

VACANCY SYSTEM

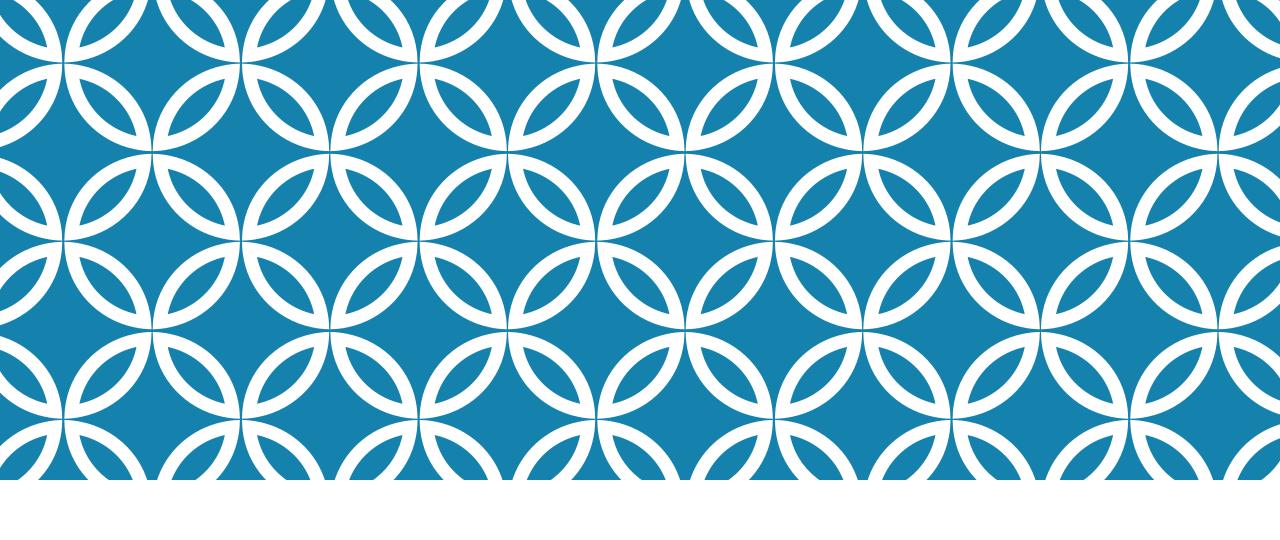
Paul McPartland

### WHAT WE ARE GOING TO TALK ABOUT TODAY

- When Should I Enter My Data?
- Why Can't I Find the Unit I Just Entered?
- What Can LHAs Edit? What Can HMS Edit?
- Common Data Entry Questions
- Importance of Not Entering Duplicate Records
- Waivers
- How to Figure Out Why You Were Assessed Fees
- Key Dates to Remember

### HOW OFTEN SHOULD I USE THE VACANCY SYSTEM?

- Regularly weekly/monthly depending on frequency of vacancies
  - Enter Initial Data as Units Become Vacant: Vacancy Date and Reason, Unit Condition, Estimated Turnover Costs, etc.
  - Enter Lease-up Data AFTER the Lease is Executed
  - Apply for Waivers as Close to Vacated Date as Possible
  - Monitor Waivers to Ensure They are Not Expired and Apply for Waiver Extensions as Needed
  - Monitor Fee Assessment Report to Ensure You Do Not Have Fees
  - If You DO Have Fees, Analyze Why and How To Reduce Them
  - Do NOT Enter Duplicate Records, as This May Incur Fees



HOW CAN I TELL IF THE VACANT UNIT I JUST ENTERED WAS SAVED BY THE SYSTEM?

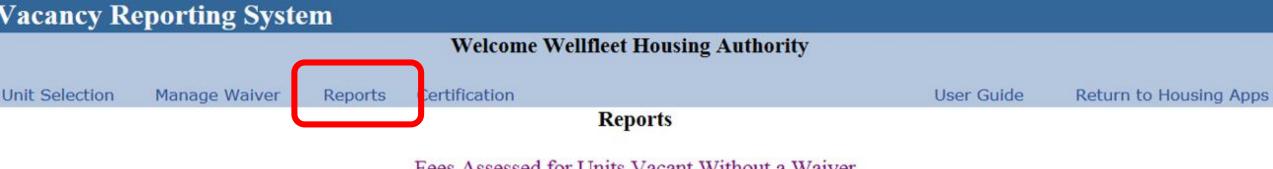
# THAT FEELING YOU GET WHEN YOU KNOW YOU ENTERED THE DATA BUT CAN'T FIND IT . . .



# HOW CAN I TELL IF THE VACANT UNIT I JUST ENTERED WAS SAVED IN THE SYSTEM?

- There are TWO WAYS:
  - Run a VACANCY REPORT: provides a list of all vacant units you have entered into the system between two dates of your choosing
  - OR,
  - Look at the UNIT HISTORY
- Here is how you do both . . .

### HOW TO RUN VACANCY REPORT



Fees Assessed for Units Vacant Without a Waiver

Waiver Status of all Units Vacant on Selected Date



Vacancy Report – Current Status of Units Vacated Between Selected Dates

Occupancy Rate Report

Reoccupy Vacant Units/Make Units Maintenance-Ready Report

#### **ENTER START & END DATES FOR Vacancy Report – Current Status of Units Vacated Between Selected Dates**

YOUR CHOSEN TIME PERIOD AND CLICK "VIEW REPORT"

From Date: 1/1/16

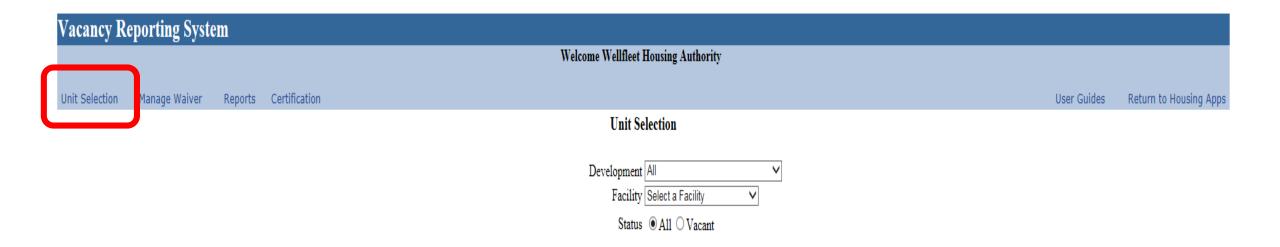
To Date: 5/20/16

View Report

	Development	Unit	Bedroom Size	General Condition	Vacated Date	Maintenance Ready Date	Lease Start Date	Applicant Control #
1	200-01 - Veterans Housing	11	3	Good	05/16/2016			
2	200-01 - Veterans Housing	44	3	Fair	05/01/2016	05/05/2016	06/01/2016	5852
3	667-01 - The Dunes 1	13	1	Good	04/15/2016			
4	200-01 - Veterans Housing	44	3	Fair	04/01/2016	04/15/2016	05/02/2016	
5	200-01 - Veterans Housing	36	2	Fair	04/01/2016	04/30/2016	06/01/2016	354
6	200-01 - Veterans Housing	38	2	Poor	04/01/2016	04/30/2016	06/01/2016	64853
7	200-01 - Veterans Housing	10	2	Poor	04/01/2016	05/15/2016		
8	200-01 - Veterans Housing	1	2	Poor	04/01/2016	04/15/2016	06/01/2016	3545
9	200-01 - Veterans Housing	3	2	Poor	04/01/2016	04/30/2016	06/01/2016	35453
10	200-01 - Veterans Housing	14	3	Poor	04/01/2016	04/28/2016	06/01/2016	6456
11	200-01 - Veterans Housing	12	2	Poor	04/01/2016	09/01/2016	10/01/2016	5701
12	667-01 - The Dunes 1	1	1	Fair	03/31/2016			

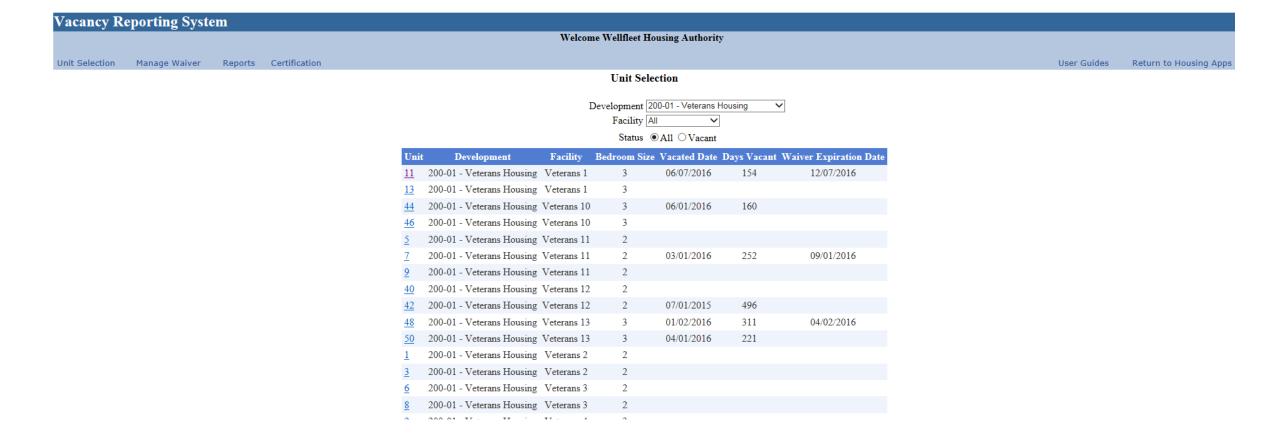
### HOW TO LOOK AT UNIT HISTORY

Step 1: Go to Unit Selection Page



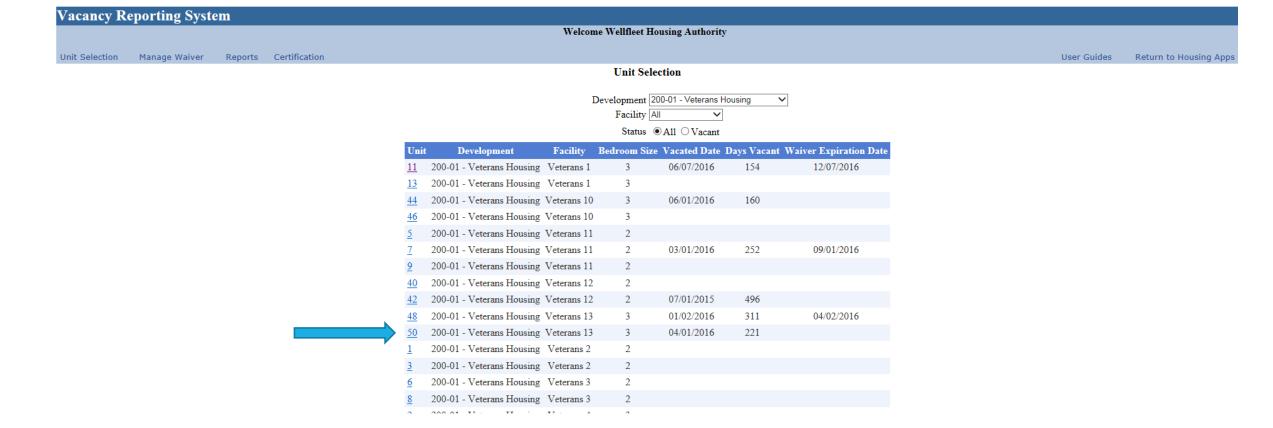
### HOW TO LOOK AT UNIT HISTORY

Step 2: Select Development and Facility From Dropdown

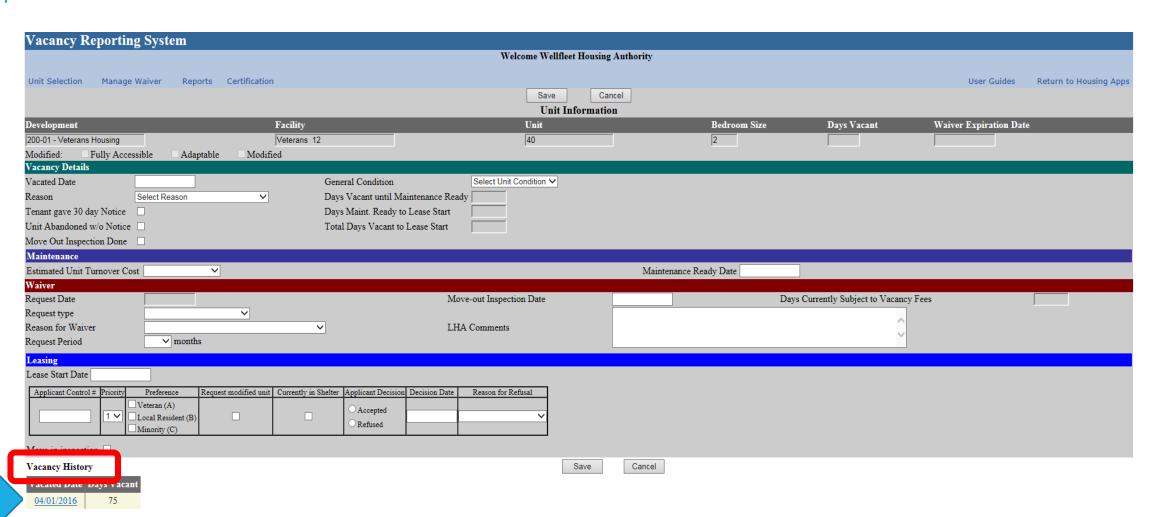


### HOW TO LOOK AT UNIT HISTORY

Step 2: Select a unit.

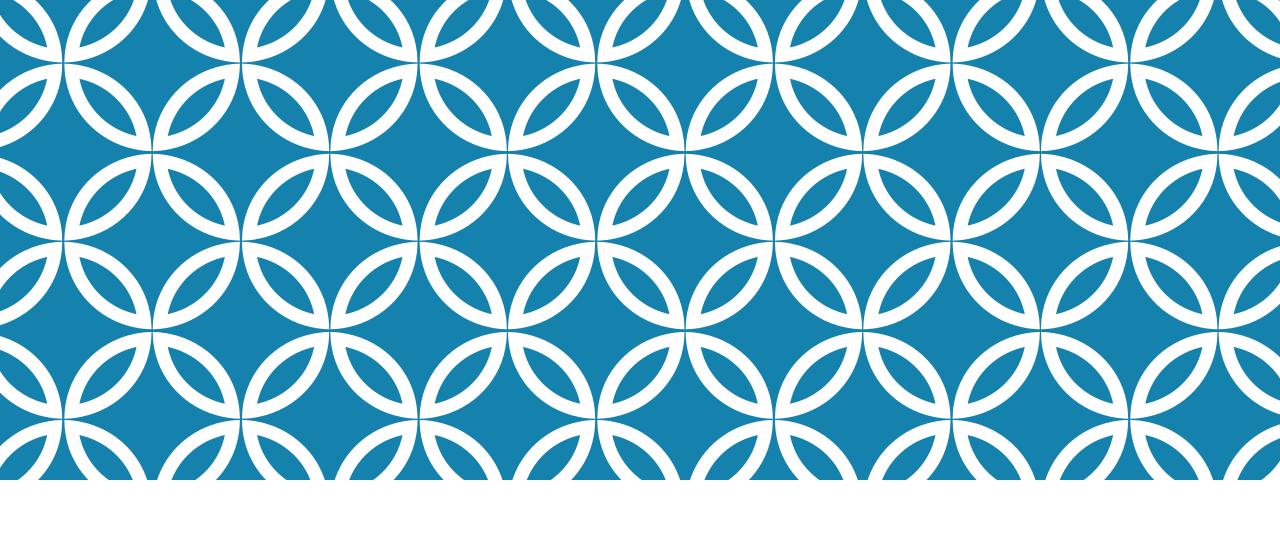


# THIS UNIT IS NOT CURRENTLY VACANT (VACATED DATE IS BLANK). BUT SCROLL TO "VACANCY HISTORY" AT BOTTOM OF PAGE TO SEE UNIT WAS VACANT 75 DAYS STARTING 4/1/16. FOR MORE DETAILS, CLICK ON THE HIGHLIGHTED "4/1/2016" DATE. . .



# THIS OPENS UP A NEW SCREEN THAT LOOKS SIMILAR, BUT IS ACTUALLY A HISTORICAL RECORD FOR THIS UNIT (NOTE 4/1/2016 VACATED DATE). ALL OLD VACANCY RECORDS ARE PRESERVED IN THE VACANCY HISTORY.

Vacancy Reporting System					
		Welcome Wellfleet Housing A	Authority		
Unit Selection Manage Waiver Reports Certif	fication				User Guides Return to Housing App
		Unit Information			
Development	Facility	Unit	Bedroom Size	Days Vacant	Waiver Expiration Date
200-01 - Veterans Housing	Veterans 12	40	2	75	
	Modified				
Vacancy Details Vacated Date  4/1/2016	General Condition	Poor			
Reason Moved in with Family	Days Vacant until Mainten	*			
Tenant gave 30 day Notice	Days Maint. Ready to Leas				
Unit Abandoned w/o Notice	Total Days Vacant to Lease	e Start 75			
Move Out Inspection Done  Maintenance					
Estimated Unit Turnover Cost Over \$25000			Maintenance Ready Date 5/30/2016		
Waiver			Maintenance Ready Date 3/30/2010		
Request Date		Move-out Inspection Date	Day	ys Currently Subject to Vacancy Fee	s 14
Request type		•			
Reason for Waiver	~	LHA Comments			
Request Period vmonths					
(click link for detail) Request Type Reason for waiver	equest Period (months) DHCD Decision # Months Approved	DHCD Decision Date Suspended Occupancy Payment SOP Cancel	Date Expiration Date		
4/1/2016 Initial Request 7 - Major Tenant Damage	4 Denied	06/29/2016			
Leasing					
Lease Start Date 6/15/2016					
	ied unit Currently in Shelter Applicant Decision Decis	sion Date Reason for Refusal			
□ Veteran (A) □ Local Resident (B) □ Minority (C)	☐ Accepted ○ Refused				
	ied Unit Currently in Shelter Applicant Decision Deci				
35415 1 Local	<u> </u>	10/2016			
3545 2 Veteran	Refused 06/	01/2016 Location			
Move in inspection					



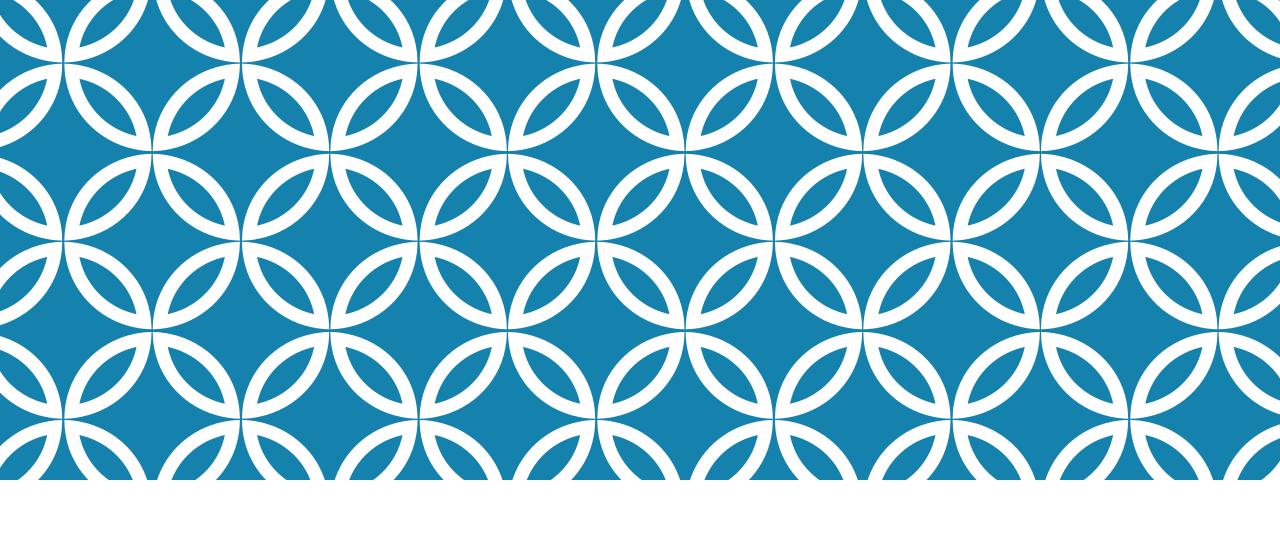
WHAT LHAS AND HMS CAN EDIT IN THE NEW VACANCY SYSTEM

### WHAT CAN LHAS EDIT IN THE VACANCY SYSTEM?

- BEFORE SAVING A NEW VACANT UNIT RECORD FOR THE FIRST TIME LHAS
  CAN EDIT ANY FIELD.
- 2. **AFTER** SAVING THE VACANT UNIT RECORD FOR THE FIRST TIME, AND **BEFORE** YOU ENTER AND SAVE THE "LEASE START DATE" LHAS CAN EDIT ANY FIELD EXCEPT "VACATED DATE".
- 3. AFTER YOU ENTER AND SAVE THE "LEASE START DATE", THE VACANT UNIT RECORD IS SAVED INTO "VACANCY HISTORY" AT THE BOTTOM OF THE SCREEN. LHAS CANNOT EDIT DATA THAT IS SAVED INTO HISTORY.

# WHAT CAN HOUSING MANAGEMENT SPECIALISTS (HMS) EDIT?

- HMS can delete records (especially duplicate records entered accidentally)
- HMS can edit any field, even in data saved to "Vacancy History"



COMMON DATA ENTRY QUESTIONS IN THE VACANCY SYSTEM

### **EVERYONE STILL AWAKE?**



## WHEN SHOULD I ENTER A LEASE START DATE?

- Only enter a "Lease Start Date" AFTER A LEASE IS SIGNED
  - Once you enter the Lease Start Date and hit the SAVE button, the record is moved to "History". If the applicant then rejects the unit, LHAs cannot go back into the History to correct the data. They will need to contact their HMS.
- If a tenant backs out of a lease once it is signed but before moving in, LHAs should create a new vacant unit record, with a new vacancy date.

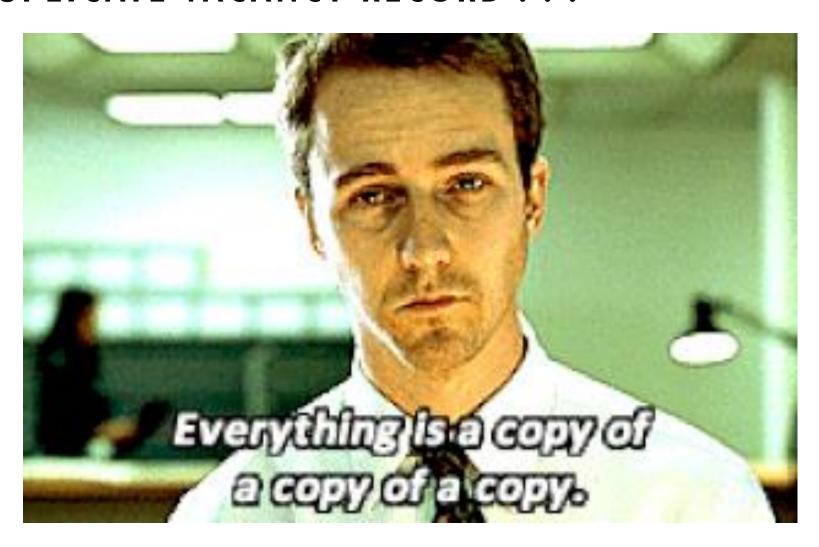
# WHAT SHOULD I ENTER IN THE APPLICANT CONTROL ID FIELD?

- Always fill in Applicant Control ID
- If administrative transfer, indicate in field as "Admin Transfer"
- If not an administrative transfer, enter the Applicant Control ID e.g. "E16-296"
- No other text should be entered in the applicant control ID field

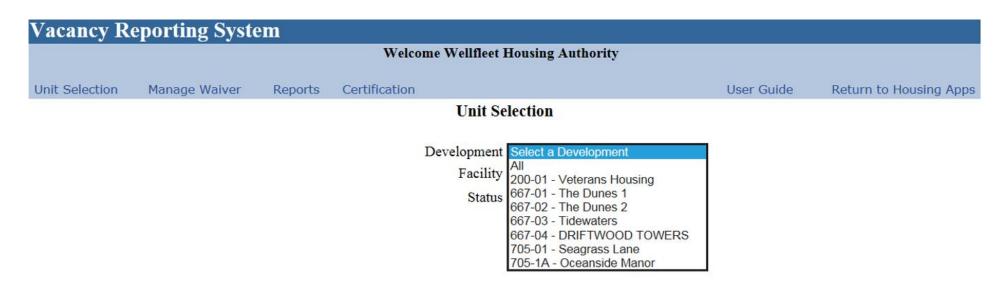
## DO NOT ENTER DUPLICATE RECORDS - PLEASE

- When you realize there is a data error and are unable to edit the record, please **do not** reenter the info in a new duplicate record.
- Contact your HMS to correct the data error.
- DUPLICATE RECORDS ARE THE MAJOR
   REASON FOR ERRONEOUS FEE ASSESSMENTS.

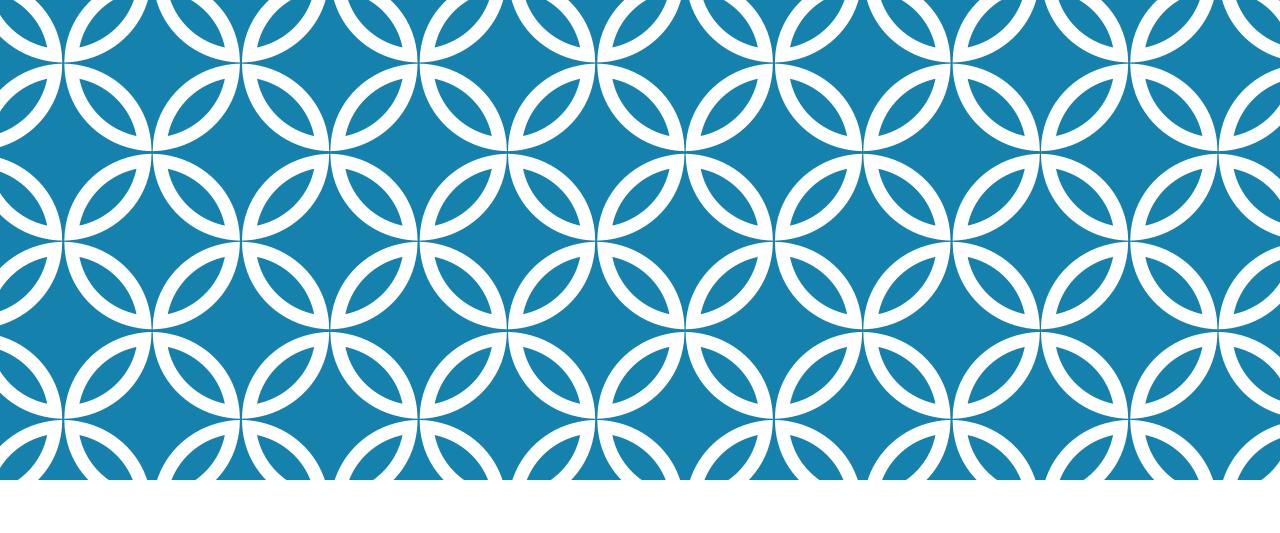
## THE FEELING DHCD STAFF GET WHEN THEY ENCOUNTER A DUPLICATE VACANCY RECORD . . .



## WHAT IF THE UNITS LISTED IN THE DROPDOWNS ARE INCORRECT?



Needs to be fixed in the Capital Planning System (CPS). Please email Paul McPartland at paul.mcpartland@state.ma.us with questions.



WAIVERS

### WHEN SHOULD I REQUEST A WAIVER?

Promptly inspect the newly vacant unit, assess its condition, and come up with a turnover plan

Best Practice:	Request a waiver <u>PROMPTLY</u> if you anticipate the vacancy will not be filled by:
	End of the Month Following the Vacancy Month

- For example, if you have a January vacancy, and expect the unit to be vacant beyond the end of February, request a waiver <u>PROMPTLY</u>
- AN EARLY REQUEST GIVES YOU TIME TO TAKE ACTION IF YOUR WAIVER REQUEST IS NOT APPROVED.

### HOW LONG A WAIVER SHOULD I REQUEST?

#### YOUR REQUEST SHOULD:

- START AT THE VACATED DATE AND
- END ON THE DATE YOU EXPECT TO REOCCUPY UNIT

#### Example:

- A unit has a Vacated Date of January 1<sup>st.</sup>
- You expect to have it reoccupied by June 1.
- You should therefore request a 5-month waiver (January May).

## WHAT IF I MAKE AN ERROR IN MY WAIVER REQUEST?

- Contact your HMS to discuss the best course of action in terms of resolving a waiver request error.
- Ideally, request waivers early to leave time to address any problems.

### WHAT IF I FORGOT TO REQUEST A WAIVER?

- If you have not yet entered a Lease Start date for the unit, you can still select that unit, open the vacant unit record and apply for a waiver.
- If you entered and saved the unit's Lease Start date without requesting a waiver, then that vacancy was closed and moved to "History". CALL YOUR HMS to discuss waiver eligibility.
- PLEASE DO NOT CREATE A DUPLICATE RECORD WITH A NEW WAIVER REQUEST, SINCE DUPLICATE RECORDS CAN LEAD TO ERRONEOUS FEES.



FEE ASSESSMENTS

### FEE ASSESSMENTS — WHY DO WE DO THIS???



## FEE ASSESSMENTS — WHY DO WE DO THIS???

- HOUSE FAMILIES -- Maximize the occupancy of state public housing – one of the few housing resources available to extremely low income households.
- MONEY! -- A 1% decrease in the statewide vacancy rate generates about \$1.8M in rental income every year funds that can be used to better maintain and preserve the portfolio.
- LEVEL PLAYING FIELD LHAs only get operating subsidy for deserving units

### FEE ASSESSMENTS

## HOW CAN I FIGURE OUT IF I MIGHT BE ASSESSED A VACANCY FEE?

THREE Easy Steps:

### FEE ASSESSMENTS — WILL I BE CHARGED FEES?

STEP ONE . . .



Reoccupy Vacant Units/Make Units Maintenance-Ready Report

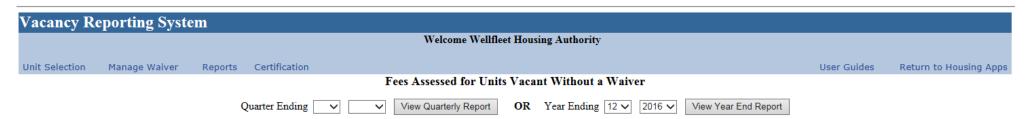
GO TO THE "REPORTS" OPTION IN THE UPPER LEFT OF YOUR SCREEN. THEN SELECT THE FIRST OPTION FROM THE LIST OF REPORTS: "FEES ASSESSED FOR UNITS VACANT WITHOUT A WAIVER"

# FEE ASSESSMENTS — WILL I BE CHARGED FEES? STEP TWO . . .



CHOOSE THE NEXT UPCOMING QUARTER END OR YEAR END DATE FROM THE OPTIONS ABOVE TO GET A COMPLETE LIST OF UNITS SUBJECT TO FEES FOR THE CURRENT QUARTER OR YEAR TO DATE. E.G., IF TODAY IS 11/14/16, SELECT 12/2016.

### FEE ASSESSMENTS - STEP THREE . . .



Date: 1/1/2016 - 12/31/2016

YOU WILL SEE A
REPORT LISTING
EVERY UNIT
SUBJECT TO FEES &
THE FEE AMOUNT
FOR THE SELECTED
TIME PERIOD.

	Development	Facility	Unit	Fee	SOP	Total Assessments \$ (Fee + SOP)
1	200-01 - Veterans Housing	Veterans 10	44	\$935.00	\$0.00	\$946.00
2	200-01 - Veterans Housing	Veterans 12	42	\$1,441.00	\$0.00	\$1,441.00
3	200-01 - Veterans Housing	Veterans 13	48	\$1,441.00	\$0.00	\$1,441.00
4	200-01 - Veterans Housing	Veterans 13	50	\$1,782.00	\$0.00	\$1,782.00
5	200-01 - Veterans Housing	Veterans 6	10	\$1,430.00	\$0.00	\$1,430.00
6	200-01 - Veterans Housing	Veterans 1	11	\$517.00	\$0.00	\$517.00
7	200-01 - Veterans Housing	Veterans 11	7	\$748.00	\$0.00	\$748.00
8	200-01 - Veterans Housing	Veterans 11	9	\$286.00	\$0.00	\$286.00
9	667-01 - The Dunes 1	1-6 Dunes 1-1	1	\$1,441.00	\$0.00	\$1,441.00
10	667-01 - The Dunes 1	1-6 Dunes 1-1	2	\$176.00	\$0.00	\$176.00
11	667-01 - The Dunes 1	1-6 Dunes 1-1	3	\$418.00	\$0.00	\$418.00
12	667-01 - The Dunes 1	13-18 Dunes 1-3	13	\$1,364.00	\$0.00	\$1,364.00
13	667-01 - The Dunes 1	13-18 Dunes 1-3	14	\$1,067.00	\$0.00	\$1,067.00
14	667-01 - The Dunes 1	13-18 Dunes 1-3	15	\$1,441.00	\$0.00	\$1,441.00
15	667-01 - The Dunes 1	7-12 Dunes 1-2	10	\$1,441.00	\$0.00	\$1,441.00
16	667-01 - The Dunes 1	7-12 Dunes 1-2	11	\$1,441.00	\$0.00	\$1,441.00
17	667-01 - The Dunes 1	7-12 Dunes 1-2	12	\$1,441.00	\$0.00	\$1,441.00
18	667-02 - The Dunes 2	31-40 Dunes 2-1	31	\$1,111.00	\$0.00	\$1,111.00
19	667-02 - The Dunes 2	31-40 Dunes 2-1	32	\$1,111.00	\$0.00	\$1,111.00
20	667-02 - The Dunes 2	31-40 Dunes 2-1	39	\$1,441.00	\$0.00	\$1,441.00
	Grand Total			\$22,473.00	\$0.00	\$22,473.00

NOTE: THESE
FEES COULD
INCREASE IN
THE FUTURE
FOR UNITS THAT
STAY VACANT
WITHOUT A
WAIVER.

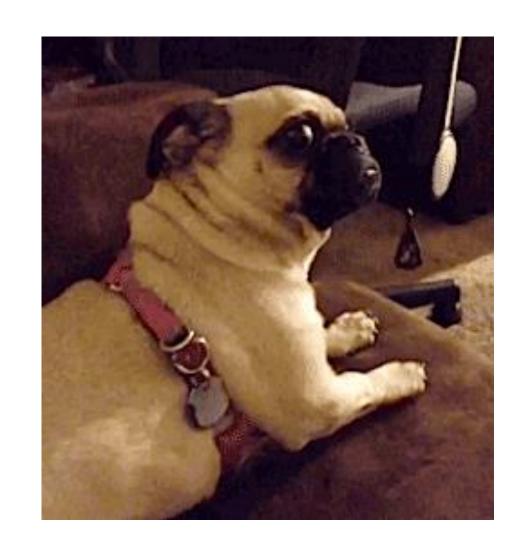
Note: this report does not estimate future fees that may be assessed for units vacant after the Report Run Date.

Report Run Date: 11/8/2016

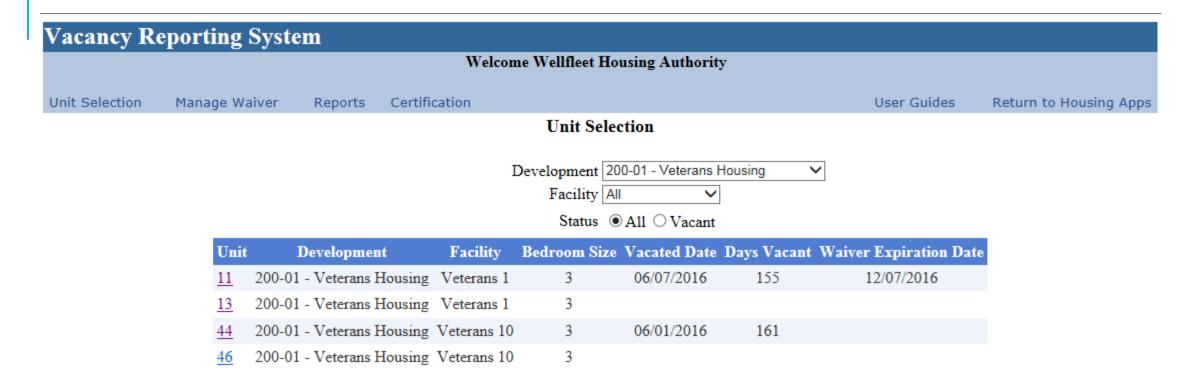
### FEE ASSESSMENTS

## WHY IS A UNIT BEING ASSESSED A VACANCY FEE?

IF YOU DON'T KNOW WHY A UNIT IS ON THE FEE ASSESSMENT REPORT, HERE IS HOW YOU CAN FIND OUT . . .



### FEE ASSESSMENTS — WHY IS THERE A FEE?

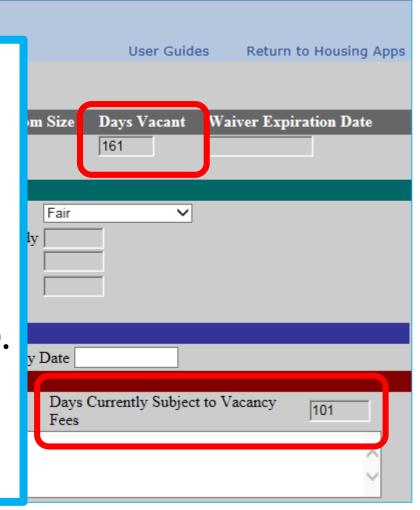


FIRST, GO TO THE "UNIT SELECTION" OPTION IN THE UPPER LEFT OF YOUR SCREEN. THEN SELECT THE UNIT THAT HAS THE FEE YOU ARE CONCERNED ABOUT – HERE, UNIT #44.

### FEE ASSESSMENTS — WHY IS THERE A FEE?

### Vacancy Reporting System Welcome Wellfleet Housing Authority

- 1. NOTE THE "DAYS VACANT" AT THE RIGHT END OF THE GRAY BAR. UNITS VACANT OVER 60 DAYS WITHOUT A WAIVER ARE SUBJECT TO FEES. THIS UNIT HAS BEEN VACANT 161 DAYS.
- 2. SINCE NO FEE IS ASSESSED FOR THE FIRST 60 DAYS AFTER THE UNIT BECOMES VACANT, THIS UNIT OWES FEES FOR 101 DAYS: 161 MINUS 60.
- 3. YOU CAN SEE THIS AT ANY TIME IN THE "DAYS CURRENTLY SUBJECT TO WAIVER FEES" FIELD UNDER THE RIGHT END OF THE RED BAR.



### FEE ASSESSMENTS — WHY IS THERE A FEE?

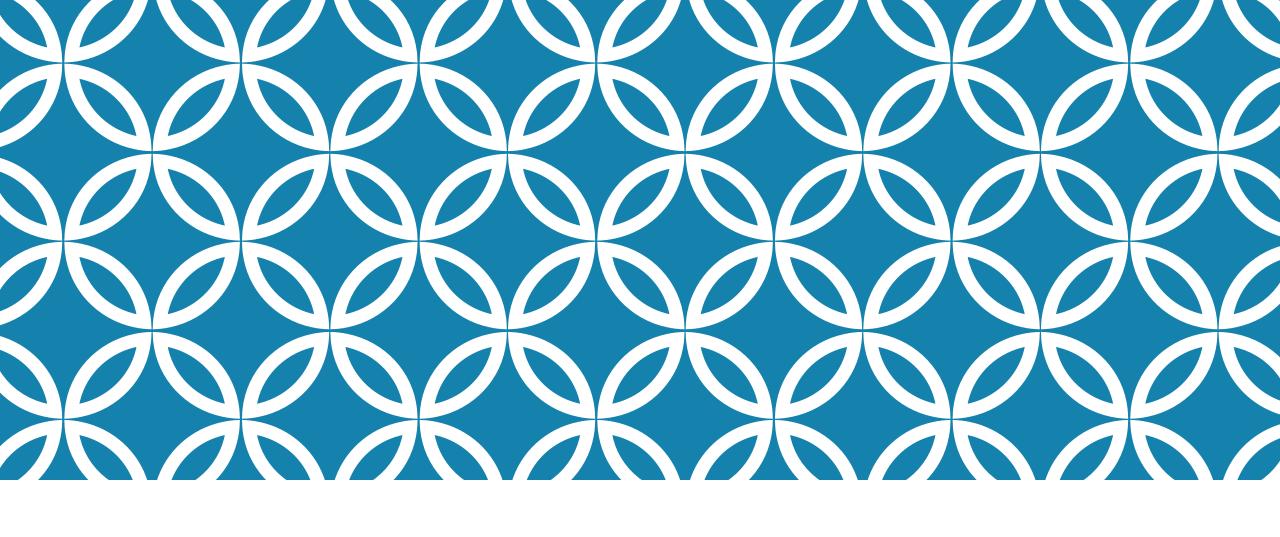
1. FEES ARE \$5.50/DAY FOR DAYS 61-90 AND \$11/DAY THEREAFTER.

#### 2. THE FEE FOR THIS UNIT VACANT FOR 161 DAYS WOULD BE:

DAYS VACANT	FINE PER DAY		NUMBER OF DAYS		FEE
FIRST 60 DAYS VACANT (DAYS 1 TO 60)	\$0	×	60 DAYS	=	\$0
NEXT 30 DAYS VACANT (DAYS 61 TO 90)	\$5.50/DAY	x	30 DAYS	=	\$165
ANY DAYS VACANT BEYOND 90 DAYS (DAYS 91+)	\$11/DAY	X	71 DAYS	=	\$781
TOTAL DAYS VACANT			161 TOTAL DAYS		Total Fee: \$946

### FEE ASSESSMENT — BEST PRACTICES:

- LHAs should regularly:
  - 1) Look to see if they have fees
  - 2) Analyze how they received those fees
  - 3) Remedy any fees if possible
- Regularly monitor vacancy and waiver expiration dates
- Apply for waiver extensions as needed
- Share Vacancy Report and Fee Assessment Report with LHA Commissioners
- NOTE: It is the responsibility of the LHAs to address any concerns about fees BEFORE the fee assessment date. Once fees are assessed on the four key dates throughout the year, DHCD will not change fees other than those resulting from DHCD error.

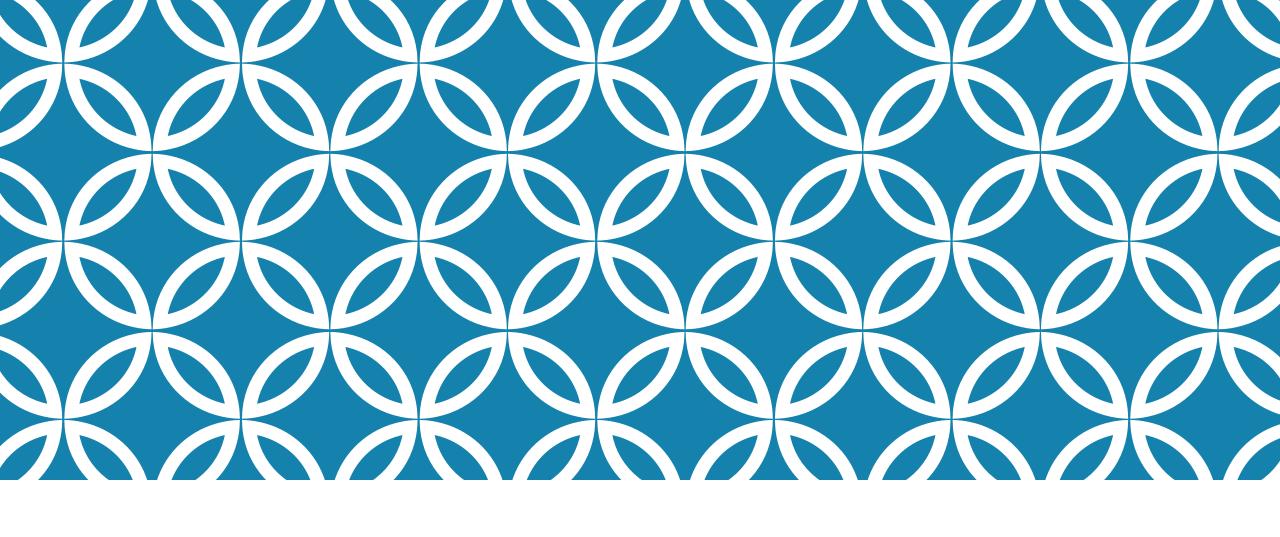


KEY DATES TO REMEMBER

### **KEY DATES**

	FYE: December 31	FYE: March 31	FYE: June 30	FYE: September 30
Vacancy certifications due to DHCD and All Vacancy Waiver Requests In*	1 <sup>st</sup> Qtr. Apr. 30	1 <sup>st</sup> Qtr. Jul 31	1 <sup>st</sup> Qtr. Oct. 31	1 <sup>st</sup> Qtr. Jan. 31
	2 <sup>nd</sup> Qtr. Jul. 31	2 <sup>nd</sup> Qtr. Oct. 31	2 <sup>nd</sup> Qtr. Jan. 31	2 <sup>nd</sup> Qtr. Apr. 30
	3 <sup>rd</sup> Qtr. Oct. 31	3 <sup>rd</sup> Qtr. Jan. 31	3 <sup>rd</sup> Qtr. Apr. 30	3 <sup>rd</sup> Qtr. Jul. 31
	Year-End: January 31	Year-End: April 30	Year-End: July 31	Year-End: October 31
Fee Assessment (All Quarters) / PMR Snapshot Date (Year End only)	1 <sup>st</sup> Qtr. May 15	1 <sup>st</sup> Qtr. Aug. 14	1 <sup>st</sup> Qtr. Nov. 14	1 <sup>st</sup> Qtr. Feb. 14
	2 <sup>nd</sup> Qtr. Aug. 14	2 <sup>nd</sup> Qtr. Nov. 14	2 <sup>nd</sup> Qtr. Feb. 14	2 <sup>nd</sup> Qtr. May 15
	3 <sup>rd</sup> Qtr. Nov. 14	3 <sup>rd</sup> Qtr. Feb. 14	3 <sup>rd</sup> Qtr. May 15	3 <sup>rd</sup> Qtr. Aug. 14
	Year-End: February 14	Year-End: May 15	Year-End: August 14	Year-End: November 14

\*Note: The dates presented in the table above for waiver requests are the last possible dates vacancy waivers can be submitted in order for the waivers to be processed by DHCD in time for the "snapshot" of PMR data and for fee assessments. Any waiver requests submitted after these dates will not be processed by DHCD in time for the "snapshot" or to avoid fee assessments for that quarter end. Depending on the date the unit became vacant, waivers may need to be requested prior to the deadlines stated above. Best practice is to apply for a vacancy waiver as close as possible to the vacated date.



AND LASTLY, GOOD NEWS!!!

### NO FEES FOR UNITS VACANT PRIOR TO 10/1/16!!

- DHCD WILL ONLY ASSESS FEES FOR UNITS VACANT WITHOUT WAIVERS ON OR AFTER OCTOBER 1, 2016.
- Fees appearing in the online Fee Assessment Report for the 9/2016 quarter-end will still be visible in the report but will be waived.
- First fee assessment date February 14th, 2017 (for units vacant without a waiver 10/1/16-12/31/16)





