHP with a representation of currently assigned properties and assist PAEs in the management of their assigned portfolios.

Users of the M2M system include OAHP (Headquarters (HQ) and Preservation Office levels); OAHP's PAEs, with whom OAHP has executed agreements; and OAHP's support contractors.

1.3 System Requirements

RELEASE 7.0.1 uses browser-based technology to provide access via the World Wide Web. To access the system, a user must have access to the Internet using an Internet Service Provider (ISP) and advanced browser software. Netscape Navigator 3.x browser software or higher, or Internet Explorer 5.0 or higher is recommended.

As M2M RELEASE 7.0.1 is a secure, web-based system that contains sensitive information, security registration is required prior to gaining access. OAHP staff must fill out a security form and forward it to ADP Security for approval and registration. Further information on the M2M system's security may be found in **Section 2, M2M System Security**.

The following hardware and software is required to access and operate M2M RELEASE 7.0.1:

- ◆ Windows 2000 or XP
- ◆ Internet Explorer 7.0 or higher
- ◆ 486 processor or higher
- ◆ 16 megabyte memory or higher
- ◆ Hard Drive: 60MB Recommended;
- ◆ Video/Screen Resolution of 480x640 with 16 colors Display: SVGA;
- ◆ Internet Service Provider (ISP) connection with minimum modem speed of 28.8K bps (bits per second)

It is also expected that users of the M2M system have a basic understanding and proficiency in the use of computers, Windows, and web browsers.

OAHP staff may access the M2M System via either the **Intranet** (<http://hudapps.hud.gov/ssmaster>) or the **Internet** (https://hudapps.hud.gov/HUD_Systems/)

1.4 Tips for Using the System (Before Getting Started)

Functions that are standard throughout the M2M system are explained in more detail in the following subsections.

1.4.1 Case-Sensitivity Sign-On

When signing onto the M2M system, it is necessary to note that user names and passwords are case-sensitive (i.e., whatever uppercase/lowercase convention is used to create User IDs and passwords, must be used to sign into the system).

1.4.2 Set Browser to Accept “Cookies”

Users must ensure that their browsers are set to “Accept All Cookies.” The following paragraphs provide instructions for Internet Explorer users to set this feature:

Internet Explorer 7.0 users: select “View” on the top tool bar; select “Internet Options”, select “Advanced”, scroll down below “Security” to “Cookies” and ensure “Always Accept Cookies” is checked.

For all other browsers, go through the “Help” section to ensure the browser is set to accept all cookies.

1.4.3 Saving Changes

After adding or updating data on any screen, follow the directions on that screen to retain any changes made before proceeding to another screen. In browser-based applications, data will be lost when navigating to other pages if not saved.

1.4.4 Date Format

All dates must be entered in the MM/DD/YYYY format.

1.4.5 Error Messages

If an error message is encountered anywhere in the M2M system when navigating from one screen to the next, follow the instructions presented in the resulting informational screen. If that does not resolve the problem, click the “Reload” button on Netscape’s toolbar to reload the page (as shown below in Figure 1-1, Netscape Reload Button), or review the information last entered on the screen for accuracy.



Figure 1-1, Netscape Reload Button

If further technical assistance is needed, return to the Home screen and send an e-mail message through the link (located on the M2M home screen). Describe the question or problem in detail, and include a reply e-mail address (if different than the sender's), and name and telephone number of the contact person. A reply will be sent promptly.

2 M2M SYSTEM SECURITY

M2M is part of HUD's Secure Systems. Access to the system will be granted at the user level, restricted to selected OAHP HQ, Preservation Offices, HUD Intranet Guests, and PAE;s using the Internet that are acting as agents for OAHP. The M2M database contains confidential information on HUD's portfolios and program participants. To perform processing functions in the M2M system, a user must have a valid User ID and password with the necessary roles and security access. The HUD Intranet Guest user will have view-only access to the system (i.e., they will not be able to make any updates to M2M data).

2.1 M2M Security Roles and Access Levels

The M2M system has four designated Secured System groups:

1. OAHP HQ
2. Preservation Office
3. Guest
4. PAE

The OAHP HQ and Preservation Office level users have a group property assignment function that associates them to all PAEs and properties referred to the M2M system.

The Preservation Offices have more restricted access to the M2M system than the OAHP HQ user.

The Guest user has a "view only" access of the properties and the PAEs currently in the M2M system.

The PAE level has specific user property assignments for access to the system, the PAE user will be restricted to viewing and updating the properties to which they have been specifically assigned.

The M2M system reads the user's property assignments and their secured system group to provide additional security in the M2M system.

There are different levels of user access defined for the M2M system based on the user's group affiliation and property assignment is what they have access to view, make data entries or update information in the M2M system. There is an **M2M Administrator** responsible for the access permissions for the OAHP (HUD) user ids and the coordination of the PAE registration for user and coordinator ids and their permission levels.

OAHP users must fill out a form to obtain a HUD user id, then gain approval for a user id and M2M access from their supervisor and the M2M system administrator. ADP Security assigns a unique user id to all HUD staff requesting.

For PAEs, there are two roles: **Coordinator** and **User**.

For OAHP, there are two roles: **HQ** and **Preservation Office** roles.

PAE coordinators are responsible for permission levels for the users registered under their Tax ID for the M2M system access. Property assignment maintenance is the primary responsibility of the PAE Coordinator.

OAHP HQ has asset allocation rights, approval rights, and other data entry responsibilities

OAHP Preservation Office users have similar rights as the OAHP HQ users. The primary difference is the edit rights are restricted to HQ only.

The six M2M OAHP Preservation Offices (**San Francisco; New York; Chicago; Washington, DC; OAHP Transaction Center; and Centralized Closing**) have OAHP HQ as their system administrator for the M2M program. The Preservation Offices will be responsible to notify OAHP HQ of any changes in staff working on the M2M program in order to manage the access to the M2M system.

3 ACCESS TO THE M2M LOGIN SCREEN

The M2M home screen may be accessed by authorized system users through HUD's Intranet. Users must have a Secure System user ID and password. **Reminder: both the user ID and password are case-sensitive.**

3.1 Login Procedures

OAHP staff may access the M2M system through HUD's Intranet home Screen in Secure Systems or via the Internet. Access through the **Intranet** is by typing the following Intranet address: <http://hudapps.hud.gov/ssmaster>.

Each User is prompted with a request for their User ID and password. **Reminder: both the User ID and password are case-sensitive.** Click the underlined **Mark-to-Market (M2M)** link on the list of HUD System Projects.

Any User that is unsuccessful in signing onto the system after several attempts may need to have its password reset. Send a password reset request to the **System Administrator** via e-mail at: m2minfo@hud.gov. **This is not an immediate process, but will be addressed as soon as possible.** Remember to include

contact information (name, User ID, e-mail address (if different than sender's) and a brief explanation of the problem).

3.2 Log Off Procedure

Because M2M RELEASE 7.0.1 contains sensitive financial data, Users are requested to use the Log Off button  feature when exiting the system or when leaving your computer running for an extended period of time. If the log off button is **not** used, another User may be able to reopen your web browser and access system pages.

3.3 Time Out Feature

M2M RELEASE 7.0.1 has a “time-out” feature. After a period of **2 hours** of inactivity, the User will be logged off the system and must go back to the **Secure Systems** log-in page to sign-in again.

4 M2M SYSTEM HOME SCREEN

Upon authentication from the server, the following home screen appears (Figure 4-1, M2M Home Screen):



Figure 4-1, M2M Home Screen

4.1 Asset Allocation Module Button

The **Asset Allocation** button provides access for an OAHP HQ user to add or update PAEs to the M2M system, after which, the PAE may be assigned properties by a HQ user.

4.2 Critical Dates Tracking Module Button

The **Critical Dates Tracking** button provides access to the M2M properties. Within this module, OAHP Users enter critical dates data in accordance with the predetermined M2M Program timeline for **Mortgage Restructuring**, **Rent Reduction Only without Mortgage Restructuring (Rent Reduction Only)**, and **Rent Comparability Review (Comp Review)** properties.

4.3 Restructuring Plans Module Button

The **Restructuring Plans** button provides Users with access to restructuring plan forms for assigned M2M properties. Online forms are for PAEs with properties going through the **Mortgage Restructuring** (Form 5.2, Part II.B Case Memorandum Term Sheet) and the **Rent Reduction Only** (Form 10.2 OAHP Reduction of Rent and Section 8 Contract Renewal Justification) renewal options and must be submitted by the PAEs via the M2M system to OAHP.

4.4 Closing Module Button

The **Closing** button gives Users a facility for tracking and updating select restructuring plan information and to retain the actual closing figures.

4.5 Reports Module Button

The **Reports** button gives Users access to the reports in the system.

4.6 Green Retrofit Button

The **Green Retrofit** button facilitates users in retrieving properties assigned to them under the Green Retrofit portfolio and in entering critical date information relative to the retrofit process.

4.7 E-Mail Link

The M2M system provides an **E-Mail** link on the home screen for Users of the system to send any questions or comments regarding the M2M system and problems or suggestions via Netscape's Messenger's e-mail format. Please be sure to include your name, a detailed narrative (if sending a question or if there is a problem), return e-mail address (if different from the sending address), contact name, and telephone number (including area code) to receive a timely reply.

♪ **Note:** Use Your Browser's **Back** button to return to the M2M system after sending your e-mail message.

4.8 Other HUDweb sites

Other useful HUDweb sites (such as HUD's home screen) are listed at the bottom of the screen. Click on an underlined link to visit a HUD web site.

♪ **Note:** You will be exiting the M2M system if you click one of the external HUD links. Use Your Browser's **Back** button on the toolbar to return to the M2M system.

5 GENERAL INFORMATION ABOUT THE M2M PROCESS AND DATA ENTRY

M2M RELEASE 7.0.1 allows Users to input and record dates critical to the M2M Program process, to input and submit restructuring plan forms data, and to perform other functions pertinent to the M2M Program. Property and management reports summarize the status and progress for M2M Program properties in order to assist in the management of assigned portfolios.

A data entry screen is included within the **Critical Dates Tracking** module to record critical dates for each property in the M2M system. Each of these data entry screens were designed to reflect the actual dates within the execution of a M2M Program process. A M2M renewal option is one of four types:

1. **Mortgage Restructuring**—Renewal with mortgage restructuring
2. **Rent Reduction Only**—Renewal with rent reduction and no debt restructuring (also referred to as OAHP Life)
3. **Comp Review**—An owner declares its rents are below market and HUD's field office has requested a third party rent comparability review to determine market rents
4. **Post M2M Comp Review**—Mark-Up-To-Market Comp Review, A Comp Review performed after a Rent Reduction Only or Mortgage Restructuring has been completed

It is imperative that attention to detail be paid when entering data in the **Critical Dates Tracking** and the **Restructuring Plans** modules. Reports use this data to determine the progress and performance of the PAEs, Preservation Offices, and OAHP.

 **Note:** Inaccurate or incomplete data may misrepresent the progress (or lack thereof) of a property and associated contract throughout the M2M program.

Additional detailed information concerning the **Critical Dates Tracking** and **Restructuring Plans** modules may be found in **Section 7, Critical Dates Tracking Module** and in **Section 8, Restructuring Plans Module**, respectively.

6 ASSET ALLOCATION MODULE

The Asset Allocation module is accessible to OAHP and Guest Account users by selecting the **Asset Allocation** button on M2M's home screen. OAHP RO and Guest Account users will see a limited set of the functions as view only.

6.1 Asset Allocation Screen

The following screen (Figure 6-1, Asset Allocation Screen) will be returned when the Asset Allocation module button is clicked:



Figure 6-1, Asset Allocation Screen

The **Asset Allocation** screen allows access to the following functions:

- ◆ Add New PAEs
- ◆ View Existing PAEs and Assigned Portfolios
- ◆ Retrieve New Contracts from REMS
- ◆ Retrieve Contracts Referred to OAHP, but not through REMS
- ◆ Retrieve Mod/rehab Properties
- ◆ Review Assets Referred to OAHP via REMS, but not yet received
- ◆ Review Assets Received at OAHP waiting PAE Assignment
- ◆ Review M2M Assets Potentially Eligible for Mark-Up-To-Market But Not Yet Received

- ◆ Review M2M Assets Requesting Mark-Up-To-Market Received at OAHP waiting PAE Assignment
- ◆ Assigned Properties Pending C.O.I. Approval and/or Referral Receipt
- ◆ Assign/Update Portfolio Manager
- ◆ Update Rehab Escrow Account Closed Date
- ◆ Change Preservation Office
- ◆ Ineligible Properties

The buttons appear in this order to logically instruct the user to complete the addition of a PAE (if not previously added to the M2M system) before attempting to assign properties.

The left side of this page provides access to the Critical Dates Tracking, Restructuring Plans, Closing, and Reports modules by clicking the respective buttons.

6.2 Add New PAEs Screen

This is the first step in adding new PAEs into M2M. When the **Add New PAEs** button is clicked, the screen below (Figure 6-2, Select a New PAE Screen), will appear:

The screenshot shows the 'Select A New PAE' screen. The left sidebar contains the M2M logo, the date 'September 14, 2001', and buttons for 'Critical Dates Tracking', 'Restructuring Plans', 'Closing', and 'Reports'. Below these is a mailbox icon and the text 'Click on the mailbox to E-mail your comments and suggestions.' and 'User ID: C12259'. The main content area has a title 'Select A New PAE' and a subtitle 'To add a PAE to the Mark-to-Market system, enter the Tax Identification Number of the PAE below.' There is a text input field labeled 'PAE TIN #:' with 'Continue' and 'Clear' buttons below it. At the top right are 'Home', 'Back', and 'Log Off' buttons. At the bottom are links for 'HUDweb Housing', 'HUDweb Help', 'HUDweb Search', 'HUDweb Home', and 'Privacy'.

Figure 6-2, Select a New PAE Screen

The OAHP HQ user must have the **Tax ID Number (TIN)** of each PAE that will be added. The M2M administrator notifies the REMS' administrator of new PAEs

and their Tax ID numbers. The PAE and its TIN must exist in the REMS' Participant table **before** the PAE can be added to the M2M system. If an error message is returned, please recheck the TIN entered and, if necessary, contact the OAHP security administrator. Do not use a dash when entering a TIN.

When a valid REMS PAE TIN is entered, the following **Add a PAE** screen will appear (shown on the next page as Figure 6-3, Add a PAE Screen). Where applicable, existing data from the REMS system is used to populate fields. Some fields will appear blank if the information is not found in REMS. The OAHP HQ user is encouraged to complete, update and correct the M2M PAE data, whenever possible. The data used in the M2M system is what will be retained for M2M reporting and later submitted back to HUD.

The screenshot shows a web browser window with a navigation bar at the top containing buttons for 'Home', 'Back', 'Secure Systems', and 'Log Off'. The main heading is 'View/Update PAE Details'. Below the heading, there is a red instruction: 'To view this PAE's assigned properties, click [Assigned Properties](#).' The form itself is divided into several sections:

- PAE Name:** ATLANTIC CITY HOUSING AUTHORITY
- Address:** 227 N VERMONT AVE, P.O. BOX 1258
- City:** ATLANTIC CITY, **State:** NEW JERSEY (dropdown), **Zip:** 08404 - 0000
- PAE Type:** Public (dropdown, with a red 'required' label), **HFA Type:** Local (dropdown), **Jurisdiction:** NJ
- Contact Information:** Contact 1 Name, Contact 1 Phone, Contact 1 E-mail, Contact 2 Name, Contact 2 Phone, Contact 2 E-mail (all blank)
- Telephone:** (609) 344-1108, **Fax:** (blank)
- Director:** (blank), **Project Manager:** (blank), **Proj. Mgr. Email:** (blank)
- PAE Start Date:** (blank, with a red 'mm/dd/yyyy' label)
- Assigned Preservation Offices:** New York (dropdown)
- PAE Active Status:** Active (dropdown), **Cap:** 25
- Current Active Property Assignment:** 0, **Cumulative Property Assignment Number:** 0
- Comment Box:** C (input field), **GRP PAE:** (dropdown)

A 'Save Changes' button is located at the bottom center of the form.

Figure 6-3, Add a PAE Screen

After entering or updating PAE-related data, click the **Save Changes** button to save entered data.

6.2.1 Data Entry

The PAE Name field should have been automatically filled in. **Do not** change the spelling of the PAE Name.

It is mandatory that a value be chosen for the **PAE Type** field when adding a new PAE to the M2M system. The user must indicate by selecting from a drop-down box whether the entity is a **Public** or **Non-Public** PAE. If no value is chosen when an attempt is made to save data, an error message will be displayed.

6.2.2 Successful Record Addition

M2M displays a confirmation message after a new PAE is successfully added to the system. After a PAE has been added into the M2M system, it is now available to receive property assignments by OAHP HQ.

Clicking the [View Existing PAEs](#) link will take the user to the PAEs screen, where all of the PAEs in the system may be viewed and/or updated. The PAEs screen is further explained in **Section 6.3, View/Update PAEs Screen**.

6.3 View/Update PAEs Screen

After a PAE has been entered into the M2M system, the OAHP HQ user may view or update PAE-related data, as necessary.

When the [View/Update PAEs](#) button is selected, the following screen (Figure 6-4, PAEs Screen) will appear:

[Home](#) [Back](#) [Log Off](#)

PAEs

To **View/Update** PAE Details, click an underlined PAE name.

PAE Name	PAE Type (Public/ Non-Public)	Jurisdiction	PAE Status (Active/ Inactive)	Cumulative Property Assignment	Active			Cap	Assigned Regional Offices	
					Total	Full	Lite			
CHAMCO HOUSING CORPORATION	N	Test jurisdiction	A	4	4	2	1	1	3	Washington
COLORADO HOUSING FINANCE AUTHORITY	P	west	A	1	1	1	0	0	20	San Francisco
D.C. HOUSING FINANCE AGENCY	P	Testing	A	0	0	0	0	0	10	Washington
FLINT LAFAYETTE LIMITED PARTNERSHIP	P		A	0	0	0	0	0	0	New York
Florida Housing Finance Corporation	N	Southeastern	A	26	19	11	4	4	500	Washington
INTERFAITH HOUSING ENTERPRISES, L.P.	N		A	4	4	1	3	0	0	Washington
Jefferson County Assisted Housing Corporation	N	Southern US	A	57	52	25	16	11	50	Washington
MASSACHUSETTS HOUSING FINANCE AGENCY	P	Northeast	A	9	8	4	3	1	0	New York
OHFA	P		A	0	0	0	0	0	0	
OHIO HOUSING FINANCE AGENCY	N	Midwest	A	16	14	10	1	3	100	Chicago
OMHAR Transaction Center PAE	N		A	1	1	0	1	0	0	
PENNSYLVANIA HOUSING FINANCE AGENCY	P	Testing	A	32	30	17	7	6	100	
Tennessee Housing Development Agency	P	Southeast	A	0	0	0	0	0	50	Washington
WEST VIRGINIA HOUSING DEVELOPMENT FUND	N	Wash.	A	22	20	13	7	0	15	Washington

[Asset Allocation](#)

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Figure 6-4, PAEs Screen

This screen is a summary of the PAEs (in alphabetical order) currently entered in the M2M system. Assignment values on this screen are system-generated. Other PAE information is entered by the OAHP HQ user either through the **PAE View/Update PAE Details** screen or the **Add PAE** screen.

6.3.1 View/Update PAE Data

To view or update a PAE's existing data, click its underlined link and the following View/Update PAE Details screen will be returned, Figure 6-5, View/Update PAE Details Screen:

[Home](#)
[Back](#)
[Secure Systems](#)
[Log Off](#)

View/Update PAE Details

To view this PAE's assigned properties, click [Assigned Properties](#).

PAE Name: <input type="text" value="City of Indianapolis"/> Address: <input type="text" value="200 East Washington Stre"/> <input type="text" value="Suite 1841"/> City: <input type="text" value="Indianapolis"/> State: <input type="text" value="INDIANA"/> <input type="button" value="v"/> Zip: <input type="text" value="46204"/> - <input type="text" value=""/> PAE Type: <input type="text" value="Public"/> <input type="button" value="v"/> required HFA Type: <input type="text" value="Local"/> <input type="button" value="v"/> Jurisdiction: <input type="text" value="Indianapolis, IN"/> Contact 1 Name: <input type="text" value="Michael Cervay"/> Contact 1 Phone: <input type="text" value=""/> Contact 1 E-mail: <input type="text" value=""/> Contact 2 Name: <input type="text" value="George Courtney"/> Contact 2 Phone: <input type="text" value="(317) 327-5854"/> Contact 2 E-mail: <input type="text" value="gcourtne@indygov.org"/>	Telephone: <input type="text" value="(317)327-5854"/> Fax: <input type="text" value="(317)327-3980"/> Director: <input type="text" value=""/> Project Manager: <input type="text" value="George Courtney"/> Proj. Mgr. Email: <input type="text" value=""/> PAE Start Date: <input type="text" value=""/> mm/dd/yyyy Assigned Preservation Offices: <input type="text" value="Chicago"/> <input type="button" value="v"/> PAE Active Status: <input type="text" value="Active"/> <input type="button" value="v"/> Cap: <input type="text" value="0"/> Current Active Property Assignment: 0 Cumulative Property Assignment Number: 6 Comment Box: <input type="text" value="C"/> GRP PAE: <input type="text" value="No"/> <input type="button" value="v"/>
---	---

Assigned Properties

To view/update a contract's critical dates, click its underlined contract number.

Property ID	Contract Status	Property Name	Contract Number	Contract Renewal Type	Expiration Date	Property City	Property State	Unassign Property
800006555	C	BALSAM ON THE FALL CREEK	R36E000006	Full	03/27/2003	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>
800006567	C	BOLTON COURT APARTMENTS	R360061015	Full	10/31/2006	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>
800006613	C	CARAVELLE COMMONS APARTMENTS	R36M000231	Full	09/30/2009	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>
800006932	C	PARKWOOD APARTMENTS I	R360060021	Full	12/31/2004	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>
800006933	C	PARKWOOD APARTMENTS II	R360061014	Full	12/31/2004	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>
800007087	C	WEYERBACHER TERRACE APARTMENTS	R36L000013	Full	08/31/2004	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>

Figure 6-5, View/Update PAE Details Screen

This screen closely resembles the [Add New PAE](#) screen. Its purpose is to allow the OAHP HQ user the ability to update or add PAE data, as necessary. For example, if inaccurate data was previously entered or if the contact name has changed, it may be corrected or updated on this screen.

6.3.2 Assigned Properties Section

At the bottom of the View/Update PAEs screen, all of the current properties assigned to the PAE are listed in the **Assigned Properties** section. Clicking an underlined **contract number** link will take the user directly to the Critical Dates Tracking data entry screen for that property. No properties will appear unless they have been assigned (refer to **Section 6.8.3, Review Asset Received at OAHP waiting PAE Assignment**). This module is further discussed in detail in **Section 7, Critical Dates Tracking Module**. A Comment field is also available for each property.

6.3.3 Unassign Property

OAHP HQ users may unassign a property from a PAE by putting a check mark () in the **Unassigned Property** box next to each property that is to be unassigned. Once the **Save Changes** button is clicked, each property will then be available for reassignment to another PAE in the Review/Assign Assets module. This action will reduce the PAE's **Current Active Property Assignment** and the **Cumulative Property Assignment Number** counts by one for each property unassigned as well as create a history record of the action. The 'OAHP Receives Referral from Field Office' date is retained in the current critical dates to allow reassignment of the property.

6.4 Retrieve New Contracts from REMS Screen

It is important to note, that since M2M RELEASE 7.0.1 is a web-based system, users of the system may be required to reload pages or manually retrieve data in order to have current information.

At least once a day, an OAHP HQ user should retrieve new Section 8 contracts that qualify for the M2M Program from the REMS database by clicking the **Retrieve New Contracts from REMS** link (located on the **Asset Allocation** page). It may take several minutes for this process to complete. After the process has completed, a confirmation screen will appear.

From the **Retrieve New Contracts** confirmation screen, the OAHP HQ user may select the **Review Assets** button to continue. The **Review Assets Referred to OAHP via REMS, but not yet received** link (located on the **Asset Allocation** screen) will also take the User to the selection criteria for the Review Assets Referred to OAHP via REMS, but not yet received section (as illustrated in Figure 6-6, Select Search Criteria below). This facilitates a focused search of properties once contracts referred to OAHP have been retrieved.

♪ **Note:** To ensure that M2M-related properties are available for assignment on a timely basis, the **Retrieve New Contracts** button should be clicked at least once a day.

The screenshot shows the M2M web application interface. On the left is a blue sidebar with the M2M logo, the date "November 9, 2004", and several menu items: "Critical Dates Tracking", "Restructuring Plans", "Closing", and "Reports". Below these is a mailbox icon and the text "Click on the mailbox to E-mail your comments and suggestions." and "User ID: 1112222". The main content area has a header with navigation links: "Home", "Back", "Secure Systems", and "Log Off". The title is "Select Search Criteria for Reviewing Assets Referred to OAHP via REMS But Not Received". Below the title, it says "Select one of the following criteria:" followed by two input fields: "REMS ID:" and "FHA #:". Below that, it says "Or select one or more of the following options:" followed by two input fields: "Property:" and "State:". Below these are "Continue" and "Clear" buttons. At the bottom, there is a link: "Or click [HERE](#) to get ALL the properties Referred to OAHP via REMS But Not Received." and a footer with links: "HUDweb Housing | HUDweb Help | HUDweb Search | HUDweb Home | Privacy".

Figure 6-6, Select Search Criteria

Select one of the following criteria available to search for properties to be received:

- ◆ Enter a REMS ID for a specify property
- ◆ Enter a FHA Number for a specific property

Or select one or more of the following options available to search for properties to be received:

- ◆ Enter a Property's Name for a specific property
- ◆ Select a state from the drop-down list
- ◆ Click the underlined [HERE](#) link to retrieve all referred properties awaiting to be received

6.5 Retrieve Contracts Referred to OAHP, but not through REMS Screen

Clicking this link from the Asset Allocation screen will display the screen shown below, Figure 6-7, Retrieve Contract Referred to OAHP, but not through REMS. This function is for retrieving properties into M2M that have been referred to OAHP, but have not had the proper renewal option code updated in REMS. The properties may be requested by property ID number or contract number.

The screenshot shows the M2M web application interface. At the top, there are navigation buttons: Home, Back, Secure Systems, and Log Off. The main heading is "Compile List Of Contracts Referred to OAHP, but not through REMS". Below this, it says "Enter Up To 10 Property IDs And/Or Contract Numbers In The Boxes Below:". There are two input sections: "Enter Up To Ten Property IDs Below:" and "Enter Up To Ten Contract Numbers Below:". Each section contains a table with 10 numbered input boxes. At the bottom, there are "Continue" and "Clear" buttons. A footer contains links for HUDweb Housing, HUDweb Help, HUDweb Search, HUDweb Home, and Privacy.

Home Back Secure Systems Log Off

Compile List Of Contracts Referred to OAHP, but not through REMS

Enter Up To 10 Property IDs And/Or Contract Numbers In The Boxes Below:

Enter Up To Ten Property IDs Below:

1		2	
3		4	
5		6	
7		8	
9		10	

Enter Up To Ten Contract Numbers Below:

11		12	
13		14	
15		16	
17		18	
19		20	

Continue Clear

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Figure 6-7, Retrieve Contract Referred to OAHP, but not through REMS

6.6 Retrieve Mod/Rehab Properties Screen

This function allows OAHP HQ users to retrieve designated Mod/Rehab properties into M2M. The property may be selected by entering the Property Number or the FHA Number. Since these properties do not have renewal contracts, the user must enter a Contract Number and Expiration Date for tracking purposes within M2M. All currently saved mod/rehab contract numbers should be in the new format according to user defined specifications (For Example: FL001MR0001). The entry screen is shown below in Figure 6-8, Mod/Rehab Properties Screen.

Figure 6-8, Mod/Rehab Properties Screen

6.7 Retrieve Assets Referred to OAHP via REMS, but not yet received

The Retrieve Asset Referred to OAHP via REMS, but not yet received function allows OAHP HQ users to review and assign receive dates to the selected properties. The search screen is described and shown in Section 6.4 Retrieve New Contracts from REMS Screen and Figure 6-6, Select Search Criteria screen. The displayed properties are active, not assigned to a PAE, and do not have a Referral Receipt Date. The following steps direct users in making Receipt assignments:

1. Click the Add check box next to the Property ID to indicate the property is have a Referral Receipt Date
2. If desired, click the Comment Box to enter any comments
3. Enter the desired Referral Receipt Date (defaulted to current date)
4. Repeat steps 1-3 for each additional property
5. You may alternately designate the property as being Ineligible by clicking the Ineligible check box and entering a comment in the Ineligible Comment Box

- After all property selections have been made, enter your first name, middle initial, and last name in the **Enter Your Name** field

Enter Your Name:

- Click the Submit button to save the Referral Receipt Dates and/or Ineligible designations for your selections

The Referral Receipt Date for a property will not be saved by M2M unless there is a check mark in the **Add** box in addition to the OAHP HQ approver's name in the **Enter Your Name** field.

Any property that is not getting a receipt date or becoming Ineligible when the screen is saved, will be available the next time the **Retrieve Asset Referred to OAHP via REMS, but not yet received** page is retrieved (depending upon the selection criteria used). Shown below in Figure 6-9, Asset Referred to OAHP via REMS, but not yet received Screen, is a sample screen of selected properties.

Home Back Secure Systems Log Off

Review Assets Referred to OAHP via REMS But Not Received

The following 3 out of 3 properties met your LA state search criteria.

- Check the Add box () next to each property that you are adding a referral receipt date.
- Click the pop-up box next to each property ID to add any comments.
- Click the Submit button below to save your additions.

Add	Property Name	Property City	State	Sec 8 Contract Number	Referral Date	Sec 8 Contract Renewal Type	Referral Receipt Date	Indigible
<input type="checkbox"/>	DESOTO ESTATES	MANSFIELD	LA	LA480010004	09/24/1999	Full	<input type="text" value="11/09/2004"/>	<input type="checkbox"/>
<input type="checkbox"/>	OLDE SALEM VILLAGE	SHREVEPORT	LA	LA481000055	09/24/1999	Full	<input type="text" value="11/09/2004"/>	<input type="checkbox"/>
<input type="checkbox"/>	RED RIVER ESTATES	COUSHATTA	LA	LA481010001	09/24/1999	Full	<input type="text" value="11/09/2004"/>	<input type="checkbox"/>

Enter Your Name: (First name, last name)

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

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Figure 6-9, Retrieve Asset Referred to OAHP via REMS, but not yet received Screen

6.8 Review Assets Received at OAHP waiting PAE Assignment

The **Review Asset Received at OAHP waiting PAE Assignment** screen is used to review and assign properties to PAEs within the M2M system. M2M generates recommended property assignments based on predefined geographical criteria. This screen allows the OAHP HQ user the ability to:

- ◆ See the geographically recommended PAE for a property

- ◆ Choose another PAE for the property
- ◆ Review a summary of the PAE that is being considered for selection
- ◆ Review a listing of all the properties awaiting assignment in the M2M system
- ◆ Review the M2M renewal type currently entered in REMS and the option of changing it in M2M
- ◆ Utilize comment boxes to add information/comments, as needed, for each assignment
- ◆ Indicate that the property is to be Ineligible
- ◆ Indicate that the property is to be a partial assignment for a Mortgage Restructuring Plan and Rent Reduction Only.
- ◆ Selecting one of the 3 OAHP PAE (OAHP WPO – Creditvest, OAHP WPO – ONTRA, Inc., or OAHP Chicago – Heskin) shall require the property to be selected as a partial if it's a Full or Lite renewal type.

The screen is depicted below as Figure 6-10, Review/Assign Assets Screen:

Home
Back
Secure Systems
Log Off

Review / Assign Assets

The following 3 out of 3 properties met your All search criteria.

- Check the Assign box () next to each property that you are assigning to a PAE. All of the contracts associated with the property will be assigned.
- Click the pop-up box next to each property ID to add any comments.
- Click the Submit button below to save your assignments.

Assign	Property Name	Property City	State	Set 8 Contract Number	Expiration Date	Partial	Set 8 Contract Renewal Type	Preservation Office	Recommended PAE Name	Cumulative Property Assignment	Property Assignment Cap
<input type="checkbox"/>	SENIOR HERITAGE PLAZA	COLORADO SPRINGS	CO	C099T851004	10/29/2027	<input type="checkbox"/>	Full		Colorado Housing & Finance Authority	15	0
<input type="checkbox"/>	BRITTANY COURT	Gardner	KS	KS16H156001	07/31/2008	<input type="checkbox"/>	Lite		No Assigned PAE	0	0
<input type="checkbox"/>	PINE TERRACE APTS	LAWTON	OK	OK560013006	06/30/2010	<input type="checkbox"/>	Full		No Assigned PAE	0	0

Enter Your Name: (First name, last name)

Enter the Initial Assignment Date:

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

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Secure Systems | Log Off

Review / Assign Assets

The following 3 out of 3 properties met your All search criteria.

next to each property that you are assigning to a PAE. All of the contracts associated with the property will be assigned.
 > box next to each property ID to add any comments.
 n below to save your assignments.

Property City	State	Sec 8 Contract Number	Expiration Date	Partial	Sec 8 Contract Renewal Type	Preservation Office	Recommended PAE Name	Cumulative Property Assignment	Property Assignment Cap	Current Active Assignment	Indigible
COLORADO SPRINGS	CO	C099T831004	10/29/2027	<input type="checkbox"/>	Full		Colorado Housing & Finance Authority	15	0	2	<input type="checkbox"/> C
Gardner	KS	KS16H156001	07/31/2008	<input type="checkbox"/>	Lite		No Assigned PAE	0	0	0	<input type="checkbox"/> C
LAWTON	OK	OK560013006	06/30/2010	<input type="checkbox"/>	Full		No Assigned PAE	0	0	0	<input type="checkbox"/> C

Enter Your Name: (First name, last name)
 Enter the Initial Assignment Date:

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

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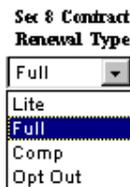
Figure 6-10, Review/Assign Assets Screen

The following steps direct users in making property assignments in the M2M system (for each property that will be assigned to a PAE):

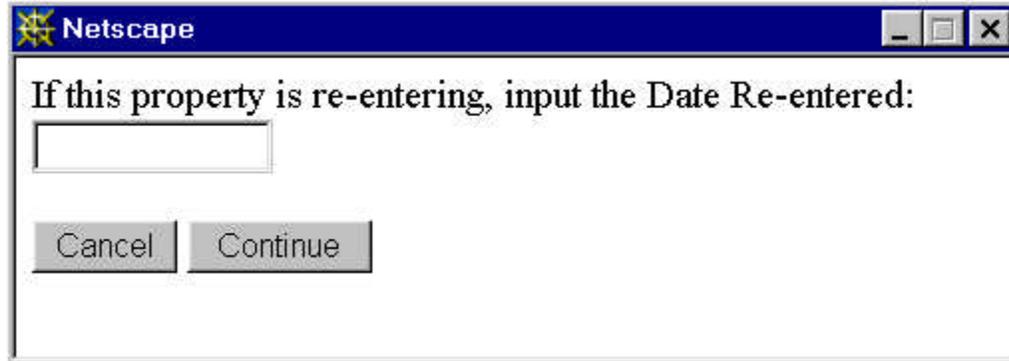
1. Review property data to ensure that it is accurate and complete

Note: Only one contract is displayed for each property. All contracts associated with the property will be assigned to the PAE with the one displayed.

2. Review the Contract Renewal Type field for the property to ensure that it is accurate. If necessary, click the drop-down box to change the renewal option (This change should only be made with the documentation from the HUD Field Office or owner verifying the renewal option).



3. A pop-up window with the text 'If this property is re-entered, input the Data Re-entered:', and an input field shall be displayed if previously approved rent reduction only (lite) is changed to a mortgage restructuring (full).



♪ **Note:** This change is only effective within the M2M system and it may be necessary to contact other representatives of other systems to correct or update data.

4. Review the Recommended PAE Name generated by M2M. If there is no recommended PAE (based on the predefined criteria), the property will have “No Assigned PAE” as its Recommended PAE Name

No Assigned PAE

If there is no recommended PAE or to select a different PAE than what was recommended, click the Recommended PAE Name button to select one from a list of PAEs. Click the Continue button to save the PAE selected from the list.

5. Click the Assign check box next to the Property ID to indicate assignment approval
6. If desired, click the Comment Box to enter any comments about the property assignment
7. If desired, click the Partial check box next to the Expiration Date to indicate the property is to be a partial assignment (for a Mortgage Restructuring Plan only)
8. Repeat steps 1-6 for each additional property assignment
9. You may alternately designate the property as being Ineligible by clicking the Ineligible check box and entering a comment in the Ineligible Comment Box
10. After all property assignments have been made, enter your first name, middle initial, and last name in the Enter Your Name field

Enter Your Name:

11. The system date is populated in the Enter Today's Date field. If necessary, it may be overwritten by the end-user with the correct initial assignment date. This is the data that populates the critical dates field for the initial assignment **Enter Today's Date:**
12. Click the Assign Assets button to make the property assignments to the PAE or to save your selections before going to the next page (by clicking the Next Page button) to make additional property assignments

The property-to-PAE assignment will not be created by M2M unless there is a check mark in the **Assign** box, values in the **Contract Renewal Type** and **Recommended PAE Name** fields (for each assigned property), in addition to the OAHP HQ approver's name in the **Enter Your Name** field.

Any property that is not assigned when the assignments are made will be available the next time the **Review/Assign Assets** page is retrieved (depending upon the selection criteria used). Assets that were accurately assigned will not be retrieved on the page (unless they are later unassigned from the PAE and consequently returned to the pool).

The system will return a confirmation screen upon a successful assignment.

6.8.2 Assignment Dated Fields

The date the property is assigned automatically populates **OAHP Initial Assignment Date** field in the **Critical Dates Tracking** module for the specific asset. The PAE must submit Conflict of Interest Form 2.2 for clearance before the Asset is Accepted by the PAE date is filled in.

The PAE has three days after the assignment by OAHP HQ to accept or decline the assignment. If the PAE declines the assignment after the property is assigned to them, the OAHP HQ user must unassign the property by going into the **View/Update PAEs** module, selecting the PAE, and entering a check mark in each **Unassigned Property** box under the **Assigned Properties** section, and saving the changes. This will make the property available for reassignment to another PAE in the **Review/Assign Assets** screen. More detail on this PAE/property unassignment may be found in **Section 6.3, View/Update PAEs Screen**.

For each property assignment, OAHP HQ should review the **Critical Dates Tracking** screen to confirm the dates and data entered for the contracts assigned to the PAEs have complete and accurate data pulled from REMS.

6.9 Review M2M Assets Potentially Eligible for Mark-Up-To-Market But Not Yet Received

This function allows OAHP HQ users to enter the Referral Receipt Date and Referral Date for multiple properties at a time instead of going through each property's Critical Dates Tracking screen. The search screen allows selecting ALL Properties Potentially Eligible for Mark-Up-To-Market, But Not Yet Received. The screen is depicted below in Figure 6-11, Review M2M Asset Potentially Eligible for Mark-Up-To-Market But Not Received Screen.

[Home](#) [Back](#) [Log Off](#)

Review M2M Assets Potentially Eligible for Mark-Up-To-Market, but not yet received

The following 4 out of 4 properties met your All search criteria.

- Check the Add box () next to each property that you are adding a referral receipt date.
- Click the Submit button below to save your additions.

Add	Property Name	Property City	State	Sec 8 Contract Number	Expiration Date	Renewal Type	Completed As	Referral Receipt Date	Referral Date
<input type="checkbox"/>	Magnolia Village	AMERICUS	GA	GA06L000006	05/31/1999	Full		<input type="text" value="12/11/2002"/>	<input type="text" value="12/11/2002"/>
<input type="checkbox"/>	CARMICHAELS ARBORES	CARMICHAELS	PA	PA280015017	08/12/1999	Full		<input type="text" value="12/11/2002"/>	<input type="text" value="12/11/2002"/>
<input type="checkbox"/>	MON VIEW HEIGHTS	WEST MIFFLIN	PA	PA28L000026	08/31/1999	Full		<input type="text" value="12/11/2002"/>	<input type="text" value="12/11/2002"/>
<input type="checkbox"/>	LAKEVIEW TERRACE APTS	CHAMBERLAIN	SD	SD99M000026	04/30/2000	Full		<input type="text" value="12/11/2002"/>	<input type="text" value="12/11/2002"/>

Enter Your Name: (First name, middle initial, last name)

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

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Figure 6-11, Review M2M Assets Potentially Eligible for Mark-Up-To-Market But Not Received Screen

To add or change the information for a property, check the Add box, enter the Referral Receipt Date and the Referral Date, your name, and click the SUBMIT button.

6.10 Review M2M Assets Requesting Mark-Up-To-Market Received at OAHP waiting PAE Assignment

This function allows OAHP HQ users to assign properties requesting Mark-up-to-Market Comp Reviews to a PAE. The search screen allows selecting ALL Properties Requesting Mark-Up-To-Market Received at OAHP waiting PAE Assignment. The screen is depicted below in Figure 6-12, Review M2M Asset Requesting Mark-Up-To-Market Received at OAHP waiting PAE Assignment Screen.

[Home](#) [Back](#) [Log Off](#)

Review / Assign Assets

The following 1 out of 1 properties met your All search criteria.

• Check the Assign box () next to each property that you are assigning to a PAE. All of the contracts associated with the property will be assigned.
 • Click the Submit button below to save your assignments.

Assign	Property Name	Property City	State	Sec 8 Contract Number	Expiration Date	Renewal Type Completed As	Regional Office	Recommended PAE Name	Cumulative Property Assignment	Property Assignment Cap	Current Active Assignment
<input type="checkbox"/>	OXFORD PLACE	PROVIDENCE	RI	RI43H023013	01/24/2000	Lite	New York	Rhode Island Housing & Mortgage FC	4	20	3

Enter Your Name: (First name, middle initial, last name)

Enter the Initial Assignment Date:

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

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Figure 6-12, Review M2M Assets Requesting Mark-Up-To-Market Received at OAHP waiting PAE Assignment Screen

To assign a property, check the **Assign Box**, select a **Preservation Office** and a **PAE**, enter **your name** and a **date**, and click the **SUBMIT** button.

6.11 Assigned Properties Pending C.O.I. Approval and/or Referral receipt

This function allows OAHP HQ users to enter the COI Approval Date and/or Referral Date for multiple properties at a time instead of going through each property's Critical Dates Tracking screen. The search screen allows selecting properties by PAE Name or ALL Properties Pending C.O.I. Approval and/or Referral Receipt. Only assigned properties that do not already have both a COI Approval Date and Referral Date are selected. The screen is depicted below in Figure 6-13, Assigned Properties Pending C.O.I. Approval and/or Referral Receipt Screen.

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Assigned Properties Pending C.O.I. Approval and/or Referral Receipt

The following 5 out of 5 properties are the result of your **Florida Housing Finance Corporation** PAE search.

Property ID	Property Name	City	State	Renewal Type	OAHF Initial Assignment Date	OAHF Receives Referral from Field Office	OAHF Approves C.O.I. Form 2.2
800003971	CARAVAN APTS	JACKSONVILLE	FL	Full	07/20/1999	09/27/1999	<input type="text"/>
800004066	EMERSON ARMS	JACKSONVILLE	FL	Lite	08/19/1999	<input type="text"/>	<input type="text"/>
800004329	OAKLAND TERRACE	JACKSONVILLE	FL	Lite	07/06/1999	11/11/1999	<input type="text"/>
800004331	OAKWOOD TERRACE I	PENSACOLA	FL	Lite	07/07/1999	<input type="text"/>	<input type="text"/>
800004524	TROPICAL MANOR APARTMENTS	MERRITT ISLAND	FL	Lite	08/19/1999	<input type="text"/>	<input type="text"/>

Enter Your Name: (First name, last name)

Before proceeding to another screen, save all changes by clicking the Save Changes button above.

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Figure 6-13, Assigned Properties Pending C.O.I. Approval and/or Referral Receipt Screen

To add or change the information for a property, enter the Referral Receipt Date and/or COI Approval Date, your name, and click the Save Changes button.

6.12 Assign/Update Portfolio Manager

This function allows OAHP HQ users to assign or update the Portfolio Manager for the selected properties. The search screen allows selecting properties by REMS ID, FHA Number, Property Name, State, PAE Name, Portfolio Manager, Closing Date, Assignment Status or ALL Assigned Properties. The Search screen is depicted below in Figure 6-14-1, Select Search Criteria for Assign/Update Portfolio Manager Screen. The Portfolio Manager screen is depicted below in Figure 6-14-2, Assign/Update Portfolio Manager Screen. Removing or changing the Portfolio Manager of a property will generate a history record of the action.

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Select Search Criteria for Assign/Update Portfolio Manager

Select one of the following criteria:

REMS ID:

FHA #:

Or select one or more of the following options:

Property:

State:

Portfolio Manager:

Closing Date:

Assignment Status:

Or click [HERE](#) to get ALL properties.

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Figure 6-14-1, Select Search Criteria for Assign/Update Portfolio Manager Screen

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Assign/Update Portfolio Manager Of Assigned Properties

The following is the result of your 800000093 property search.

Enter all dates in mm/dd/yyyy format.
 Enter Date Unassigned before you reassign a new portfolio manager.
 To assign/reassign Portfolio Manager, enter manager's name first. Then enter Date Assigned.
 Click the Save Changes button to save all updates/changes.

PAEName	Status	Property			Portfolio			New Portfolio		
		ID	Property Name	City	State	Manager Name	Date Assigned	Date Unassigned	Manager Name	Date Assigned
ONTRA, Inc.	C	800000093	EXECUTIVE ESTATES	FAIRBANKS	AK	R.E.R., Inc.	11/19/2003	<input type="text"/>	<input type="text"/>	<input type="text"/>

Before proceeding to another screen, save all changes by clicking the Save Changes button above.

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Figure 6-14-2, Assign/Update Portfolio Manager Screen

To assign/change the Portfolio Manager for a property, select from the drop down options.

6.13 Update Rehab Escrow Account Closed Date

This function allows OAHP HQ users to update the Rehab Escrow Account Closed Date for the selected properties. The search screen allows selecting properties by REMS ID, FHA Number, Property Name, State, Closing Date, Rehab Escrow Account Status or ALL Assigned Properties. The Search screen is depicted below in Figure 6-15-1, Select Search Criteria for Update Rehab Escrow Account Closed Date Screen. The Update Rehab Escrow Account Closed Date Screen is depicted below in Figure 6-15-2, Update Rehab Escrow Account Closed Date Screen. Removing or changing the Portfolio Manager of a property will generate a history record of the action.

Figure 6-15-1, Select Search Criteria for Update Rehab Escrow Account Closed Date Screen

PAE Name	Status	Property ID	Property Name	City	State	Rehab Escrow Account Closed Date
ONTRA, Inc.	C	800000083	AYALPEK APARTMENTS	BETHEL	AK	<input type="text"/>

Figure 6-15-2, Update Rehab Escrow Account Closed Date Screen

To Update Rehab Escrow Account Closed Date for a property, enter the Rehab Escrow Account Closed Date in mm/dd/yyyy format, and click the **Save Changes** button.

6.14 Change Preservation Office Screen

This function allows OAHP HQ users to change the assigned Preservation Office for the selected properties. The search screen allows selecting properties by State, PAE Name, Property ID, or ALL Assigned Properties. The screen is depicted below in Figure 6-16, Change Preservation Office Screen. Changing the Preservation Office of a property will generate a history record of the action.

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Preservation Office Changes Of Assigned Properties

The following 5 out of 5 properties met your MASSACHUSETTS HOUSING FINANCE AGENCY PAE search criteria.

Status	Property ID	Property Name	City	State	Renewal Type	Preservation Office
A	800008520	GRANITE PLACE	QUINCY	MA	Full	Centralized Closing
A	800008606	JUDSON HOUSE	HAVERTHILL	MA	Comp	New York
A	800008744	OLDE ENGLISH VILLAGE	GARDNER	MA	Lite	New York
A	800008749	ORANGE APARTMENTS	SPRINGFIELD	MA	Lite	New York
A	800008918	TANNERY II	PEABODY	MA	Lite	New York

Preservation Office Change
 Date:
 (mm/dd/yyyy)

Before proceeding to another screen, save all changes by clicking the Save Changes button above.

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Figure 6-16, Change Preservation Office Screen

To change the Preservation Office for a property, select from the drop down options,



enter the **Change Date** (defaulted to current date), and click the **Save Changes** button.

6.15 Ineligible Properties Screen

This function allows OAHF HQ users to reactivate properties that have been designated as Ineligible. The search screen allows selecting properties by State, Property ID, or ALL Ineligible Properties. The screen is depicted below in Figure 6-17, Ineligible Properties Screen.

[Home](#) [Back](#) [Log Off](#)

Ineligible Properties

The following **5** out of **5** properties met your **KS** state search criteria.

Property ID	Property Name	City	State	Date Selected As Ineligible	Comments	Reactivate Ineligible Property
800007194	DALE APARTMENTS	COFFEYVILLE	KS	11/06/2000	Allan Bird Property	<input type="checkbox"/>
800007254	HILLSIDE TERRACE APTS	PRATT	KS	04/25/2001	Mark Up to Market - according to REIMS	<input type="checkbox"/>
800007262	JESSE COUP APTS	HOPE	KS	11/08/2000	demo	<input type="checkbox"/>
800007329	Osage Trails/Westgate Homes	PARSONS	KS	11/15/2000	Allan Bird property, HUD Hub performing the RCS	<input type="checkbox"/>
800007356	PLAZA APARTMENTS	COFFEYVILLE	KS	11/06/2000	Allan Bird Property	<input type="checkbox"/>

Enter Your Name: (First name, middle initial, last name)
Enter Eligibility Date:

Before proceeding to another screen, save all changes by clicking the Save Changes button.

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |

Figure 6-17, Ineligible Properties Screen

To reactivate a property, click the **checkbox** for the desired properties, enter your **name**, the **Eligibility Date** (defaulted to current date), and click the **Save Changes** button.

7 CRITICAL DATES TRACKING MODULE

The Critical Dates Tracking module is accessed by clicking the **Critical Dates Tracking** button on M2M's home screen. Within the Critical Dates Tracking module, OHAP users may enter and modify critical date fields and their associated comments, view any associated history information, change the renewal type (HQ only), and end the M2M process.

Clicking **Critical Dates Tracking** button retrieves a search selection criteria page, similar to other search criteria screens, as shown below in Figure 7-1, Search Criteria for Critical Dates Tracking Screen.

Figure 7-1, Search Criteria for Critical Dates Tracking Screen

Select one of the following criteria available to retrieve properties for the **Critical Dates Tracking** module:

- ◆ Enter a REMS ID for a specify property
- ◆ Enter a FHA Number for a specific property

Or select one or more of the following options available to retrieve properties for the **Critical Dates Tracking** module:

- ◆ Select a **State** from the drop-down list
- ◆ Select a **PAE** from the drop-down list
- ◆ Select a **Deb Restructuring Specialist** from the drop-down list
- ◆ Enter a Property's Name for a specific property
- ◆ Select a Property's **Status** (Active or Completed)

- ◆ Select a **Renewal Type** (Mortgage Restructuring, Rent Reduction only, Comp Review or Post M2M Comp Review)
- ◆ Click the underlined **HERE** link to retrieve all properties in the system

7.1 Assigned Properties Screen

The **Assigned Properties** screen (shown below as Figure 7-2, Assigned Properties) will be returned once the search is performed (based on the criteria on the Select Search page).

The screenshot shows a web interface for 'Assigned Properties'. At the top, there are three buttons: 'Home', 'Back', and 'Log Off'. Below them is the title 'Assigned Properties' and a message: 'The following 2 out of 2 properties met your Active, Mortgage Restructuring search criteria.' A note says: 'To view/update a contract's critical dates, click its underlined Contract Number.' Below this is a table with columns: Status, Property Name, Sec 8 Contract Number, Sec 8 Contract Renewal Type, Expiration Date, Property City, and State. The table contains two rows of data. At the bottom, there is a footer with links: '| HUDweb Housing | HUDweb Help | HUDweb Search | HUDweb Home | Privacy |'.

Status	Property Name	Sec 8 Contract Number	Sec 8 Contract Renewal Type	Expiration Date	Property City	State
A	MT VERNON PLAZA II	OH160001001	Mortgage Restructuring	09/13/1999	COLUMBUS	OH
A	SKYLINE TERRACE	OH12M000095	Mortgage Restructuring	06/30/1999	CANTON	OH

Figure 7-2, Assigned Properties

All of the assigned properties that have a renewal option will be displayed (based on the criteria used to select property) and have a link to a **Critical Dates Tracking** form.

7.2 Contract Number Link

The **Assigned Properties** screen displays all assigned properties and pertinent information. It also contains the highlighted **contract number** ^{Contract Number} [FL29M000113](#) as a link to access the **Critical Dates Tracking** form to enter or view the critical dates. The contract highlighted will be the first expiring contract for the property. The resulting screen is the **Critical Dates Tracking** screen (discussed in the next section).

7.3 Critical Dates Tracking Screen

After a contract link is selected, a Critical Dates Tracking screen is retrieved (based on the property's M2M renewal option type). Figure 7-3, Mortgage Restructuring Critical Dates Screen, on the next page, provides an example of a Critical Dates Tracking screen for a property with a Mortgage Restructuring renewal option. The **Critical Dates Tracking** screens vary depending upon the M2M renewal type.

Figure 7-3-1, Mortgage Restructuring Critical Dates Screen (Partial), on the following page provides an example of a Critical Dates Tracking screen for a property designated as a partial assignment. HQ users may check the steps that need to be performed by the PAE and also enter a due date for selected steps. Only the steps that are checked or have a due date will be displayed to the PAE. Preservation Office users may input due dates, but cannot select any of the other steps.

Figure 7-3-2, Rent Reduction only Critical Dates Screen, on the next page, provides an example of a Critical Dates Tracking screen for a property with a Rent Reduction only renewal option.

Figure 7-3-3, Rent Reduction only Critical Dates Screen (Partial), on the following page provides an example of a Critical Dates Tracking screen for a property designated as a partial assignment. HQ users may check the steps that need to be performed by the PAE and also enter a due date for selected steps. Only the steps that are checked or have a due date will be displayed to the PAE. Preservation Office users may input due dates, but cannot select any of the other steps.

Figure 7-3-4, Post M2M Comp Review Critical Dates Screen, on the following page provides an example of a Critical Dates Tracking screen for a property designated as a Mark-Up-To-Market Comp Review assignment.

Critical Dates Tracking

HERMES Property ID: 30000012 Property Name: SHADOW PINE APARTMENTS
 Primary FBA Number: 1114897 FAE Name: DPTFA, Inc.
 Owner/Owner: A232800001 Renewal Type: Mortgage Restructuring
 Preservation Office: Washington
 HED Project Manager: JEROME B HILLY
 FAE Project Manager: [Blank]
 Due Assigned: [Blank]

Date Restructuring Specialist: JEFFREY J DUBOCH
 OAHF FAE Endorsement: [Blank]

To view previous FAE or Critical Dates for previous renewal type or previous FAE Manager, click on [Previous Critical Dates](#) button.
 To view or update the OAHF comments log, click on the [OAHF Comments Log](#) button.
[OAHF Comments Log](#)

Phase	Start/End	Assignment to FAE	Due Date	Underway	Item Approval	Change	Post-Closing
Phase 1	01	05	05	05	05	05	05

There are 137 days left until the Critical Dates contract expires. This contract is currently in the **Change** and **Post-Closing** phase.

Original Extension Expiration Date (Post M2MRA): [Blank]
 Change Section 5 Expiration Date: 11/30/2011
 Field Office Review Status to Review Date Owner: [Blank]
 Field Office Review to OAHF: [Blank]
 OAHF Review Status Date, Field Office: 08/01/2009

Phase: Assignments/Assessments

OAHF Sends List of Potential Awards: 08/24/2009
 OAHF Approves/Declines Plan 3.2: 08/25/2009
 FAE Accepts Assignment: 08/01/2009
 FAE's Estimated Restructuring Plan (Form 3.2) Submission Date: [Blank]
 Amended FRA Milestone Date Per 2.13 Waiver: 12/18/2010
 OAHF Plan or Property On Hold: [Blank]
 Assigned to the Bank Renewal Date: [Blank]
 OAHF Reviews Property Plan/On Hold: [Blank]

Phase: Data Collection/Date Expenses

Data Collection:
 FAE and Owner Have Kickoff Meeting: 07/06/2010
 FCA Assigned by FAE: 08/11/2009
 FAE Sends Documents to Review: [Blank]
 OAHF Returns Documents for Review: [Blank]
 FAE Resubmits Documents: [Blank]
 OAHF Approves/FCA: [Blank]
 Approval Assigned by FAE: 09/11/2009
 Team Meeting - All: 10/29/2009
 Owner Submits Data Collection Report: 09/22/2010
 Due Expenses:
 FAE/FCA Complete: 11/03/2009
 FAE/FCA Approval Complete: 10/12/2010
 FAE Complete Date Expenses: 08/22/2010
 Title Bring Down Complete: [Blank]
 Title Bring Down Executed: [Blank]

Phase: Documenting/Restructuring Plan

Travel Meeting - All: [Blank]
 Submit FAE Restructuring Plan Submission to OAHF: [Blank]
 FAE Submits Restructuring Plan to OAHF: [Blank]
 OAHF Reviews Complete Restructuring Plan and Form 3.2: [Blank]
 Date Assigned to Underwrite: [Blank]

Phase: Loan Funding/Approval Process

OAHF Approves Restructuring Plan: [Blank]
 OAHF Returns Restructuring Plan to FAE for Review: [Blank]
 OAHF Returns FAE's Submission: [Blank]
 Number of Restructuring: [Blank]
 Restructuring Plan Approved by OAHF: [Blank]
 Restructuring Commitment Executed by Owner: [Blank]

M2M Close Indicators:

Declared Owner:
 Level 1 Owner:
 Level 2 Owner:
 Closing Issues:
 Additional Funds:
 Broad Pawning Existing Lines:
 JAGSP:
 TPA:
 Corp:
 QRP Data Ref:
 Other Issues:
 Mail Ref:
 Banking:
 Awaiting OAHF Policy:
 Other:

Phase: Closing and Post-Closing

Closing:
 OAHF approved 4.11 or 4.12: [Blank]
 Scheduled Closing Date: [Blank]
 Closing Date: [Blank]
 New Extended Contract Effective Date: 12/01/2010
 Section 5 Closure Type: [Blank]

Post-Closing:
 Closing Documents Distributed by FAE: [Blank]
 Transactions Made subsequent to Monthly Closing: [Blank]
 Monthly scheduled meeting was necessary:
 Initial Review Approval: [Blank]

Date Action/Owner Has Closing Document (This date will be the application was mailed or per FBA Output): 11/18/2010

One Option Selected Below
 OAHF Approves Restructuring Plan in the Feasible Plan or Feasibility Plan Value
 Owner Provides FRA, Section 5 and FAE must enter new market rates into Form 3.2
 Ineligible for OAHF "Final Owner" Determination
 Ineligible for OAHF - Final before re-apply to Market
 Ineligible for OAHF - Credit Review/Status/Loan Pawning Documents and Restructuring Plan
 Ineligible for OAHF or Other Outside Determination of status 4-10
 Determined Owner is Unreliable - FAE Does Not Issue Restructuring Commitment
 Restructuring Commitment Issued But Not Extended to Owner (FAE must enter new market rates into Form 3.2)
 Owner Open to Other Programs
 The hidden options, if selected, will automatically update the "Watchlist as EED" once the "End M2M Process" button is selected.

OAHF Closed Test:
 FAE Closed Test:

[Restructuring Plan](#) Click here to go to Restructuring Plan for Form 3.2
[Go to Items](#) Click here to enter/publish the Act for Dates
[End M2M Process](#) Click here to complete the M2M process
[Change Renewal Type](#) Click here to change the M2M Renewal Type (Approved Form 2.10 Required)

[Go Back to Select Search Criteria for Critical Dates Tracking Screen](#)

Figure 7-3, Mortgage Restructuring Critical Dates Screen

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Back
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Critical Dates Tracking

HEREMS Property ID: 80000142
Primary FHA Number: 06233361
Contract Number: ALD90022063
Preservation Office: Chicago
HUD Project Manager:

Property Name: ANOEL APARTMENTS
PAE Name: Jefferson County Assisted Housing Corp.
Renewal Type: Rent Reduction Only

Debt Restructuring Specialist: PATRICIA AMERSON
OAHP/PAE Underwriter: NANCY J RICHARDS

To view previous PAE or Critical Dates for previous renewal type or previous Portfolio Manager, click on Historical Data link below:
[Historical Data](#)

Previously Assigned PAE: Jefferson County Assisted Housing Corp.
Previous Renewal Type: Mortgage Restructuring
Previous Preservation Office: Washington

To view or update the OAHP comments log, click on the OAHP Comment Log link below:
[OAHP Comment Log](#)

There are **-1398** days left until this Section 8 contract expires. If there was a successful appeal from the owner, click here to: [Update the Rents](#)

This contract is currently in the **Assignment/Assessment** phase.

Enter all dates in mm/dd/yyyy format
Click the Save button near the bottom of this screen to save all updates/changes

Original Section 8 Expiration Date (Per MAHRA):	01/06/2002	
Current Section 8 Expiration Date:	09/30/2004	<input type="button" value="C"/>
Field Office Receives Request for Rent Reduction from Owner:	10/07/2003	
Field Office Refers to OAHP:		
OAHP Receives Referral from Field Office:		

Phase: Assignment/Assessment

OAHP Sends List of Potential Assets:	08/29/2001	
OAHP Approves COI Form 2.2:		
PAE Accepts Assignment:		<input type="button" value="Save and Continue"/>
PAE's estimated Recommendation (Form 10.2) Submission Date:		<input type="button" value="C"/>
Tier 1 Incentive Due Date (Per PRA):		<input type="button" value="C"/>
Amended Tier 1 Incentive Due Date:		<input type="button" value="C"/>
Amended Tier 1 Due Date (Per Rel. Mgr.):		<input type="button" value="C"/>
Tier 2 Incentive Due Date (Per PRA):		<input type="button" value="C"/>
Amended Tier 2 Incentive Due Date:		<input type="button" value="C"/>
Amended Tier 2 Due Date (Per Rel. Mgr.):		<input type="button" value="C"/>
OAHP Places Property On Hold:		<input type="button" value="C"/>
Anticipated On Hold Removal Date:		<input type="button" value="C"/>
OAHP Removes Property From On Hold:		<input type="button" value="C"/>

Phase: Rent Reduction Determination

Tenant Notice Sent:		<input type="button" value="C"/>
PCA Assigned by PAE:		<input type="button" value="C"/>
Appraisal Assigned by PAE:		<input type="button" value="C"/>
PAE's PCA Complete:		<input type="button" value="C"/>
PAE's Appraisal Complete:		<input type="button" value="C"/>
Initial PAE Restructuring Plan Submission to OAHP:		<input type="button" value="C"/>
PAE Submits Justification for Recommendation (Form 10.2):		<input type="button" value="C"/>
OAHP Receives Complete PAE Justification (Form 10.2) Submission:		<input type="button" value="C"/>
OAHP Approves PAE 'Lite' Recommendation:		<input type="button" value="C"/>
OAHP Notifies HUD Project Manager:		<input type="button" value="C"/>
PAE Sends New Sec. 8 Contract to Owner and Notifies HUD Project Manager:		<input type="button" value="C"/>
PAE Receives Copy of Owner's Signed Sec. 8 Contract:		<input type="button" value="C"/>

Status of Miscellaneous Items

PAE Notifies Owner of Recommendation to Convert to Mortgage Restructuring:		<input type="button" value="C"/>
OAHP Approves Tier 2 Conversion (Form 2.16):		<input type="button" value="C"/>
OAHP Returns Submission to PAE for Revision:		<input type="button" value="C"/>
OAHP Receives PAE Resubmission:		<input type="button" value="C"/>
Number of Resubmissions:	0	
New Section 8 Contract Effective Date:		<input type="button" value="C"/>
Section 8 Contract Type:		<input type="button" value="C"/>

Clear Option Selected Below
 Renew as Tier 1
 Renew as Tier 2
 Watchlist - Ineligible, Recommended Conversion to Full
 Not to Renew
 Ineligible for Mark-to-Market - Rents below or equal to Market
 Ineligible for Mark-to-Market - Other
 Owner Opt's Out of Section 8 Program

OAHP Comment Text:

FAP Comment Text:

Click here to go to Restructuring Plan for Form 10.2.
 Click here if completed the M2M program.
 Click here to change the M2M Renewal Type. (Approved Form 2.16 Required)

Figure 7-3-2, Rent Reduction Only Critical Dates Screen

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Critical Dates Tracking (Partial)

HEREMS Property ID: 80006288
Primary FHA Number: 07135436
Contract Number: IL06A001002
Preservation Office: Chicago
HUD Project Manager: KEN JONES
Debt Restructuring Specialist: F. DENNISON SHAW, JR.
OAHF/PAE Underwriter:

Property Name: ROOSEVELT INDEPENDENCE
PAE Name: Heskin Signet Partnership
Renewal Type: Rent Reduction Only

To view previous PAE or Critical Dates for previous renewal type or previous Portfolio Manager, click on Historical Data link below:

Historical Data
 Previously Assigned PAE: City of Chicago Department of Housing
 Previous Renewal Type: Mortgage Restructuring

To view or update the OAHF comments log, click on the OAHF Comment Log link below:

OAHF Comment Log

There are **-576** days left until this Section 8 contract expires.
 This contract is currently in the **Rent Reduction Determination** phase.

If there was a successful appeal from the owner, click here to:

Enter all dates in mm/dd/yyyy format. Click the **Save** button near the bottom of this screen to save all updates/changes.

Original Section 8 Expiration Date (Post MAHRA):

Current Section 8 Expiration Date: 12/31/2006

Field Office Receives Request for Rent Reduction from Owner: 08/30/2006

Field Office Refers to OAHF:

OAHF Receives Referral from Field Office:

Phase: Assignment/Assessment

OAHF Sends List of Potential Assets: 12/13/2005

OAHF Approves COI Form 2.2:

PAE Accepts Assignment: 01/02/2006

PAE's estimated Recommendation (Form 10.2) Submission Date: 03/17/2006

OAHF Places Property On Hold: 01/17/2006

Anticipated On Hold Removal Date: 02/01/2006

OAHF Removes Property From On Hold:

Phase: Rent Reduction Determination	Due/Select	Actual	
Tenant Notice Sent:	<input checked="" type="checkbox"/>	04/01/2006	<input type="button" value="C"/>
PCA Assigned by PAE:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="button" value="C"/>
Appraisal Assigned by PAE:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="button" value="C"/>
PAE's PCA Complete:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="button" value="C"/>
PAE's Appraisal Complete:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="button" value="C"/>

OAHF Comment Text:

PAE Comment Text:

Restructuring Plan

Click here to go to Restructuring Plan for Form 10.2.

End M2M Process

Click here if completed the M2M program.

Change Renewal Type

Click here to change the M2M Renewal Type. (Approved Form 2.16 Required)

Go Back To Select Search Criteria for Critical Dates Tracking Screen

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Figure 7-3-3, Rent Reduction Only Critical Dates Screen (Partial)

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Critical Dates Tracking

HEREMS Property ID: 80000254

Primary FHA Number: 06244041

Contract Number: FL120MR2345

Preservation Office: New York

HUD Project Manager: PAT ALLEN

Debt Restructuring Specialist:

Property Name: FAIRLANE MEADOWS

PAE Name: VENCOR, INC.

Renewal Type: Post M2M Comp Review

To view or update the OAHF comments log, click on the OAHF Comment Log link below:
[OAHF Comment Log](#)

There are **-1148** days left until this Section 8 contract expires.
 This contract is currently in the **Assignment/Assessment** phase.

Enter all dates in **mm/dd/yyyy** format.
 Click the **Save** button near the bottom of this screen to save all updates/changes.

Original Section 8 Expiration Date (Post MAHRA):			
Current Section 8 Expiration Date:	09/18/2001	<input type="button" value="C"/>	Mod Rehab
Field Office Receives Intent to Renew from Owner:			
Field Office Refers to OAHF:	<input type="text" value="02/18/2004"/>		
OAHF Receives Referral from Field Office:	<input type="text" value="02/18/2004"/>		

Phase: Assignment/Assessment

OAHF Sends List of Potential Assets:	02/18/2004		
OAHF Approves COI Form 2.2:	<input type="text"/>		
P AE Accepts Assignment:	<input type="text"/>		
P AE's estimated Comp Review submission Date:	<input type="text"/>	<input type="button" value="C"/>	
Complete Comp Review Due (per PRA):			
Amended Due Date (Per Rel. Mgr.):	<input type="text"/>	<input type="button" value="C"/>	

Phase: Comparability Review

P AE Submits Review Results to OAHF:	<input type="text"/>	<input type="button" value="C"/>	
OAHF Approves Review Results:	<input type="text"/>	<input type="button" value="C"/>	
OAHF Returns Review Results to P AE for Revision:	<input type="text"/>	<input type="button" value="C"/>	
P AE Notifies HUD Field Office:	<input type="text"/>	<input type="button" value="C"/>	
OAHF Receives Complete Comp Review:	<input type="text"/>	<input type="button" value="C"/>	
OAHF Receives P AE Resubmission:	<input type="text"/>	<input type="button" value="C"/>	
Number of Resubmissions:	<input type="text" value="0"/>		

Approved Review Results:

Review in Process

Section 8 Contract Rent Over Market

Section 8 Contract Rent Equal/Under Market

Click to enter / update comp review results.

OAHF Comment Text:

P AE Comment Text:

Click here if completed the M2M program.

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#)

Figure 7-3-4, Post M2M Comp Review Critical Dates Screen

7.3.1 Historical Data Display

If there is any historical data for a property, a link and previous values will appear near the top of the Critical Dates Tracking screen as show below in Figure 7-4, History Notice.

The screenshot shows a web interface titled "Critical Dates Tracking". At the top, there are navigation buttons: Home, Back, Secure Systems, and Log Off. Below these, the title "Critical Dates Tracking" is centered. The main content area is divided into two columns of information:

- Left Column:**
 - HEREMS Property ID: 800000170
 - Primary FHA Number: 06235213
 - Contract Number: AL090015023
 - Preservation Office: Washington
 - HUD Project Manager: SARAH RICHEY
 - Debt Restructuring Specialist: [Dropdown menu]
- Right Column:**
 - Property Name: BRADLEY PARK
 - PAE Name: Jefferson County Assisted Housing Corp.
 - Renewal Type: Mortgage Restructuring
 - Portfolio Manager:
 - Date Assigned:
 - Re-entered: [Text input field]

Below the information, there is a link: "To view previous PAE or Critical Dates for previous renewal type or previous Portfolio Manager, click on Historical Data link below:". Underneath this link is a red text link labeled "Historical Data". At the bottom of the screen, it says "Previous Renewal Type: Mortgage Restructuring".

Figure 7-4, History Notice

To see a summary of the historical actions, click the **Historical Data** link to display the Historical Data screen as shown in Figure 7-5, Historical Data Summary Screen.

The screenshot shows a screen titled "Historical Data for Property # 800000000 EXECUTIVE ESTATES". Below the title, there is a link: "To view previous critical date detail, click on Renewal Type or PAE unassignment or Reactivation or Portfolio Manager link(s) below:". Below this link is a table with the following data:

Changed Information	From	To	On	By
Regional Office	San Francisco	OMHAR Transaction Center	05/09/2001	H14141
Regional Office	OMHAR Transaction Center	Washington	03/12/2003	C19725
Portfolio Manager	R.E.R., Inc.		11/18/2003	C12258

Figure 7-5, Historical Data Summary Screen

The Critical Date Detail, saved at the time the action was performed, can be viewed by clicking the **Renewal Type** or **PAE unassignment** or **Reactivation** links. Shown below, in Figure 7-6, Historical Critical Date Detail Screen, is a sample display. Clicking the **Portfolio Manager** link will display a popup window showing the date the indicated portfolio manager was assigned.

[Back](#) [Print](#)

Saved Critical Dates

HEREMS Property ID: 80000199	Property Name: CLAIBORNE ARMS APTS
Primary FHA Number: 06235323	PAE Name: Jefferson County Assisted Housing Corp.
Contract Number: AL090021022	Renewal Type: Mortgage Restructuring
Preservation Office: Washington	
Debt Restructuring Specialist:	Re-entered:
OAHP/PAE Underwriter:	

Original Section 8 Expiration Date (Post MAHRA):
Current Section 8 Expiration Date: 10/31/2006
Field Office Receives Intent to Renew from Owner: 07/14/2004
Field Office Refers to OAHP: 07/22/2004
OAHP Receives Referral from Field Office: 08/06/2004

Assignment/Assessment

OAHP Sends List of Potential Assets: 08/30/2004
 OAHP Approves COI Form 2.2:
 PAE Accepts Assignment:
 PAE's estimated Restructuring Plan (Form 5.2) Submission Date:
 Amended PRA Milestone Date Per 2.15 Waiver:
 Reason:
 OAHP Places Property On Hold:
 Anticipated On Hold Removal Date:
 OAHP Removes Property From On Hold:

Data Collection/Due Diligence

PAE and Owner Have Kickoff Meeting:
 PCA Assigned by PAE:
 Appraisal Assigned by PAE:
 Tenant Meeting - #1:
 Owner Submits Data Collection Report:
 PAE's PCA Complete:
 PAE's Appraisal Complete:
 PAE Completes Due Diligence:
 Title Bring Down Order:
 Title Bring Down Received:

Underwriting/Restructuring Plan

Tenant Meeting - #2:
 PAE Submits Restructuring Plan to OAHP:
 OAHP Receives Complete Restructuring Plan and Form 5.2:
 Date Assigned to Underwriter:
 Reviewer: FA Staff
 No

Loan Funding/Approval Process

OAHP Approves Restructuring Plan:
 OAHP Returns Restructuring Plan to PAE for Revision:
 OAHP Receives PAE resubmission:
 Number of Resubmissions: 0
 Restructuring Plan Executed by OAHP:
 Restructuring Commitment Executed by Owner:
 M2M Green Initiative:
 Closing Issues:
 Other Issues:

Closing and Post Closing

OAHP approved 4.11 or 4.12:
 Scheduled Closing Date:
 Closing Date:
 New Section 8 Contract Effective Date:
 Section 8 Contract Type:
 Closing Documents Distributed by PAE:
 Transmission Memo submitted to Multifamily Housing:
 Rehab Escrow Account Closed:
 Multifamily indicated no meeting was necessary:

Date Action Other than Closing Occurred:

OAHP Comment:

PAE Comment:

Figure 7-6, Historical Critical Date Detail Screen

7.3.2 OAHP Comment Log

If there is any OAHP Comment Log for a property, a link will appear near the top of the Critical Dates Tracking screen as show below in Figure 7-5, OAHP Comment Log Notice.

The screenshot shows the 'Critical Dates Tracking' interface. At the top, there are navigation buttons: Home, Back, Secure Systems, and Log Off. The main content area is titled 'Critical Dates Tracking' and contains property details for 'BRADLEY PARK'. The details are split into two columns:

- Left Column:**
 - HEREMS Property ID: 800000170
 - Primary FHA Number: 06235213
 - Contract Number: AL090015023
 - Preservation Office: Washington
 - HUD Project Manager: SARAH RICHEY
 - Debt Restructuring Specialist: [Dropdown menu]
- Right Column:**
 - Property Name: BRADLEY PARK
 - PAE Name: Jefferson County Assisted Housing Corp.
 - Renewal Type: Mortgage Restructuring
 - Portfolio Manager:
 - Date Assigned:
 - Re-entered: [Text input field]

Below the details, there is a link: 'To view previous PAE or Critical Dates for previous renewal type or previous Portfolio Manager, click on Historical Data link below:'. Underneath is a link labeled 'Historical Data'. Further down, it says 'Previous Renewal Type: Mortgage Restructuring' and 'To view or update the OAHP comments log, click on the OAHP Comment Log link below:'. At the bottom of this section is a link labeled 'OAHP Comment Log'.

Figure 7-7, OAHP Comment Log Notice

To see a list of the OAHP Comments Log, click the **OAHP Comment Log** link to display the OAHP Comment Log screen as shown in Figure 7-8, OAHP Comment Log Screen.

The screenshot shows the 'Comment Log for Property # 800003910 ATLANTIC ARMS EAST APARTMENTS' screen. At the top, there are navigation buttons: Home, Back, Secure Systems, and Log Off. Below the title, there is a horizontal line. Underneath, there are instructions: 'To add a new comment, scroll down to the empty comment box. To update an existing comment, click its underlined Date. To delete an existing comment, click its underlined Date, then remove comments from the comment box and click the Save button.'

Date	User	Comment
<u>Mar 24 2003 4:00PM</u>	LING-JANE LIN	testing

Below the table, there is a section titled 'Add/Edit a comment' with a large text input area. At the bottom of this section are 'Cancel' and 'Save' buttons. At the very bottom of the screen is a button labeled 'Go Back To Critical Dates Tracking Screen'.

Figure 7-8, OAHP Comment Log screen

7.3.3 Critical Dates Data Entry

All **Critical Dates** data entry boxes applicable to the PAE or OAHP User may be entered or updated by the OAHP HQ users. The OAHP RO Users may enter or update the critical date fields applicable to OAHP, but only have the ability to **read** the data the PAE entered. The same holds true in reverse for the PAE User, i.e., PAEs may only **read** OAHP fields, but not enter or update them.

The following Mortgage Restructuring, Rent Reduction Only, and Comparability Review critical date fields are system-generated and therefore cannot be edited by Users: **Original Section 8 Expiration Date (Post MAHRA), Current Section 8 Expiration Date, Field Office Receives Intent to Renew from Owner, Field Office Receives Request for Rent Reduction from Owner, Field Office Refers to OAHP, OAHP Sends List of Potential Assets, Complete Comp Review Due (per PRA), and Number of Resubmissions.**

Comments relative to tasks/dates may be recorded in the M2M system and are encouraged. Click on the “**C**” button next to a critical date to enter comments (in a pop-up box) related to a specific date or phase. Figure 7-9, Comment Fields is an excerpt of a **Mortgage Restructuring Critical Dates Tracking** screen with highlighted comment boxes.

Phase: Data Collection/Due Diligence

Data Collection:

PAE and Owner Have Kickoff Meeting:	11/11/2000	C *
PCA Assigned by PAE:	05/04/2000	C *
Appraisal Assigned by PAE:	05/05/2000	C *
Tenant Meeting - #1:	05/05/2000	C *
Owner Submits Data Collection Report:	06/03/2000	C *

Figure 7-9, Comment Fields

On the **Mortgage Restructuring Critical Dates Tracking** screen (only) there is a yellow timeline that shows at a glance, the guidelines for completing phases and tasks (in accordance to the timeframes in the M2M Operating Procedures Guide).

All dates must be entered in the **MM/DD/YYYY** format. The **Save** button must be selected once the updates or changes are verified.

7.3.4 Critical Dates Reporting

Data entered in the Critical Dates Tracking module is used to generate the following reports:

- ◆ Assigned Active Property Report
- ◆ Submitted Plans Awaiting Decision Report
- ◆ Property Status Report
- ◆ Overview of the Portfolio Status Report
- ◆ Partial Assignments Report
- ◆ Rent Comparability Review Progress Report
- ◆ Rent Reduction Only Progress Report
- ◆ Mortgage Restructuring Progress Report

♪ **Note:** Careful attention to detail must be paid when entering dates on the Critical Dates Tracking screen. Updates are made to the system's database once the User saves the changes. It is **strongly suggested** you review the data for accuracy before **and** after selecting the Save button.

A message is displayed confirming changes were saved if the data was entered in the correct format.

There are additional comment buttons at the bottom of the screen for use by the PAE and OAHP Users, respectively.

If an action other than a closing occurred on a Mortgage Restructuring contract, there is a date and comment box available at the bottom of the screen. There are also radio button options below this date that should be selected.

Date Action Other than Closing Occurred:

♪ **Note:** Remember to save any and all changes or updates before leaving this screen by selecting the Save button at the bottom of the screen.

7.3.5 Ending M2M Contract Process

After a contract has completed the M2M process, OAHP may close it by clicking the End M2M Process button at the bottom of the screen. A confirmation window, as illustrated below as Figure 7-10, End M2M Process Confirmation Window, will be displayed. Select OK to end the contract or Cancel to return to the previous screen.

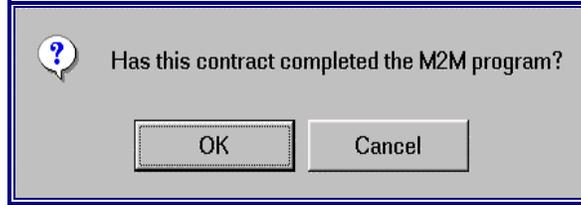


Figure 7-10, End M2M Process Confirmation Window

7.3.6 Changing Contract Renewal Type

During the M2M Program process, a contract's renewal type may be changed by selecting the **Change Renewal Type** button  resulting in the Figure 7-11, Contract Renewal Type Change, screen (shown below).

The screenshot shows a web application interface titled "Change Contract's Renewal Type". At the top left are navigation buttons: "Home", "Back", and "Log Off". Below the title, there are two columns of property information: "HEREMS Property ID: 800004437" and "Primary FHA Number:" on the left; "Property Name: SHULLMANOR APARTMENTS" and "PAE Name: Florida Housing Finance Corporation" on the right. Below this, "Contract Number: FL29M000150" is displayed. The main content area states: "The renewal type of this contract is changed from Mortgage Restructuring to Rent Reduction Only on 07/11/1999 (mm/dd/yyyy)". Below this is a "Comments:" field with a note "(Only the first 255 characters will be saved)" and a large text input area. At the bottom are "Cancel" and "Continue" buttons.

Figure 7-11, Contract Renewal Type Change

The **current** renewal type is displayed and a drop-down box is available to select the new renewal type for the contract. The User is also required to enter the date the contract's renewal type changed. Comments relating to the contract's changed status may also be entered.

After the user clicks the **Continue** button, a confirmation screen is displayed to let the user know the change was accepted. Changing the renewal type for a contract will generate a history record of the action. Clicking the **Continue** button will return a Critical Dates Tracking screen, based on the **new** renewal type.

7.3.7 As Is Rents Screen

If a 'Date Action Other than Closing Occurred' is entered and saved, an 'As Is Rents' button will appear near the bottom of the screen. Clicking the 'As Is Rents' button will display a screen for entering as is rent information as shown below in Figure 7-12, As Is Rents Screen.



[Home](#) [Back](#) [Log Off](#)

Mortgage Restructuring As Is Rents

HEREMS Property ID: 800000455 **Property Name:** TALLADEGA DOWNS
Primary FHA Number: 06244054 **PAE Name:** Jefferson County Assisted Housing Corp.
Contract Number: AL09M000044

PAE Recommendation: Project Based Assistance Required

Bedroom Type	# of Units (REMS)	As Is Rents
0		<input type="text"/>
1	16	<input type="text" value="427.00"/>
2	38	<input type="text" value="587.95"/>
3	46	<input type="text" value="1,124.25"/>
4		<input type="text"/>
5		<input type="text"/>
6		<input type="text"/>
7		<input type="text"/>

Figure 7-12, As Is Rents Screen

The 'PAE Recommendation' with drop down selection box for options 'Project Based Assistance' and 'Tenant Based Assistance' is required to be selected.

Input data fields allow the user to enter an 'As Is Rent' amount for each unit type.

7.3.8 Comp Review Results Screen

Clicking the 'Comp Review Results' button that is displayed on a Comp Review type contract, will display a screen for entering Comp Review Results information as shown below in Figure 7-13, Comp Review Results Screen.

Review in Process
 Section 8 Contract Rent Over Market
 Section 8 Contract Rent Equal/Under Market

Click to enter / update comp review results.

Comp Review Results

HEREMS Property ID: 800001447

Primary FHA Number: 12135056

Contract Number: CA39M000158

Property Name: EL CASA VERDE I

PAE Name: Heskin Signet Partnership

Bedroom Type	# of Units (REMS)	Current Contract Rents	Owner's Submitted Rents	Determined Market Rents
0	16	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	24	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	48	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	22	<input type="text"/>	<input type="text"/>	<input type="text"/>
4		<input type="text"/>	<input type="text"/>	<input type="text"/>
5		<input type="text"/>	<input type="text"/>	<input type="text"/>
6		<input type="text"/>	<input type="text"/>	<input type="text"/>
7		<input type="text"/>	<input type="text"/>	<input type="text"/>

Figure 7-13, Comp Review Results Screen

Input data fields allow the user to enter the Current Rent, Owner's Submitted Rent, and Determined Market Rent amounts for each unit type.

7.3.9 Comp Review to Determine Mark-Up-To-Market Eligibility Screen

Clicking the 'Comp Review Results' button that is displayed on a Post M2M Comp Review type contract, will display a screen for entering Comp Review to Determine Mark-Up-To-Market Eligibility information as shown below in Figure 7-14, Comp Review To Determine Mark-Up-To-Market Eligibility Screen.

Approved Review Results: Review in Process Section 8 Contract Rent Over Market Section 8 Contract Rent Equal/Under Market

Click to enter / update comp review results.

Comp Review to Determine Mark-Up-To-Market Eligibility

HEREMS Property ID: 800000416 **Property Name:** ROCKWOOD APARTMENTS
Primary FHA Number: 06235325 **PAE Name:** Marion County Housing Authority
Contract Number: AL09M000025

Bedroom Type	# of Units (REMS)	Current Contract Rents	Owner's Submitted Rents	Determined Market Rents
0		<input type="text"/>	<input type="text"/>	<input type="text"/>
1	16	<input type="text" value="345.00"/>	<input type="text" value="425.00"/>	<input type="text" value="395.00"/>
2	48	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	24	<input type="text"/>	<input type="text"/>	<input type="text"/>
4		<input type="text"/>	<input type="text"/>	<input type="text"/>
5		<input type="text"/>	<input type="text"/>	<input type="text"/>
6		<input type="text"/>	<input type="text"/>	<input type="text"/>
7		<input type="text"/>	<input type="text"/>	<input type="text"/>

Figure 7-14, Comp Review To Determine Mark-Up-To-Market Eligibility Screen

Input data fields allow the user to enter the Current Rent, Owner's Submitted Rent, and Determined Market Rent amounts for each unit type.

8 RESTRUCTURING PLANS MODULE

The Restructuring Plans module is accessed by selecting the **Restructuring Plans** button from M2M's home screen. There are also links at the bottom of the **Mortgage Restructuring** and **Rent Reduction Only Critical Dates Tracking** screens to the associated property's restructuring plan form.

♪ **Note:** These restructuring plan forms are only one part of the **Draft Restructuring Plans and Subsidy Recommendations** that must be submitted to OAHP for approval.

Within this module are **Restructuring Plan Forms** that must be submitted and approved via M2M. Each type of restructuring plan form (**Form 5.2** and **Form 10.2**) has its own menu selections, specific to the data that must be collected to generate a form. Additional detail may be found in **Section 8.2 Mortgage Restructuring Plan Forms** and **Section 8.3 Rent Reduction Only Plan Forms**, respectively.

Figure 8-1, Restructuring Plans Screen, represents the screen that will be retrieved when the Restructuring Plans button is clicked. The button may be found on M2M's home page and on the menu bar within other modules.

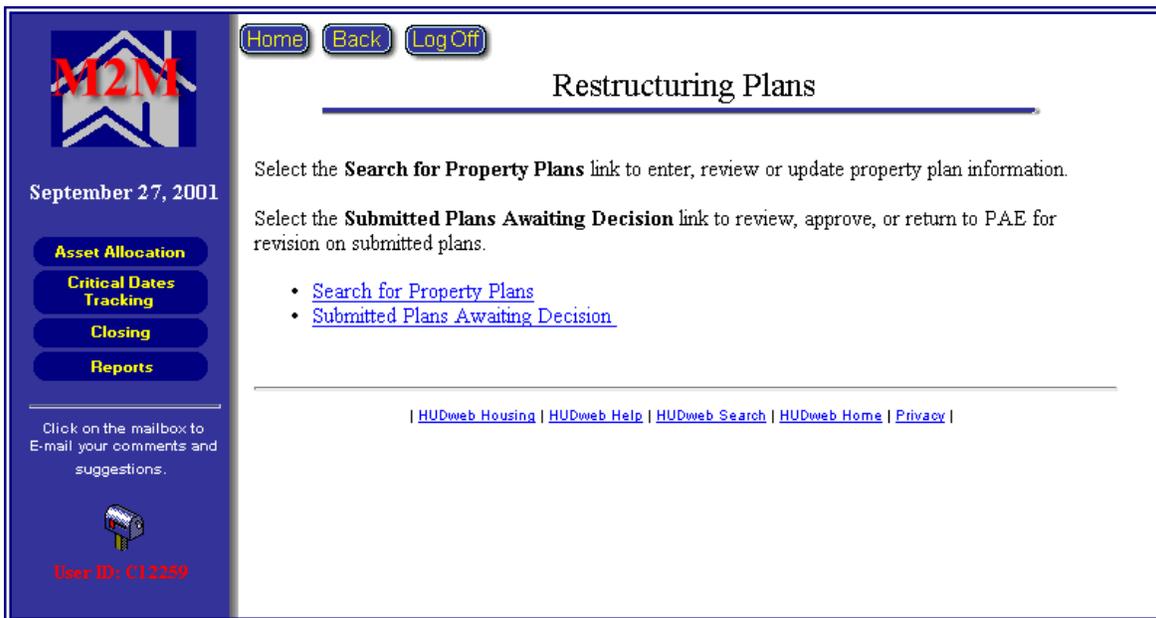


Figure 8-1, Restructuring Plans Screen

Users may search for **Restructuring Plans** by clicking the **Search for Property Plans** link or retrieve submitted plans by clicking the **Review Submitted Plans Awaiting Decision** link. Clicking the **Search for Property Plans** link retrieves a search selection criteria page, as shown below in Figure 8-2, Restructuring Plans Search Criteria Screen.

Home Back Secure Systems Log Off

Select Search Criteria for Restructuring Plans

Select one of the following criteria:

REMS ID: FHA #:

Or select one or more of the following options:

Preservation Office:

State:

PAE:

Property:

Plan Status: Date of Selected Plan Status:

Renewal Type:

Or click [HERE](#) to get ALL Restructuring Plans.

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#)

November 9, 2004

[Asset Allocation](#)
[Critical Dates Tracking](#)
[Closing](#)
[Reports](#)

Click on the mailbox to E-mail your comments and suggestions.

User ID: 112289

Figure 8-2, Restructuring Plans Search Criteria Screen

Select one of the following criteria available to retrieve properties for the Restructuring Plans:

- ◆ Enter a REMS ID for a specify property
- ◆ Enter a FHA Number for a specific property

Or select one or more of the following options available to retrieve properties for the Restructuring Plans:

- ◆ Select an **OAHP Region** from the drop-down list
- ◆ Select a **State** from the drop-down list
- ◆ Select a **PAE Name** from the drop-down list
- ◆ Enter a **Property's Name**
- ◆ Select a **Restructuring Plan Status** from the drop-down list
- ◆ Select a **Date of Selected Plan Status** from drop-down list
- ◆ Select a **Renewal Type** (Mortgage Restructuring or Rent Reduction Only)
- ◆ Click the underlined [HERE](#) link to retrieve all restructuring plans in the system

8.1 Restructuring Plans General Information

Figure 8-3, Restructuring Plans Property Selection Screen, represents the results from the Restructuring Plans Search Criteria based on a state criterion search.

[Home](#) [Back](#) [Log Off](#)

Assigned Properties

The following 3 out of 3 properties met your Mortgage Restructuring, OMHAR Transaction Center search criteria.

To view/update a contract's restructuring plan, click its underlined Contract Number.

Note:

- * You will only be able to update or save data for plans with a **Not Submitted** or **Returned for Revision** Approval Status.
- * Properties that have **Comp Review** or **Opt Out** as a renewal option are not displayed, since there are no restructuring plans for these renewal types.

PAE Name	Status	Approval Status	Property Name	Model Uploaded	Sec 8 Contract Number	Sec 8 Contract Renewal Type	Expiration Date	Property City	State
Indiana Housing Finance Authority	A	Not Submitted	Summerchase Apartments	C	AR37L000081	Mortgage Restructuring	06/30/1999	Van Buren	AR
Indiana Housing Finance Authority	A	Not Submitted	BARBOUR GARDEN APARTMENTS	C	CT26E000010	Mortgage Restructuring	04/25/2000	HARTFORD	CT
VENCOR, INC.	A	Approved	WINDSOR PLACE	C	OH16H051005	Mortgage Restructuring	10/13/1999	LANCASTER	OH

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |

Figure 8-3, Restructuring Plans Property Selection Screen

OAHF users can view properties and associated data entered by the PAEs on the property by clicking an underlined contract number link to access the Restructuring Plans section. If a property has completed the M2M process, it is “completed” (as indicated by a “C” in the Contract Status column) and the User will only be allowed to view or print the restructuring plan form.

8.1.1 Negative Data Entry Fields

Within the Restructuring Plans module, there are fields that have red negative number indicators outside their data entry boxes (e.g., as represented below in the Residential Bad Debt and Residential Vacancy fields shown in Figure 8-4, Negative Field Indicators). Users are instructed to enter positive numbers in these fields, as the system is programmed to subtract these values in calculations, where applicable.

Residential Bad Debt -

Residential Vacancy -

Figure 8-4, Negative Field Indicators

8.1.2 Navigating the Restructuring Plans Sections

Users may quickly “jump” to another section within the Restructuring Plans module by clicking one of the buttons on the menu bar located on the left side of the screen. It is important to know that the User should save before jumping to a different page in order to keep the data entered. Clicking the **Critical Dates Tracking** button will take the User to the Critical Dates Tracking form for the current property. In addition, the User may print a hardcopy of the restructuring plan form, by clicking the **Printable Form** button at any time. Figure 8-5, Restructuring Plan Menu Bar, shows an example of the Restructuring Plans menu bar.



Figure 8-5, Restructuring Plan Menu Bar

8.2 Mortgage Restructuring Plan Forms

The following sections provide information on the data required to complete and submit the Form 5.2 Mortgage Restructuring. The user may opt to upload and populate the form with data extracted from the Excel Underwriting Model or key the data manually. Figure 8-6, Form 5.2 Mortgage Restructuring provides an

example of the Mortgage Restructuring main screen with subdivisions for the model functions and the online form.

Home Back Log Off

Restructuring Plans

Form 5.2 Mortgage Restructuring

April 15, 2002

Asset Allocation
Critical Dates Tracking
Closing
Reports

Click on the mailbox to E-mail your comments and suggestions.

User ID: C12345

Property ID: 800000000 FHA Number: 17635014

Property Name: OMHAR Property

PAE Name: Test PAE

Excel Underwriting Model v4

- [Instructions for uploading the Model v4 and the Model data](#)
- [Upload extracted data into the online Form 5.2](#)
- [Upload a copy of the Model for centralized storage](#)
- [Open or Download Model](#)

Online Form 5.2

- [Property & Loan Information Term Sheet](#)
- [Property Operating Statement](#)
- [Debt Restructuring](#)
- [Sources and Uses](#)
- [Print the Entire Form 5.2](#)

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Figure 8-6, Form 5.2 Mortgage Restructuring

Also, let it be noted, that the PAE is responsible for entering the data and selecting the “submit” button to lock the data and notify OAHP of the submission. Also, the PAE must mail in the full submission documentation and place a copy of the Underwriting Model on the centralized server. OAHP is responsible for approving or returning for revision the submitted documentation.

8.2.1 Excel Underwriting Model v4

The following subsections provide detailed instructions showing how to upload the Extract data and Model to the M2M System:

- ◆ [Instructions for uploading the Model v4 and the Model data](#)
- ◆ [Upload extracted data into the online Form 5.2](#)
- ◆ [Upload a copy of the Model for centralized storage](#)
- ◆ [Open or Download Model](#)

8.2.1.1 Instructions for uploading the Model v4 and the Model data

The [Instructions for uploading the Model v4 and the Model data](#) (shown on the next page as Figure, 8-7, How to Upload Extract and Model screen) contains

general and detailed information of the process to upload extracted data and the model to the M2M system for Form 5.2:

Print Close

How to Upload Extract and Model to M2M System

The M2M system has been upgraded to allow for PAEs to

1. upload data from the M2M Excel Underwriting Model v4 automatically, (without having to perform data entry into the M2M Form 5.2). This new feature only works with the **version 4** of the model. Also,
2. the M2M Excel Underwriting model being submitted for review and approval must be uploaded and saved on this centralized, protected server.

Steps to Perform the Two Tasks:

To prepare the Model for uploading into the M2M system Form 5.2 online:

1. Complete the data entry in the Underwriting Model v4 and save as the name - REMS Property Id.xls or .xlsm (e.g., 800000000.xls). It is very important to note the location where the model is saved and the REMS #.
2. Go to the Worksheet Tab in the model named: "Create MIS Upload Worksheet."
3. Click on the Button "Create Extract File."
4. An "extract" file is created automatically and saved in the SAME folder or location as the current Model.
5. The extract file is automatically named the REMS property id.txt (e.g., 800000000.txt).
6. Print a copy of the worksheet called "Form 5.2 Data" – to use in the validation of the uploaded data.

To Upload the Extracted Data in order to populate the Form 5.2 online:

1. Log into the M2M system and go to the Restructuring Plans Module.
2. Search for the property associated with the model to be uploaded.
3. Select the property.
4. From the Restructuring Plans screen, select the option: Upload extracted data into the online Form 5.2
5. Either type in the path or location of the extract file (txt file) or click on Browse to find it on the workstation. (It will be in the same folder as the model).
6. Click on the button "Upload the File."
 - If the filename or type of file is incorrect there will be an error displayed.
 - If the filename matches the REMS property id and is the correct file, the data will be extracted and populate the Form 5.2 automatically.
7. First, a screen with data will appear. The PAE should review the data by comparing the printout from the Model "Form 5.2 Data" worksheet.
8. Click on Save if the data is valid.
9. If there were errors in the data and the PAE doesn't want to save the data into the system, cancel by clicking the Back button.
10. If there were errors, review the model and make corrections in the model. Save the corrections and start over by creating a new extract file as described above.

To upload and save a copy of the M2M Excel Underwriting Model on the centralized server:

1. Go to the Restructuring Plans Module in M2M system.
2. Select the property.
3. From the Restructuring Plans screen select the option: Upload a copy of the Model for centralized storage
4. Either type in the path or location of the Model (excel) file or click on Browse to find it on the workstation.
5. Click on the Button "Upload the File."
6. An error will display if there are problems, otherwise, click on Continue.
7. The model is now saved on the server.
8. If the PAE is ready to submit the restructuring plan to OAHF, click on Submit after uploading the model and extracted data to the M2M system.

For the PAE or OAHF to view or download to a workstation:

1. Go to the Restructuring plans screen.
2. Select the Property.
3. Select the option: Open or Download Model
4. If there is an error, it is most likely that the browser is not set up to view Excel and ".xls" needs to be added to the browser's list of applications.
5. Otherwise, choose "save" or "open" – depending on your need.

Figure 8-7, How to Upload Extract and Model Screen

8.2.1.2 Upload extracted data into the online Form 5.2

The Upload extracted data into the online Form 5.2 (shown as Figure, 8-8, Form 5.2 Upload Screen) contains general and detailed information on how to upload extracted data into the online Form 5.2:

Figure 8-8, Form 5.2 Upload Screen

8.2.1.3 Upload a copy of the Model for centralized storage

The Upload a copy of the Model for centralized storage (shown on the next page as Figure, 8-9, Excel Underwriting Model Upload Screen) contains general and detailed information on how to upload the Excel underwriting model:

Figure 8-9, Excel Underwriting Model Screen

8.2.1.4 Open or Download Model

The Open or Download Model function allows users to view or download the Excel Model that has been placed on the centralized server.

8.2.2 Online Form 5.2

The following subsections provide additional information on the data that is required to populate and generate the Form 5.2 Mortgage Restructuring Plan:

- ◆ Property & Loan Information Term Sheet
- ◆ Property Operating Statement
- ◆ Debt Restructuring
- ◆ Sources and Uses
- ◆ Print the Entire Form 5.2
- ◆ Submit a Decision for Restructuring Plan (for Pending properties only)

8.2.2.1 Form 5.2 Property & Loan Information Term Sheet

The **Property & Loan Information Term Sheet** (an example of which is on the next page as Figure, 8-10, Property & Loan Information Term Sheet) contains general and detailed information about the property, e.g., physical location, number of units, current Unpaid Principal Balance (UPB), etc., and consists of the following subsections:

- ◆ General Information
- ◆ Pre-Restructuring Loan Information
- ◆ Property Information
- ◆ Section 8 Contract Information
- ◆ Mark-to-Market Rents

Home Back Secure Systems Log Off

Form 5.2 Property & Loan Information

General Information

Property ID: 80000220
 FHA Number: 06244018
 FHA Program Type: 236(0)1
 Property Name: DANYA PARK GDNS
 Property Address: 113 DANYA COURT
 City: PRATTVILLE
 State: ALABAMA

PAE Name: Jefferson County Assisted Housing Corp.
 HUD Project Manager: PAT ALLEN FORREST PITTS
 Owner:
 Owner Contact: HUGH V. SMITH
 Management Company:

Identity of Interest: No If incorrect, please correct here.

Year Built:
 Year of Last Rehab:

Pre-Restructuring Loan Information

	REMS	PAE Entry or Corrections
Original Loan Amount:	471,400.00	<input type="text" value="1,590,000.00"/>
Annual Debt Service (Without MIP):	37,225.80	<input type="text" value="133,988.00"/>
Annual Debt Service (With MIP):		<input type="text" value="140,810.00"/>
Interest Rate (%):	7.5000	<input type="text" value="7.4000"/>
Original Term (In Years):	40.00	<input type="text"/>
Maturity Date:	09/01/2013	<input type="text" value="03/01/2022"/>
Prepayment Penalty (%):		<input type="text"/>
UPB as of 08/27/2003 :	324,238.59	<input type="text" value="1,355,879.00"/>

Property Information

	REMS (Pre)	PAE Entry or Corrections (Pre)	Post Restructuring
Total Units:	40	<input type="text" value="50"/>	<input type="text" value="50"/>
# Non-Revenue Units:		<input type="text"/>	<input type="text"/>
# of Sect. 8 Assisted Units:	0	<input type="text" value="50"/>	<input type="text" value="50"/>
# of Unassisted Units:	40	<input type="text"/>	<input type="text"/>

Current Physical Vacancy (%) (Apts Only):

Rural, Suburban or Urban:

Elderly/Family: Family

Appraisal Date:
 Appraised Value:
 New Assisted: No

Section 8 Contract Information

Contract #	Expiration Date	Current Contract Status	Unit Type	# of Units	Contract Rents	Which Contract Is Being Renewed?	Is this Contract Being Combined?
AL120MR2345		Inactive			\$0.00	<input type="radio"/>	N/A

Mark-to-Market Rents Approved Rent Appeal?

Prior to Submission to OAHF, PAE needs to determine the following:

Use of Exception Rents? *

PAE Recommendation:

* Changing the value of this field will save all your current data and redisplay the screen with additional fields for Exception Rents or remove them if not needed.

Rebates Type	# of Pre Restructuring Contract Units (REMS)	# of Pre Restructuring Contract Units (Corrected)	Pre Restructuring Average Monthly Contract Rents	# of Post Restructuring Contract Units	Post Restructuring Monthly Market Rents	Post Restructuring Monthly Exception Rents	PDR	System Generated Exception PDR
0							343.00	
1	0	8	565.00	8	425.00	432.00	457.00	0.9453
2	0	36	658.00	36	510.00	519.00	599.00	0.8664
3	0	6	704.00	6	580.00	590.00	749.00	0.7877
4							841.00	
5							967.00	
6							1,093.00	
7							1,219.00	

Use Weighted Average for Units Included in Mark-to-Market Only

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Figure 8-10, Property & Loan Information Term Sheet

8.2.2.2 Form 5.2 Property Operating Statement

The **Property Operating Statement** contains pre- and post-restructuring revenue and expense financial data (REMS read-only displays, PAE User entries, or system-calculated). The Property Operating Statement (an example of which is on the next page as Figure, 8-11, Property Operating Statement) consists of the following subsections:

- ◆ Annual Revenue
- ◆ Annual Expenses
- ◆ Net Operating Income (including Adjusted NOI and DSCR)

Form 5.2
Property Operating Statement

General Information
 Property ID: 80000000
 FHA Number: 00035194
 Property Name: OMHAR Property
 PAE Name: Test PAE

Annual Revenue	Pre-Restructuring As of FY ending 12/31/2000			Post-Restructuring As of 10/01/2003			System-Generated Difference		
	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month
Gross Residential Income <small>(Non-Section 8 Project Based Units)</small>									
Gross Residential Income <small>(Section 8 Project Based Units)</small>	255,190.00	5,547.61	462.30	219,840.00	4,779.13	398.26	35,350.00	768.48	64.04
Commercial									
Other	4,182.00			2,900.00			1,282.00		
Gross Potential Income Residential Vacancy	259,372.00	5,638.52	469.88	222,740.00	4,842.17	403.51	36,632.00	796.35	66.36
Pre()% Post()%	6,595.00			10,992.00			4,397.00		
Residential Bad Debt				4997.00					
Commercial Vacancy									
Commercial Bad Debt									
Effective Gross Income	252,777.00	5,495.15	457.93	207,351.00	4,507.63	375.64	45,426.00	987.52	82.29

Annual Expenses	Pre-Restructuring As of FY ending 12/31/2000			Post-Restructuring As of 10/01/2003			System-Generated Difference		
	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month
Base									
Real Estate Taxes	10,053.00	218.54	18.21	10,882.00	236.57	19.71	-829.00	-18.03	-1.50
Insurance	10,043.00	218.33	18.19	13,500.00	293.48	24.46	-3,457.00	-75.15	-6.26
Utilities	17,870.00	388.48	32.37	20,000.00	434.78	36.23	-2,130.00	-46.30	-3.86
Base Total	37,966.00	825.35	68.78	44,382.00	964.83	80.40	-6,416.00	-139.48	-11.62
Controllable									
Management Fees	19,920.00	433.04	36.09	20,000.00	434.78	36.23	-80.00	-1.74	-1.14
Salaries and Benefits	44,767.00	973.20	81.10	48,628.00	1,057.13	88.09	-3,861.00	-83.93	-6.99
Other Administrative	13,320.00	289.57	24.13	12,431.00	270.24	22.52	889.00	19.33	1.61
Section 8 Administrative									
Repairs and Maintenance	23,605.00	513.15	42.76	21,500.00	467.39	38.95	2,105.00	45.76	3.81
Other Controllable									
Controllable Total	101,612.00	2,208.96	184.08	102,559.00	2,229.54	185.80	-947.00	-20.58	-1.71
Other									
Security									
Neighborhood Network									
Capital Recovery Payment(CRP)				13,263.00	288.33	24.03	-13,263.00	-288.33	-24.03
Other Total	0.00	0.00	0.00	13,263.00	288.33	24.03	-13,263.00	-288.33	-24.03
Total Expenses	139,578.00	3,034.30	252.86	160,204.00	3,482.70	290.22	-20,626.00	-448.40	-37.37

Net Income	Pre-Restructuring As of FY ending 12/31/2000			Post-Restructuring As of 10/01/2003			System-Generated Difference		
	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month
Net Operating Income	113,199.00	2,460.85	205.07	47,147.00	1,024.93	85.41	66,052.00	1,435.92	119.66
Reserve for Replacement Contributions	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Adjusted Net Operating Income	113,199.00	2,460.85	205.07	47,147.00	1,024.93	85.41	66,052.00	1,435.92	119.66
Annual Debt Payments									
1 st Mortgage Annual Debt Service	\$117,955.00	\$2,564.24	\$213.69	\$18,226.00	\$396.22	\$33.02	\$99,729.00	\$2,168.02	\$180.67
IRP Applied to Debt Service									
Total Amount of 1 st Mortgage Debt Service Less IRP	117,955.00	2,564.24	213.69	18,226.00	396.22	33.02	99,729.00	2,168.02	180.67
Gross Cash Flow (After Debt Service)	-4,756.00	-103.39	-8.62	28,921.00	628.72	52.39	-33,677.00	-732.11	-61.01
Incentive Performance Fee (IPF)				6,484.00	140.96	11.75	-6,484.00	-140.96	-11.75
Surplus Cash	-4,756.00	-103.39	-8.62	22,437.00	487.76	40.65	-27,193.00	-591.15	-49.26
Post Restructuring 2 nd Mortgage									
Enter the Post Restructuring 2 nd Mortgage Surplus Cash Flow Split Percentage				100.0	%				
System Generated Post Restructuring 2 nd Mortgage Surplus Cash Flow Payment				22,437.00	\$				
Debt Service Coverage Ratio (1 st Mortgage Debt)				2.59					

* Value for Pre-Restructuring is from the Property and Loan Information Page's Annual Debt Service with MIP
 * Value for Post-Restructuring is from the Debt Restructuring Page's 1st Mortgage Annual Debt Service with MIP

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Figure, 8-11, Property Operating Statement

8.2.2.3 Form 5.2 Debt Restructuring

The **Debt Restructuring** screen consists of the pre- and post-restructuring financial data and terms for the restructured mortgage(s), e.g., originator, original loan amount, interest rate, etc. The following is an excerpt of the Debt Restructuring screen for the **First Mortgage** (Figure 8-12, Debt Restructuring).

Home
Back
Log Off

Form 5.2 Debt Restructuring (Annual)

Property ID: 800000000
Primary FHA Number: 00035194
Property Name: OMHAR Property
PAE Name: Test PAE

Remember to save all changes or updates by clicking **Save** button on the left.

If there was existing FHA or HUD Held subordinate debt before restructuring that will remain after restructuring, click here to enter the PRE and Post-Restructuring loan terms. Subordinate Debt

	Debt Restructuring (Annual)	Pre Restructuring	Post Restructuring
First Mortgage			
(Take out or Modified Loan)			
<small>Note: Leave blank if no refinancing or no modification to existing debt.</small>			
New FHA Number			17635040
Originator			
Loan Type			
FHA Program Type	223(a)(7)/221(d)(4)M		223(a)7
Original Loan Amount	3,168,400.00		1,865,498.00
UPB as of 04/19/2001	3,114,688.00		
Annual Debt Service (Without MIP)	253,260.00		151,468.00
Annual Debt Service (With MIP)	269,102.00		160,795.00
Loan Terms:			
Interest Rate (%)	7.6250		8.2500
Original Term (Months)	348		480
Remaining Amortization Period (Months)	356		
Maturity Date	10/01/2030		
Prepayment Penalty (%)			
Lockout Date			
Appraised LTV (%)			50.76

Figure 8-12, Debt Restructuring

8.2.2.4 Form 5.2 Sources and Uses

The **Sources and Uses** section is a data entry screen for OAHP HQ, OAHP RO, and PAE Users to record a summation of the property funding and the anticipated distribution of those funds. Figure 8-13, Sources and Uses, is an example of the Sources and Uses screen.

Home	Back	Secure Systems	Log Off
----------------------	----------------------	--------------------------------	-------------------------

**Form 5.2
Sources and Uses**

Property ID: 800000220
Primary FHA Number: 06244018
Property Name: DANYA PARK GDNS
PAE Name: Jefferson County Assisted Housing Corp.

Remember to save all changes or updates by clicking the Save button on the left.

Sources	Amount	Fund Uses	Amount
DEBT:			
Restructured 1st Mortgage Principal:	<input type="text" value="263,000.00"/>	Partial Payment of Existing Loan (if Modifying):	<input type="text"/>
Mortgage Restructuring Payment:	<input type="text" value="1,336,543.00"/>	Payoff Existing 1st Mortgage Loan (if Refinancing):	<input type="text" value="1,355,878.81"/>
EXISTING ACCOUNT BALANCES:			
Reserve for Replacement:	<input type="text" value="116,053.47"/>		
Residual Receipts:	<input type="text"/>	Other OAHP Approved Transaction Costs*:	<input type="text" value="40,363.90"/>
Existing Tax Escrow:	<input type="text" value="21,761.38"/>		
Existing Hazard Insurance:	<input type="text"/>		
Surplus Cash Account/Other Escrow:	<input type="text"/>	Owner's Share of Surplus Reserves:	<input type="text"/>
236 Rehab Grants:	<input type="text"/>		
OWNER'S CONTRIBUTION TOWARD:		ESCROWS:	
Rehabilitation Escrow:	<input type="text" value="13,337.63"/>	OAHP Approved Rehabilitation Costs:	<input type="text" value="66,688.17"/>
IDRR (If Greater Than Existing Reserve Balance):	<input type="text"/>	Initial Deposits to Replacement Reserves (IDRR):	<input type="text" value="263,500.00"/>
Other Transaction Costs:	<input type="text" value="8,640.00"/>	Tax Escrow:	<input type="text" value="23,793.60"/>
		Hazard Insurance Escrow:	<input type="text" value="9,111.00"/>
Repair Loan or Grant:	<input type="text"/>		
OTHER FUND SOURCES:		OTHER FUND USES:	
Debt Service Reserve:	<input type="text"/>	Tax Escrow Offset:	<input type="text" value="2,032.22"/>
2:	<input type="text"/>	Insurance Escrow Offse:	<input type="text" value="9,111.00"/>
3:	<input type="text"/>	Shortfall in Note Payoff:	<input type="text"/>
	<input type="text"/>	D:	<input type="text"/>
Other Sources Needed to Balance:	<input type="text"/>	Additional Recovery to HUD:	<input type="text"/>
Total Sources of Funds:	<input type="text" value="1,759,335.48"/>	Total Uses of Funds:	<input type="text" value="1,770,478.70"/>

* Subtotal of all transaction costs less the tax and hazard insurance escrow increases. This avoids counting the increases twice, as they will already be reflected in the tax and hazard insurance escrows in the uses.

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Figure 8-13, Sources and Uses

8.2.2.5 Print Entire Form

The Print Entire Form option requires several steps to print each of the pages. Each screen is printed using the browser's print button, one screen at a time.

8.2.2.6 Submit a Decision for Restructuring Plan

The Submit a Decision for Restructuring Plan option will only be present for properties that are in the Pending Status. The user can select their decision from the drop down box and the name, e-mail address, and date must be entered. The PAE will be notified via e-mail of the decision. Figure 8-14, Review of PAE Plan Submissions, show below, is a sample of the screen.

State	Property Name	Property	Renewal Type	Date Submitted	OAHP Decision	Comments
FL	CARVER GARDENS	800003978	Mortgage Restructuring	05/31/2001	Decision Pending	<input type="button" value="PAE"/> <input type="button" value="OAHP*"/> <input type="button" value="TRANS"/>

Figure 8-14, Review of PAE Plan Submissions

8.3 Rent Reduction Only Plan Forms

The following subsections provide additional information on the data relative to **10.2 Rent Reduction Only Restructuring Plan Forms**. Figure 8-15, Form 10.2 Rent Reduction Only, provides an example of the Rent Reduction Only Restructuring Plans main screen. It contains links to the following three major categories of data used to populate a property's Rent Reduction Only Restructuring Plan Form 10.2 as well as a print option and a submit decision option.

- ◆ Property & Loan Information Term Sheet
- ◆ Property Operating Statement
- ◆ Refinancing Sheet
- ◆ Print the Entire Form
- ◆ Submit a Decision for Restructuring Plan (Pending properties only)

The screenshot shows a web application interface for 'Restructuring Plans' under 'Form 10.2 Rent Reduction Only'. The interface is divided into a left sidebar and a main content area. The sidebar, which has a dark blue background, contains the M2M logo at the top, the date 'September 28, 2001', and four menu items: 'Asset Allocation', 'Critical Dates Tracking', 'Closing', and 'Reports'. Below these is a mailbox icon and the text 'Click on the mailbox to E-mail your comments and suggestions.' At the bottom of the sidebar, it says 'User ID: C12259'. The main content area has a white background and includes navigation buttons for 'Home', 'Back', and 'Log Off' at the top. The title 'Restructuring Plans' is centered, with 'Form 10.2 Rent Reduction Only' below it. A horizontal line separates the title from the data fields. The data fields are: 'Property ID: 800016766', 'FHA Number: 04335192', 'Property Name: JEFFREY PLACE', and 'PAE Name: Ohio Housing Finance Agency'. Below these fields is a bulleted list of links: 'Property & Loan Information Term Sheet', 'Property Operating Statement', 'Refinancing Sheet', 'Print the Entire Form 10.2', and 'Submit a Decision for Restructuring Plan'. At the bottom of the main area, there is a footer with links: '| HUDweb Housing | HUDweb Help | HUDweb Search | HUDweb Home | Privacy |'.

Figure 8-15, Form 10.2 Rent Reduction Only

8.3.1 Form 10.2 Property & Loan Information Term Sheet

The **Property & Loan Information Term Sheet's** contents were covered in Section 8.2.2.1, Form 5.2 Property & Loan Information Term Sheet; however, it is important to note that there are some differences between the Form 5.2 and Form 10.2 Property & Loan Information Term Sheet.

8.3.2 Form 10.2 Property Operating Statement

Refer to Section 8.2.2.3, Property Operating Statement to note the content of this screen. Again, there are some fields in Form 5.2 that are not in the Rent Reduction Only form. The Property Operating Statement in Form 10.2 (an example of which is on the next page as Figure, 8-16, Form 10.2 Property Operating Statement)

Form 10.2 Property Operating Statement										
General Information										
Property ID: 800000000										
FHA Number: 00035194										
Property Name: OMHAR Property										
PAE Name: Test PAE										
Annual Revenue		Pre-Restructuring As of FY ending 12/31/2000			Post-Restructuring As of 03/30/2001			System-Generated Difference		
	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	
Gross Residential Income <small>(Non-Section 5 Project Based Units)</small>										
Gross Residential Income <small>(Section 5 Project Based Units)</small>	947,484.00	7,641.00	636.75	932,640.00	7,521.29	626.77	14,844.00	119.71	9.98	
Commercial										
Other	4,881.00			4,739.00			142.00			
Gross Potential Income	952,365.00	7,618.92	634.91	937,379.00	7,499.03	624.92	14,986.00	119.89	9.99	
Residential Vacancy										
Pre(3.8)% Post(5.0)%	-35,504.00			-46,632.00			-11,048.00			
Residential Bad Debt										
Pre(1.4)% Post(2.0)%	-13,276.00			-18,653.00			-5,377.00			
Commercial Vacancy										
Pre()% Post()%										
Commercial Bad Debt										
Pre()% Post()%										
Effective Gross Income	903,505.00	7,228.04	602.34	872,094.00	6,976.75	581.40	31,411.00	251.29	20.94	
Annual Expenses		Pre-Restructuring As of FY ending 12/31/2000			Post-Restructuring As of 03/30/2001			System-Generated Difference		
	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	
Base										
Real Estate Taxes	43,849.00	350.79	29.23	47,105.00	376.84	31.40	-3,256.00	-26.05	-2.17	
Insurance	18,381.00	147.05	12.25	26,857.00	214.86	17.90	-8,476.00	-67.81	-5.65	
Utilities	137,048.00	1,096.38	91.37	143,258.00	1,146.06	95.51	-6,210.00	-49.68	-4.14	
Base Total	199,278.00	1,594.22	132.85	217,220.00	1,737.76	144.81	-17,942.00	-143.54	-11.96	
Controllable										
Management Fees										
Pre()% Post()%	52,936.00	423.49	35.29	49,000.00	392.00	32.67	3,936.00	31.49	2.62	
Section 8 Administrative										
Other Administrative	46,031.00	368.25	30.69	33,766.00	270.13	22.51	12,265.00	98.12	8.18	
Salaries and Benefits	66,661.00	533.29	44.44	63,353.00	506.82	42.24	3,308.00	26.47	2.21	
Repairs and Maintenance	76,772.00	614.18	51.18	76,273.00	610.18	50.85	499.00	4.00	.33	
Other Controllable										
Controllable Total	242,400.00	1,939.20	161.60	222,392.00	1,779.14	148.26	20,008.00	160.06	13.34	
Other										
Security										
Neighborhood Network										
Other Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Total Expenses	441,678.00	3,533.42	294.45	439,612.00	3,516.90	293.07	2,066.00	16.52	1.38	
Net Income		Pre-Restructuring As of FY ending 12/31/2000			Post-Restructuring As of 03/30/2001			System-Generated Difference		
	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	
Net Operating Income	461,827.00	3,694.62	307.88	432,482.00	3,459.86	288.32	29,345.00	234.76	19.56	
Reserve for Replacement Contributions	-24,828.00	198.62	16.55	-24,828.00	198.62	16.55	0.00	0.00	0.00	
Adjusted Net Operating Income	436,999.00	3,495.99	291.33	407,654.00	3,261.23	271.77	29,345.00	234.76	19.56	
1st Mortgage Annual Debt Service	\$336,768.00	\$2,694.14	\$224.51	\$336,768.00	\$2,694.14	\$224.51	\$0.00	\$0.00	\$0.00	
IRP Applied to Debt Service	-			-						
Total Amount of 1st Mortgage Debt Service Less IRP	336,768.00	2,694.14	224.51	336,768.00	2,694.14	224.51	0.00	0.00	0.00	
Net Cash Flow (After Debt Service)	100,231.00	801.85	66.82	70,886.00	567.09	47.26	29,345.00	234.76	19.56	
Debt Service Coverage Ratio	1.30			1.21			0.09			
Other Income		Comments								
* Value is from the Property and Loan Information Page's Annual Debt Service with MIP										

Figure 8-16, Form 10.2 Property Operating Statement

8.3.3 Refinancing

If refinancing the existing mortgage is involved for the property, because it is a Tier 2, click the [Refinancing Sheet](#) button to go to the refinancing section, as represented in Figure 8-17, Refinancing Sheet.

Note: A property undergoing a debt restructuring is designated as a Mortgage Restructuring and is covered in Section, 8.2, Mortgage Restructuring Forms.

Home
Back
Log Off

Form 10.2 Refinancing

Property ID: 800016640
FHA Number: 04635442
Property Name: Greenfield Meadows
PAE Name: Ohio Housing Finance Agency

Remember to save all changes or updates by clicking **Save** button on the left.

	Pre Restructuring	Post Restructuring	System Generated Difference
Originator		<input type="text"/>	
Loan Type	<input type="text"/>	<input type="text"/>	
FHA Program Type	221(d)(4)MKT	<input type="text"/>	
Original Loan Amount	82,800.00	<input type="text"/>	<input type="text"/>
UPB as of 07/04/1999	659,201.36		
Annual Debt Service (Without MIP)	65,188.56	<input type="text"/>	<input type="text"/>
Annual Debt Service (With MIP)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Loan Terms:			
Interest Rate (%)	7.5000	<input type="text"/>	<input type="text"/>
Original Term (Months)	480	<input type="text"/>	<input type="text"/>
Remaining Amortization Period (Months)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maturity Date	07/01/2018	<input type="text"/>	
<input type="button" value="Comments *"/>			

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Figure 8-17, Refinancing Sheet

8.4 Submitted Plans Awaiting Decisions

OAHP users have the capability to review Restructuring Plan Forms prior to submission or plans submitted by PAEs. Those submitted require approval or return for revision decisions. Click the [Review Submitted Plans](#) link on the **Restructuring Plans** menu to select search criteria for generating a list of submitted Restructuring Plans (as illustrated in Figure 8-18, Review of PAE Plan Submissions).

State	Property Name	Property	Renewal Type	Date Submitted	OAHP Decision	Comments
FL	CARVEE GARDENS	800003978	Mortgage Restructuring	05/31/2001	Decision Pending	<input type="button" value="PAE"/> <input type="button" value="OAHP*"/> <input type="button" value="TRANS"/>

Figure 8-18, Review of PAE Plan Submissions

The following steps direct OAHP users in reviewing and approving or returning PAE-submitted Restructuring Plan Forms:

1. Click an underlined **Property Name** link to view property and loan data used to develop the Restructuring Plan
2. After reviewing Restructuring Plan data, select of the options in the OAHP Decision field

3. Review comments entered by the PAE in the PAE Comment Box. If desired, enter comments about the OAHP Decision in the OAHP Comment box

4. Repeat steps 1 through 3 for each additional decision on the remaining restructuring plans

5. After all decisions have been made on the Restructuring Plans, enter your first name and last name in the To Continue, Enter Your First and Last Name field

To continue, enter your first and last name:

6. Enter your e-mail address in the Enter your complete e-mail address field

Enter your complete e-mail address:

7. The system date populates the Enter Today's Date field. If necessary, it may be overwritten by the end-user if a corrected approval/return date needs to be entered

Enter Today's Date:

8. Click the Submit Decisions button to save the Restructuring Plan decisions in the system. An approval message window (shown as Figure 8-19, Approval Message Window, provides the user with additional detail information:



Figure 8-19, Approval Message Window

The successful submission of the restructuring plan form to OAHP HQ will automatically populate the Critical Dates Tracking date field "PAE Submits Restructuring Plan to OAHP" for that respective property (depending upon the renewal option type).

9 CLOSING MODULE

This module is designed to display, track, and update specific closing information from the Restructuring Plans information in the M2M system. This module should prove essential to OAHP in collecting some of the data necessary to report total dollar savings from the M2M program.

There is a search screen when this module is selected as shown below in Figure 9-1, Select Search Criteria for Closing Screen.

Figure 9-1, Select Search Criteria for Closing Screen

Select one of the following criteria available to retrieve properties for the Closing properties:

- ◆ Enter a REMS ID for a specify property
- ◆ Enter a FHA Number for a specific property

Or select one or more of the following options available to retrieve the Closing properties:

- ◆ Select an **OAHP Region** from the drop-down list
- ◆ Select a **State** from the drop-down list
- ◆ Select a **PAE Name** from the drop-down list
- ◆ Enter a **Property's Name**
- ◆ Select a **Closing Date** from the drop-down list
- ◆ Click the underlined **HERE** link to retrieve all closing properties in the system

The optional selections of **Closing Date Month** and **Closing Date Year** may be selected by themselves or in combination with the other selections. Figure 9-2, Closed Properties Screen, show the results of the search screen. Properties will only appear if their plan has been approved and a closing date has been entered. Clicking an underlined contract number link will take the user directly to the Mortgage Restructuring Closing screen for that property as shown below in Figure 9-3, Mortgage Restructuring Closing Screen.

[Home](#) [Back](#) [Log Off](#)

Closed Properties

The following 4 out of 4 properties met your All search criteria.

To view/update a contract's closing information, click its underlined **Contract Number**.

PAE Name	Status	Property Name	Model Uploaded	Sec 8 Contract Number	Closing Date	Expiration Date	Property City	State
Florida Housing Finance Corporation	A	CARAVAN APTS	C	FL29M000114	12/12/2000	06/30/1999	JACKSONVILLE	FL
VENCOR, INC.	A	Holden House Apartments	C	OH10M000242	12/25/2001	09/30/1999	DAYTON	OH
VENCOR, INC.	A	WINDSOR PLACE	C	OH16H051005	11/30/2001	10/13/1999	LANCASTER	OH
OMHAR Transaction Center	A	1890 HOUSE	C	RI43M000070	06/20/2001	06/30/1999	PROVIDENCE	RI

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Figure 9-2, Closed Properties Screen

9.1 Mortgage Restructuring Closing Screen

The following sections provide information on the data required to complete the Closing Terms. The user may opt to upload and populate the terms with data extracted from the Excel Underwriting Model or key the data manually. Figure 9-3, Mortgage Restructuring Closing Screen, provides an example of the Mortgage Restructuring Closing main screen with subdivisions for the model functions and the online closing screen.



Figure 9-3, Mortgage Restructuring Closing Screen

9.1.1 Excel Underwriting Model v4

The following subsections provide detailed instructions showing how to upload the Extract data and Model to the M2M System:

- ◆ Instructions for uploading the Model v4 and the Model data (Closing)
- ◆ Upload extracted data into the online Closing Module
- ◆ Upload a copy of the Model for centralized storage
- ◆ Open or Download Model

9.1.1.1 Instructions for uploading the Model v4 and the Model data (Closing)

The Instructions for uploading the Model v4 and the Model data (Closing) (shown on the next page as Figure, 9-4, How to Upload Extract and Model screen) contains general and detailed information of the process to upload extracted data and model to the M2M system for closing:

How to Upload Extract and Model to M2M System

The M2M system has been upgraded to allow for PAEs to

1. upload data from the M2M Excel Underwriting Model v4 automatically, (without having to perform data entry into the M2M Form 5.2). This new feature only works with the **version 4** of the model. Also,
2. the M2M Excel Underwriting model being submitted for review and approval must be uploaded and saved on this centralized, protected server.

Steps to Perform the Two Tasks:

To prepare the Model for uploading into the M2M system Form 5.2 online:

1. Complete the data entry in the Underwriting Model v4 and save as the name - REMS Property Id.xls or .xsm (e.g., 800000000.xls). It is very important to note the location where the model is saved and the REMS #.
2. Go to the Worksheet Tab in the model named: "Create MIS Upload Worksheet."
3. Click on the Button "Create Extract File."
4. An "extract" file is created automatically and saved in the SAME folder or location as the current Model.
5. The extract file is automatically named the REMS property id.txt (e.g., 800000000.txt).
6. Print a copy of the worksheet called "Form 5.2 Data" – to use in the validation of the uploaded data.

To Upload the Extracted Data in order to populate the Form 5.2 online:

1. Log into the M2M system and go to the Restructuring Plans Module.
2. Search for the property associated with the model to be uploaded.
3. Select the property.
4. From the Restructuring Plans screen, select the option: Upload extracted data into the online Form 5.2
5. Either type in the path or location of the extract file (txt file) or click on Browse to find it on the workstation. (It will be in the same folder as the model).
6. Click on the button "Upload the File."
 - If the filename or type of file is incorrect there will be an error displayed.
 - If the filename matches the REMS property id and is the correct file, the data will be extracted and populate the Form 5.2 automatically.
7. First, a screen with data will appear. The PAE should review the data by comparing the printout from the Model "Form 5.2 Data" worksheet.
8. Click on Save if the data is valid.
9. If there were errors in the data and the PAE doesn't want to save the data into the system, cancel by clicking the Back button.
10. If there were errors, review the model and make corrections in the model. Save the corrections and start over by creating a new extract file as described above.

To upload and save a copy of the M2M Excel Underwriting Model on the centralized server:

1. Go to the Restructuring Plans Module in M2M system.
2. Select the property.
3. From the Restructuring Plans screen select the option: Upload a copy of the Model for centralized storage
4. Either type in the path or location of the Model (excel) file or click on Browse to find it on the workstation.
5. Click on the Button "Upload the File"
6. An error will display if there are problems, otherwise, click on Continue.
7. The model is now saved on the server.
8. If the PAE is ready to submit the restructuring plan to OAHP, click on Submit after uploading the model and extracted data to the M2M system.

For the PAE or OAHP to view or download to a workstation:

1. Go to the Restructuring plans screen.
2. Select the Property.
3. Select the option: Open or Download Model
4. If there is an error, it is most likely that the browser is not set up to view Excel and ".xls" needs to be added to the browser's list of applications.
5. Otherwise, choose "save" or "open" – depending on your need.

Figure 9-4, How to Upload Extract and Model Screen

9.1.1.2 Upload extracted data into the online Closing Module

The **Upload extracted data into the online Closing Module** (shown as Figure, 9-5, Upload (Closing) Screen) contains general and detailed information on how to upload extracted data into the online Closing Module:

[Home](#) [Back](#) [Log Off](#)

Mortgage Restructuring Properties Upload (Closing)

Property ID: 800000000 **FHA Number:** 08335299
Property Name: OMHAR Property
PAE Name: Test PAE

Note: This process is to upload the CLOSING TERMS that were extracted from the final closing model into the text file that was created by clicking the 'Create extract file' button on the 'Create MIS upload worksheet' in the Excel model.

The filename of the data extract to be uploaded must match the REMS property id and have a .txt extension. Performing this upload will overwrite any Closing Terms data for this property that has previously been saved.

Enter the path and name of the data extract file in the space below or click the browse button to locate the file on your workstation.

File to Upload:

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Figure 9.5, Upload (Closing) Screen

Click the Upload the File button to open the Mortgage Restructuring Upload (Closing) Screen (shown as Figure, 9-6, Mortgage Restructuring Upload (Closing) Screen):

Update data and click the Save button in the bottom of the Mortgage Restructuring Upload Closing screen to open the Information Saved Screen (shown as Figure, 9-7, Upload (Closing) Information Saved Screen), Then Click the Save button in the screen to save data into M2M database.

Information Saved

The data was saved successfully.

If this property was built prior to 1978, please complete the Lead Based Paint Evaluation section below:

Risk Assessment/Inspection Completed: N/A
Date Owner Received:
Lead Based Paint Exists: N/A
Lead Based Paint Hazard: N/A

If there is a Section 8 Recapture agreement in place at Closing, please fill in the Expiration Date of the Recapture Agreement here:

If this property was a TPA (Transfer of Physical Assets), did HUD forgive the Mortgage Restructuring Note? No
The Contingency Repayment Note? No

If there are any unusual or important issues that should be brought to the attention of the HUD Project Manager, please enter them in this comment box to appear on the Transmission Memo. Special Conditions *

Save

Otherwise, click "Continue" to go to the Closing Module screen.

Continue

Figure 9.7, Upload (Closing) Information Saved Screen

9.1.1.3 Upload a copy of the Model for centralized storage

The Upload a copy of the Model for centralized storage (shown on the next page as Figure, 9-8, Excel Underwriting Model Upload Screen) contains general and detailed information on how to upload the Excel underwriting model:

Excel Underwriting Model Upload

Property ID: 800000905
Property Name: HACIENDA DEL RIO
PAE Name: Signet Partners
FHA Number: 12335160

Note: The filename of the model to be uploaded must match the property id and have a .xls or .xism extension. Performing this upload will overwrite any model for this property that has previously been uploaded.

Enter the path and filename of the model in the space below or click the browse button to locate the model on your workstation.

File to Upload: Browse...
Upload the File

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Figure 9-8, Excel Underwriting Model Screen

9.1.1.4 Open or Download Model

The **Open or Download Model** function allows users to view or download the Excel Model that has been placed on the centralized server.

9.1.2 Online Closing

The following subsections provide additional information on the data that is required to populate Mortgage Restructuring Closing terms:

- ◆ Closing Module Screen
- ◆ Print the Transmission Memo
- ◆ Printable View of Closing Module Screen

9.1.2.1 Closing Module Screen

The Closing Module screen for the selected property, as shown below in Figure 9-10, Closing Module Screen, contains the following sections:

- ◆ Mark to Market Rents
- ◆ IRP
- ◆ CRP
- ◆ First Mortgage
- ◆ Second Mortgage
- ◆ Third Mortgage
- ◆ Sources
- ◆ Fund Uses
- ◆ Lead Based Paint Hazard
- ◆ Rehab Escrow
- ◆ Confirm

After reviewing the information, OAHP users may confirm the closing by entering their name and date in the locations at the bottom of the screen and clicking the **Confirm** button on the left menu. Any data changes that may have been made will also be saved. Data changes may be saved without confirming by clicking the **Save** button on the left menu. Also, the user may Upload extracted Data, Upload the Model, View the Model, or Print the Transmission Memo by clicking the following buttons on the left menu.



Figure 9-9, Closing Module Menu

9.1.2.2 Print the Transmission Memo

The [Print the Transmission Memo](#) (an example of which is on the next page as Figure, 9-11, Closing Memo for Mortgage Restructuring Properties) contains all the property's closing information for printing:

Office of Affordable Housing Preservation

Memo

To: CAROL A STEFFEN, Project Manager Coral Gables
From: Portfolio Office Director
Date: November 12, 2014
Subject: Mark-to-Market (M2M) Debt Restructuring Post Closing Transmission to HUD

Project Name: CENTRAL AREA APTS **Date Closed:** 07/28/2000
Project Address: 2014 NW 5TH PL **Date Model Upload:**
 MIAMI, FLORIDA 33127

Restructured Loans

Loan Position*	Lender	Type of Loan	Post Closing FHA ID:	Principal Amount
1st	Oneal Labor Financial Group	FHA Reverse	04213374	200,000.00
2nd**	HUD	M2M Mortgage Restructuring Note	04213387	3,428,029.71
3rd**	HUD	M2M Contingency Repayment Note	04213386W	3,179,027.29

* Loan positions and mortgages can vary. Borrowers should be notified to fit the terms of the transaction.
 ** This project has been transferred to a Qualified Non-Profits (QNP) in accordance with HUD Appendix C. The purchaser has requested forgiveness/assignment/modification of the M2M/CRN. Further confirmation and documentation will follow when available if complete.

Terms of 1st Mortgage

Interest Rate	Term	Monthly Date	Monthly P&I Payment (incl. MIP)
4.5000%	360 Mos.	11/01/2004	1,500.17

Terms of Mortgage Restructuring Note (MRN)

Interest Rate	Term	Monthly Date	Payment Term
1.0000%	360 Mos.	11/01/2004	85.0% of Single Cash

Terms of Contingent Repayment Note (CRN)

Interest Rate	Term	Monthly Date	Payment Term
1.0000%	360 Mos.	11/01/2004	85.0% of Single Cash after Payoff of MRN

M2M Surplus Cash Calculation: Reflecting projected first year cash flow of the transaction:

RE Gross Income (Assisted and unassisted rents + Comm & other income - vacancy/delta)	1,269,293.00
Less: Expenses	1,169,714.00
Reserve for Employment	97,200.00
CRP (assisted funds retained to owner, amount anticipated per underwriting)	3,211.00
Equal: AHGI	117,500.00
Less: Int Mortgage Debt Service (includes MIP)	20,203.05
Plus: DP	
Equal: Gross Cash Flow	97,297.95
Less: DP (owner incentive fee, calculated 1st year, available thereafter if cash flow and performance allow, amount anticipated per underwriting)	40,129.00
Equal: Single Cash Available for MRN (or CRN) and Owner Split	57,168.95
Amount to MRN (or CRN)	49,246.56
Amount to Owner	6,922.39

CRP and IFF

CRP - Monthly Payments	327.38
CRP - Number of Months	120
IFF - Percentage of Effective Gross Income	2.93

RAR

Initial Post-M2M RAR Account Balance	494,131.81
RAR Minimum Annual Amount (includes OY receipts or DP)	78,000.00
RAR Monthly Deposit (includes OY receipts or DP)	6,500.00

Lead Based Paint Evaluation

Risk Assessment/Inspection Completed	
Date Owner Received	
Lead Based Paint Status	
Lead Based Paint Hazard	

Rehab Escrow: Indicates Total Amount Escrowed and Contingency Amount. Attach Schedule of Items and Costs.

Total Amount Escrowed	N/A
Contingency Amount	

Rehab Escrow:

Rehabilitation Escrow Administrator:

Cash Management Organization and Contact Name:
 Address:
 Phone Number:

Repair Oversight Organization and Contact Name:
 Address:
 Phone Number:

Other Escrow

Taxes Escrowed at Closing	78,282.38
Insured Interest Escrowed at Closing	15,696.83
Operating Deficit Escrow Amount	1,500.00

IRP and Section 8 Out-Year Recapture (if applicable)

IRP Available:

IRP Payments to be made to RAR	
IRP Payments to be applied to Int Mortgage Debt Service	
Number of Months	

Section 8 Out-Year Recapture Funds Available:

Section 8 Recapture applied to RAR per Month (This amount plus the monthly RAR deposit amount per added together and total goes in the Regulatory Agreement at the owner's required RAR deposit)	
Section 8 Recapture applied to 2nd & 3rd Mortgage Debt Service	
Section 8 Recapture applied to Other approved Uses	
Number of Months	
Expiration Date of Recapture Agreement	12/30/2002

Rent Determination for Next HAP Contract (to be adjusted by OCAF if applicable):

0 Bedroom	
1 Bedroom	571.00
2 Bedroom	
3 Bedroom	
4 Bedroom	
5 Bedroom	
6 Bedroom	

Other Special Conditions or Issues:

Direct questions to PATRICIA AMERSON. Direct post-closing cash management questions to Jo Anne Garrison, OAHF Closing Technical Manager at 202-708-0001 x8376.

Please note that the information in this Transmission Memo is current as of the date of the Memo. Any updates to the data or changes to the transaction subsequent to the date of this Transmission Memo, may, however, make this Transmission Memo inaccurate. We will endeavor to keep you up-to-date if changes occur post closing. If however, you believe changes have occurred, you may always verify the accuracy of this information via an automatically up-dated version of this memorandum located in OAHF's MIS site (Closing Modules) in Secure Systems. Approximately 90-120 days post closing you should receive a final docket of closing related documents that will be the final reference point for all information related to this restructuring.

Figure 9-11, Closing Memo

9.1.2.3 Printable View of Closing Module Screen

The [Printable View of Closing Module Screen](#) (an example of which is on the next page as Figure, 9-12, Printable View of Closing Module Screen) contains all the property's closing information for printing:

Closing Module Screen For Mortgage Restructuring Properties

Property ID: 00000091
 Previous FHA Number: 0605001
 New FHA Number(s): 1st 0605001 2nd 0423389F 3rd 0423389F
 Property Name: CENTRAL ARBA APTS
 PAF Name: Florida Housing Finance Corporation
 Promotional Office: Ft. Washington
 Debt Restructuring Specialist:
 Closing Date: 07/26/2000
 Debt Service Coverage: 2.78 Closing Trustee: 2.84

If this property was a TPA (Transfer of Physical Assets) or a QIP (Qualified New Profit), has the QIP required Reg. 203 assignment/modification of the Mortgage Restructuring Note? Yes
 The Contingency Requirement Note? Yes

Mark-to-Market Items

Item No.	Type	# of Prior Restructuring Contract Dates	Prior Restructuring Monthly Market Rate	Final Market Rate Prior to Closing	Prior Monthly Exception Rate	Final Exception Rate Prior to Closing
1			10.00	10.00		10.00
2		208	10.00	10.00		10.00
3			10.00	10.00		10.00
4			10.00	10.00		10.00
5			10.00	10.00		10.00
6			10.00	10.00		10.00
7			10.00	10.00		10.00

Section 8 Receipts Agreement

Total Section 8 Receipts Available	
Amount Applied to Payment of First Mortgage	
Amount Applied to Payment of Second & Third Mortgage	
Amount Applied to Payment of Supplemental (SFP)	
Amount Applied to Other Agreement Date	
Total Section 8 Payment Amount Applied	8.00
Amount Section 8 Borrow to BEB	8.00
Payment of Monthly Applied	
Signature Date of Receipts Agreement	10/26/2000

SFP

Amount of SFP Available	
Amount of SFP Applied to Debt Service	
Amount of SFP Applied to Payment (SFP)	
Amount Suspended to BEB	8.00
Payment of Monthly Applied	

Capital Recovery Payment (CRP) Terms

CRP Monthly Payment	127.00
Payment of Monthly Applied	127.00

First Mortgage (Take Out or Stabilized Loan)

Itemization	Restructuring Rate Terms	Final Closing Date
Original Loan	10.00%	07/26/2000
Yield Spread	0.00%	07/26/2000
Original Loan Interest	207,000.00	207,000.00
Amortized Loan (CRP at BEB)	30,000.00	30,000.00
Amortized Loan (CRP - SFP)	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	5.00%
Original Loan (CRP)	300	300
Restructuring Amortization (CRP - BEB)	300	300
Market Risk (%)	0.00%	0.00%
Amortized Loan	18,000.00	18,000.00
Amortized SFP (%)	10.00	10.00

Second Mortgage (Mortgage Restructuring Note)

Itemization	Restructuring Rate Terms	Final Closing Date
Original Loan Interest	122,000.00	9,400.00
Amortized Loan (CRP at BEB)	2,000.00	12,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Amortized Loan	18,000.00	18,000.00

Third Mortgage (Contingent Payment Note)

Itemization	Restructuring Rate Terms	Final Closing Date
Original Loan Interest	12,000.00	1,200.00
Amortized Loan (CRP at BEB)	4,000.00	12,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Amortized Loan	18,000.00	18,000.00

Source

Itemization	Restructuring Rate Terms	Final Closing Date
Supplemental 1st Mortgage Payment	30,000.00	120,000.00
2nd Mortgage Amortization Payment	50,000.00	4,000.00
Payment to BEB	4,000.00	12,000.00
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan (CRP)	1,000	1,000
Original Loan Interest	4,000.00	4,000.00
CRP Term		
Market Risk (%)	1.00%	1.00%
Original Loan		

10 REPORTS MODULE

The **Reports** module is accessed by selecting the **Reports** button from M2M's home screen. The reports within the module are a summarization of the data entered in the **Critical Dates Tracking** screens and are management tracking tools to view the overall status of where the assigned properties are in the restructuring process. In addition, there are internal management level reports to assist OAHP and its business partners in the management of its M2M Program assets.

Generally, only **active** properties in the M2M Program that are assigned to and accepted by a PAE appear in M2M's Reports, though some reports include **completed** properties and allow the User to choose what to be selected. In addition, there is specific criteria for each report, e.g., for the **Property Status Report**, only properties that have at least **one critical date** entered into the system are included on the report. The **Property and Report Selection** page is shown below as Figure 10-1, Property and Report Selection Screen:

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Property and Reports Selection

Report Information

Click On Report Title Below:

Management Reports
Assigned Active Properties Report
Submitted Plans Awaiting Decision Report
Property Status Report
Overview of the Portfolio Status Report
Partial Assignments Report

And View Its Description Here:

The Partial Assignments Report provides a listing of the properties that have been assigned to the designated PAE for completing a specific portion of the full restructuring process. The report shows the due dates and actual dates of the assigned phases. Also, there

Click Here

To View Printable Version Only ¹

Click Here

To View Screen Version

Click Here

To Download Electronic Version Only ²

Click On SELECT SEARCH OPTIONS Button To Continue:

SELECT SEARCH OPTIONS

Click On Clear Selections Button To Restore Default Settings:

Clear Selections

¹ To print a selected report:

1. Select the **View Printable Version** Button above.
2. Click '**Select Search Options**' Button.
3. Select search options and click '**Continue**' Button.
4. Select **Print** on the File menu.
5. Click on **Properties**.
6. Select **Letter** or **Legal*** on the Paper Size option.
7. Select **Portrait** or **Landscape*** on the Orientation option.
8. Click **OK**.

² To download a selected report:

1. Select the **Download Electronic Version** Button above.
2. Click '**Select Search Options**' Button.
3. Select search options and click '**Continue**' Button.
4. Click the "Save File..." button when it appears and name the file any name with a ".csv" extension (e.g., "testrept.csv").

Open Microsoft Excel (or other application of choice) and open the saved file. The file may now be resaved in the format of Excel or other chosen application.

Reports with an asterisk (*) must be printed in landscape mode on legal-sized paper.

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Figure 10-1, Property and Report Selection Screen

10.1 Property and Report Selection

The **Reports** module allows users to generate the following reports:

- ◆ Assigned Active Properties Report
- ◆ Submitted Plans Awaiting Decision Report
- ◆ Overview of the Portfolio Status Report
- ◆ Partial Assignments Report
- ◆ Late Submissions Report
- ◆ Rent Comparability Review Progress Report
- ◆ Rent Comparability Review Progress Report – Post M2M
- ◆ Rent Reduction Only Progress Report
- ◆ Mortgage Restructuring Progress Report
- ◆ Focus on Production Report
- ◆ Properties On Hold Report
- ◆ Underwriting Tracking Report

To view a report, click the report title in the scroll down selection box and click one of the viewing options. Reports may be viewed on-screen, printed, or downloaded and saved in an electronic format. Next, click the Select Search Options button and make your selections in the opened window.

To save a downloadable version of a report:

1. Select the Download Electronic Version radio button
2. Click the 'Select Search Options' button
3. Select search options and click the 'Continue' button
4. Click the "Save File..." button and name the file a name with a ".csv" extension (e.g., "testrept.csv").
5. Open application of choice (e.g., Microsoft Excel) and the saved file.
6. The file may be resaved in the format of the application.

10.2 Assigned Active Properties Report

The **Assigned Active Properties Report** (Figure 10-2, Assigned Active Properties Report on the next page) contains a listing of all of the current M2M Program properties, the PAE to which each property is assigned, and the M2M Program phase in which each property resides.

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Assigned Active Properties Report

Today's Date: 11/12/2004

Preservation Office: New York

PAE Name	Property Name	Section 8 Contract Renewal Type	Last Critical date	Date	Property ID	Property City	Property State
MASSACHUSETTS HOUSING FINANCE AGENCY	GRANITE PLACE	Mortgage Restructuring	OMHAR Sends List of Potential Assets	05/11/2001	800008520	QUINCY	MA
MASSACHUSETTS HOUSING FINANCE AGENCY	JUDSON HOUSE	Comp Review	PAE Accepts Assignment	12/11/2000	800008606	HAVERHILL	MA
MASSACHUSETTS HOUSING FINANCE AGENCY	OLDE ENGLISH VILLAGE	Rent Reduction Only	OAHP Receives Referral from Field Office	06/22/2001	800008744	GARDNER	MA
MASSACHUSETTS HOUSING FINANCE AGENCY	ORANGE APARTMENTS	Rent Reduction Only	OAHP Receives PAE Resubmission	05/06/2000	800008749	SPRINGFIELD	MA
MASSACHUSETTS HOUSING FINANCE AGENCY	TANNERY II	Rent Reduction Only	PAE Accepts Assignment	07/04/2000	800008918	PEABODY	MA

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Figure 10.2, Assigned Active Properties Report

10.3 Submitted Plans Awaiting Decision Report

The Submitted Plans Awaiting Decision Report contains a listing of all of the current restructuring plans submitted by PAEs that do not have an “Approved” or “Returned for Revision” status and are awaiting a decision from OAHP. Shown below in Figure 10.3, Submitted Plans Awaiting Decision Report, is an example of a Submitted Plans Awaiting Decision Report.

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Submitted Plans Awaiting Decision Report

Today's Date: 11/12/2004

Preservation Office: Chicago

PAE Name	Property Name	Property State	Section 8 Contract Renewal Type	Property ID	Date Submitted
Ohio Housing Finance Agency	JEFFREY PLACE	OH	Mortgage Restructuring	800016766	10/10/2003

Preservation Office: New York

PAE Name	Property Name	Property State	Section 8 Contract Renewal Type	Property ID	Date Submitted
Pennsylvania Housing Finance Agency	MON VIEW HEIGHTS	PA	Mortgage Restructuring	800018680	08/22/2003

Preservation Office: Washington

PAE Name	Property Name	Property State	Section 8 Contract Renewal Type	Property ID	Date Submitted
Florida Housing Finance Corporation	CARVER GARDENS	FL	Mortgage Restructuring	800003978	05/31/2001

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Figure 10-3, Submitted Plans Awaiting Decision Report

10.4 Overview of the Portfolio Status Report

The Overview of the Portfolio Status Report (Figure 10-4, Overview of the Portfolio Status Report) is an overview of the status of all the Properties reflecting the Accepted, Submitted, Approved, Closing, and “Other Completed” Dates sorted by Preservation Office, PAE, State, and Property Name with the option to select completed, active, or all properties. Also, there is a direct link to the property’s critical dates’ page to view the current dates and update, if necessary.

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Overview of the Portfolio Status Report

Today's Date: 11/12/2004

Preservation Office: New York

PAE Name	Property State	Property Name	Property ID	Status	Section 8 Contract Renewal Type	Accepted Date	Submitted Date	Approved Date	Closing Date	Other Completed Date
MASSACHUSETTS HOUSING FINANCE AGENCY	MA	GRANITE PLACE	800008520	Active	Mortgage Restructuring					
MASSACHUSETTS HOUSING FINANCE AGENCY	MA	JUDSON HOUSE	800008606	Active	Comp Review	12/11/2000				
MASSACHUSETTS HOUSING FINANCE AGENCY	MA	OLDE ENGLISH VILLAGE	800008744	Active	Rent Reduction Only					
MASSACHUSETTS HOUSING FINANCE AGENCY	MA	ORANGE APARTMENTS	800008749	Active	Rent Reduction Only	05/06/2000	05/06/2000			
MASSACHUSETTS HOUSING FINANCE AGENCY	MA	TANNERY II	800008913	Active	Rent Reduction Only	07/04/2000				

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Figure 10-4, Overview of the Portfolio Status Report

10.5 Partial Assignments Report

The Partial Assignments Report (Figure 10-5, Partial Assignments Report) is a list of all the Properties that are designated as partial assignments, sorted by Preservation Office, PAE, State, and Property Name with the option to select completed, active, or all properties. Also, there is a direct link to the property’s critical dates’ page to view the current dates and update, if necessary.

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Partial Assignments Report

Today's Date: 08/06/2008

Preservation Office: New York

PAE Name	State	Property Name	Property ID	Status	Due Diligence Due Date	Due Diligence Actual Date	Title Bring Down Order Actual Date	Title Bring Down Received Actual Date	Submit Due Date	Submit Actual Date	OAHF Executed Restructuring Plan Due Date	OAHF Executed Restructuring Plan Actual Date	Owner Executed Restructuring Commitment Due Date	Owner Executed Restructuring Commitment Actual Date
CreditVest, Inc.	PA	LEO MEYER MANOR	800018604	Completed	10/10/2001	10/11/2001			10/30/2001	06/08/2001			11/01/2001	11/17/2001
CreditVest, Inc.	RI	OXFORD PLACE	800019383	Completed	06/28/2001	06/29/2001			09/01/2001	08/20/2001			10/18/2001	09/17/2001
Foley and Judell, LLP	MA	CITYWIDE APTS.	800028733	Completed						02/12/2002				
Heskin Signet Partnership	MA	OLDE ENGLISH VILLAGE	800008744	Completed						01/03/2003				

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Partial Assignments Report

Today's Date: 08/13/2008

New York

Property ID	Status	Due Diligence Due Date	Due Diligence Actual Date	Title Bring Down Order Actual Date	Title Bring Down Received Actual Date	Submit Due Date	Submit Actual Date	OAHF Executed Restructuring Plan Due Date	OAHF Executed Restructuring Plan Actual Date	Owner Executed Restructuring Commitment Due Date	Owner Executed Restructuring Commitment Actual Date	Closing Due Date	Closing Actual Date	Action Other Than Closing Date
800018604	Completed	10/10/2001	10/11/2001			10/30/2001	06/08/2001			11/01/2001	11/17/2001	01/30/2002	01/18/2002	
800019383	Completed	06/28/2001	06/29/2001			09/01/2001	08/20/2001			10/18/2001	09/17/2001	12/18/2001	01/03/2002	
800028733	Completed						02/12/2002					07/31/2002	07/29/2002	
800008744	Completed						01/03/2003					03/31/2004	03/31/2004	

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Figure 10-5, Partial Assignments Report

10.6 Late Submissions Report

The Late Submissions Report (Figure 10-6-1, Late Submissions Report (Part I)) provides a roll up of the total number of late plan submissions by type. Clicking on the total (underlined in blue) will provide details (Figure 10-6-2, Late Submissions Report (Part II)) on which properties comprise the total number, sorted by Preservation Office and by PAE. The last Milestone and date completed and the number of days the property is late is provided. Also, there is

a direct link to the property's critical date's page to view the current dates and update, if necessary.

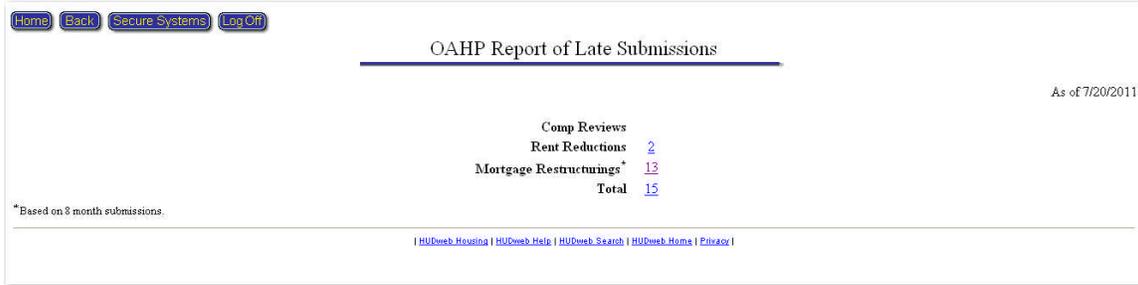


Figure 10-6-1, Late Submissions Report (Part I)

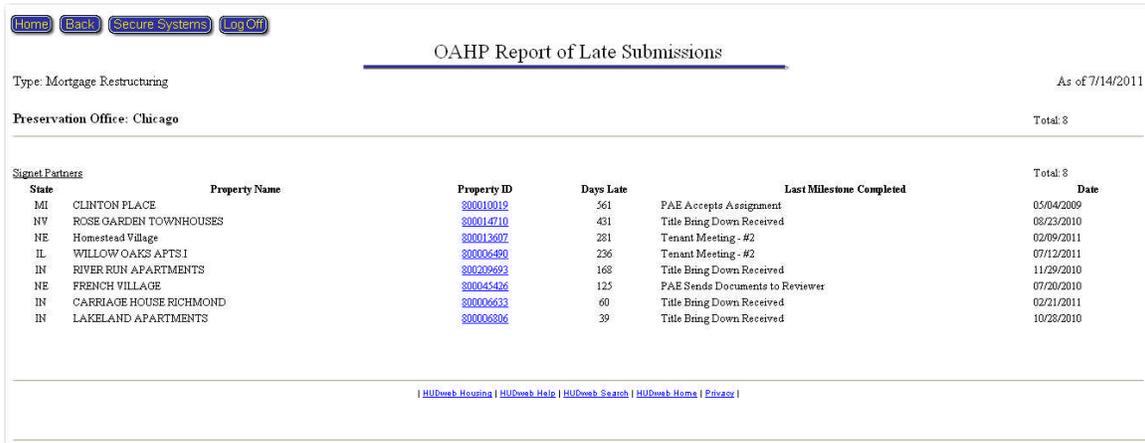


Figure 10-6-2, Late Submissions Report (Part II)

10.7 Rent Comparability Review Progress Report

The **Rent Comparability Review Progress Report** (illustrated as Figure 10.7 on the next page) represents the progress and status of the active Rent Comparability Review properties currently assigned to PAEs. It details the referral and acceptance dates, the dates review results were submitted to OAHP and the date OAHP approves the results.

Home	Back	Secure Systems	Log Off	<u>Rent Comparability Review Progress Report</u>							Today's Date: 11/12/2004
Property State	Status	Primary FHA Number	Field Office Refers to OAHP	OAHP Initial Assignment	OAHP Approves COI Form 2.2	PAE Accepts Assignment	PAE Submits Review Results to OAHP	OAHP Approves Review Results Date	Approved Review Results		
Preservation Office: New York											
Indiana Housing Finance Authority											
ANTILLEAN MANOR COOPERATIVE	CT	Completed		09/24/1999	07/20/1999		03/05/2000		Review in Process		
PAE Total				1	1	0	1	0	0		
MASSACHUSETTS HOUSING FINANCE AGENCY											
JUDSON HOUSE	MA	Active	02335147	09/24/1999	09/02/1999		12/11/2000		Review in Process		
PAE Total				1	1	0	1	0	0		
Preservation Office Total				2	2	0	2	0	0		
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Figure 10.7, Rent Comparability Review Progress Report

10.8 Rent Comparability Review Progress Report – Post M2M

The **Rent Comparability Review Progress Report – Post M2M** (illustrated as Figure 10.8 on the next page) represents the progress and status of the Post M2M Program Rent Comparability Review properties currently assigned to PAEs. It details the referral and acceptance dates, the dates review results were submitted to OAHP and the date OAHP approves the results.

Home	Back	Secure Systems	Log Off	<u>Post M2M Rent Comparability Review Progress Report</u>							Today's Date: 11/12/2004
Property State	Status	Primary FHA Number	Field Office Refers to OAHP	OAHP Initial Assignment	OAHP Approves COI Form 2.2	PAE Accepts Assignment	PAE Submits Review Results to OAHP	OAHP Approves Review Results Date	Approved Review Results		
Preservation Office: New York											
VENCOR, INC.											
FAIRLANE MEADOWS	AL	Active	06244041	02/18/2004	02/18/2004				Review in Process		
BEECH HILL PARK	NH	Completed	02444006	11/06/2002	11/20/2002	11/20/2002			Review in Process		
PAE Total				2	2	1	0	0	0		
Preservation Office Total				2	2	1	0	0	0		
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Figure 10.8, Rent Comparability Review Progress Report – Post M2M

10.9 Rent Reduction Only Progress Report

The **Rent Reduction Only Progress Report** represents the progress and status of the active M2M Program Rent Reduction Only properties currently assigned to PAEs. It details the referral and acceptance dates, the dates the PAE executes M2M Program tasks, the dates the Rent Reduction Only Restructuring Plan was submitted to OAHP and the date OAHP issues a decision on submitted plans.

Figure 10-9, Rent Reduction Only Progress Report (Part I) and Figure 10-10, Rent Reduction Only Progress Report (Part II), shown below, is an example of the Rent Reduction Only Progress Report.

Note: It is necessary to load legal-sized paper and set you printer to print in landscape mode for this progress report.

Home Back Secure Systems Log Off															
<p align="center">Rent Reduction Only Progress Report -- Part I</p>															
<p align="right">Today's Date: 08/13/2008</p>															
Property State	Status (*Partial)	Primary FHA Number	OAHP Initial Assignment	OAHP Approves COI Form 2.2	PAE Accepts Assignment	Tier 1 Due Date	Amended Tier 2 Due Date (Per Rel. Mgr.)	Tenant Notice Sent	PCA Assigned by PAE	Appraisal Assigned by PAE	PAE's PCA Complete	PAE's Appraisal Complete	PAE Submits Justification for Recommendation (Form 10.2)	OAHP Receives Complete PA Justification (Form Submi	
Preservation Office: Washington															
First Housing Development Corporation															
LAKE WALES GARDENS	FL	Active	06792011	11/02/2005	11/18/2005	11/28/2005	02/26/2006	08/29/2006	12/14/2005	12/02/2005	12/02/2005		05/25/2006	05/26/2006	
PLAZA APARTMENTS (THE)	NC	Active	05335286	08/09/2006	08/18/2006										
STANLEY SQUARE	NC	Active	05335840	05/25/2006	06/01/2006	06/07/2006	09/03/2006	07/11/2006	06/08/2006	06/08/2006			08/21/2006	08/22/2006	
PAE Total			3	3	2	2	1	2	2	2	0	0	2	2	
Housing Authority of the City of Atlanta															
PEACHTREE VILLAS APARTMENTS	GA	Active	06111133	03/28/2006	04/04/2006	03/29/2006	06/27/2006		04/24/2006	04/24/2006	04/24/2006		06/16/2006	06/19/2006	
PAE Total			1	1	1	1	0	1	1	1	0	0	1	1	
NW Financial Group															
VINE ASSOCIATES	CT	Active	01735071	08/30/2006											
SOUTHWICK BLOCK APTS	MA	Active	02335176	05/25/2006	05/31/2006	06/01/2006	08/30/2006	06/07/2006	06/08/2006	06/07/2006			08/15/2006	08/16/2006	
The BROOK APARTMENTS	NY	Active	01335132	07/28/2006	08/08/2006	08/11/2006	11/09/2006		08/14/2006	08/15/2006					
Falmont Arbors	WV	Active	04511006	05/09/2006	05/12/2006	05/21/2006	08/19/2006	06/07/2006	05/21/2006	05/21/2006			07/26/2006	07/28/2006	
Potomac Heights	WV	Active	04535206	11/23/2005	11/30/2005	12/01/2005	03/01/2006		12/12/2005	12/12/2005			03/28/2006	02/15/2006	
Twin Rivers Tower	WV	Active	04535117	11/30/2005	12/02/2005	12/06/2005	03/06/2006	01/17/2006	12/12/2005	12/12/2005			02/07/2006	02/08/2006	
PAE Total			6	5	5	5	0	3	5	5	0	0	4	4	
RER Solutions, Inc.															
FILLMORE I	AZ	Active	12335128	05/29/2003											
GAINESWAY VILLAGE APARTMENTS	KY	Active	08335622	06/21/2006	06/27/2006	07/03/2006	10/01/2006		07/11/2006	07/11/2006			08/31/2006		
Dunbar Towers	WV	Active	04535069	08/10/2004	09/27/2004	08/24/2004	11/22/2004	11/22/2006	09/01/2004	09/01/2004					
PAE Total			3	2	2	2	1	0	2	2	0	0	1	0	
Preservation Office Total			13	11	10	10	2	6	10	10	0	0	8	7	
<p align="center"> HUDweb Housing HUDweb Help HUDweb Search HUDweb Home Privacy </p>															

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Rent Reduction Only Progress Report -- Part I

Today's Date: 08/13/2008

Property	Status (*Partial)	Primary FHA Number	OAHF Initial Assignment	OAHF Approves COI Form 2.2	PAE Accepts Assignment	Tier 1 Due Date	Amended Tier 2 Due Date (Per Rel. Mgr.)	Tenant Notice Sent	PCA Assigned by PAE	Appraisal Assigned by PAE	PAE's PCA Complete	PAE's Appraisal Complete	PAE Submits Justification for Recommendation (Form 10.2)	OAHF Receives Complete PAE Justification (Form 10.2) Submission	OAHF Approves PAE Lite Recommendation
Washington															
ment Corporation															
	Active	06792011	11/02/2005	11/18/2005	11/28/2005	02/26/2006	08/29/2006	12/14/2005	12/02/2005	12/02/2005			05/25/2006	05/26/2006	06/28/2006
	Active	05335286	08/09/2006	08/18/2006											
	Active	05333840	05/25/2006	06/01/2006	06/07/2006	09/05/2006		07/11/2006	06/08/2006	06/08/2006			08/21/2006	08/22/2006	08/30/2006
Total		3	3	2	2	1	2	2	2	0	0	2	2	2	
te City of Atlanta															
	Active	06111133	03/28/2006	04/04/2006	03/29/2006	06/27/2006		04/24/2006	04/24/2006	04/24/2006			06/16/2006	06/19/2006	07/28/2006
Total		1	1	1	1	0	1	1	1	0	0	1	1	1	
	Active	01735071	08/30/2006												
	Active	02335176	05/25/2006	05/31/2006	06/01/2006	08/30/2006		06/07/2006	06/08/2006	06/07/2006			08/15/2006	08/16/2006	
	Active	01335132	07/28/2006	08/08/2006	08/11/2006	11/09/2006			08/14/2006	08/15/2006					
	Active	04511006	05/09/2006	05/12/2006	05/21/2006	08/19/2006		06/07/2006	05/21/2006	05/21/2006			07/26/2006	07/28/2006	08/23/2006
	Active	04535206	11/23/2005	11/30/2005	12/01/2005	03/01/2006			12/12/2005	12/12/2005			03/28/2006	02/15/2006	05/05/2006
	Active	04535117	11/30/2005	12/02/2005	12/06/2005	03/06/2006		01/17/2006	12/12/2005	12/12/2005			02/07/2006	02/08/2006	
Total		6	5	5	5	0	3	5	5	0	0	4	4	2	
	Active	12335128	05/29/2003												
	Active	08335622	06/21/2006	06/27/2006	07/03/2006	10/01/2006			07/11/2006	07/11/2006			08/31/2006		
	Active	04535069	08/10/2004	09/27/2004	08/24/2004	11/22/2004	11/22/2006		09/01/2004	09/01/2004					
Total		3	2	2	2	1	0	2	2	0	0	1	0	0	
Total		13	11	10	10	2	6	10	10	0	0	8	7	5	

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Figure 10.9, Rent Reduction Only Progress Report (Part I)

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Rent Reduction Only Progress Report -- Part II

Today's Date: 08/13/2008

	Property State	Status (+Partial)	Primary FHA Number	OAHP Approves PAE Lite Recommendation	OAHP Notifies Sec. 8 Contract Administrator	PAE Notifies Sec. 8 Contract Administrator	PAE Receives Sec. 8 Contract Administrator's Confirmation of Receipt	PAE Notifies Owner of Recommendation to Convert to Mortgage Restructuring	OAHP Approves Tier 2 Conversion (Form 2.16)	OAHP Returns to PAE for Revision	OAHP Receives PAE Resubmission
Preservation Office: Washington											
First Housing Development Corporation											
	LAKE WALES GARDENS	FL	Active	06792011	06/28/2006	06/20/2006	06/28/2006		05/31/2006		
	PLAZA APARTMENTS (THE)	NC	Active	05335286							
	STANLEY SQUARE	NC	Active	05335840	08/30/2006	08/31/2006					
	PAE Total				2	2	1	0	0	1	0
Housing Authority of the City of Atlanta											
	PEACHTREE VILLAS APARTMENTS	GA	Active	06111133	07/28/2006						
	PAE Total				1	0	0	0	0	0	0
NW Financial Group											
	VINE ASSOCIATES	CT	Active	01735071							
	SOUTHWICK BLOCK APTS	MA	Active	02335176							
	The BROOK APARTMENTS	NY	Active	01335132							
	Falmont Arbors	WV	Active	04311006	08/23/2006						
	Potomac Heights	WV	Active	04335206	05/05/2006			05/10/2006		03/13/2006	03/28/2006
	Twin Rivers Tower	WV	Active	04335117							
	PAE Total				2	0	0	0	1	0	1
RER Solutions, Inc.											
	FILLMORE I	AZ	Active	12335128							
	GARNESWAY VILLAGE APARTMENTS	KY	Active	08335622							
	Dunbar Towers	WV	Active	04335069					08/24/2006		
	PAE Total				0	0	0	0	0	1	0
	Preservation Office Total				5	2	1	0	1	2	1

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Figure 10.10, Rent Reduction Only Progress Report (Part II)

10.10 Mortgage Restructuring Progress Report

The **Mortgage Restructuring Progress Report** details the progress and status of the active Mortgage Restructuring properties currently assigned to PAEs. It details the referral and acceptance dates, the dates the PAE executes M2M Program tasks, the dates the Mortgage Restructuring Plan was submitted to OAHP and the date OAHP issues a decision on submitted plans. An example of this report is presented as Figure 10-11, Mortgage Restructuring Progress Report (Part I) and Figure 10-12, Mortgage Restructuring Progress Report (Part II).

Note: It is necessary to load legal-sized paper and set you printer to print in landscape mode for this progress report.

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Mortgage Restructuring Progress Report

(Critical Dates up to the Tenant Meeting - #2)

Today's Date: 07/14/2011

State	Status (*Partial)	Primary FHA Number	OAHF Initial Assign.	OAHF Approves COI Form 2.2	Amended PRA Milestone Date Per 2.15 Waiver	PAE Accepts Assign.	Owner Kickoff Meeting	PCA Assigned by PAE	PAE Sends Documents to Reviewer	OAHF Returns Documents for Fixes	PAE Resubmits Documents	OAHF Approves GPCA	Appraisal Assigned by PAE	Tenant Meeting - #1	Owner Submits Data Collection Report	PCA Complete	Appraisal Complete	PAE Completes Due Diligence	Title Bring Down Order	Title Bring Down Received	Tenant Meeting - #2
Preservation Office: Chicago																					
ONTRA, Inc.																					
St. Paul Village	OH	Active	04644149	05/26/2009	06/09/2009	10/51/2010	06/12/2009	07/06/2009	06/19/2009				06/19/2009	07/21/2009	06/22/2009	07/27/2009	07/28/2009	09/10/2009	09/03/2009	09/16/2009	
UNION ACRES TRUST	TX	Active	11435034	12/20/2007	01/08/2008	03/31/2011	01/11/2008	01/22/2008	01/23/2008				01/16/2008	02/26/2008	01/20/2008	03/04/2008	03/12/2008	03/12/2008	01/31/2008	02/22/2008	03/25/2008
PAE Total			2	2	2	2	2	2	2	0	0	0	0	2	2	2	2	2	2	1	
Signet Partners																					
HACIENDA DEL RIO	AZ	Active	12331160	12/14/2010	12/16/2010	08/21/2011	12/22/2010	03/03/2011	01/06/2011				01/06/2011	07/21/2011		02/08/2011	02/07/2011		06/21/2011	06/28/2011	
CREEDSIDE PLACE	CO	Active	10133512	07/01/2010	07/09/2010	03/31/2011	07/14/2010	07/15/2010	07/20/2010				07/20/2010	08/11/2010	08/30/2010	08/19/2010	08/19/2010	08/30/2010	07/19/2010	07/26/2010	02/16/2011
Robson Heights Apartments	IA	Active	07431125	02/26/2010	03/02/2010	01/31/2011	03/03/2010	03/05/2010	03/25/2010				03/25/2010	05/06/2010	04/14/2010	04/22/2010	04/13/2010	04/22/2010	03/11/2010	03/19/2010	
FRIENDSHIP MANOR I	ID	Active	12411005	03/09/2011	02/11/2011		02/16/2011	02/18/2011	02/25/2011				02/25/2011	03/31/2011	03/29/2011	04/01/2011	03/22/2011	04/01/2011	03/07/2011	03/09/2011	
AUBURN MANOR APARTMENTS	IL	Active	07111122	06/04/2010	06/11/2010	09/30/2011	06/17/2010	06/21/2010	07/08/2010				07/08/2010	07/21/2010	08/07/2010	08/15/2010	07/20/2010	08/16/2010	07/08/2010	07/15/2010	04/20/2011
RAVINA HOUSING	IL	Active	07134467	02/13/2009	02/18/2009	08/31/2011	02/26/2009	02/27/2009	03/11/2009				03/11/2009	11/12/2009	10/21/2009	04/30/2009	04/09/2009	10/30/2009	09/17/2009	10/30/2009	06/08/2010
SLATE CREEK APARTMENTS	IL	Active	07211080	12/19/2008	01/06/2009	08/31/2011	01/12/2009	01/16/2009	01/20/2009				01/20/2009	02/24/2009	03/13/2009	03/26/2009	03/04/2009	03/26/2009	02/26/2009	03/03/2009	09/01/2009
WILD BERRY VILLAGE	IL	Active	07133734	05/26/2009	05/29/2009	07/29/2011	05/30/2009	06/07/2009	06/19/2009				06/19/2009	01/27/2010	02/09/2010	07/24/2009	07/13/2009	02/09/2010	01/23/2010	01/15/2010	11/17/2010
WILLOW OAKS APTS I	IL	Active	07232552	03/17/2010	03/19/2010	07/29/2011	03/25/2010	04/01/2010	04/07/2010				04/07/2010	10/20/2010	11/01/2010	03/04/2010	04/06/2010	11/11/2010	11/02/2010	11/11/2010	07/12/2011
BELMONT ESTATES	IN	Active	07333635	03/11/2009	03/17/2009	07/31/2011	03/23/2009	03/25/2009	03/31/2009				03/31/2009	04/23/2009	04/21/2009	06/01/2009	05/04/2009	06/01/2009	04/10/2009	03/01/2009	12/16/2009
CARRLAKE HOUSE NEW ALBANY	IN	Active	07333592	02/18/2011	02/23/2011		02/28/2011	07/08/2011	03/04/2011				03/04/2011			03/31/2011	04/06/2011				
CARRLAKE HOUSE RICHMOND	IN	Active	07311325	09/07/2010	09/14/2010	09/30/2011	09/17/2010	02/15/2011	09/30/2010				09/30/2010	03/24/2011	03/03/2011	11/04/2010	11/04/2010	03/24/2011	02/15/2011	02/11/2011	
ELGIN MANOR APARTMENTS	IN	Active	07311230	10/15/2009	10/20/2009	04/29/2011	10/23/2009	10/24/2009	11/11/2009				11/11/2009	12/16/2009	12/09/2009	12/11/2009	12/14/2009	01/13/2010	11/11/2009	01/13/2010	07/13/2010
LAKELAND APARTMENTS	IN	Active	07333639	09/30/2010	10/05/2010	08/31/2011	10/08/2010	10/21/2010	10/21/2010				10/21/2010	12/08/2010	11/08/2010	11/22/2010	11/23/2010	11/23/2010	10/21/2010	10/28/2010	
RIVER RUN APARTMENTS	IN	Active	07333531	05/18/2010	05/21/2010	07/29/2011	06/01/2010	06/03/2010	06/21/2010				06/21/2010	12/08/2010	08/12/2010	07/22/2010	07/21/2010	12/08/2010	11/15/2010	11/29/2010	
CLINTON PLACE	MI	Active*	04433500	04/24/2009	04/28/2009	12/31/2010	05/04/2009														
FOX RIDGE	MI	Active	04732218	06/27/2011	06/28/2011		07/05/2011	07/11/2011													
VILLAGE MANOR APARTMENTS	MI	Active	04411079	05/05/2010	05/07/2010	09/30/2011	05/12/2010	05/14/2010	06/01/2010				06/01/2010	07/15/2010	07/04/2010	07/06/2010	07/06/2010	07/15/2010	06/24/2010	06/30/2010	04/21/2011
CHICAGO AVE APARTMENTS	MI	Active	09232399	10/09/2009	10/14/2009	09/30/2011	10/19/2009	10/23/2009	11/11/2009				11/11/2009	06/23/2010	08/23/2010	01/21/2010	12/16/2009	06/23/2010	05/14/2010	06/02/2010	03/17/2011
FALLS MEADOWS TOWNHOUSES	MI	Active	09232338	10/23/2009	10/27/2009	06/30/2011	11/02/2009	03/22/2010	11/20/2009				11/17/2009	05/05/2010	04/20/2010	12/21/2009	12/14/2009	03/24/2010	03/15/2010	03/24/2010	12/15/2010
ORCHARDVALE PLACE	MI	Active	09211197	07/21/2009	07/23/2009	09/30/2011	07/28/2009	03/22/2010	08/12/2009				08/12/2009	05/06/2010	03/05/2010	09/14/2009	09/17/2009	04/21/2010	04/13/2010	04/21/2010	12/16/2010
TOWER HILL APARTMENTS	MI	Active	09333113	12/14/2010	12/16/2010	08/14/2011	12/22/2010	03/02/2011	01/06/2011				01/06/2011	07/06/2011	06/20/2011	02/07/2011	02/09/2011	07/06/2011	06/07/2011	06/14/2011	
COMMUNITY HOMES I	ND	Active	09444001	06/17/2011	06/22/2011		06/27/2011	07/01/2011	07/11/2011				07/11/2011								
COMMUNITY HOMES II	ND	Active	09444007	06/17/2011	06/22/2011		06/27/2011	07/01/2011													
FRENCH VILLAGE	NE	Active	10311017	07/01/2010	07/09/2010	07/31/2011	07/14/2010	07/15/2010	07/20/2010				07/20/2010								
Homeside Village	NE	Active	10330021	01/29/2010	02/02/2010	07/31/2011	02/08/2010	02/11/2010	02/26/2010				02/26/2010	05/05/2010	03/08/2010	03/31/2010	03/31/2010	02/25/2010	03/08/2010	02/09/2011	
L-E-W HSG FOR ELDERLY	NE	Active	10311016	01/29/2010	03/02/2010	08/31/2011	02/08/2010	07/28/2010	02/26/2010				02/26/2010	08/31/2010	08/31/2010	03/29/2010	04/05/2010	08/31/2010	08/11/2010	08/11/2010	02/10/2011
Centennial Park Area Apartments	NV	Active	12511057	12/14/2010	12/16/2010		12/22/2010	12/28/2010	01/06/2011				01/06/2011	02/08/2011	01/14/2011	02/07/2011	02/07/2011	02/07/2011	01/18/2011	01/23/2011	
Community Outlets	NV	Active	12511052	12/14/2010	12/16/2010		12/22/2010	12/28/2010	01/06/2011				01/06/2011	02/09/2011	01/14/2011	02/09/2011	02/09/2011	02/09/2011	01/18/2011	01/21/2011	
ROSE GARDEN TOWNHOUSES	NV	Active	12544001	09/03/2009	09/09/2009	08/31/2011	09/11/2009	10/14/2009	10/05/2009				10/05/2009	11/30/2009	09/12/2010	01/13/2010	11/06/2009	11/30/2009	08/04/2010	08/23/2010	
WILSHIRE PLACE, LTD.	OH	Active	04333070	11/25/2008	12/02/2008	07/29/2011	12/05/2008	12/17/2008	12/17/2008				12/17/2008	01/20/2009	01/05/2009	03/11/2009	01/05/2009	03/11/2009	12/19/2008	01/05/2009	09/22/2009
MOUNTAINVIEW PRIDE HOMES	TN	Active	08133072	01/12/2010	01/19/2010	06/30/2011	01/25/2010	02/01/2010	02/10/2010				02/10/2010	03/17/2010	03/12/2010	03/12/2010	03/12/2010	03/12/2010	02/25/2010	03/08/2010	
PAE Total			32	32	25	32	31	29	1	0	0	0	28	26	25	27	27	25	26	26	15
Preservation Office Total			34	34	27	34	33	31	1	0	0	0	30	28	27	29	29	27	28	28	16

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Figure 10-11, Mortgage Restructuring Progress Report (Part I)

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Mortgage Restructuring Progress Report

(Critical Dates from PAE's Draft Plan Submission)

Today's Date: 08/13/2008

State	Status (*Partial)	Primary FHA Number	PAE Submits Restr. Plan to OAHP	OAHP Receives Complete Restr. Plan and Form 5.2	Date Assigned to UW	OAHP Approves Restr. Plan	OAHP Returns Restr. Plan for Revision	OAHP Receives PAE Resub	Restructuring Plan Executed by OAHP	RC Executed by Owner	OAHP Approved 4.11 or 4.12	Scheduled Closing Date	Closing Date	New Section 8 Contract Effective Date	Closing Documents Distributed by PAE
Preservation Office: San Francisco															
Colorado Housing & Finance Authority															
MARYMEAD PARK APARTMENTS	CA	Active*	13635613	07/25/2006		08/28/2006									
PAE Total			1	0	0	1	0	0	0	0	0	0	0	0	0
OAHP WPO - ONTRA															
VILLAGE SQUARE	WI	Active**	07544099												
PAE Total			0	0	0	0	0	0	0	0	0	0	0	0	0
Preservation Office Total			1	0	0	1	0	0	0	0	0	0	0	0	0

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Figure 10-12, Mortgage Restructuring Progress Report (Part II)

10.11 Focus on Production Report

The **Focus on Production Report** (Figure 10-13, Focus on Production Report (Part I)) provides a roll up of the total number of the expected submissions in the next two weeks, the next 6 months (by month) and the total for the next six months. By clicking on the total numbers underlined in blue, the properties expected to be submitted are detailed (Figure 10-14, Focus on Production Report (Part II)) by Preservation Office and PAE. Also, there is a direct link to the property's critical dates' page to view the current dates and update, if necessary.

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Focus on Production Report

As of 11/15/2004

Plans Due	Total	Comp Reviews	Rent Reductions	Mortgage Restructurings
This Week	6		3	3
Next Week				
November, 2004	21		13	8
December, 2004	21	2		19
January, 2005	12		4	8
February, 2005	15		2	13
March, 2005	30		1	29
April, 2005	7			7
November, 2004 - April, 2005	106	2	20	84

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Figure 10-13, Focus on Production Report (Part I)

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Focus on Production Report

Plans (Mortgage Restructuring) Due in Week of 11/14/2004

Preservation Office: Washington Total: 3

NW Financial Group Total: 1

State	Property Name	Property ID	Date of Acceptance	Estimated Submission Date
NY	BURNIE C MCCARLEY GARDENS	800053705	04/23/2004	11/19/2004

Comment:

RFR Solutions, Inc. Total: 2

State	Property Name	Property ID	Date of Acceptance	Estimated Submission Date
MD	FOXWELL MEMORIAL APTS	800009221	07/21/2004	11/17/2004
MD	FRANKLIN SQUARE SCHOOL 100	800009224	07/21/2004	11/17/2004

Comment:

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Figure 10-14, Focus on Production Report (Part II)

10.12 Properties On Hold Report

The **Properties On Hold Report** (Figure 10-15, Properties On Hold Report) lists all assets currently On Hold. A property is placed on hold when impediments to the restructuring process are completely outside of the PAE's control. The 'OAHP Places Property On Hold' date freezes the property for all OAHP PRA required dates.

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Properties On Hold Report

Today's Date: 11/12/2004

	State	Status (*Partial)	Primary FHA Number	Section 8 Contract Renewal Type	Date put on Hold	Anticipated On Hold Removal Date
Preservation Office: Washington						
Florida Housing Finance Corporation						
TIDEWATER APARTMENTS	FL	Active	06335043	Rent Reduction Only	12/25/2000	12/31/2000
PAE Total					1	1
Jefferson County Assisted Housing Corp.						
TALLADEGA DOWNS	AL	Active	06244054	Mortgage Restructuring	07/30/2003	09/30/2003
PAE Total					1	1
Preservation Office Total					2	2

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Figure 10-15, Properties On Hold Report

10.13 Underwriting Tracking Report

The **Underwriting Tracking Report** (Figure 10-16, Underwriting Tracking Report by Preservation Office) lists all Full Debt Restructurings currently submitted to OAHP for Underwriting Review sorted by Preservation Office. (Figure 10-17, Underwriting Tracking Report by Underwriting Region) lists all Full Debt Restructurings currently submitted to OAHP for Underwriting Review sorted by Underwriting Region.

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Underwriting Tracking Report

Today's Date: 11/12/2004

	State	Status (*Partial)	Primary FHA Number	Date Originally Submitted	Date Currently Submitted	Date Assigned to Underwriter	Underwriter Name
Preservation Office: New York							
Underwriting Region: Washington							
Pennsylvania Housing Finance Agency							
MON VIEW HEIGHTS	PA	Active	03344044	08/22/2003	08/22/2003	08/30/2003	WILLIAM S RICHBURG
PAE Total				1	1	1	
Underwriting Region Total				1	1	1	
Preservation Office Total				1	1	1	

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Figure 10-16, Underwriting Tracking Report by Preservation Office

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Underwriting Tracking Report

Today's Date: 11/12/2004

	State	Status (*Partial)	Primary FHA Number	Date Originally Submitted	Date Currently Submitted	Date Assigned to Underwriter	Underwriter Name
Underwriting Region: Washington							
Preservation Office: New York							
Pensylvania Housing Finance Agency							
MON VIEW HEIGHTS	PA	Active	03344044	08/22/2003	08/22/2003	08/30/2003	WILLIAM S RICHEBOURG
PAE Total				1	1	1	
Preservation Office Total				1	1	1	
Underwriting Region Total				1	1	1	

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Figure 10-17, Underwriting Tracking Report by Underwriting Region

11 GREEN RETROFIT PROGRAM MODULE

The Green Retrofit Program module is accessible to OAHP, RO, PAE and Guest Account users by selecting the **Green Retrofit** button on M2M's home screen to open the Green Retrofit Program Screen. Guest Account users will see a limited set of the functions as view only.

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Green Retrofit Program (GRP)



October 13, 2009

- [GRP Asset Allocation](#)
- [Green Retrofit Tracking](#)
- [GRP Closing](#)
- [GRP Reports](#)

Click on the mailbox to E-mail your comments and suggestions.



User ID: 019728

Welcome to the Green Retrofit Program (GRP) created by the Office of Affordable Housing Preservation (OAHP). Title XII of Division A of the American Recovery and Reinvestment Act of 2009, P. L. 111-5 (the "Recovery Act"), in the section titled "Assisted Housing Stability and Energy and Green Retrofit Investments" under "Housing Programs", includes authority for HUD to make loans, make grants, and take a variety of other actions to facilitate utility-saving retrofits and other retrofits that produce environmental benefits, in certain existing HUD-assisted multifamily housing, subject to agreement between HUD and the Owner. These activities are undertaken to further the objectives of the Recovery Act, namely, to provide a necessary boost to our economy in these difficult times and to create jobs, restore economic growth, and strengthen America's middle class. The Recovery Act is designed to stimulate the economy through measures that, among other things, modernize the Nation's infrastructure, jump start American energy independence, and protect those in greatest need.

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Figure 11, Green Retrofit Program Screen

11.1 GRP Asset Allocation Module Button

The **Asset Allocation** button provides access for an OAHP HQ user to add or update properties to the Green Retrofit Program, after which, the PAE may be assigned properties by a HQ user.

11.2 Green Retrofit Tracking Module Button

The **Green Retrofit Tracking** button provides access to the GRP properties. Within this module, OAHP Users enter Tracking dates data in accordance with the predetermined Green Retrofit Program timeline for **GRP** properties.

11.3 GRP Closing Module Button

The **GRP Closing** button gives Users a facility for tracking and updating select Green Retrofit Properties information and to retain the actual closing figures.

11.4 GRP Reports Module Button

The **GRP Reports** button gives Users access to the reports in the system.

12 GRP ASSET ALLOCATION MODULE

The following screen (Figure 12-1, Asset Allocation Screen) will be returned when the Green Retrofit module button is clicked:

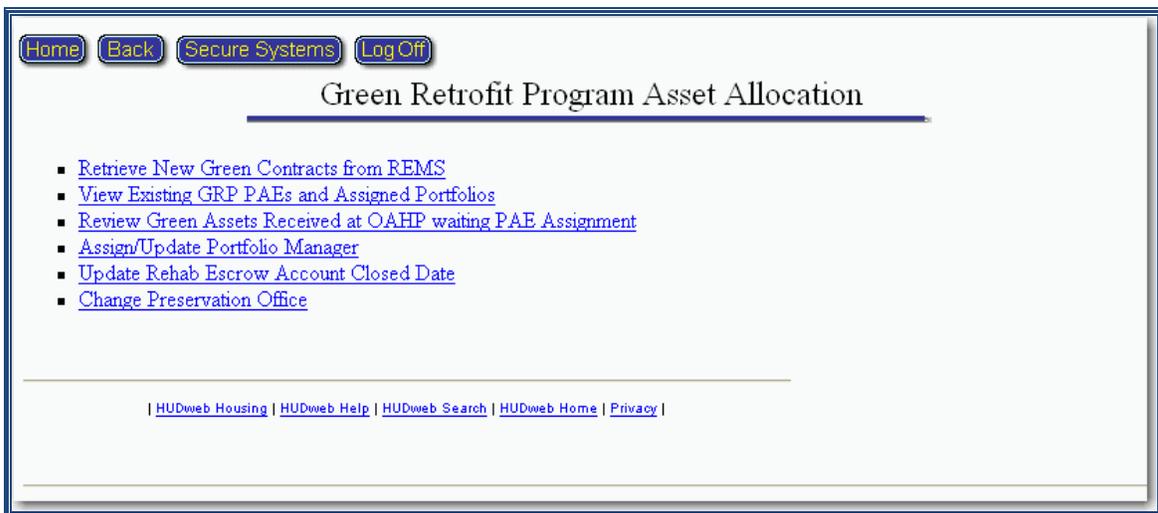


Figure 12-1, GRP Asset Allocation Screen

The **Green Retrofit Asset Allocation** screen allows access to the following functions:

- * Retrieve New Green Contracts from REMS
- * View Existing GRP PAEs and Assigned Portfolios
- * Review Green Assets Received at OAHP waiting PAE Assignment
- * Assign/Update Portfolio Manager
- * Update Rehab Escrow Account Closed Date
- * Change Preservation Office

12.1 Retrieve New Green Contracts from REMS Screen

OAHP HQ user should retrieve new Green contracts that qualify for the M2M Green Retrofit Program from the REMS database by clicking the **Retrieve New Green Contracts from REMS** link (located on the **Green Retrofit Asset Allocation** page). It may take several minutes for this process to complete. After the process has completed, a confirmation screen will appear. This facilitates a focused search of properties once contracts referred to OAHP have been retrieved (as illustrated in Figure 12-2, Select Search Criteria below).

The screenshot shows a web form titled "Select Search Criteria for Reviewing Assets to Enter M2M Green Retrofit Program via REMS". At the top, there are navigation buttons: Home, Back, Secure Systems, and Log Off. Below the title, a horizontal line separates the header from the content. The form asks the user to "Select one of the following criteria:" and provides two input fields: "REMS ID:" and "FHA #:". Below this, it asks the user to "Or select one or more of the following options:" and provides three input fields: "Property:" (a text box), "Section of Act (SOA):" (a dropdown menu), and "State:" (a dropdown menu). At the bottom of the form, there are two buttons: "Continue" and "Clear". Below the form, there is a link: "Or click [HERE](#) to get ALL the properties to Enter M2M Green Retrofit Program via REMS." At the very bottom, there is a footer with links: "HUDweb Housing | HUDweb Help | HUDweb Search | HUDweb Home | Privacy |".

Figure 12-2, Select Search Criteria for Reviewing Assets to Enter M2M Green Retrofit via REMS

Select one of the following criteria available to search for properties to be received:

- * Enter a REMS ID for a specify property
- * Enter a FHA Number for a specific property

Or select one or more of the following options available to search for properties to be received:

- * Enter a Property's Name for a specific property
- * Section of Act (SOA)
- * Select a state from the drop-down list
- * Click the underlined [HERE](#) link to retrieve all referred properties awaiting to be received

Shown below in Figure 12-3, Review Assets to Enter M2M Green Retrofit Screen, is a sample screen of selected properties.

[Home](#)
[Back](#)
[Secure Systems](#)
[Log Off](#)

Review Assets to Enter M2M Green Retrofit Program

The following 50 out of 61178 properties met your All search criteria.

- Check the Add box () next to each property that you are adding to M2M Green Retrofit Program.
- Click the Submit button below to save your additions.

Add	Property Name	Property City	State	Sec 8	Contract Number	Expiration Date	FHA Num	Entity Type	Grant/Loan Type	Section of Act
<input type="checkbox"/>	WOODLAND ESTATES (TLR REALTY)			00	EM3Q991001	12/31/2008				Other
<input type="checkbox"/>	WOODLAND ESTATES (TLR REALTY)			00	EM3Q991001	12/31/2008	016HD025			811
<input type="checkbox"/>	13TH AND EAGLE APARTMENTS	ANCHORAGE	AK		AK02ED00001	10/31/2005				Other
<input type="checkbox"/>	ALPINE TERRACE	ANCHORAGE	AK		AK06ED00004	12/31/2006				Other
<input type="checkbox"/>	ALPINE TERRACE	ANCHORAGE	AK		AK06ED00004	12/31/2006	17633029			221(d)(4)MKT
<input type="checkbox"/>	AYALPIK APARTMENTS	BETHEL	AK		AK020006001	05/31/2021				Other
<input type="checkbox"/>	AYALPIK APARTMENTS	BETHEL	AK		AK020006001	05/31/2021	17633019			221(d)
<input type="checkbox"/>	AYALPIK APARTMENTS	BETHEL	AK		AK020006001	05/31/2021	17633019			221(d)
<input type="checkbox"/>	AYALPIK APARTMENTS	BETHEL	AK		AK020006001	05/31/2021	17633039			223(a)(7)
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK02MD00010	08/31/2010				Other
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK02MD00022	10/31/2008				Other
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK06L000005	09/30/1999				Other
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK02MD00010	08/31/2010	17644020			236
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK02MD00022	10/31/2008	17644020			236
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK06L000005	09/30/1999	17644020			236
<input type="checkbox"/>	BAYVIEW TERRACE	KODIAK	AK		AK020001001	07/31/2001				Other
<input type="checkbox"/>	BAYVIEW TERRACE	KODIAK	AK		AK020001001	07/31/2001	17633012			221(d)(4)MKT
<input type="checkbox"/>	CHENANA APARTMENTS	FAIRBANKS	AK		AK020002001	07/31/2007				Other
<input type="checkbox"/>	CHENANA APARTMENTS	FAIRBANKS	AK		AK020002001	07/31/2007	17633009			221(d)(4)MKT
<input type="checkbox"/>	CHENANA APARTMENTS	FAIRBANKS	AK		AK020002001	07/31/2007	17633009			221(d)(4)MKT
<input type="checkbox"/>	CHENANA APARTMENTS	FAIRBANKS	AK		AK020002001	07/31/2007	17633009			221(d)(4)MKT
<input type="checkbox"/>	CHENANA APARTMENTS	FAIRBANKS	AK		AK020002001	07/31/2007	17633042			223(a)(7)
<input type="checkbox"/>	CHESTER CREEK ESTATES	ANCHORAGE	AK		AK02MD00013	07/31/2004				Other
<input type="checkbox"/>	CHESTER CREEK ESTATES	ANCHORAGE	AK		AK02MD00023	07/31/2007				Other
<input type="checkbox"/>	CHESTER CREEK ESTATES	ANCHORAGE	AK		AK02MD00013	07/31/2004	17644024			236
<input type="checkbox"/>	CHESTER CREEK ESTATES	ANCHORAGE	AK		AK02MD00023	07/31/2007	17644024			236
<input type="checkbox"/>	CHESTER PARK ESTATES	ANCHORAGE	AK		AK02MD00012	08/31/2006				Other
<input type="checkbox"/>	CHESTER PARK ESTATES	ANCHORAGE	AK		AK06L000009	09/30/1999				Other
<input type="checkbox"/>	CHESTER PARK ESTATES	ANCHORAGE	AK		AK02MD00012	08/31/2006	17644018			236
<input type="checkbox"/>	CHESTER PARK ESTATES	ANCHORAGE	AK		AK06L000009	09/30/1999	17644018			236
<input type="checkbox"/>	CHNOOK APARTMENTS	JUNEAU	AK		AK06L000017	10/31/2006				Other
<input type="checkbox"/>	CHNOOK APARTMENTS	JUNEAU	AK		AK06L000017	10/31/2006	17611039			207/223(f)
<input type="checkbox"/>	CHNOOK APARTMENTS	JUNEAU	AK		AK06L000017	10/31/2006	17633024			221(d)(4)MKT
<input type="checkbox"/>	CHUGACH VIEW	ANCHORAGE	AK		AK020102002	11/30/2017				Other
<input type="checkbox"/>	COHO PARK	JUNEAU	AK		AK020007002	09/30/2006				Other
<input type="checkbox"/>	COHO PARK	JUNEAU	AK		AK020007002	09/30/2006	17611040			207/223(f)
<input type="checkbox"/>	COHO PARK	JUNEAU	AK		AK020007002	09/30/2006	17633020			221(d)(4)MKT
<input type="checkbox"/>	CRESTVIEW APARTMENTS	DILLINGHAM	AK		AK02R000005	06/30/2005				515
<input type="checkbox"/>	DAYBREAK APARTMENTS (CMD)	PALMER	AK		AK02T851001	03/14/2008				Other
<input type="checkbox"/>	DAYBREAK APARTMENTS (CMD)	PALMER	AK		AK02T851001	03/14/2008	176EH003			202
<input type="checkbox"/>	EXECUTIVE ESTATES	Fairbanks	AK		AK020004001	05/31/2021				Other
<input type="checkbox"/>	EXECUTIVE ESTATES	Fairbanks	AK		AK020004001	05/31/2021	17633014			221(d)(4)MKT
<input type="checkbox"/>	EXECUTIVE ESTATES	Fairbanks	AK		AK020004001	05/31/2021	17633037			223(a)(7)
<input type="checkbox"/>	EXECUTIVE ESTATES	Fairbanks	AK		AK020004001	05/31/2021	17633037			223(a)(7)
<input type="checkbox"/>	EXECUTIVE ESTATES	Fairbanks	AK		AK020004001	05/31/2021	17633037			223(a)(7)
<input type="checkbox"/>	EXECUTIVE ESTATES	Fairbanks	AK		AK020004001	05/31/2021	17633040			223(a)(7)
<input type="checkbox"/>	FAIRBANKS COMMUNITY HOMES	FAIRBANKS	AK		AK06Q021001	12/31/2010				Other
<input type="checkbox"/>	FAIRBANKS COMMUNITY HOMES	FAIRBANKS	AK		AK06Q021001	12/31/2010	176HD021			811
<input type="checkbox"/>	GASTINEAU APARTMENTS	JUNEAU	AK		AK02MD00015	11/30/2003				Other
<input type="checkbox"/>	GASTINEAU APARTMENTS	JUNEAU	AK		AK02MD00015	11/30/2003	17644015			236

Enter Your Name: (First name, last name)

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

Figure 12-3, Review Assets to Enter M2M Green Retrofit Screen

This screen is a summary of the PAEs (in alphabetical order) currently entered in the Green Retrofit Program. Assignment values on this screen are system-generated.

12.3 View/Unassign Green Retrofit Program PAE Properties Screen

To view or Unassign a Green Retrofit Program PAE's existing data, click its underlined link and the following View/Unassign Green Retrofit Program PAE Properties screen will be returned, Figure 12-5, Green Retrofit Program PAEs Screen:

View/Unassign Green Retrofit Program PAE Properties

**City of Chicago Department of Housing
Assigned Properties**

To view/update a contract's critical dates, click its underlined contract number.

Property ID	Contract Status	Property Name	Contract Number	Entity Type	Grant/Loan	Section of Act	Expiration Date	Property City	Property State	Unassign Property
800078767	A	AASC Housing I, Inc.	AE06Q971001	Non-Profit	Grant/Loan	811	12/04/2006	ANCHORAGE	ALASKA	<input type="checkbox"/>
800000082	C	Andrews Apartments	AE06Q931001	Profit	Grant	811	12/31/2014	ANCHORAGE	ALASKA	
800000101	C	DOUGLAS TERRACE APARTMENTS	AE06Q951003	Non-Profit	Grant/Loan	202	11/30/2006	JUNEAU	ALASKA	

Figure 12-5, View/Unassign GRP PAE Properties Screen

OAHP HQ users may unassign a property from a PAE by putting a check mark (☑) in the **Unassigned Property** box next to each property that is to be unassigned. Once the **Save Changes** button is clicked, each property will then be available for reassignment to another PAE in the Review/Assign Green Retrofit Program Assets module.

12.4 Retrieve Green Assets Receive at OAHP waiting PAE Assignment Screen

OAHP HQ user should retrieve Green Retrofit Asset Assignment by clicking **Retrieve Green Assets Receive at OAHP waiting PAE Assignment** link (located on the **Green Retrofit Asset Allocation** page). After the process has completed, a confirmation screen will appear. (as illustrated in Figure 12-6, Select Search

Criteria below). This facilitates a focused search of Green Retrofit Asset Assignment properties have been retrieved.

The screenshot shows a web interface with a navigation bar at the top containing buttons for 'Home', 'Back', 'Secure Systems', and 'Log Off'. The main heading is 'Select Search Criteria for Green Retrofit Program Asset Assignment'. Below the heading, there are two sections for search criteria. The first section, 'Select one of the following criteria:', includes input fields for 'REMS ID:' and 'FHA #:'. The second section, 'Or select one or more of the following options:', includes input fields for 'Property:', 'Section of Act (SOA):', 'Entity Type:', and 'State:'. Below these fields are 'Continue' and 'Clear' buttons. At the bottom of the form, there is a link: 'Or click [HERE](#) to get ALL the properties awaiting assignment.' and a footer with links: '| [HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |'.

Figure 12-6, Select Search Criteria for Green Retrofit Assets Assignment

Select one of the following criteria available to search for properties to be received:

- * Enter a REMS ID for a specify property
- * Enter a FHA Number for a specific property

Or select one or more of the following options available to search for properties to be received:

- * Enter a Property's Name for a specific property
- * Section of Act (SOA)
- * Entity Type
- * Select a state from the drop-down list
- * Click the underlined [HERE](#) link to retrieve all referred properties awaiting to be received

12.5 Review / Assign Green Retrofit Program Assets Screen

The [Review / Assign Green Retrofit Program](#) screen is used to review and assign Green Retrofit Asset properties to PAEs within the M2M system. M2M generates recommended Green Retrofit property assignments based on

predefined geographical criteria. This screen allows the OAHP HQ user the ability to:

- ◆ Review a listing of all the Green Retrofit Program properties awaiting assignment in the M2M system
- ◆ Review the M2M Entity type and the option of changing it
- ◆ Review the Grant/Loan type and the option of changing it
- ◆ Review the Section of Act and the option of changing it
- ◆ Selecting one of the Preservation Office from the drop down list box.
- ◆ Choose a PAE for the Green Retrofit property

The **screen** is depicted below as Figure 12-7, Review/Assign Green Retrofit Assets Screen:

[Home](#)
[Back](#)
[Secure Systems](#)
[Log Off](#)

Review / Assign Green Retrofit Program Assets

The following 37 out of 37 properties met your All search criteria.

- Check the Assign box () next to each property that you are assigning to a PAE. All of the contracts associated with the Green Retrofit Program property will be assigned.
- Click the Submit button below to save your assignments.

Assign	Property Name	Property City	State	Sec 8 Contract Number	Expiration Date	Entity Type	Grant/Loan Type	Section of Act	Preservation Office	Recommended PAE Name
<input type="checkbox"/>	COMMODORE PARK	ANCHORAGE	AK	AK065961001	12/31/2006	Profit		202		No Assigned PAE
<input type="checkbox"/>	Denali View Senior Housing	Chugiak	AK	AK065011002	05/04/2008	Profit	Grant	202		No Assigned PAE
<input type="checkbox"/>	ETOLN HEIGHTS	WRANGELL	AK	AK06L000008	06/30/2007	Profit	Grant	202		No Assigned PAE
<input type="checkbox"/>	FIREWEED HOUSING DEVELOPMENT	WASILLA	AK	AK06Q921001	07/05/2014	Profit	Grant	811		No Assigned PAE
<input type="checkbox"/>	AGAPE HOUSE	BIRMINGHAM	AL	AL09Q921010	06/21/2015	Profit		811		Jefferson County Assisted Housi
<input type="checkbox"/>	AGAPE II	BIRMINGHAM	AL	AL09Q961001	06/09/2007	Non-Profit		811		Jefferson County Assisted Housi
<input type="checkbox"/>	AHEPA 23 III	Montgomery	AL	AL09S001002	08/31/2009	Profit		202		Jefferson County Assisted Housi
<input type="checkbox"/>	CLAIBORNE ARMS APTS	MOBILE	AL	AL090021022	10/31/2006	Profit	Grant/Loan	Mod Rehab		Jefferson County Assisted Housi
<input type="checkbox"/>	RAINBOW APARTMENTS	Rainbow City	AL	AL090021030	09/30/2022	Profit	Grant/Loan	Other		Jefferson County Assisted Housi
<input type="checkbox"/>	Meadow Park Apartments	ROGERS	AR	AR37M000046	08/31/2006			221(d)		No Assigned PAE
<input type="checkbox"/>	Cannon Apts	LOS ANGELES	CA	CA16M000385	12/31/2010	Profit	Grant	241/221		No Assigned PAE
<input type="checkbox"/>	DILLON CHRISTIANE WESTERN	SACRAMENTO	CA	CA30L000031	12/31/2010	Non-Profit	Grant	233(c)236		No Assigned PAE
<input type="checkbox"/>	EUCALYPTUS PARK	INGLEWOOD	CA	CA168023007	07/31/2006	Profit	Grant/Loan	221(d)(4)MKT		No Assigned PAE
<input type="checkbox"/>	TAMARIN APTS	DURANGO	CO	CO99H001082	05/31/2008	Non-Profit	Grant	524(c)		No Assigned PAE
<input type="checkbox"/>	Cavalier Apartments	WASHINGTON	DC	DC39A001003	02/23/2007	Non-Profit	Grant/Loan	223(a)(7)		No Assigned PAE
<input type="checkbox"/>	SOUTH SHORE BEACH APARTMENTS	CHICAGO	IL			Non-Profit	Grant	241/223		City of Chicago Department of H
<input type="checkbox"/>	Aberdeen Housing for Elderly	ABERDEEN	MD					Other		No Assigned PAE
<input type="checkbox"/>	Aberdeen Senior Housing	Aberdeen	MD					Other		No Assigned PAE
<input type="checkbox"/>	ABUNDANT LIFE TOWERS	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	ABUNDANT LIFE TOWERS II	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	Access	COLUMBIA	MD					Other		No Assigned PAE
<input type="checkbox"/>	ADVENT SENIOR HSG	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	AMCO	HYATTSVILLE	MD					Other		No Assigned PAE
<input type="checkbox"/>	ALDEN PARK APTS	COLLEGE PARK	MD					Other		No Assigned PAE
<input type="checkbox"/>	ALEXANDER HOUSE	HAGERSTOWN	MD					Other		No Assigned PAE
<input type="checkbox"/>	ALICE ANNE TOWNHOUSES	BEL AIR	MD					Other		No Assigned PAE
<input type="checkbox"/>	AMITY FAMBLE APARTMENTS	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	AND-OVER GROUP HOME	FREDERICK	MD					Other		No Assigned PAE
<input type="checkbox"/>	Andrew Kim House	OLNEY	MD					Other		No Assigned PAE
<input type="checkbox"/>	APOSTOLIC TOWERS	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	AREBUTA ARMS II	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	Arlington Estates Cooperative Apts	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	ARNOLD GARDENS APTS	SUTLAND	MD					Other		No Assigned PAE
<input type="checkbox"/>	TALLMAN TOWERS	NYACK	NY	NY36L000130	09/30/2006	Non-Profit	Grant	223(c)/221(d)		No Assigned PAE
<input type="checkbox"/>	Albina Plaza	PORTLAND	OR			Non-Profit	Grant	241		No Assigned PAE
<input type="checkbox"/>	SOMERVILLE HOMES	PHILADELPHIA	PA	PA26L000023	12/31/2009	Non-Profit	Grant/Loan	241/236		No Assigned PAE
<input type="checkbox"/>	BRYANT MANOR	SEATTLE	WA	WA19L000005	07/31/2007	Non-Profit	Grant/Loan	233(c)236		No Assigned PAE

Enter Your Name: (First name, last name)
 Enter the Initial Assignment Date:

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#)

Figure 12-7, Review/Assign Green Retrofit Assets Screen

1. Click the Add check box next to the Property ID to indicate the property is to have an assigned Entity Type, Grant/Loan Type and Section of Act (SOA).
2. Review the Entity Type Profit / Non Profit and option to change
3. Review the Grant/Loan Type and option to change it
4. Review the Section of Act and option to change it
5. Select a Preservation Office from the drop down list box
6. Assign a PAE from the Recommended PAE Name drop down list box
7. Repeat steps 1-6 for each additional property
8. After all property selections have been made, enter your first name, middle initial, and last name in the **Enter Your Name** field
Enter Your Name:
9. Click the Submit button to save the M2M Green Retrofit Assigned PAE Properties

12.6 Assign/Update Portfolio Manager

This function is not operational at this time.

12.7 Update Rehab Escrow Account Closed Date

This function is not operational at this time.

12.8 Change Preservation Office Screen

This function allows OAHP HQ users to change the assigned Preservation Office for the selected Green Retrofit properties. The search screen allows selecting properties by REMS ID, FHA Number, Property Name, State, PAE Name, or ALL Assigned Properties. The Search screen is depicted below in Figure 12- 8, Change Preservation Office Screen is depicted below in Figure 12- 9. Changing the Preservation Office of a property will generate a history record of the action.

[Home](#)
[Back](#)
[Secure Systems](#)
[Log Off](#)

Select Search Criteria for Changing Preservation Office

Select one of the following criteria:

REMS ID:

FHA #:

Or select one or more of the following options:

Property:

State:

PAE:

Or click [HERE](#) to get ALL assigned properties.

[HUDweb Housing](#) |
 [HUDweb Help](#) |
 [HUDweb Search](#) |
 [HUDweb Home](#) |
 [Privacy](#)

Figure 12-8, Select Search Criteria for Changing Preservation Office Screen

[Home](#)
[Back](#)
[Secure Systems](#)
[Log Off](#)

Preservation Office Changes Of Assigned Properties

The following 4 out of 4 properties met your CALIFORNIA state search criteria.

Status	Property ID	Property Name	City	State	Entity Type	Preservation Office
CITY OF INDIANAPOLIS						
A	80000993	AARON HOUSE	ROHNERT PARK	CA	Non-Profit	Centralized Closing
CREDITVEST, INC.						
A	80001089	BEAR MOUNTAIN RESIDENCES	SAN ANDREAS	CA	Profit	Washington
ILLINOIS HOUSING DEVELOPMENT AUTHORITY						
A	80002877	1215 D STREET	SACRAMENTO	CA	Non-Profit	Washington
SIGNET PARTNERS						
A	80001599	Sunny Meadows	FREEDOM	CA	Non-Profit	San Francisco

Preservation Office Change Date:

 (mm/dd/yyyy)

Before proceeding to another screen, save all changes by clicking the Save Changes button above.

Figure 12-9, Change Preservation Office Screen

To change the Preservation Office for a property, select from the drop down options,



Enter the **Change Date** (defaulted to current date), and click the **Save Changes** button.

13 GREEN RETROFIT TRACKING MODULE

The Green Retrofit Tracking module is accessed by clicking the **Green Retrofit Tracking** button on left menu of Green Retrofit Assets Allocation Menu screen. Within the Green Retrofit Tracking module, OHAP users may enter and modify critical date fields and their associated comments, and end the Green Retrofit process.

Clicking **Green Retrofit Tracking** button retrieves a search selection criteria page, similar to other search criteria screens, as shown below in Figure 13-1, Search Criteria for Critical Dates Tracking Screen.

A screenshot of a web application search criteria page. At the top, there are four navigation buttons: "Home", "Back", "Secure Systems", and "Log Off". Below these is the title "Select Search Criteria for Green Retrofit Program Tracking". The page prompts the user to "Select one of the following criteria:" followed by two input fields: "REMS ID:" and "FHA #:". Below this, it says "Or select one or more of the following options:" and lists several dropdown menus: "State:", "PAE:", "Debt Restructuring Specialist:", "Property:", "Status:", "Entity Type:", "Section of the Act (SOA):", and "Grant/Loan:". At the bottom of the form area are "Continue" and "Clear" buttons. Below the buttons, there is a link: "Or click [HERE](#) to get ALL properties." At the very bottom, there is a footer with links: "| HUDweb Housing | HUDweb Help | HUDweb Search | HUDweb Home | Privacy |".

Figure 13-1, Search Criteria for Green Retrofit Tracking Screen

Select one of the following criteria available to retrieve properties for the **Critical Dates Tracking** module:

- * Enter a REMS ID for a specify property
- * Enter a FHA Number for a specific property

Or select one or more of the following options available to retrieve properties for the **Critical Dates Tracking** module:

- * Select a **State** from the drop-down list
- * Select a **PAE** from the drop-down list
- * Select a **Deb Restructuring Specialist** from the drop-down list
- * Enter a Property's Name for a specific property
- * Select a Property's **Status** (Active or Completed)
- * Select a **Entity Type** (Profit / Non Profit)
- * Select a **Section of Act** (SOA)
- * Select a **Grant/Loan Type**
- * Click the underlined **HERE** link to retrieve all properties in the system

13.1 Assigned Green Retrofit Properties Screen

The **Assigned Green Retrofit Properties** screen (shown below as Figure 13-2, Assigned Green Retrofit Properties) will be returned once the search is performed (based on the criteria on the Select Search page).

Status	Property Name	Section of Act	Sec 8 Contract Number	Entity Type	Grant/Loan	Expiration Date	Property City	State
A	AASC Housing I, Inc.	811	AK060971001	Non-Profit	Grant/Loan	12/04/2006	ANCHORAGE	AK
C	Andrews Apartments	811	AK060931001	Profit	Grant	12/31/2014	ANCHORAGE	AK
C	Aurora Commons	236	AK060981002	Non-Profit	Grant/Loan	02/28/2007	SOLDOTNA	AK
C	Cranberry Ridge	202	AK060991002	Non-Profit	Grant/Loan	04/25/2007	HOUSTON	AK
A	Cupbush House	515	AK060971002	Profit	Grant/Loan	02/08/2007	STEBBINS	AK
C	DOUGLAS TERRACE APARTMENTS	202	AK060951003	Non-Profit	Grant/Loan	11/30/2006	JUNEAU	AK
A	KNOLLWOOD RETIREMENT CENTER	207(223g)	AL027871010	Non-Profit	Grant	06/26/2010	ROANOKE	AL
A	Access Anaheim	202	CA16T931020	Profit	Grant/Loan	10/22/2006	ANAHEIM	CA
A	BAY VISTA METHODIST HEIGHTS	223(c)/221(d)	CA33M000051	Profit	Grant/Loan	05/31/2009	SAN DIEGO	CA
A	MILWOOD APTS	221(d)	CA16M000339	Non-Profit	Grant/Loan	05/31/2007	CANOGA PARK	CA
A	BOOTH TOWERS	Other	MD06M000079	Profit	Grant/Loan	07/31/2006	CUMBERLAND	MD
A	ALPINE ALTEN ZIMMER	515	MI33R000045	Non-Profit	Grant	06/18/2011	GAYLORD	MI

Figure 13-2, Assigned Green Retrofit Properties

All of the assigned Green Retrofit properties that have a SOA, Entity Type and Grant/Loan Type option will be displayed (based on the criteria used to select property) and have a link to a [Green Retrofit Tracking](#) form.

13.2 Contract Number Link

The [Assigned Green Retrofit Properties](#) screen displays all assigned properties and pertinent information. It also contains the highlighted [contract number](#) Contract Number
[FL29M000113](#) as a link to access the [Green Retrofit Tracking](#) form to enter or view the critical dates. The contract highlighted will be the first expiring contract for the property. The resulting screen is the [Green Retrofit Tracking](#) screen (discussed in the next section).

13.3 Green Retrofit Program Tracking Screen

After a contract link is selected, a Green Retrofit Program Tracking screen is retrieved. Figure 13-3, Green Retrofit Tracking Screen.

Home | Back | Secure Systems | Log Off

Green Retrofit Program Tracking

HEREMS Property ID: 800078767
Primary FIA Number: 1768D013
Contract Number: AK06Q071001
Preservation Office: Chicago
HUD Project Manager: LEONA L BLANKENSHIP
Region: Seattle
Debt Restructuring Specialist: PATRICIA AMERSON
OAHP/FAE Underwriter: PATRICIA AMERSON

To view or update the OAHP comments log, click on the OAHP Comment Log link below:
[OAHP Comment Log](#)

Property Name: AABC Housing I, Inc.
FAE Name: City of Chicago Department of Housing
Entity Type: Non-Profit
Grant/Loan: Grant/Loan
Section of the Act (SOA): 811

Enter all dates in mm/dd/yyyy format
 Click the Save button near the bottom of this screen to save all updates/changes.

Original Section 8 Expiration Date (Post MAHRA): _____

Current Section 8 Expiration Date: 12/04/2006

OAHP Receives Green Retrofit Package: 05/01/2009

Complete Application: Yes No 04/27/2009

Duplicate Application: Yes No 04/27/2009

OAHP Returns Green Retrofit Package: Yes No 04/27/2009

Phase: Assignment/Assessment

OAHP Sends List of Potential Assets: 04/22/2009

FAE Clears and OAHP Approves COI: 05/15/2009

FAE Accepts Assignment: 05/29/2009

FAE IFA Validation Feasibility Test Completed: Pass Fail

OAHP Approved FAE's IFA Analysis: _____

Phase: Waiver/Holds

Waiver: 12/30/2009 Reason: _____

Waiver No. of Days: _____

OAHP Places Property On Hold: _____

Anticipated On Hold Removal Date: _____

OAHP Removes Property From On Hold: _____

Phase: Due Diligence

3rd Party Reports Ordered: 06/03/2009

Tenant Meeting: 06/22/2009

3rd Party Reports Accepted as Approvable: 06/29/2009

Title Being/Down Received: 07/02/2009

Due Diligence Completed: 08/01/2009

Phase: Underwriting

FAE Submits Green Retrofit Plan Submission to OAHP: 08/03/2009

OAHP Receives FAE's Green Retrofit Plan Submission: 08/05/2009

Date Proposed GR Plan Assigned to Underwriter: 08/05/2009

Date Underwriter Review of GR Plan Complete: 08/09/2009

SFOA Reviewer: PATRICIA AMERSON

Exhibit A Review Approval Date: _____

PO/HQ Loan Committee Date: 09/01/2009

Green Retrofit Plan Approved by OAHP: 09/09/2009

Phase: Commitment Stage

Green Retrofit Plan Commitment Received by OAHP: 09/20/2009

Green Retrofit Plan Commitment Reviewed by OAHP: 10/01/2009

718 Package Completed and Delivered by OAHP: 10/10/2009

718 Approved: 10/11/2009 Reason: _____

718-Approved Grant Amount: 110,000.00

718-Approved Loan Amount: 96,000.00

Green Retrofit Plan Commitment Sent to Owner: 10/21/2009

Green Retrofit Plan Commitment Executed by Owner: 10/22/2009

Green Retrofit Plan Commitment Executed by OAHP: 10/23/2009

Expiration Date of Green Retrofit Plan Commitment: 11/22/2009

Phase: Closing

Scheduled Closing Date: 12/23/2009

FAE Counsel Ready to Close Date: 11/29/2009

Closing Date: 12/29/2009

Amount of Closed Grant: 99,000.00

Amount of Closed Loan: 96,000.00

Phase: Post-Closing

Critical Documents Received by OAHP: 01/01/2010

Closing Documents Distributed by FAE: 01/02/2010

GRP Pre-Development Incentive Paid (Date): _____

GRP Pre-Development Incentive Paid (Amount): _____

Retrofit/Repair Completion Date: _____

GRP Efficiency Incentive Paid (Date): _____

GRP Efficiency Incentive Paid (Amount): _____

Job Creation Incentive Paid (Date): _____

Job Creation Incentive Paid (Amount): _____

Number of Jobs Created/Saved: _____

Expected Utility Savings per Project: _____

OAHP Comment Text

FAE Comment Text

Figure 13-3, Green Retrofit Program Tracking Screen

14 GRP CLOSING MODULE

This module is designed to display, and track specific closing information from the Green Retrofit Program information in the M2M system. This module should prove essential to OAHP in collecting some of the data necessary to report total dollar savings from the Green Retrofit program.

There is a search screen when this module is selected as shown below in Figure 14-1, Select Search Criteria for GRP Closing Screen.

HERE to get ALL Closings.' At the very bottom, there is a footer with links: '| HUDweb Housing | HUDweb Help | HUDweb Search | HUDweb Home | Privacy |'."/>

Home Back Secure Systems Log Off

Select Search Criteria for Green Retrofit Program Closing

If a property is not listed on the resulting screen(s) of your search, please verify in Green Retrofit Tracking that a closing date has been entered.

Select one of the following criteria:

REMS ID: FHA #:

Or select one or more of the following options:

Preservation Office:

State:

PAE:

Property:

Entity Type:

Section of the Act (SOA):

Grant/Loan:

Closing Date:

Or click [HERE](#) to get ALL Closings.

| HUDweb Housing | HUDweb Help | HUDweb Search | HUDweb Home | Privacy |

Figure 14-1, Select Search Criteria for GRP Closing Screen

Select one of the following criteria available to retrieve properties for the Closing properties:

- ◆ Enter a REMS ID for a specify property
- ◆ Enter a FHA Number for a specific property

Or select one or more of the following options available to retrieve the Closing properties:

- ◆ Select an **Preservation Office** from the drop-down list
- ◆ Select a **State** from the drop-down list

- ◆ Select a PAE Name from the drop-down list
- ◆ Enter a Property's Name
- ◆ Select a Entity Type (Profit / Non Profit)
- ◆ Select a Section of Act (SOA)
- ◆ Select a Grant/Loan Type
- ◆ Select a Closing Date from the drop-down list
- ◆ Click the underlined [HERE](#) link to retrieve all closing properties in the system

The optional selections of Closing Date Month and Closing Date Year may be selected by themselves or in combination with the other selections. Figure 13-2, GRP Closed Properties Screen, show the results of the search screen. Properties will only appear if their plan has been approved and a closing date has been entered. Clicking an underlined contract number link will take the user directly to the Green Retrofit Program Closing screen for that property as shown below in Figure 14-2, Green Retrofit Program Closed properties Screen.

Home Back Secure Systems Log Off

Green Retrofit Program Closed Properties

The following 4 out of 4 properties met your All search criteria.

To view/update a contract's closing information, click its underlined Contract Number.

PAE Name	Status	Property Name	Section of Act	Model Uploaded	Sec 8 Contract Number	Entity Type	Grant/Loan	Closing Date	Expiration Date	Property City	State
City of Chicago Department of Housing	A	AASC Housing I, Inc.	811	<input type="radio"/>	AK060271001	Non-Profit	Grant/Loan	12/29/2009	12/04/2006	ANCHORAGE	AK
Illinois Housing Development Authority	C	Aurora Commons	236	<input type="radio"/>	AK060281002	Non-Profit	Grant/Loan	08/03/2009	02/28/2007	SOLDOTNA	AK
Heskin Siguet Partnership	C	Cranberry Ridge	202	<input type="radio"/>	AK060991002	Non-Profit	Grant/Loan	09/03/2009	04/25/2007	HOUSTON	AK
Heskin Siguet Partnership	A	Cuphaaq House	515	<input checked="" type="radio"/>	AK060971002	Profit	Grant/Loan	08/25/2009	02/08/2007	STEEBENS	AK

| [HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |

Figure 14-2, GRP Closed Properties Screen

14.1 Green Retrofit Program Closing Screen

The following sections provide information on the data required to complete the Closing Terms. The user must upload and populate the terms with data extracted from the Excel Underwriting Model. Figure 14-3, Green Retrofit Program Closing Screen, provides an example of the Green Retrofit Program Closing main screen with subdivisions for the model functions and the online Closing screen.

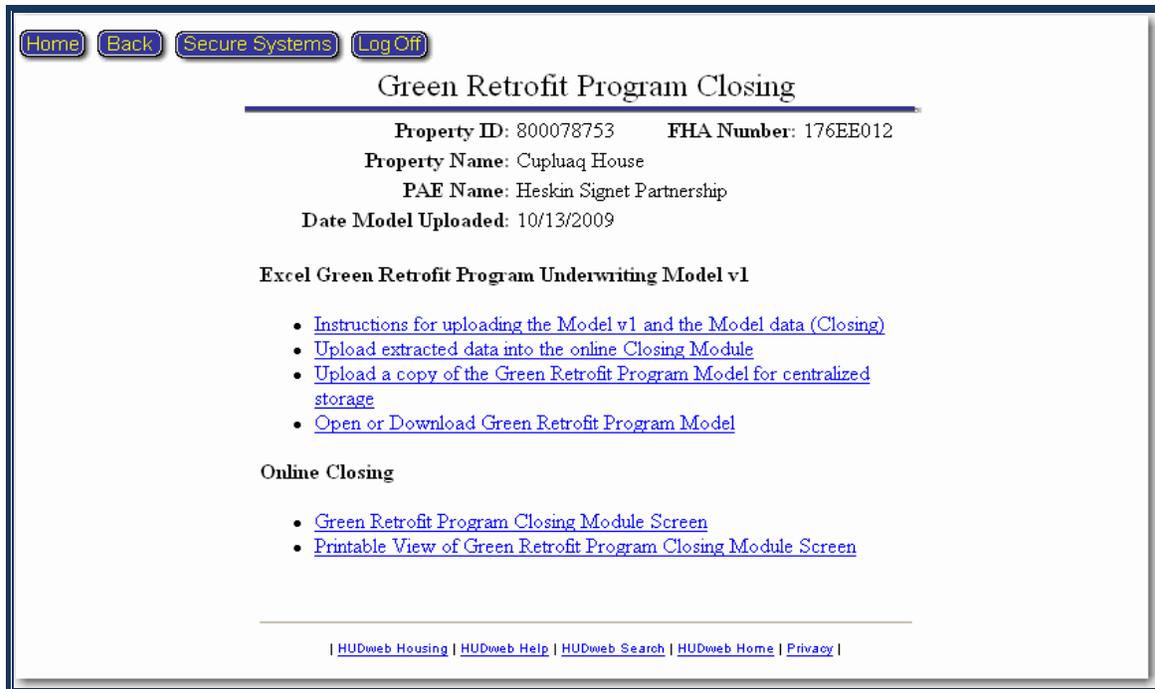


Figure 14-3, Green Retrofit Program Closing Screen

14.1.1 Excel Green Retrofit Program Underwriting Model v1

The following subsections provide detailed instructions showing how to upload the Extract data and Model to the Green Retrofit Program:

- ◆ [Instructions for uploading the Model v1 and the Model data \(Closing\)](#)
- ◆ [Upload extracted data into the online Closing Module](#)
- ◆ [Upload a copy of the Model for centralized storage](#)

14.1.1.1 Instructions for uploading the Model v1 and the Model data (Closing)

The [Instructions for uploading the Model v1 and the Model data \(Closing\)](#) (shown on the next page as Figure, 14-4, How to Upload Extract and Model screen) contains general and detailed information of the process to upload extracted data and model to the Green Retrofit Program for closing:

Print Close

How to Upload Extract and Model to M2M System

The M2M system has been upgraded to allow for PAEs to

1. upload data from the GRP Excel Underwriting Model automatically into the Closing, (without having to perform data entry into the Closing Module).
2. the final GRP Excel Underwriting model must be uploaded and saved on this centralized, protected server.

There are several steps outlined below to perform these two tasks:

To prepare the Model for uploading into the Closing Module online:

1. Complete the data entry in the GRP Excel Underwriting Model and save as the name - [REMS Property Id][G].xlsm (e.g., 800000000G.xlsm). It is very important to save the file with the property id number and the "G" suffix and to note the location where the model is saved as well as the REMS #.
2. Go to the last Worksheet Tab in the model named: "Create MIS Upload Worksheet."
3. Click on the Button "Create Extract File."
4. An "extract" file is created automatically and saved in the SAME folder or location as the current Model.
5. The extract file is automatically named the REMS property id.txt (e.g., 800000000.txt).
6. Print a copy of the worksheets called "Green Export" – to use in the validation of the uploaded data.

To Upload the Extracted Data in order to populate the Closing Module online:

1. Log into the M2M system and go to the Green Retrofit Module and then access the GRP Closing Module.
2. Search for the property associated with the model to be uploaded.
3. Select the property.
4. From the Green Retrofit Program Closing screen, select the option: Upload extracted data into the online Closing Module
5. Either type in the path or location of the extract file (txt file) or click on Browse to find it on the workstation. (It will be in the same folder as the model).
6. Click on the button "Upload the File."
 - o If the filename or type of file is incorrect there will be an error displayed.
 - o If the filename matches the REMS property id and is the correct file, the data will be extracted and populate the Closing Module automatically.
7. First, a screen with data will appear. The PAE should review the data by comparing the printout from the Model "Green Export" worksheet.
8. Click on Save if the data is valid
9. Click on Continue to return to the Green Retrofit Program Closing screen.
10. If there were errors in the data and the PAE doesn't want to save the data into the system, cancel by clicking the Back button.
11. If there were errors, review the model and make corrections in the model. Save the corrections and start over by creating a new extract file as described above.

To upload and save a copy of the GRP Excel Underwriting Model on the centralized server from the Closing Module:

1. Go to the GRP Closing Module in M2M system.
2. Select the property.
3. From the Green Retrofit Program Closing screen select the option: Upload a copy of the Green Retrofit Program Model for centralized storage
4. Either type in the path or location of the Model (excel) file or click on Browse to find it on the workstation.
5. Click on the Button "Upload the File."
6. An error will display if there are problems, otherwise, click on Continue.
7. The model is now saved on the server.

For the PAE or OAHP to view or download to a workstation:

1. Go to the GRP Closing Module screen.
2. Select the Property.
3. From the Green Retrofit Program Closing screen select the option: Open or Download Green Retrofit Program Model
4. If there is an error, it is most likely that the browser is not set up to view Excel and "xlsm" needs to be added to the browser's list of applications.
5. Otherwise, choose "save" or "open" – depending on your need.

Figure 14-4, How to Upload Extract and Model Screen

14.1.1.2 Upload extracted data into the online Closing Module

The Upload extracted data into the online GRP Closing Module (shown as Figure, 14-5, Upload GRP (Closing) Screen) contains general and detailed information on how to upload extracted data into the online GRP Closing Module:

Home Back Secure Systems Log Off

Green Retrofit Program Properties Upload (Closing)

Property ID: 800078753 FHA Number: 176EE012
Property Name: Cupluaq House
PAE Name: Heskin Signet Partnership

Note: This process is to upload the GREEN RETROFIT PROGRAM CLOSING TERMS that were extracted from the Green Retrofit Program model into the text file that was created by clicking the 'Create extract file' button on the 'Create MIS upload worksheet' in the Green Retrofit Program Excel model.

The filename of the data extract to be uploaded must match the REMS property id and have a .txt extension. Performing this upload will overwrite any Closing Terms data for this property that has previously been saved.

Enter the path and name of the data extract file in the space below or click the browse button to locate the file on your workstation.

File to Upload:

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |

Figure 14-5, Green Retrofit Program Properties Upload (Closing) Screen

Click the Upload the File button to open the Green Retrofit Program Properties Upload (Closing) Screen (shown as Figure, 14-6, Green Retrofit Program Properties Upload (Closing) Screen):

Click the Save button in the bottom of the Green Retrofit Program Properties Upload Closing screen to save data into M2M database and open the Information Saved Screen (shown as Figure, 14-7, GRP Properties Upload (Closing) Information Saved Screen).



Figure 14.7, GRP Properties Upload (Closing) Information Saved Screen

14.1.1.3 Upload a copy of the Model for centralized storage

The Upload a copy of the Model for centralized storage (shown as Figure, 14-8, Excel Underwriting Model Upload Screen) contains general and detailed information on how to upload the Excel underwriting model:

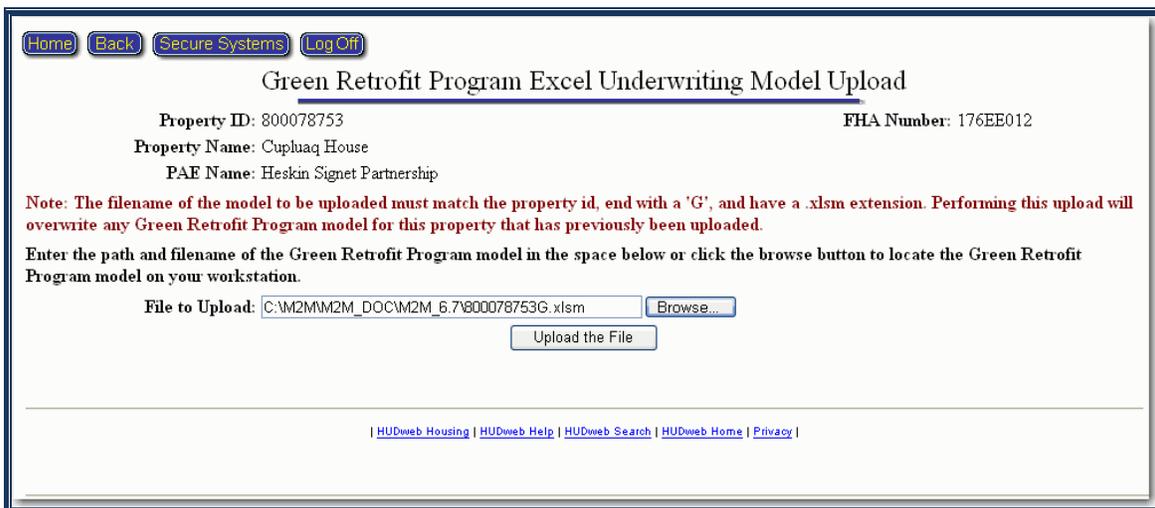


Figure 14-8, Excel Underwriting Model Screen

Perform Upload Model by clicking the Upload the File button in the bottom of the Green Retrofit Program Excel Underwriting Model Upload screen to save the model and open the Green Retrofit Program Excel Underwriting Model Upload Screen (shown as Figure, 14-9, GRP Excel Underwriting Model Upload was Successful Information Screen), Then Click the Continue button in the screen to return into Green Retrofit Program Closing Menu List Screen.

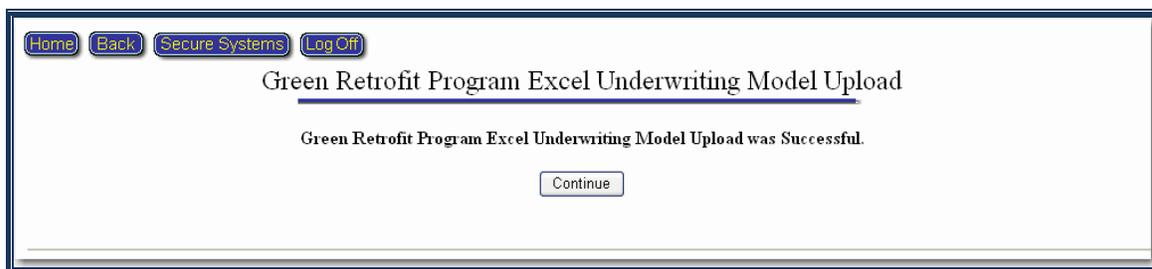


Figure 14-9, GRP Excel Underwriting Model Upload Information Screen

14.1.1.4 Open or Download Model

The **Open or Download Model** function allows users to view or download the GRP Excel Model that has been placed on the centralized server.

14.1.2 Online Closing

The following subsections provide additional information on the data that is required to populate Green Retrofit Program Closing terms:

- * [Green Retrofit Program Closing Module Screen](#)
- * [Printable View of Green Retrofit Program Closing Module Screen](#)

14.1.2.1 Green Retrofit Program Closing Module Screen

The Closing Module screen for the selected property, as shown below in Figure 14-10, Closing Module Screen, contains the following sections:

- * [General Information](#)
- * [Current Unit Summary](#)
- * [First Mortgage Loan](#)
- * [Other Amortizing Loan](#)
- * [Subsidy Contract](#)
- * [Utility](#)
- * [Sources & Uses](#)
- * [Rehab Escrow Needs](#)

After reviewing the information, OAHP users may confirm the closing by entering their name and date in the locations at the bottom of the screen and clicking the **Submit** button on the left menu.

Figure 14-11, Printable View of GRP Closing Module Screen

15 GRP REPORTS MODULE

The GRP **Reports** module is accessed by selecting the **Reports** button from GRP's home screen. The reports within the module are a summarization of the data entered in the **Critical Dates Tracking** screens and are also management tracking tools to view the overall status of where the assigned properties are in the GRP process. In addition, there are internal management level reports to assist OAHF and its business partners in the management of its Green Retrofit Program assets.

Generally, only **active** properties in the Green Retrofit Program that are assigned to and accepted by a PAE appear in GRP's Reports, though some reports include **completed** properties and allow the User to choose what to be selected. In addition, there are specific criteria for each report, e.g., for the GRP **Property Status Report**, only properties that have at least **one critical date** entered into the system are included on the report. The **Property and Report Selection** page is shown below as Figure 15-1, Property and Report Selection Screen:

October 13, 2009

GRP
Asset Allocation
Green Retrofit
Tracking
GRP Closing

Click on the mailbox to E-mail your comments and suggestions.

View ID: C1P728

Home Back Secure Systems Log Off

GRP Property and Reports Selection

Report Information

Click On Report Title Below:	And View Its Description Here:
Management Reports	The Green Retrofit Assigned Active Properties Report is a list of all of the current Green Retrofit properties, the assigned PAE, and the Green Retrofit phase in which each property resides.
Green Retrofit Assigned Active Properties Report	
Progress Reports	
Green Retrofit Progress Report I	
Green Retrofit Progress Report II	
Green Retrofit Focus on Production Report	

Click Here To View Printable Version Only ¹

Click Here To View Screen Version

Click Here To Download Electronic Version Only ²

Click On SELECT SEARCH OPTIONS Button To Continue:

SELECT SEARCH OPTIONS

Click On Clear Selections Button To Restore Default Settings:

Clear Selections

¹ To print a selected report:

1. Select the **View Printable Version** Button above.
2. Click '**Select Search Options**' Button.
3. Select search options and click '**Continue**' Button.
4. Select **Print** on the File menu.
5. Click on **Properties**.
6. Select **Letter** or **Legal** on the Paper Size option.
7. Select **Portrait** or **Landscape** on the Orientation option.
8. Click **OK**.

² To download a selected report:

1. Select the **Download Electronic Version** Button above.
2. Click '**Select Search Options**' Button.
3. Select search options and click '**Continue**' Button.
4. Click the '**Save**' button when it appears, name the file any name and save as type Microsoft Office Excel Comma Separated Value File.

Open Microsoft Excel (or other application of choice) and open the saved file. The file may now be resaved in the format of Excel or

Figure 15-1, GRP Property and Report Selection Screen

15.1 GRP Property and Report Selection

The GRP **Reports** module allows users to generate the following reports:

- ◆ Green Retrofit Assigned Active Properties Report
- ◆ Green Retrofit Progress Report I
- ◆ Green Retrofit Progress Report II
- ◆ Green Retrofit Focus on Production Report

To view a report, click the report title in the scroll down selection box and click one of the viewing options. Reports may be viewed on-screen, printed, or downloaded and saved in an electronic format. Next, click the Select Search Options button and make your selections in the opened window.

To save a downloadable version of a report:

7. Select the Download Electronic Version radio button
8. Click the 'Select Search Options' button
9. Select search options and click the 'Continue' button
10. Click the "Save File..." button and name the file a name with a ".csv" extension (e.g., "testrept.csv").
11. Open application of choice (e.g., Microsoft Excel) and the saved file.
12. The file may be resaved in the format of the application.

15.2 Green Retrofit Assigned Active Properties Report

The Green Retrofit **Assigned Active Properties Report** (Figure 15-2, Green Retrofit Assigned Active Properties Report on the next page) contains a listing of all of the current Green Retrofit Program properties, the PAE to which each property is assigned, and the Green Retrofit Program phase in which each property resides.

[Home](#)
[Back](#)
[Secure Systems](#)
[Log Off](#)

Green Retrofit Assigned Active Properties Report

Today's Date: 10/13/2009

Preservation Office: Chicago									
PAE Name	Property Name	Entity Type	Grant/Loan Type	Section of Act	Last Critical date	Date	Property ID	Property City	Property State
City of Chicago Department of Housing	AASC Housing I, Inc.	Non-Profit	Grant/Loan	811	Closing Date	12/29/2009	800078767	ANCHORAGE	AK
CreditVest, Inc.	ALPINE ALTEN ZIMMER	Non-Profit	Grant	515	OAHP Sends List of Potential Assets	07/29/2009	800009877	GAYLORD	MI
Preservation Office: San Francisco									
PAE Name	Property Name	Entity Type	Grant/Loan Type	Section of Act	Last Critical date	Date	Property ID	Property City	Property State
Heskin Signet Partnership	Cupluaq House	Profit	Grant/Loan	515	Closing Date	08/25/2009	800078733	STEBBINS	AK
Foley and Judell, LLP	Access Anaheim	Profit	Grant/Loan	202	OAHP Sends List of Potential Assets	05/06/2009	800000996	ANAHEIM	CA
ONTRA, Inc.	BAY VISTA METHODIST HEIGHTS	Profit	Grant/Loan	223(c)/221(d)	OAHP Sends List of Potential Assets	08/05/2009	800052180	SAN DIEGO	CA
The Siegel Group, Inc.	MILWOOD APTS	Non-Profit	Grant/Loan	221(d)	OAHP Sends List of Potential Assets	04/29/2009	800001979	CANOGA PARK	CA
Preservation Office: Washington									
PAE Name	Property Name	Entity Type	Grant/Loan Type	Section of Act	Last Critical date	Date	Property ID	Property City	Property State
Jefferson County Assisted Housing Corp.	KNOLLWOOD RETIREMENT CENTER	Non-Profit	Grant	207/223(f)	OAHP Receives Green Retrofit Package	07/25/2009	800000405	ROANOKE	AL
CreditVest, Inc.	BOOTH TOWERS	Profit	Grant/Loan	Other	OAHP Sends List of Potential Assets	09/14/2009	800009125	CUMBERLAND	MD

Figure 15-2, Green Retrofit Assigned Active Properties Report

15.3 Green Retrofit Progress Report

The **Green Retrofit Progress Report** details the progress and status of the active GRP properties currently assigned to PAEs. It details the referral and acceptance dates, the dates the PAE executes M2M Program tasks, the dates the Green Retrofit Program was submitted to OAHP and the date OAHP issues a decision on submitted plans. An example of this report is presented as Figure 15-3, Green Retrofit Progress Report (Part I) and Figure 15-4, Green Retrofit Progress Report (Part II).

Note: It is necessary to load legal-sized paper and set your printer to print in landscape mode for this progress report.

Home	Back	Secure Systems	Log Off	Green Retrofit Progress Report I														
														Today's Date: 03/24/2010				
State	Status	Primary FHA Number	Entity Type	Grant/Loan	Property ID	SOA	OAHP Receives GRP	Complete Application	Duplicate Application	OAHP Returns GRP	OAHP Sends List of Potential Assets	PAE Clears and OAHP Approves COI	PAE Accepts Assign.	PAE IFA Validation Feasibility Test Completed	OAHP Approved PAE's IFA Analysis	Waiver	OAHP Place Prop On Hold	
Preservation Office: Chicago																		
City of Chicago Department of Housing																		
AASC Housing I, Inc.	AK	Active	176HD013	Non-Profit	Grant/Loan	800078767	811	05/01/2009	04/27/2009	04/27/2009	04/27/2009	04/22/2009	05/15/2009	05/29/2009			12/30/2009	
PAE Total							1	1	1	1	1	1	1	0	0	1	0	
CreditVest, Inc.																		
ALPINE ALTEN ZIMMER	MI	Active		Non-Profit	Grant	800009877	515	01/01/2010	01/02/2010	01/03/2010	01/04/2010	07/29/2009	02/01/2010	02/02/2010	02/03/2010	02/04/2010	03/01/2010	03/02/2010
PAE Total							1	1	1	1	1	1	1	1	1	1	1	1
Illinois Housing Development Authority																		
Aurora Commons	AK	Completed	176HD016	Non-Profit	Grant/Loan	800112382	236	04/01/2009	04/02/2009	04/03/2009	04/04/2009	04/23/2009	04/24/2009	04/25/2009	04/26/2009		08/04/2009	
PAE Total							1	1	1	1	1	1	1	1	1	0	1	0
Preservation Office Total							3	3	3	3	3	3	3	2	1	3	1	

Date: 03/24/2010																	
Waiver	OAHP Places Property On Hold	Anticipated On Hold Removal Date	OAHP Removes Property from On Hold	3rd Party Reports Ordered	Tenant Meeting	3rd Party Reports Accepted as Approvable	Title Bring-Down Received	Due Diligence Completed	PAE Submits GRP Submission to OAHP	OAHP Receives PAE's GRP Submission	Date Proposed GRP Assigned to Underwriter	Date Underwriter Review of GRP Complete	Exhibit A Review Approval Date	PO/HQ Loan Committee Date	GRP Approved by OAHP		
12/30/2009				06/03/2009	06/22/2009	06/29/2009	07/02/2009	08/01/2009	08/03/2009	08/05/2009	08/05/2009	08/09/2009		09/01/2009	09/09/2009		
1	0	0	0	1	1	1	1	1	1	1	1	1	0	1	1		
03/01/2010	03/02/2010	03/03/2010	03/04/2010	04/01/2010	04/02/2010	04/03/2010	04/04/2010	04/05/2010	05/01/2010	05/02/2010	05/03/2010	05/04/2010	05/05/2010	05/06/2010	05/07/2010		
1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1		
08/04/2009				05/01/2009	05/02/2009	05/03/2009	05/04/2009	05/05/2009	06/01/2009	06/02/2009	06/13/2009	06/14/2009		06/15/2009	06/16/2009		
1	0	0	0	1	1	1	1	1	1	1	1	1	0	1	1		
3	1	1	1	3	3	3	3	3	3	3	3	3	1	3	3		

Figure 15-3, Green Retrofit Progress Report (Part I)

Home		Back		Secure Systems		Log Off											
Green Retrofit Progress Report II																	
Today's Date: 03/24/2010																	
State	Status	Primary FHA Number	Entity Type	Grant/Loan	Property ID	SOA	GRP Commitment Received by OAHF	GRP Commitment Reviewed by OAHF	718- Package Completed and Delivered by OAHF	718 Approved	GRP Commitment Sent to Owner	GRP Commitment Executed by Owner	GRP Commitment Executed by OAHF	Expiration Date of GRP Commitment	Sche Clos De		
Preservation Office: Chicago																	
City of Chicago Department of Housing																	
AASC Housing I, Inc.	AK	Active	176HD013	Non-Profit	Grant/Loan	800078767	811	09/20/2009	10/01/2009	10/10/2009	10/11/2009	10/21/2009	10/22/2009	10/23/2009	11/22/2009	12/23/2009	
PAE Total							1	1	1	1	1	1	1	1	1	1	
CreditVest, Inc.																	
ALPINE ALTEN ZIMMER	MI	Active		Non-Profit	Grant	800009877	515	06/01/2010	06/02/2010	06/03/2010	06/04/2010	06/05/2010	06/06/2010	06/07/2010	07/07/2010	07/01/2010	
PAE Total							1	1	1	1	1	1	1	1	1	1	1
Illinois Housing Development Authority																	
Aurora Commons	AK	Completed	176HD016	Non-Profit	Grant/Loan	800112382	236	07/11/2009	07/12/2009	07/03/2009	07/04/2009	07/15/2009	07/16/2009	07/17/2009		08/01/2009	
PAE Total							1	1	1	1	1	1	1	1	0	1	
Preservation Office Total							3	3	3	3	3	3	3	3	2	3	

Today's Date: 03/24/2010										
GRP Commitment Executed by OAHF	Expiration Date of GRP Commitment	Scheduled Closing Date	PAE Counsel Ready to Close Date	Closing Date	Critical Documents Received by OAHF	Closing Documents Distributed by PAE	GRP Pre-Development Incentive Paid Date	Retrofit/Repair Completion Date	GRP Efficiency Incentive Paid Date	Job Creation Incentive Paid Date
10/23/2009	11/22/2009	12/23/2009	11/29/2009	12/29/2009	01/01/2010	01/02/2010				
1	1	1	1	1	1	1	0	0	0	0
06/07/2010	07/07/2010	07/01/2010	07/02/2010	07/03/2010	08/01/2010	08/02/2010	08/03/2010	08/04/2010	08/05/2010	08/06/2010
1	1	1	1	1	1	1	1	1	1	1
07/17/2009		08/01/2009	08/02/2009	08/03/2009						
1	0	1	1	1	0	0	0	0	0	0
3	2	3	3	3	2	2	1	1	1	1

Figure 15-4, Green Retrofit Progress Report (Part II)

15.4 Green Retrofit Focus on Production Report

The Focus on Production Report (Figure 15-5, Green Retrofit Focus on Production Report) provides a roll up of the total number by SOA, Profit, Non-Profit, Grant, Grant/Loan for each Preservation Office.

Home Back Secure Systems Log Off		Green Retrofit Focus on Production Report																		As of 10/13/2009						
Preservation Office	Total Received	202	207/223 (0)	220	221 (0)	221(0)(3) BMIR	221(0)(4) MKT	223(0) (7)	223 (0)/221(0)	223 (0)	231	233(0) 236	236	241	241/221	241/223	241/236	515	524 (0)	611	Med Rehab	Other	Profit	Non-Profit	Grant	Grant/Loan
Chicago	3	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	1	0	1	0	0	0	3	1	2
New York	2	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	1	0	2
San Francisco	6	1	0	0	1	0	0	0	1	0	0	1	0	0	0	0	0	1	0	1	0	0	4	2	2	4
Washington	3	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	2	1	2
Total	14	3	1	0	1	0	0	0	1	0	0	1	1	0	0	0	0	2	0	2	1	1	6	8	4	10

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Figure 15-5, Green Retrofit Focus on Production Report