General Software Features

Features	Response Code	Modification Cost	Comments
Software Modules are arranged in a logical manner according to order of processing			
Menus within software modules are arranged logically according to order of processing			
System to generate documents on HUD required forms, where applicable (such as Voucher, HAP contract, etc). System to use current version of HUD required forms in a variety of languages when available through HUD.			
Users have the ability to navigate easily between fields, screens and modules			
System automatically assigns a unique client ID number for each household (not based on SSN) which remains with the household through various modules, head of household changes, etc.			
Data entry fields are arranged in a logical manner for ease of data entry; with pertinent information summarized on initial screen.			
All software modules have easy to use on-line help.			
Software modules are standardized as to menus, screens, entry fields, cursor movement, function or special keys, prompts, data editing, and terminology.			
Processes are standardized between software modules as to balancing procedures, check processing procedures, setup routines, etc			
Time / date fields are displayed in a standardized manner.			
Field editing / validation performed prior to updating			
Software routines exist for correcting user errors and audit trail is maintained			
Modular specific tables exist permitting system administrator to change parameters used within modular software (i.e. income ranges, utility allowances, appliance allowance, tax rates)			
Each module supports <u>unlimited</u> user defined fields			
System administrator has ability to add additional screens for entry of user defined fields.			
Housing software modules track HUD required information and historical information such as 50058 information			
General Ledger is GAAP compliant and HUD compliant.			
User Customization and Program Stored Procedures are supported			
Organization has user group which meets at least annually.			
Organization uses feedback from user group to determine software direction.			
Application module software source code is available.			
System provides Application System security for data Read Only, Read & Write, Supervisory			

Menus are password protected and main navigation screen can be uniquely configured by each specific user			
Screens can be view only or update based on Security codes			
Individual fields can be view only or update based on Security codes			
Security passwords are known by the System Administrator or Supervisor.			
Provide audit trails tracking user access to system and activity.			
Provide user profiles to assist in creating new users based on user security or application access.			
Flexible, robust report writer feature available in all subsystems			
If yes to the above, please list available report writers			
Ability for system to support 10 financial users			
Ability for system to support at least 100 concurrent housing users			
Ability for your organization to train Authority users thoroughly			
Ability for your organization to support Authority users in a timely manner			
Ability to request custom software with reasonable time frames			
Is the program built on a data warehouse concept, with program modules/add-ons being integrated with each other			
Complete user and technical documentation is maintained with software releases			
Complete test environment for all modules			
Ability to schedule reports to be run at certain future/dates and time and reports can be created in both a printed or electronic format			
Access to reports can be secured by user			

WORKFLOW

Ability to automatically enter a note in the tenant / applicant record when particular actions (to be identified by PHA) have been taken, such as the generation of a letter, a status change, etc.			
Ability to customize automated notes to include an unlimited number of data fields, specific to the type of automated note. For example, in the case of an address change for an applicant, automated note could be programmed to include the staff name, the date and time of the change, the type of change, the previous address and the new address.			
Ability to automatically generate standardized letters to a single applicant / tenant or to a group of applicants / tenants.			
Ability for automated standardized letters to be generated in the language of the tenant / applicant's preference			
Ability to generate semi-standard letters with some customizable content to a single applicant / tenant or to a group of applicants / tenants.			
Ability to automatically generate and store an image file of any letter, report or document generated within the system			
Ability to automatically print specific image documents stored as attachments within the system along with system generated letters (such as automatically printing a signed authorization form PDF stored as an attachment along with a verification form or letter)			

Ability to automatically change certain data fields for all recipients of a particular letter or all applicants / tenants included in a report (for example, change status field of all recipients of a specific letter)			
Ability to integrate with MS Outlook calendar (for example, generation of a specific appointment letter could be set up to create an appointment in a specific staff member's Outlook calendar)			
Ability to process batch actions for a group of tenants / applicants identified on a report (for example, batch status changes)			
Ability to auto-populate specific fields in an applicant / tenant record based on PHA specified rules (for example, if a voucher is issued in the system, automatically populate voucher issuance date, and also automatically populate voucher expiration date to be 60 days later)			
Ability to assign and re-assign caseloads for staff, based on PHA defined criteria			
Ability to create unlimited number of task / action specific checklists (such as initial eligibility checklist, annual review checklist, transfer checklist, etc.)			
Ability to create checklists that are customized by program or voucher type (for example, items that are specific to a program like LIPH, USDA, or Enhanced Vouchers would only be included in checklists for applicants / tenants of those programs or voucher types)			
Ability to link checklists to internal procedure and training documents			
Ability to link image documents as well as documents from other programs (such as Crystal Reports and MS Access) directly from checklists			
Ability to establish additional customized alerts when staff change specific data fields for specific voucher types (for example, if a payment standard for an enhanced voucher is changed, staff could be alerted that in the enhanced voucher program, payment standard must equal gross rent)			
Ability for warning and alert screens to link to internal procedure and training documents			
Ability to automatically generate a note when barcoded document has been received / scanned			
Ability to automatically change specific data field (such as status) when barcoded document has been received / scanned			
Ability to automatically produce reports and send alerts when specific actions have been taken (such as status changes)			
Reporting Features:			
Produce reports and mailing labels for user entered criteria such as all boys between ages of 12 and 15 living in a specific conventional housing site number			
Produce family composition reports within each housing function (wait list, housing program, etc) based on user defined criteria			
Produce reports per housing site that identify each family member with either earned income, SS, SSI, TANF or any user selected combination.			

WEB INTERFACE AND VOICE INTERFACE

Online pre-apps application entry form.			
Landlord Payment Information and updates.			
Unit Inspections with ability to request a change in inspection date.			
Program participant Interims Review and Annual Review status			
Tenants can submit LIPH work orders.			
WL request status form.			
Interconnected Voice Recoginition compatibility			

DOCUMENT IMAGING (DI) INTERFACE

Ability to support document imaging software either integrated or 3rd party (i.e. Laserfiche). What customization would be required.			
Support Authorization forms and auto attach to client records			
Does the supported DI software have integrated Windows Active Directory Security			
Bar code support			
Automated posting of mailings to DI.			
Support for mass mailings e.g. Annual Reviews			
Support shortcuts to DI documents			
Support automated workflow			

LETTERS/CRYSTAL/BAR CODING

Ability to track/audit letter usage usage.			
Support for integration of bar codes on printed letters and in returned completed forms.			
Support for Crystal Reports version 8.			

REPORTS

Ability to generate custom reports on an ad hoc basis.			
Annual Review and inspection reports			
Wait List Reports			
Lease up reporting			

General Ledger Features

Provide for flexible Chart of Accounts			
Uses a standardized user-defined Master Chart of Accounts			
Accommodate minimum of 4 account number segments (including Fund)			
Track user information for each Journal Entry to include user name, time / date stamp			
Automatic and seamless interface to all other software modules			
Ability to view transactions in summary or in detail			
Provides a simultaneous cash and accrual set of Accounting Books			
Robust GL allocation subsystem			
Ability to support multiple fiscal calendars			
Ability to support multiple general ledgers for various projects			
Full Bank Reconciliation part of program			
Prohibit posting of out of balance JE or JVs with the ability to override (by management level clearance).			
Ability to view full allocation of allocation entries during ‘trial posting’ stage			
User defined inter-fund account numbers			
Automatic creation of inter-fund/inter-company transactions with complete balancing			
Ability to automatically reconcile inter-fund/inter-company transactions and cut a check.			
Ability to define reoccurring journal entries			
Ability to drill down to detail information from the GL system to all interfacing subsystem			
Ability to drill down on account activity to the JE level			
Ability to auto reconcile payable checks with auto-import from Bank			
Ability to support allocation table			
Supports multiple financial entity data entry on one Journal Entry			
Ability for multiple bank accounts per financial entity/database or for shared accounts			
Does the program come with MICR check writing and ability to create a MICR deposit slip? Please indicate if this is a third party program.			
Ability with program security for certain users to go back in previous operating months/years and post financial transactions.			
Ability to set up additional users defined sets of books in addition to the primary two (cash/accrual)			
Ability to drill down on GL account activity into the AP disbursement			
Reporting Features:			
Ability to run financial reports for past periods, including past months or past year without limits to go back in history.			
Ability to export system reports into third party tools like excel.			
If yes to above, list names of third party products			
Ability to consolidate any financial entities together for reporting purposes			

The current version of software has the ability to provided Project Based Accounting reports, including separate financial reports either by individual Project or Consolidated with either some or all of the Projects/Departments/Funds included, as determined by the user.			
Robust report writer feature for this module			
Real Time Cash requirements report based on deposits made, checks cut, journal entries affecting cash account and open a/p posted.			

Budgeting Features

Ability to copy current budget as prototype for future budget			
Ability to support multiple versions of future budgets without impacting current budget or allocations			
Ability for each department or cost center to enter annual future budget on-line without impacting current budget			
Ability to enter annual approved budget amounts for each department or cost center			
Ability to summarize/roll up cost center budgets to multiple levels			
Seamless interface between General Ledger expenses and annual budget			
Reporting Features:			
Ability to download or upload budget to/from Excel			
Ability to track all actuals against approved budget amount			

Accounts Payable Features

Ability to track all invoices data			
Ability to track all checks to vendor			
Ability to tie checks and invoices to original purchase order			
Automatic interface between check process and vendor data update			
Ability to batch check requests by vendor, with data selection period, or other defined selection criteria			
Ability to enter manual check into the system			
Ability to create automatic recurring check requests			
Provide option of consolidating multiple check requests for a single vendor into one check			
Complete automatic interface with general ledger			
Automatic “reverse” function once payable has been posted to the general ledger			
Ability to pay owner or vendors via ACH direct deposits.			
Multiple General Ledger accounts per check request			
Automatic interface with Tenant Accounting for refunds of security deposit, utility reimbursements and other credit balances			
Automatic interface with Misc Accounts Receivable for refunds of overpayments and other credit balances			
Permit partial payments against Purchase Orders			

System does not require the use of a 1 time vendor for Tenant Accounting and all payments are shown on tenant ledger along with tenant charges/payments			
Ability to pay a vendor from multiple financial entities/bank accounts/general ledger accounts from one payable input screen without redundant data entry.			
Ability to provide user assigned vendor numbers			
Ability to review vendor ledger for multiple financial entities from one screen			
Seamless integration with other subsystem to reduce data entry. If PO number is entered, vendor information should display from PO. System can either push or pull the PO info onto a payable			
Comprehensive and logical display screens. Reducing need for operator to move from menu to menu to obtain/view information			
Ability to drill down to detail information			
Vendor Payment Subsystem to track vendor payments, adjustments, voids by vendor; online inquiry plus reporting subsystem			
Is there a check/A/P approval process			
Ability to allow multiple payments for one invoice			
Limit A/P dollar amount changes from previously approved PO dollar amount.			
Ability to set up pre-defined allocation table for payment on 1 vendor from multiple financial entities			
Ability to link a scanned copy of Owner W-9 on HCV Owner record.			
Ability to prevent payment to a vendor if certificate of insurance for worker comp/liability insurance has expired.			
Ability to void checks and re-write.			
Ability to void checks and reverse associated payable			
Ability to track vendor invoice number to prevent duplication payment			
Checks can be created with electronic signatures.			
Reporting Features:			
Provide a detailed Final check register			
Interface automatically with Purchasing system, updating payable with PO and check information			
Ability to place check request on hold			
Ability to place vendor on check hold			
Ability to produce check and check register by user sort criteria			
Vendor performance reporting for minority and local businesses			
Ability to accurately run A/P reports historically for previously operating months/years.			
Open check request report for all check requests awaiting payment, based on AP subsystem and check request dates			
Produce 1099's for applicable vendors/Section 8 Owners and produce 1099 electronic transmissions as required by federal government and State			

Tenant Billing

Ability to charge monthly rental amounts to active tenants.			
Ability to charge multiple recurring charges such as Parking, Pet charges in either a recurring monthly or user defined months basis			
Ability to charge one time charges such as Maintenance, Parking Permit, etc			
Ability to produce a standard rent statement form and allow for statement customizations			
Ability to charge/bill a past or future tenant.			
Ability to print messages on rent statement			
Seamless integration with tenants accounts receivable and General Ledger			
Ability to track multiple security deposit types and link security deposits to a different bank account than the standard entity operating account.			
Ability to preview monthly charges prior to posting and pre posting report provides for a 'variance' column to show the difference from last months posted charges.			
Ability to post monthly recurring rental amounts to future operating months (ie posting May 2005 rents on April 15th 2005)			
Ability to automatically create a tenant charge directly from a work order for all or a portion of the work order amount.			
Ability to create charges/accept receipts from applicants			
Ability to set a "user warning" for a specified amount of time i.e. 30 days, 60 days, etc.			
Ability to reprint an individual monthly statement as well as by site.			
Ability to reactivate an account if moved-out or transferred in error.			
Ability to track active tenants with repayment agreements.			
Ability to track history of 14 day notices tenant receives within a user defined period.			

Utility Billing

Ability to charge monthly water utility amounts to active tenants.			
Ability to charge multiple recurring charges such as: connection fees, tiered water rates, utility taxes.			
Ability to credit one time charges such as: maintenance credit, leak credits.			
Ability to produce a standard water utility statement form and allow for statement customizations			
Ability to charge/bill a past or future tenant.			
Ability to print messages on utility statement			
Seamless integration with tenants accounts receivable and General Ledger			
Ability to interface with meter reading software (Badger Meters, Readcenter software)			
Ability to store water rates/fees for different water districts.			

Ability to post monthly recurring utility amounts in arrears (ie posting July water charges in August)			
Ability to calculate water charges based on sub-meter usage and local water district rates			
Ability to create water charges/accept receipts from tennants			
Ability to set a “user warning” for a specified amount of time i.e. 30 days, 60 days, etc.			
Ability to reprint an individual monthly statement as well as by project.			

Cash Collection

Ability to set the system up to prioritize a short payment by resident and the ability to override this system default.			
Ability for receipt posting among at least 6 different resident charge types for 1 receivable.			
Ability to support of bank lockbox system for processing of resident payments. To include “no collection” file.			
Trial and final posting of lockbox payments to tenants account			
System supports “user warnings” on receipt screen if a resident is in a “do not accept payment” or “cash payment only money order/cashiers check” status			
Seamless interface with General Ledger in real time			
Ability to handle debit card/ach/check scanning transactions in the future			
System supports “user warnings” on inquiry and receipt screens if a resident is “in legal” or “see manager” status.			
Ability to interface from one screen to another without losing data.			
Ability to support batch entries			
Ability to insert/go to “notes” from cash receipts/collections			
Pending/unposted batch entries to be reflected on the tenant inquiry screen as “pending” with a new balance.			
Ability to block receipt of payment on “do not accept payment” status.			

Purchasing and Requisitioning

Ability for recurring Purchase Orders			
Track changes to purchase orders by user id, date and time			
Printing of multiple part purchase orders			
Ability to drill down from purchase order to requisitions			
Ability to drill ‘up’ to invoices and payments from purchase orders			
Ability to access vendor file directly from purchase order			
Ability to print copy of original purchase order (copy clearly identified)			
Ability to open a purchase order closed in error			
Ability to inquire from vendor or entity level all open and closed purchase orders			
Ability to modify printed purchase order document			
Ability to set up user based security for Purchase Order based on ability of user to be over budget.			
Ability to cross reference budget limitations on fund and/or project level			

Ability to set and hold to budget parameters for a purchase order			
Ability for user identified fields			
Ability to set up user based security based upon total dollar amount PO and to set up a notification hierarchy for proper staff approvals.			
Reporting Features:			
Ability to produce reports for MBE/WBE and Section 3 activity using user entered time frame			
Ability to produce reports for each financial entity using user entered time frame			
Ability to produce Open Order by financial entity report			
Ability to report vendors alphabetically throughout the report system			
Ability to report vendors by commodity codes either multiple or single codes			
Ability to produce reports of vendors with no FEIN numbers			
Ability to track vendor payments for a specific time period			
Ability to track and sort by City, MBE/WBE, or Section 3			
Ability to print MBE/WBE or Section 3 reports for vendors			
Ability to print approved requisition report			
Ability to print open requisitions by: Department, date, and number.			
User configurable report filter screens			
Requisitions features:			
Ability to enter on-line requisitions			
Ability for various approval and denial when processing requisitions			
Ability for users to track requisitions through the approval process			
Ability to print a multiple part requisition form			
Receiving Features:			
Security to restrict staff that receives			
Ability to print receiving documents by: Purchase order number, date, receiver			
Ability to receive on non-stock items			
Ability to partially receive a PO			
Vendor Features:			
Ability to enter and update vendors be restricted by security levels			
System users a Master Vendor List			
Ability to inactivate a vendor with out deleting vendor			
Ability to track vendors as suppliers			
Ability to view open and closed purchases from a vendor			
Ability for user defined fields in vendor file			
Ability to group and track vendors by commodity codes			
Ability to identify vendor as local business			
Ability to identify vendor as minority vendor			
Ability to identify vendor as Section 3 vendor			
Provide user defined fields to be used for sorting and grouping vendors			
Ability to track by user defined fields			
Provide notes field for vendor information			

Ability to identify vendor a government, utility provider, sole proprietor, corporation, etc.			
Ability to link vendor with a default payable g/l account			
Seamless interface with General Ledger			
Ability to link multiple financial entities to one Purchase Order			
Ability to email PO to Vendor directly from the system			
Ability to Push PO information to an A/P Payable without data re-entry			

Accounts Receivable

Track all tenant receivables and payments on-line in detailed easy to understand format (tenant ledger)			
Bill tenant security deposit according to a user configured default at tenant move-in or transfer			
Bill tenant pet deposit according to user determined method at time agency receives notification of pet			
Maintain separate tenant balances for categories such as rent, security, pet, legal, maintenance, other			
Reverse NSF check function which in 1 step does the following: reverses the receipt, updates the bank cash account, places the tenant charges paid by the nsf back onto the tenant ledger, can set up a bank charge to the bank account and apply user defined NSF charge to the resident.			
Provide comprehensive aged accounts receivable reporting subsystem. Must able to select categories of tenants (current and vacated) and categories of responsibility (area or area manager)			
On-line calculation of rent, following HUD guidelines for family composition, member income types, excluded income			
Rent calculation may vary between programs and must be user definable between programs			
Ability to bypass above in favor of fixed rent amount for building custodians or building ‘responsible persons’			
Seamless interface to General Ledger			
Tenant Adjustment function to permit adjustment of any tenant charge or payment with auditing feature for current or past financial periods based upon, with user security.			
Tenant move-in function. Based on occupancy date, pro-rate rent charge, charge stove allowance if tenant occupies a stove allowance unit, charge initial security deposit.			
Interface with Maintenance system to code unit as occupied			
Tenant vacate function. Track both rent charge through date and actual vacancy date. Calculate prorate rent based on rent charge through date. Track vacancy days based on actual vacancy date			
Automatic creation of payment request to Accounts Receivable for refund purposes.			
Tenant transfer function. This function will vacate from unit and occupy to unit; calculate prorate rent on both units; create GL transactions; create notification to maintenance; interface with the tenant ledger			

All tenant movement must create correct and appropriate records for 50058 transmission			
Rent reexamination subsystem must provide the ability to 'stack' changes in income and rent and process them in order. System must be able to process retro rent amount (both credit and debit)			
Accrue interest on security and pet deposits based on user defined table			
Provide comprehensive utility allowance subsystem with utility codes and amounts based on unit size and utilities and items owned by tenant / owner. Utility allowances implemented based on table implementation date			
Provide Write off feature for inactive tenants			
Provide Bankruptcy feature for active and inactive tenants			
Provide extensive notes field			
Summary display screen with information such as name, address, rent, utility allowance amount, AR balance, number of bedrooms, site, management area, birth date, legal status, move-in, vacancy dates, last re-exam date, last 50058 date, repayment amount(s), etc. Entry by client name, unit number, client number. Users should not have to move from menu to menu or selector to selector to obtain information			
On-line display of tenant movement within units and programs			
On-line display of tenant history within units			
Ability to track outstanding balances, written off amounts, enter resident payments and add additional charges to an inactive/moved out tenant.			
Provide method of tracking attempts to deliver eviction notices			
Provide method of tracking tenant progress through eviction process.			
Rent reexamination schedule for each area manage to assist in setting up appointments			
Appointment schedule system for rent reexamination process. Ability to produce letter for initial, rescheduled and missed appointments			
For Section 8 program, complete portability subsystem to enable the Authority to bill other PHAs for portable vouchers including hard to house and admin fees			
Contact management feature in program to track user defined activities for either past or reminder of future activities.			
Contact management information is available via an on-line calendar			
Ability to print resident receipt from a/r entry screen			
Automated function to reverse resident receipt and re-apply to a different set of charges			
Reporting Features:			
Provide user requested lists of tenants for specific sites or management areas by a variety of sorts, such as unit number, tenant name, unit address			
Provide late payment letters and eviction notices			
ALL AR tenant reports necessary to meet HUD mandated reporting requirements			

Vacancy analysis report. Ability of report to track vacant units through the maintenance or modernization process.			
Ability to produce reports as email attachment or spreadsheet as appropriate			
Ability to print on-demand detailed tenant ledger			
Ability to automatically email tenant ledger from program			
Tenant based reports, A/R reports, rent rolls are all date sensitive			

Fixed Assets

Ability to access a copy of the original invoice, warranty or any other information directly from the system			
Ability to link work orders to fixed assets			
Ability to track preventative maintenance for assets that need to be maintained			
Ability to transfer assets from one location (department) to another			
Ability to track the status of an asset (new, disposed)			
Ability to track depreciation status of an asset			
Ability to track cost of an asset			
Ability to track vehicles in assets by dept			
Ability to track vehicle by VIN numbers			
Ability to track vehicle license number			
Ability to track assets by fund or account in the general ledger			
Ability to track disposal of assets			
Ability to group assets by user defined type of asset (vehicles, office equipment, computers, etc)			

Applicant Management

Pre-Applicant Features:			
Ability to maintain a pre-applicant or lottery list			
Ability to assign a user defined number or random numbers to pre-applicants			
Ability to assign system generated number to pre-applicants			
Ability to select an unlimited number of user defined “status” fields (next to process) pre applicants, including sub-categories			
Ability to produce notification letters for pre-applicants – all letters should have “auto” notes			
Ability to enter respond by date to the pre-applicant letters plus a system generated “auto date”			
Ability to withdraw pre-applicants who do not respond to the pre-applicant letter after review of system generated report			
Ability to change status to move pre-applicant family information to applicant database after client is deemed “eligible”			
Applicant Features:			
Ability to maintain separate wait lists for various programs or housing developments within a program			

User defined applicant "preferences" and ability to user define multiple weightings of preferences for multiple waitlists			
Ability to track historical wait list position including Head of Household (HOH) changes for applicants on each wait list. Ability to have a "general" archive section which included HOH changes made within system and by which staff.			
Ability to recalculate ranking separately for each wait list			
Ability to recalculate ranking on-demand			
Automatic interface between various application stages (i.e. voucher search, conventional screening)			
Ability to remove clients from specific waiting list during voucher search and screening process			
Ability to send Applicant information to 3rd party credit/criminal checking companies			
Ability to send 'interest' letter to applicants within user defined application dates			
Ability to automatically withdraw applicants who fail to respond to the 'interest' letter			
All automatic withdrawal updates withdrawal list, withdrawal date, and withdrawal reason			
Ability to manually withdraw an applicant from one wait list, leaving the applicant active on wait list for other programs or developments			
Ability to track all applicant data required for the 50058 form			
Ability to verify all new applicants against current and former housing clients – System "Alert" to notify staff if client is or was previously housed			
Ability to notify operator that applicant has outstanding balance – System "Alert" to notify staff if monies owed			
Ability to add notes to applicant record			
Ability to view future applicant reminder items on system calendar – when client is due for an update, documents expiring, etc.			
Ability to report on applicant in referral status by any field			
Ability to report on applicant in referral status by housing development desired			
Automatic interface to Section 8 voucher module			
Ability to enter unlimited number of user defined fields			
Ability to code applicant into 'tickler stage' for each interviewer or initial housing inspector			
Ability to view by interview or housing inspector applicants in 'tickler stage'			
Ability to track number of housing refusal by applicant			
Ability to withdrawal applicant from appropriate wait list after user defined number of housing refusals			
History of all previously generated waiting lists is maintained.			
Ability to produce waiting lists for each user defined program or development within a program			

User defined applicant "preferences" and ability to user define multiple weightings of preferences for multiple waitlists			
Ability for applicant to have a ledger and the ability to individually track applicant charges, security deposits, resident payments and the to refund any resident payments			
Applicant refunds automatically create an Account Payable which is linked to their Applicant ledger.			
An applicant can be entered and information updated on multiple waitlists from one applicant screen/record set up.			
For a resident on Multiple waitlists, once a resident is selected ability to update all waitlists.			
Ability to keep a Master Verification Letter Template file and Master Correspondents file for sending Verifications for all projects and actions			
System automatically tracks outstanding verification letters			
Ability to attach electronic file (like a scanned copy of birth certificate or driver's license) to Applicant Record			
Ability to view all Waiting Lists that a client is active on at a glance on one screen			
Ability to have more than one mailing address and additional contact information for other individuals the household wants correspondence to be sent to (including family, social workers, advocates, etc) & specify "who" gets "what" type of mail.			
Ability to designate a series of system "Alerts" that are visible on the main screen, for specific clients with various special needs or circumstances			
Ability to view one complete master screen that includes: resident address, mailing addresses (if more than one), authorized person (if Consent on file)			
Ability to easily "search" data fields regardless of program or status			
Security that tracks "who" and "when" changes made to Waiting List records			

Housing Project/Unit Management

Ability to support hierarchal structure of sites within management areas, project number within site, building within site, unit within building.			
Ability to view unit information i.e. unit address, bedroom size, utility information, site code, cal number, area, manager, etc			
Ability to view tenant information for a unit such as tenant number, tenant name and family demographic information			
Ability to drill down from a site to a unit to tenant history to current tenant			
Ability to maintain data on unit such as utility configuration, number and location of smoke detectors, site, building, area, manager, census tract			
Ability to classify units with special designations such as Senior Site, Hope VI development or Agency-owned property			
Ability to classify units as handicapped accessible with type of impairment identified (i.e. mobility, hearing, vision)			

Ability to track appliances in unit and per project			
Ability to track year, quarter building constructed			
Ability to track preventative maintenance dates, interior paint dates and schedule			
Ability to track on a building level exterior paint dates and scheduled Modernization work			
Ability to track Modernization dollars spent within the site and unit			
Ability to provide on-screen user defined unit fields to track AUTHORITY specific data			
If yes to the above, please note how many fields			
Ability to link unit file to electronic files such as digital photos of fire damage, plot plans, floor plans, etc.			
System automatically creates a user defined “move out” statement			
At move-in, default resident recurring monthly, on-time, and security deposits can be set up on a default basis by unit type			
Ability to make default move in and move out – either modifiable or non-modifiable by users			
Ability to set up user defined project/building attributes which can then be used to dynamically select data to be included selected reports			
Ability to enter and track card key numbers issued to tenant, including date and time.			

1. Conventional Program/Project Based HUD Programs
/Tax Credit and Tenant Management/Moderate Rehabilitation

Maintain a Conventional program ‘ready to house’ list. Clients drawn from the wait list, whose screening process is complete			
Ability to automatically link, unit “make ready” functions needed to prepare the unit for a new resident, when resident gives notice.			
Ability to automatically remove a unit from vacancy status upon tenant move-in or lease execution and auto alert + generation contract revision for PB when unit vacant over 120 days.			
On-line & system calculation of net rent using gross rent minus utility, stove, appliance and other allowances. Updating at contract renewals or changes with specific complexes/projects			
Ability to automate the reexamination process tracking reexaminations due, outstanding and completed by Housing Manager code and District Office totals as well as auto alert for non tax credit complex contract revision/re-write			
Ability to choose income based or unit based tenant rent (flat rent)			
Program notification to end user to insure that unit is vacant prior to tenant move-in			
Editing to insure that rent reexamination date is within user defined date range			
Ability to track tenants assigned to user identified special sites			
Ability to track information on pet such as number, types, acquisition dates, deposits on file, license numbers, vaccination dates, etc.			

Move-in function provides for tracking of the answers to a series of user defined questions. Auto generates contract using tenant info and pulling contract dates & rent amount, based on specific complex/project			
Move-out function provides for tracking the answers to a series of user defined questions			
Move-out functions automatically generates a user defined Security Deposit Disposition letter with specific detail for all vacates.			
Ability of resident/property managers (info restricted only to project/unit/LL info) to go on line and review status of units at different sites real time ledger and auto alert for mailing requests			
Entry of vacancy reason, based as user defined codes with the ability to run move out reports for user defined periods.			
Automatic creation of a Vacancy work order for maintenance subsystem			
Tenant transfer function. This function will vacate from unit and occupy to unit; calculate prorate rent on both units			
Tenant transfer function provides for tracking the answers to a series of user defined questions about the move-out			
Seamless interface with Work Order System to create regular work orders in response to annual inspections conducted on hand held computers			
Summary display screen with information such as name, address, rent, utility allowance amount, AR balance, number of bedrooms, site, management area, birth date, legal status, move-in, vacancy dates, last re-exam date, last 50058 date, repayment amount(s), term of lease, owner info, if tenant participant of another program or WL, if requires special language or other accommodation , etc. or “color”or other coded alert if one of the above			
Users should not have to move from menu to menu or selector to selector to obtain information.			
Entry selection for display screens available by client name, unit number, client number, address and SSN#			
On-line display of tenant movement within units and programs			
On-line display of tenant history within units.			
Ability to create user defined lease or any other resident specific form, in a master list. See #11 also			
Ability to generate MR rent adjustments using annual adjustment factor and other system data			
System automatically calculates the number of total times a resident has given an NSF check based upon automated NSF check reversal function.			
Ability of system to automatically require a “money order” payment from a resident, based upon a user defined number of NSF checks.			
System provides for Project based Section 8, 202 and 236 compliance tracking			
System provides for Tax Credit compliance tracking			
Tenant Income Certification can be completed in system			
Compliance validation occurs in system prior to move-in			

System completes the State TIC and Project Summary Report			

Work Order/Maintenance System

Ability to enter work orders based on client number, unit number, client name			
Support for multiple types of work orders such as unit (for repair within a unit), grounds			
Ability to setup “work order templates” for ease of data entry			
Ability to track changes to work order to time, date, and user			
Ability to view operator, time, date of initial work order entry. AUTHORITY operates a call center for work order intake.			
Ability to track description of problem as related by client			
Ability to track work order problem caller who may not be the resident			
Ability to review past work orders (i.e. prior to current resident move in) at time of original work order entry/resident call in			
Ability to classify work orders at entry time into routine, emergency, etc.			
Ability to set up preventative/pre-scheduled work orders on a week by week basis.			
Ability to print multi-part work orders			
Ability to create a resident charge from a work order for a portion or all of the work order cost.			
Ability to designate work order to be radio dispatched			
Ability of staff dispatcher to request all work orders which have not been dispatched (for specific work area) and code them as being dispatched			
Ability to group work orders based upon user defined regions			
Entry of tenant charges to work order			
Separation of charges to user defined categories such as labor, material, lost time, overhead			
Seamless interface of work order and A/P system for 3rd party vendor payments			
Entry of actual labor hours spent on work order			
Ability to enter user defined fields			
Materials usage on work order automatically updates inventory			
System tracks time work order spent in each status code			
System tracks costs for labor and materials			
Track work order to the Conventional housing unit			
Track work order to Asset			
Ability for work order approval hierarchy based upon estimated cost of work order			
Print permission to enter the unit on work order and shows on work order entry screen			
Ability to link to occupant screen from work order.			
Ability to track work orders by unit, by building, by site, by management area, by maintenance area, by address, by tenant			
Handheld inspection subsystem (HHS):			

Ability to download unit information into handheld			
HHS creates work orders as result of inspection			
HHS Inspections update unit file with inspection date and unit condition			
Please identify handheld device name/manufacturer			
Ability to use work order as input document for Inventory system			
Ability to track all work orders associated with a vacancy to the vacancy work order created at time of tenant move out or transfer			
Track work completed history on user defined services for each unit. User defined services such as stove repair, smoke detector replacement, safety bar installation, interior painting, etc)			
Ability to track work order to a site or building rather than unit (used for tracking exterior painting, boiler repair, stairwell repair, etc)			
Ability to allow residents to go on line and view the status of previous work orders or enter a new work order			
Ability to view on-line work order for each unit in reverse chronological order			
Ability to view above for specific craft or service code			
Summary screen to allow for on line/real time internal review of work orders for a project or projects for a user specified time-frame which shows work order opened and closed by employee, work order priority or work order status. Screen should allow for drill down			
Ability to track both actual labor/material costs for a work order as well as resident portion/charge back amount.			
Reporting Features:			
Work order reporting module produces reports required by HUD for various inspection systems (i.e. PHAS, PHMAP)			
Ability to print work orders for specific units, projects, management area, maintenance areas, within date ranges			
Ability to print work orders assigned by craft, service code, employee number within date ranges			
Exception reports based on user defined criteria (i.e. work orders outstanding after xx days)			
Radio dispatched work orders within user identified date ranges			
Detailed work order aging reports for both complete and outstanding work orders by user defined sort criteria within date ranges			
Ability modify standard system work order			
Production reports within date ranges such as work order processed, work orders dispatched, work orders completed within each craft, service code, employee, work order for specific sites, maintenance areas, management areas			

Resident & Community Services

Print out agreements			
Ability to track status of community service requirement eg. How many are Yes, No, Pending or Exempt Flag tenants that are Pending for the purpose of reminder letters to be mailed.			

If tenants are working, disabled, f/t student or receiving uib or afdc community service requirement is automatically populated			
Print out letters regarding community service			
Ability to track number of tenants doing community service			
Fields to track language, age, income of each tenant			
Reporting Features:			
Produce reports and mailing labels for user entered criteria such as sites, age groupings, and support services			

Housing Choice Voucher/LIPH/Intake Unit

Users can continue to make changes to a client 50058 account while client payables are being posted without changing the payables that are posted based on the pre-posting report.			
Unlimited historical 50058 resident data is retained in the system, as well as unit history and ability to view any change in LL/owner info, prop mngmt co, or ownership changes			
Although historical 50058's are maintained and a 50058 may exist for a future effective date, payables are directly calculated from the currently effective 50058 record and stored in chronological order when generating notices to tenant, landlord, or accounting			
Ability to track voucher success rate and ability to generate report showing rate at different search stages. Auto generate report and expiration letter for user to change status			
If the unit's utilities are designated as tenant-paid, rents are charged based on rent calculated directly from the most current 50058 record flat rent defined for the unit if the utility allowance exceeds the rent charge. Ability to auto calculate rent worksheet, utility allowances, and subsidy calculation			
Retroactive payable adjustments are automatically calculated based on the effective 50058			
A payable can be created for a single Housing Choice Voucher vendor at a time different from the regular postings and the payable will be reflected in the next regular posting without having to create any manuals adjustments.			
A payable to a Housing Choice Voucher vendor will be prevented when the vendor is placed on hold.			
For units with a change of ownership, a payable is created to the new owner regardless of the certification status of the client.			
Payments to Housing Choice Voucher vendors/Landlords on behalf of multiple tenants can be consolidated onto one check.			
Payments to Housing Choice Voucher vendors/landlords on behalf of multiple tenants can be separated by tenant and or complex.			
Automatic Data validation of 50058 information			
On-line and system calculation of tenant rent based on income, deductions, utility and appliance amounts			

On-line and system detail screen displaying all amounts used to calculate tenant rent and HAP payment. Possibility of adding an RTA screen connecting unit info to tt (auto alert when unit history has changed from info on RTA and system if previously in a participating unit). Owner info restricted			
Payables are automatically pro-rated based on the move-in and move-out date. Alert when 3 day overlap does not apply (when transf from one place to another w/same LL or within programs) or if goes over that amount of days. Also auto calculates for pro-rated families and shared housing situation			
Ability to calculate utility payments for low income tenants. (Hap to Tenant amounts)			
Housing Quality Inspections (HQS) Features:			
Comprehensive HQS inspection system Ability to auto schedule various types of inspections by type and location/address for Section 8, LIPH MR, PB units such as RLA inspections, Annuals, initials, re-inspections, etc. ability to schedule REAC inspections			
Inspection system interfaces with Section 8 units to reduce data entry			
Inspection system notification letters for tenant and landlord (or agent) for failed or PW/Comment. Auto include notes and tickle letter. Auto alert staff for follow-up on initial inspection results.			
Interface of HQS inspection subsystem with handheld			
Please identify handheld device name/manufacture			
Ability to reschedule and re-notify tenant / landlord for cancelled / no show inspections			
Ability to track and update results of HQS inspections and owner repair. Auto track # of days on letters and auto alert generating next series of letters			
Ability to track HQS failures by landlord/unit/tenant			
Ability to hold landlord payments pending unit repair with auto alert			
Ability to track inspection history by inspector, unit, inspection type and inspection result			
Ability to track days and generate report to re-inspection for units which failed initial inspection			
Ability to flag clients who have not had HQS inspection within user defined timeframe and produce report			
Ability to flag clients who have not had income reexamination within user defined timeframe and produce report			
Ability to track clients who with missed/rescheduled appointments and reason. Ability to include auto schedule inspections based on type and location/address			
Maintain historical data on unit inspection, to include initial date and status and unit pass date			
Ability to link inspection photo's electronically to inspection screen			

Comprehensive tracking of unit information such as address, bedrooms, utility configuration, appliance ownership, census tract, management area, owner, agent			
Provide on-screen user defined unit fields to track AUTHORITY specific data. Please note how many.			
Contract information for each lease such as original effective date, current effective date, expiration date, cancellation date, PSA, utility configuration, utility amount, contract rent, gross rent, tenant rent, gross family contribution, net family contribution, unit number, Housing Assistance Payment, all fields required by HUD for completion of 50058 reporting			
Comprehensive landlord information including landlord name, address, property manager or management company information, correspondence mailing address, check mailing address			
Ability to add free form notes to landlord information separate box for authorized agents/property managers			
Ability to add free form notes to client information			
Landlord screen which displays all landlord properties in summary format			
Ability to drill down from landlord summary screen to details of each lease/property			
Detail lease screen displays tenant information, details of move-in, rental history (including amounts and effective dates), inspection dates and results, case manager, cancellation date if applicable			
Ability to track tenants who are at $0 housing assistance payment (HAP)			
Ability to track tenants who have been at $0 HAP for 180 days or longer and system auto alert			
Ability to calculate utility amounts based on unit utility /project based/MR complex appliance configuration and effective date			
Display screen for summary information to assist in providing information to tenant and landlords – used by department other than Leased Housing			
On-line display of tenant movement within Section 8 units			
Ability to easily update Payment Standards table			
Ability to load agency addresses from city census tract file			
Ability to determine rent comparability based on census tract			
Ability to edit unit addresses against census tract address file			
Ability to identify 'low poverty' census tracts			
Ability to track undesirable tenants			
Ability to track undesirable landlords			
Simple method to change landlord for all leases within a building – when landlord sells building			
Simple method to change landlords for all leases under contract – when landlord sells multiple properties			
Ability to change landlord address and have the change affect all leases			
Comprehensive Voucher portability system; including incoming and outgoing and interface with 50058 transmission			
Seamless interface with General Ledger			

Ability to track fees such as hard-to-house fees, lead based paint fees, clearance testing fees			
Detail Vendor Payment Ledger on-line with ability to print as needed. Access by landlord (vendor) or contract (lease) number			
Interface with Accounts Payable for generation of 'check requests' for payment of partial rent, or other adjustments			
Ability to produce transaction for monthly landlord payment			
Ability to hold payment for a contract.			
Ability to deduct monies from a vendor monthly HAP payments			
A portion of a Housing Choice Voucher vendor payment can be abated for a specified time frame.			
Maintain all necessary information for production of annual 1099 forms			
Receipts from Housing Choice Voucher owners may be posted to the vendor ledger.			
Housing Choice Voucher processing can be completed multiple times per month			
More than one 50058 may be transmitted for a particular client at the same time			
If more than one 50058 is transmitted in the file for a particular client, the order in which the transmission occurs is by effective date.			
HUD validation rules preclude a 50058 from being transmitted unless all data is valid.			
Ability to "group" HAP payments to a landlord into one check and ability to group LL pymnt between in multiple checks based on unit complex or Property Managers.			
Ability to make landlord payments via ACH/direct deposit with detail supporting documentation to landlord			
Ability to enter future contract information without impacting current contract data			
System automatically implements future contract information based on contract effect date or HAP effective date and type of assistance (auto alert if restrictions for type of voucher)			
Retro Rent changes are calculated based upon the effective date of the 50058 change.			
50058 data cannot be modified after the date has been transmitted to HUD			
Auto checking of duplicate social security numbers.			
Interface with Housing Eligibility function at time client is issued a voucher to remove client from appropriate waiting list. Voucher printing from main screen and system auto calculates # of days until expiration date			
Ability to maintain historical information for current and cancelled contracts			
Ability to maintain historical information for client income and family composition			

Mapping ability or ability to easily export data to external mapping program			
If above “yes” then name of mapping program(s)			
Ability to track lease violations and user defined days for follow-up or correction.			

Family Self Sufficiency (FSS)

Comprehensive FSS system to fulfill all HUD tracking and reporting requirement.			
User definable codes to track health needs, support services, education services, compliance and non-compliance			
REPORTING			
All active paticipnats have several sorts: by program; AR date;Interim date;name/city/expiration date of contract			
Goal; contract dates;expiration date & specifics that can be pulled directly from datatbase to incorporate into letters.			
Ability for Automatic monthly computation of escrow balance			
Ability to maintain Account escrow tracking			
Produce and track detailed ‘escrow statements’ and separate ledgers for user entered time period, listing month, escrow, interest rate, interest amount, total.			
Interface with Section 8 appointment scheduling module to notify clients of scheduled appointments			
FSS info can be found in the main tenant file as well as tenants FSS file. FSS section should also include GOALS of participant.			
Ability to track employees appointment schedule, types of appointments and reschedules for same client			
Ability to collect annual recertification data on laptop computer			
Reporting Features:			
Ability for users to define report criteria and produce reports			
Ability for users to print forms from their desktop such as renewal notices, inspection letters, repayment letters, etc			
Ability to print vouchers			
Ability to print Section 8 leases			
On-demand 50058 forms for user entered clients for both current, past and future 50058’s			
Ability to print unit inspection schedule			
Ability to produce mailing labels for tenants and landlords based on user enter criteria			
Summary report of voucher status (prepared, issued, housed) within each voucher increment (or by monies available)			
Report of active leases with hold codes			
Lists of tenants in units with actual bedroom size different than voucher bedroom size			
Report of Conventional tenants with RLA dates; RLA date range user defined			

List of all residents who lease in place			

Grant Management

Ability to track costs by grant, phase, budget line items and budget categories			
Ability to enter descriptions for grants, phases, budget line items, budget categories			
Ability to enter, revise and delete approved amounts of budget line items (work items) including date entered and revised			
Ability to revise descriptions of budget line items			
Ability to assign various budget line items to one grant			
Ability to easily adjust budget fund allocations within multiple work item for a grant			
Ability to code costs into various user defined categories in order to separate out construction/A&E/ inspection costs from management improvements/administrative costs			
Ability to track purchase orders by grant and budget line item(s)			
Ability to maintain three-dimensional budget. Budget line items connected to sources, contracts and invoices worksheets			
Ability to maintain audit trail of revised fields with original and current information and operator or user name			
Ability to maintain contact information and other data for various groups associated with each grant (i.e. consultants, contractors, residents, service providers)			
Ability to track multiple dates for key administrative milestones (grant agreement signed, developer procured, environmental certification). Dates such as start date, target completion date, actual completion date, as well as contact management for future reminders on user defined categories.			
Ability to track multiple dates for key production activities (relocation, demolition, construction start, construction complete, lease-up, etc.) by phase and grant			
Ability to track administrative milestones and production dates by phase and by grant			
Ability to track historical information on grants			
Ability to add user defined fields			
Interface with purchase order, accounts payable and General Ledger systems			
Ability to electronically link grant related documents			
Reporting Features:			
Ability to merge contact lists into documents, mailing labels and email distribution lists			
Ability to run “phase-specific “, “grant-specific” and “aggregate/all-grant” reports			

Ability to print data (amount of contract, amount expended, amount in retention, amount remaining, contract name, number and where obligated) on all open contracts in a grant			
Ability to run static reports that reflect past status of grants at a user entered point in time			
Ability to run reports in real-time			
Ability to track and report obligations and expenditures by grant and budget line item			

Construction Management

Ability to link Construction Documents on line (original contract, drawings, etc.)			
Ability to track costs by project			
Ability to track purchase orders by project			
Ability to track costs by budget line item			
Ability to track subcontractor's and subcontract costs/budgets			
Ability to track payments made on a contract to General or Subcontractor			
Ability to automatically calculate retention withheld and to reduce percentage of retention withheld on Periodic Estimate payments to contractors. System allows for an automatic "pay retention" function to cut a check once contract is successfully completed, for multiple progress payment retention with-held.			
Ability to modify Job Cost Codes for construction costs			
Ability to track the number, amount and description of each change order in a contract. System can track multiple change orders			
Ability to track construction schedule and the % of contract expended			
Ability to enter multiple simultaneous project budget amounts			
Ability to add user defined fields			
Ability to set up new jobs based upon previous jobs completed in the system			
Interface with purchase order, accounts payable and general ledger systems			
Ability to user define which General Ledger Account is linked with each specific Job Cost Code, and updates General Ledger real time.			
Includes a "draw" process for job funding which includes the ability to produce the AIA G702 and G703			
Construction budget revisions are secured by users and provide for an audit trail of who and date/time completed the revision.			
Reporting Features:			
Ability to track daily reports			
Ability to download into Excel spreadsheet format			
Ability to download into Access database format			
Reports to track contracts, their payments and retention amounts			
Reporting to track construction schedules			

Demographic Tracking and Report System

Track family composition within each wait list program			
Track family composition within each housing program			
Produce family source of income reports within each housing function			
Track information on family ethnicity			
Track information on family primary and secondary languages			
Track information on head of house holds			
Track information on single families			
Track information on number and gender of minors			
Track income at housing eligibility income targeting on newly issued vouchers			
Track percent of families with children living in low poverty census tracts			
Ability to track information regarding elderly in all housing programs			
Track unemployed households			

SEMAP

Ability to generate sample sizes for all SEMAP indicators according to HUD's sample size methodology, along with user defined criteria such as the inclusion or exclusion of programs or voucher types, weighting sample by program or voucher type, etc.			
Ability to generate report identifying the random sample, including customized data fields identified by the user.			
Ability to generate or compile key system generated documents or attachments for those included in the random sample.			
Ability to generate data for indicators that are based on PIC data or data stored in the system (such as FMR's, percent of late AR's, etc.)			
Ability to produce report in HUD's standard SEMAP certification format.			
Ability to produce supplemental report with detailed "drill down" information documenting how the data in the summary report was calculated.			
Ability to store completed HUD SEMAP certifications.			

PHAS-MASS

Ability to generate reports using HUD's standard Management Assessment Sub-System (MASS) format providing all information required in the following PHAS-MASS indicators: 1: Vacant Unit Turnaround Time, 3: Work Orders, 4: Annual Inspection of Dwelling Units and Systems.			
Ability to produce supplemental report with detailed "drill down" information documenting how the data in the summary report was calculated.			
Ability to automatically modify reports based on new PHAS-MASS requirements pending the approval of proposed PHAS regulation changes.			
Ability to store completed PHAS-MASS certifications.			

PIC

Ability to populate all fields required on the 50058			

Ability to manually change data in any field before submitting 50058 to PIC			
Ability to batch and transmit unsent 50058s by a number of different factors, including agency, program, date completed, effective date, or type of action			
Ability to send all batched 50058 data to PIC by effective date			
Ability to transmit individual unsent 50058s			
Ability to resend 50058s that have already been sent to PIC			
Ability to pre-validate all 50058 data against all known PIC warnings and fatal errors before completion of the record			
Ability to store all 50058 historical transmissions			