



Office of Public and Indian Housing Information Center (PIC) Program

Satellite Broadcast
Monday June 25th, 2001
Implementation of
Form HUD-50058





Agenda

- **Welcome**

- **Patricia Arnaudo, Director of Occupancy/Acting Director for Customer Services and Amenities**
- **Paula Blunt, Acting General Deputy Assistant Secretary**
- **David Ziaya, Acting Director for Field Operations Staff**
- **Johnson Abraham, Deputy Assistant Secretary for Budget and Administration/CFO**



Agenda—Continued

■ Morning Session

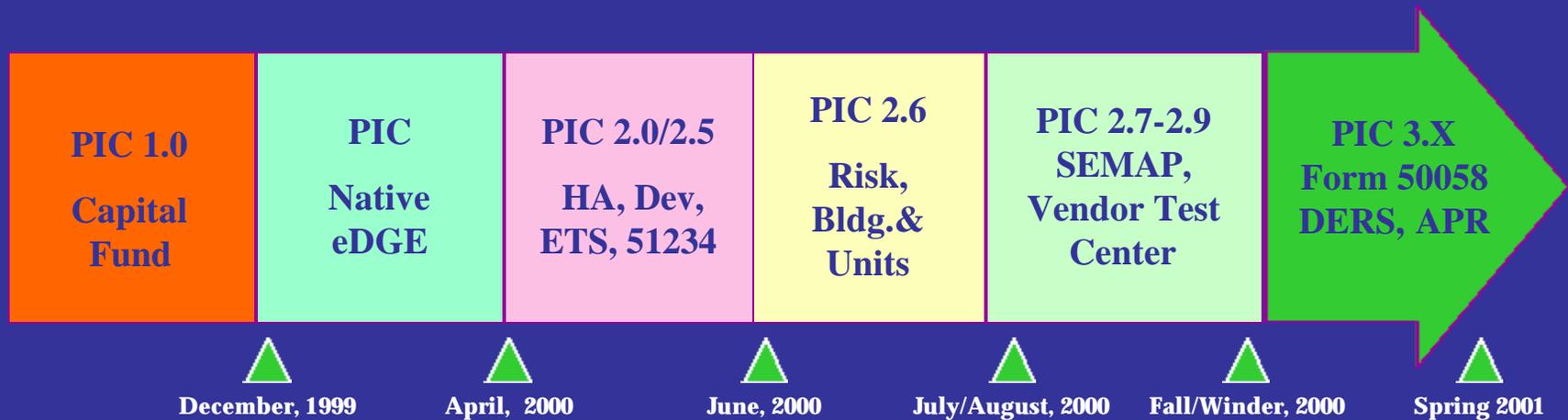
- PIC Background
- New Form 50058 Module in PIC
- Prerequisites for New Form 50058 Implementation
- PIC Building and Unit Process
- PIC Job Aid for MTCS Data Transfer to New 50058
- Format SEMAP
- Q & A Session

■ Afternoon Session

- Review of the new lines on the revised Form HUD-50058



PIC Background



- **Over 600 Web Pages in the first year**
 - approximately 250 transaction pages
 - approximately 400 Static Pages
- **Example of Government moving at e-Speed**



New Form 50058 Module in PIC

Module

- **Form 50058**

Sub Modules

- **Submission** (Submit Form 50058)
- **Reports** (All reports, same/enhanced reports like old MTCS)
- **Viewer** (Historical and Current view for tenant data)
- **Online Data Entry *** (Enter Form 50058 through PIC)

* - Available in next version of Form 50058



Prerequisites for New Form 50058 Implementation

- Upload Building and Units data
- Review Building and Units data
- Submit Building and Units data to FO
- FO Approved Building and Unit data
- Run MTCS Occupancy Reconciliation Report
- Update SSN for current occupant in Unit data
- Click on “MTCS Data Transfer” button to copy data from old MTCS to new Form 50058



PIC Building and Unit Process

■ Overview

- Adding Units to Inventory
 - Acquisition
 - New Construction

- Changes in Unit Inventory
 - Conversion Decrease/Merge
 - Conversion Increase/Split
 - Homeownership Sale
 - Mutual Help Sale
 - Replacement
 - Turnkey Sale
 - Change to Non-dwelling Use



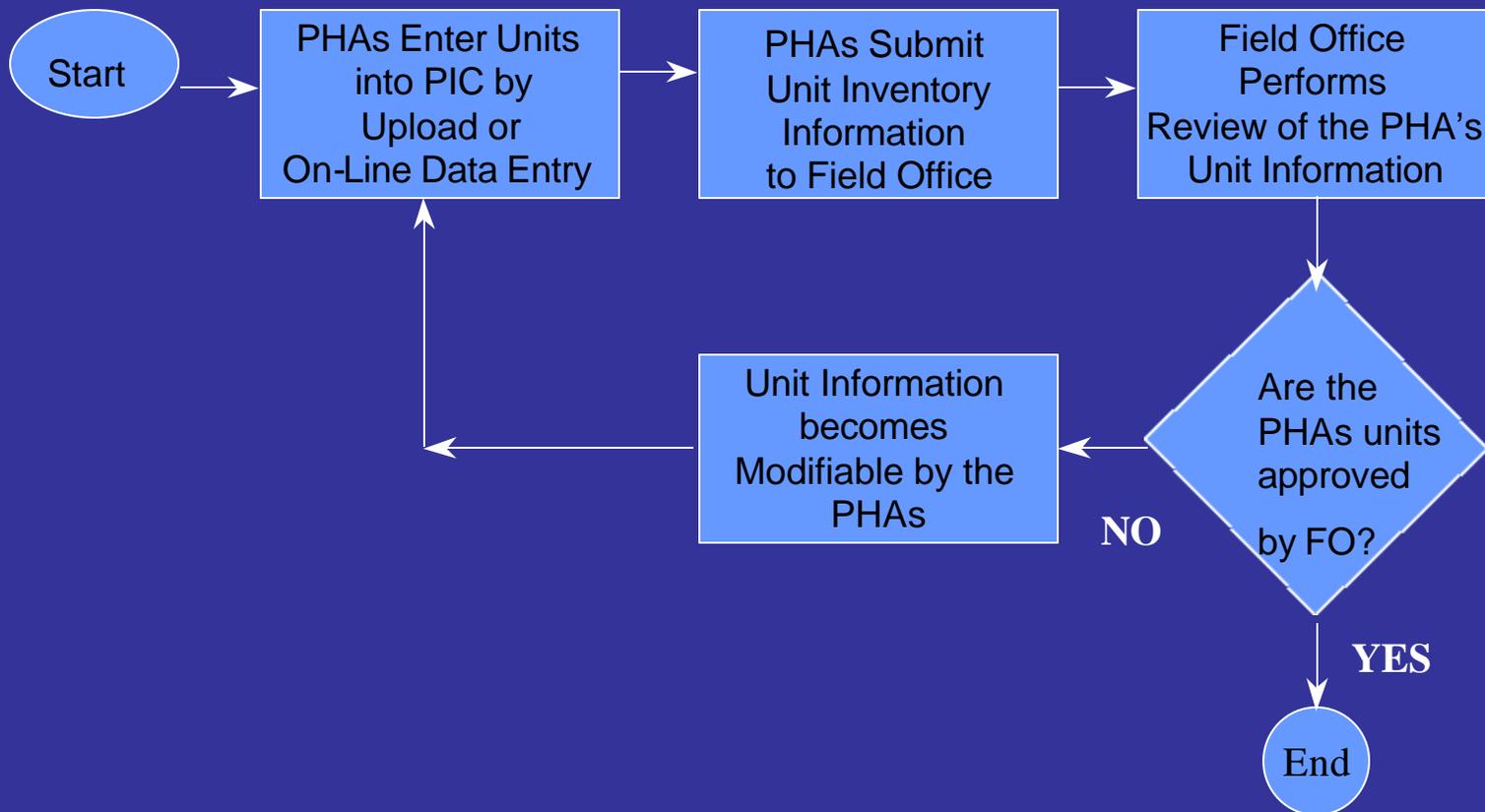
PIC Building and Unit Process

- **Overview (continued)**
 - **Changes in Unit Inventory**
 - **Require Approval**
 - **Enter directly into PIC via on-line data entry**



PIC Building and Unit Process

Adding Units to Inventory for PHA





PIC Building and Unit Process

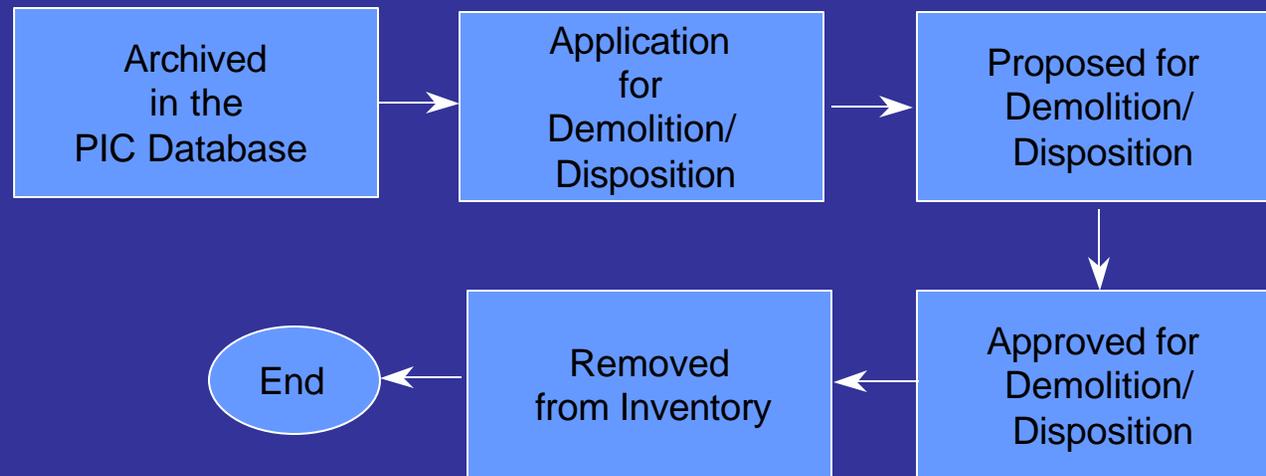
Adding Units to Inventory for PHA - continued

- **Demolition/Disposition**
 - **Proposed Demolition/Disposition**
 - **Approved**
 - **Actual Demolition/Disposition**
 - **Removed from Inventory**



PIC Building and Unit Process

Demolition/Disposition of Buildings and Units





Upcoming PIC Enhancements: Building and Unit

■ Building Details

- After initial approval, the Total Units Count will not be editable.
- Users will be prompted to add comments explaining reasons for changing the following fields:
 - Floor Count
 - Building Type
 - Construction Date
- Users will have the option of “non-dwelling structure” when selecting building type.



Upcoming PIC Enhancements: Building and Unit

■ Unit Details

- After initial approval, changes to the following will require an explanatory comment from the user:
 - ACC Indicator
 - Door Number
 - Floor Number
 - Bedroom Count
 - Unit Type

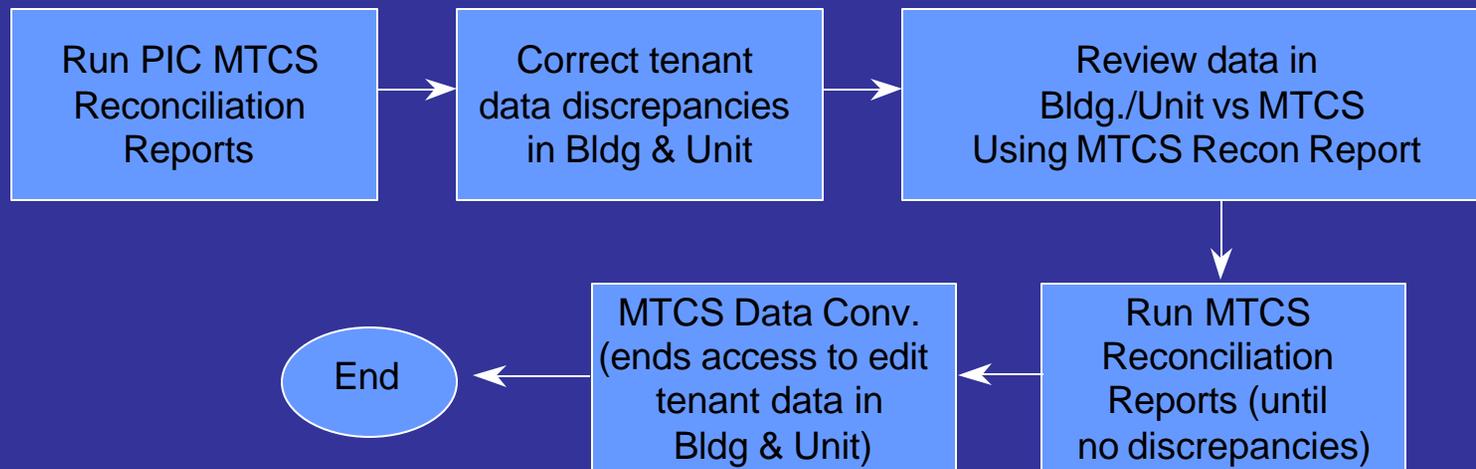
■ Approval Process

- The Building information will be archived on approval.
- The Unit information will be summarized for each Housing Authority, Development and Building.



MTCS Data Reconciliation

MTCS Data Reconciliation (pre-MTCS Conversion)





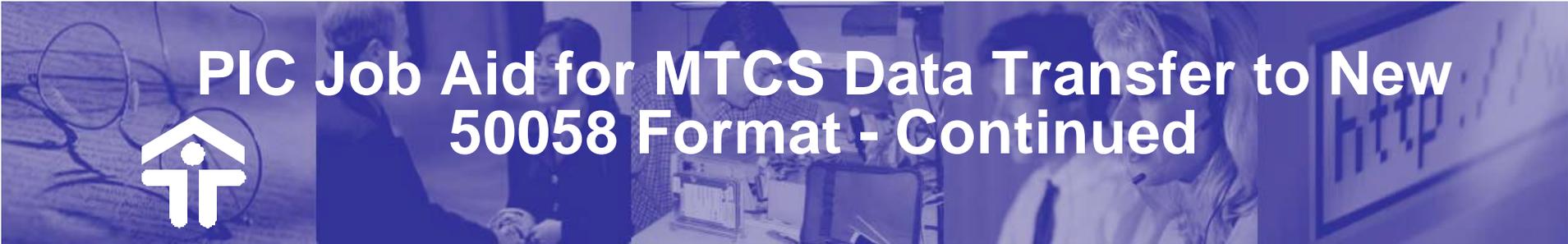
Form 50058 Upload Process

- **“New” 50058 upload of tenant & unit data is compared to PIC existing data and it must match:**
 - Tenant SSN vs Tenant SSN
 - Unit No. vs Unit No.
- **Error Examples**
 - Tenant move-in to “occupied” unit.
 - Tenant move-out from vacant unit.
 - Wrong tenant SSN to be re-certified in the unit.
- **PHA receives error report**
 - Corrects erroneous data
 - Resubmits (uploads)



PIC Job Aid for MTCS Data Transfer to New 50058 Format

- 1. “Old” MTCS.** PHAs may no longer upload tenant data in the “old” MTCS format after May 25th for any reason.
- 2. B&U Approval.** Have the PIC Building & Unit (B&U) data approved by the Field Office.
- 3. *MTCS Data Reconciliation Reports.*** After PIC B&U data is approved, identify data discrepancies between PIC B&U tenant data and the “old” MTCS tenant data by running the MTCS Data Reconciliation Reports found under “MTCS Occupancy Reconciliation” of the “Reports” tab in the Development Sub-module.



PIC Job Aid for MTCS Data Transfer to New 50058 Format - Continued

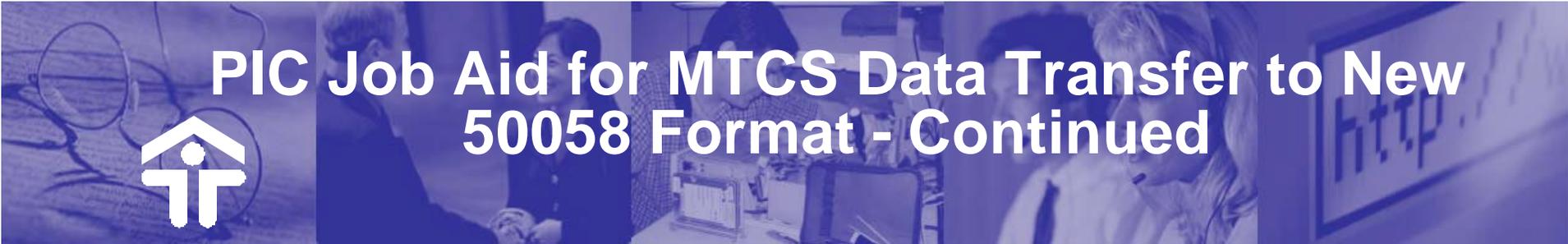


- 4. *Tenant Discrepancies.* Correct discrepancies identified in Step 3, where possible, by updating B&U using the “Update only - Head of Family” option in “Building/Unit Data Transfer” or by directly entering the new tenant data on screen in PIC. See Table 1 for a list of the data reconciliation scenarios.**



Table 1: Data Reconciliation Scenarios

Condition	Action Required
SSN Matches in PIC B&U and “old” MTCS	No action required
SSN in “old” MTCS but not in PIC B&U	Update tenant data in PIC B&U (if still a tenant) using “Update only-Head of Household” or directly on screen in PIC
SSN in PIC B&U but not in “old” MTCS	Retain discrepancy for later use (See Step 6)



PIC Job Aid for MTCS Data Transfer to New 50058 Format - Continued



5. MTCS Data Transfer. *After the tenant discrepancies in PIC have been corrected, initiate the MTCS Data Transfer in the “Housing Authority” tab of the Housing Authority Sub-module by clicking the button labeled “MTCS Data Transfer”. (Note: This step is NOT REVERSIBLE and is done only ONCE.) Only PHA users with “Submit” access may complete the data transfer. To transfer data, click on the button labeled “MTCS Data Transfer” under the “Submission” tab of the “Housing Authority” Sub-module. See Table 2 for a list of the MTCS data transfer actions.*

After the MTCS Data Transfer is conducted, all updates to tenant data must be done through submitting a Form HUD-50058 or on-line in the Form 50058 Sub-module. No more changes to tenant data may be made through B&U.

Table 2: MTCS Data Transfer Actions

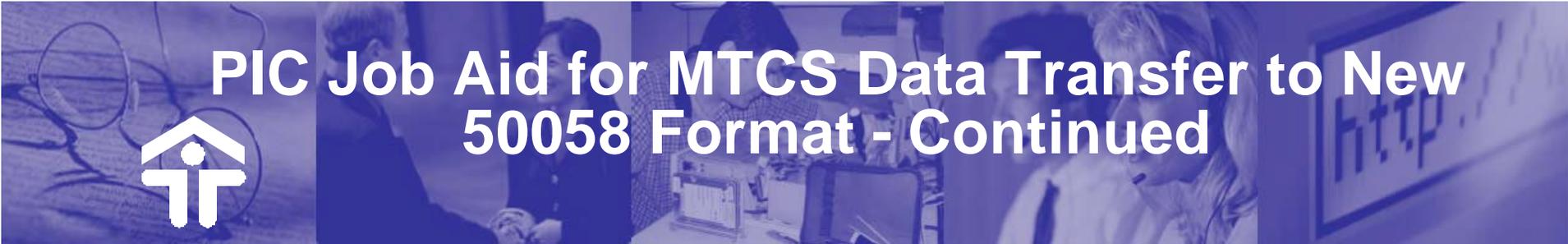


Instance	PIC B&U	“Old” MTCS	New 50058	Action Required
Tenant SSN in PIC B&U matches “old” MTCS	Keeps tenant data in PIC	Copies “old” MTCS data to PIC-50058 format	Accepts “old” MTCS data into PIC 50058 format	HA User sends all subsequent transactions in new 50058 format (e.g. re-exam, move-out)

Table 2: MTCS Data Transfer Actions - Continued



Instance	PIC B&U	“Old” MTCS	New 50058	Action Required
Tenant SSN in PIC B&U does not match “old” MTCS	Erases tenant data (if any) in PIC	Keeps data in “old” MTCS	Data is not copied from MTCS to PIC 50058	HA User must create tenant in PIC 50058 through an “Historical Adjustment ” (See Step 6)



PIC Job Aid for MTCS Data Transfer to New 50058 Format - Continued



- 6. Update Missing MTCS Tenants in PIC. After the MTCS data transfer, update the tenants in PIC that were missing from the “old” MTCS (identified in Step 4) that are still living in unit by submitting an Historical Adjustment (action code 2a=14) with the revised Form HUD-50058 (6/2001).***

Historical Adjustment is a “mini” New Admission record to the Form 50058 Sub-module.



Q&A Session

