

iREMS Data Sharing Working Group Meeting Meeting Minutes – 08/20/2009

Attendees

- Kevin Bradford
- Anne Christensen
- Alisa Costello, TRACS Team
- Tracy Egut, CGI Federal
- Michael Johnson
- Wes McAfee, iREMS Team
- Kara Penn, iREMS Team
- Tom Prorok, CGI Federal
- Naseem Saab, MF Housing
- Bob Schneider, Georgia HAP Administration

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. Begin discussion of data needs with the users for Phase II. This will include the Participant Data, Contract/Renewal Data, Financing, Financial Submissions, Occupancy/Address Information, Any additional areas not listed but requested by the PBCA and the Report areas of the system.

Minutes from Meeting

The URL <http://www.hud.gov/offices/hsg/mfh/remswrk/iremsswrkgrp.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

The following was discussed in the last meeting.

- The iREMS team continued to discuss the requirements for Phase II. The Functional Areas discussed were Participant Data, Contract/Renewal Data, Financing and Financial Submissions
- Report examples were furnished to the PBCAs however the group will revisit this area in the next meeting to give them enough time to review the various reports.
- The PBCAs will need to identify which reports they would like to have from a portfolio perspective.
- Requirements for the remaining Functional Areas of Occupancy/Address Information and Additional data not included will be discussed during the next few months.

Phase II

Requirements were discussed for the Functional Areas listed below

Participant Data

- Return data that is based on property only
- Return only those records that are visible to the PBCA's on the Property Participants Screen via the Web Service
- Return a list of property ids for any properties assigned to the CA ID where a participant or contact has changed in the last 30 days.
- Return current data only
- Identify when an owners information has changed
- Return date of last update to participant data

Contract Renewal Data (*For this section all suggestions were listed however we will have to revisit this section to ensure that iREMS delivers exactly what is needed*)

- Return data that is based on all Renewals, Amend Rents and Rent Adjustments for contracts/stages of a specific property
- Return only those records that are visible to the PBCA's on the Contract Processing screen via the Web Service
- Return the most recent renewal from each contract
- Identify when last Rent Comparability Study (RCS) was completed
- Return most recent Rent Comparability Study (RCS) and associated budget
- Identify when contract expiration date has been completed
- Return Short Term Renewals
- Return
- Return a screen that reflects the management fee (this item was added per request during the meeting)

Financing

- Return data that is based on property only
- Return only those records that are visible to the PBCA's on the Financing screen via the Web Service
- Return all active loan information
- Return all active grant information
- Return all inactive loan information
- Return all inactive grant information
- Return MIP (Annual Insurance Premium) debt service information

Financial Submissions/Statements

- Coordinate with FASS
- Return data that is based on property only
- Return only those records that are visible to the PBCA's on the Financial Statement screen via the Web Service
- Return current profit and loss statements
- Return statements for the previous 2 years
- Return balance information

Reports

There are currently 16 PBCA reports available. iREMS is open to suggestions regarding portfolio wide reports. PBCAs, please use the examples below when determining what information you would like to see on different reports.

- Reports will be provided if the entire portfolio is requested
- Reports will continue to be purged every 120 days

Examples

Report Name	Role	Description	Field Names
PBCA – Civil Rights Compliance Review – AQL Performance Report	All Roles	Used to determine the percentage of civil rights compliance reports submitted to HUD within 30 calendar days of management review completion	From Date to Date, Percentage of Reports on Time, Contract #, Property Name, Conducted Date, Date Report Sent to HUD No. of Days For Report
PBCA – Comparison of Management and Occupancy Reviews and Civil Rights Compliance Reviews	All Roles	Used to determine inconsistencies between management and occupancy reviews and civil rights reviews conducted during a specific period.	Contract#, Property Name, MOR Performance Date, CR Report to HUD Date

Report Name	Role	Description	Field Names
PBCA – Contract Renewals – AQL Performance Report	All Roles	Used to determine the percentage of renewal HAP contracts submitted to HUD 60 or more days before contract expiration or within 60 days of owner submission if owner submission is less than 120 days before HAP expiration.	From Date, To Date, Percent Renewed Timely, Contract Number, Property Name, Date Received Owner's Submission, Number Of Days To Process, Contract Expiration Date, Executed Contract To HUD
PBCA – EH&S Follow-up	All Roles	Used to track CA follow-up on EH&S deficiencies cited during REAC inspections.	From Date, To Date, Property Id, Property Name, Inspection Id, Inspection date, Score, Close-Out Status, Comments
PBCA – Life-Threatening Health & Safety -AQL Performance	All roles	Used to determine the percentage of CA responses occurring within one hour of notification.	From Date, To Date, Percent Of Responses Timely, Contract Number, Property Name, Date/Time Resident Notified CA, Date/Time CA Responded, CA Response Time
PBCA – Management and Occupancy Reviews - AQL Performance	All roles	Used to determine the percentage of management review reports completed within 30 calendar days of scheduled completion.	From Date - To date, Percent of Reports On Time, Company, Contract Number, Property Name, Conducted Date, No. Of Days For Report
PBCA – Management and Occupancy Reviews - Work Plan Compliance	All roles	Used to determine discrepancies between scheduled dates and performed dates of management reviews.	From Date to Date, Contract Number, Property Name, Scheduled Date, Conducted Date
PBCA – Management and Occupancy Reviews Over 12 Months From Previous Reviews	All roles	Used to determine the management reviews that exceed 12 months from previous review. (Report only lists properties in which the last management and occupancy review was conducted over 12 months ago)	From Date, To Date, Contract Number, Property Name, Date Of Most Recent Review, Number Of Months From Last Review

Report Name	Role	Description	Field Names
PBCA – Management and Occupancy Reviews That Are Not Closed	All roles	Used to determine properties with Management Reviews still open.	Contract Number, Property Name, Response Due, Response Received, Closed
PBCA – Management and Occupancy Reviews With Below Average Or Unsatisfactory Ratings	All roles	Used to determine which properties received management review reports with below average and unsatisfactory ratings.	From Date to Date, Contract Number, Property Name, Conducted Date, Report Date, Rating
PBCA – Multiyear Contracts	All roles	Used to determine which HAP contacts are multiyear and the corresponding expiration dates.	From Date, To Date, Contract Number, Property Name, HAP Expiration Date
PBCA – Non-Life-Threatening Health & Safety-AQL Performance	All Roles	Used to determine the percentage of CA responses occurring within two business days of notification.	Contract Number, Property Name, Date/ Time Resident Notified CA, Date/Time CA Responded, CA Response Time
PBCA – Opt-out Resident Data – AQL Performance	All Roles	Used to determine the percentage of resident data submitted to HUD 90 days before contract expiration or termination.	From date, To date, Percent Submitted On Time, Contract Number, Property Name, Date Resident Data Sent To HUD, Contract Expiration Date, Number of Days Sent Before Expiration
PBCA – Opt-out/ Termination Notification – AQL Performance	All Roles	Used to determine the percentage of owner opt-out notices/terminations submitted to HUD within one business day.	From Date, To Date, Percent Submitted On Time, Contract Number, Property Name, Recommendation For Termination Or Date Received from Owner, Date sent To HUD, Days Late, Termination or Opt Out
PBCA – Physical Inspections Report	All roles	Used to show physical inspections that were completed in a given time period and what the corresponding scores are.	From Date, To Date, Property Id, Property Name, Inspection Id, Inspection date, Release Date, Score, Status
PBCA – Rent Adjustment – AQL Performance	All roles	Used to determine the percentage of rent adjustment requests processed within 30 calendar days of owner request.	From Date, To date, Percent Of Rent Adjustment On Time, Contract Number, Property Name, Date Received From Owner, Date Completed, Days Late, Type of Increase, Hap Anniversary Date, Comments

Action Items

- Review the various reports to identify the ones you would like to have from a portfolio perspective.

Next Meeting

Next Meeting: ~~Thursday September 17th (3rd Thursday) Time: 12:00pm – 1:00pm~~

Meeting after Next: Thursday October 15th (3rd Thursday) Time: 12:00pm – 1:00pm