iREMS Data Sharing Working Group Meeting
Meeting Minutes – 05/21/2009

Attendees

- ➢ Anne Christensen
- ➢ Ann Gass, Southwest Housing Compliance Corp.
- ➢ Eileen Walker
- ➢ Naseem Saab, MF Housing
- ➢ Alisa Costello, TRACS Team
- ➢ Kara Penn, iREMS Team
- ➢ Wes McAfee, iREMS Team
- ➢ Lynsay Matthews, iREMS Team
- ➢ Bob Schneider, Georgia HAP Administration
- ➢ Tom Prorok, CGI Federal
- ➢ Kevin Bradford
- ➢ Charlene Vassil
- ➢ James Mount
- ➢ Marnie Hess
- ➢ Vince Yotsukura

Glossary

- ➢ Downloading data – HUD data and getting the data to PBCAs
- ➢ Uploading data – PBCAs data getting the data to HUD
- ➢ Reports – formatted entities with data embedded into them and pre determined with business rules and data represented in a specific way (not downloads or uploads)

> Read only view- data on a URL or website (publicly assessable data available as of the day of searching)

Background

What is the *iREMS Data Sharing Working Group*? Multifamily Housing (MFH) is establishing a working group to support as well as map out future requirements for sharing data files between the PBCA organizations and HUD's Integrated Real Estate Management System (iREMS).

What does MF Housing currently have in-place for iREMS Data Sharing? Currently, we create an XML file with some basic property information and make this single file available for download.

What are the goals of the *iREMS Data Sharing Working Group*? Our vision is to expand on the current capabilities for data sharing between HUD and its partners.

How can MFH help? Requests that we have received and ideas that we have discussed:
    a. Transfer to include more elements
    b. Transactional System-to-System data transfer
    c. Expand current file extract or create additional files to share additional business data
    d. Create a new search engine, to control / filter the contents of the file extract
    e. Direct access to iREMS standard reports while restricting the data to PBCA's portfolio
    f. Expand this concept further by providing an XML template allowing organizations to create data files (via automation) and upload them into the iREMS database

Items of Discussion

Meeting Agenda:
    1. Who's around the (virtual) table?
    2. Review the last meeting minutes (refer to the attached minutes.)
    3. Continue to discuss data needs with the users for Phase I. This will include the Project Action, Management Review Data and Physical Inspection/EH&S areas of the system.

Minutes from Meeting

The URL http://www.hud.gov/offices/hsg/mfh/rems/rems.cfm
- The site has been created to house any documentation associated with this project.
- There are some documents that may not appear because this is a public site.

Data Sharing
- Reports will be handled in Phase II of this project

Transmission
There is a 70% chance that we will use Web Services to provide a request or response to the PBCA's. If this method is chosen, a Simple Object Access Protocol (SOAP) request will be created by the PBCA using the Contract Number and/or Property ID along with a request code identifying the type of data to be returned (e.g. Management Reviews, Project Actions, etc.) The response will be a SOAP message containing the response. Security will be enforced to ensure the requesting entity has rights to the requested data before responding.

Data Transfer to PBCAs
- 3 items discussed for Phase I of this Project:
  - Physical Inspection/ EH&S
  - Management Review Data
  - Project Actions
- Remaining Items will be handled in Phase II of this Project
  - Participant Data
  - Contract/Renewal Data
  - Financing
  - Financial Submissions
  - Occupancy/Address Information
  - Additional data not included here

- **Physical Inspections/EH&S**
  - Return data that is based on property only
  - Return only those records that are visible to the PBCA's on the Physical Inspection/EH&S Detail Screen via the Web Service
  - All Physical Inspection fields/data will be returned for the property
  - Return Last 2 inspections
  - Return list of Physical Inspections/EH&S items based on CAID # within last 30, 60, or 90 days
  - Display date Physical Inspection/EH&S item was last updated
  - Display last person to update Physical Inspection/EH&S Item
- **Management Review Data Needs**
  - Return data that is based on property only
  - Return only those records that are visible to the PBCA's on the Management Review Detail screen via the Web Service
  - All Management Review fields/data will be returned for the property
  - Return list of properties or contracts based on CAID # within last 30, 60, or 90 days
  - Display date Management Review was last updated
  - Display last person to update Management Review
- **Project Actions**
  - Return data that is based on property only
  - Return only those records that are visible to the PBCA's on the Project Action Detail screen via the Web Service
  - All Project Action fields/data will be returned for the property
  - Return all <u>OPEN</u> Project Actions displayed under the Project Action List Tab, or
  - Return list of properties or contracts based on CAID # within last 30, 60, or 90 days
  - Display date Project Action was last updated
  - Display last person to update Project Action

Attached Documents:
1. Last month's Meeting Minutes. Note: Thanks to Kara Penn, from the iREMS team, for putting these minutes together.

Action Items

Next Meeting

Next Meeting: Monday June 15th (to coincide with TRACS Conference) Time:12:00pm - 1:00pm ***NOTE: Different meeting date pattern ***
Meeting after Next: Thursday July 16th (3rd Thursday) Time:12:00pm - 1:00pm