

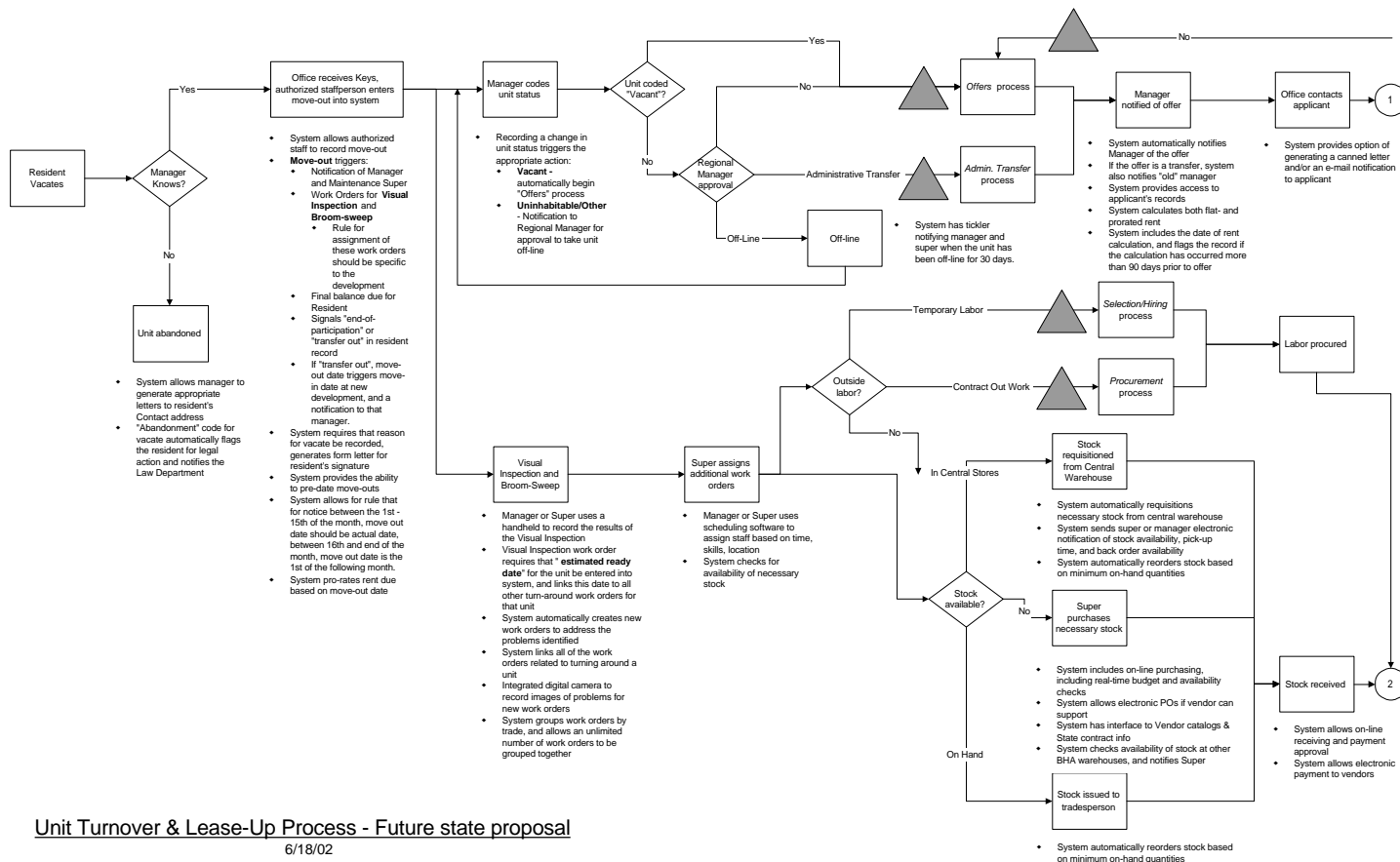
## Public Housing – Lease-up and Unit Turnover:

### Overview

The current BHA unit turn-over process includes visual inspection and manual completion of vacant unit inspection forms, which then must be data-entered into the system. Work orders must be printed for each trade needed. The BHA is proposing a process that would eliminate duplicate manual steps. The system would group work orders by trade/mechanic (neutral task) for quicker assignments, track work order completion and stock needs, and would result in improved vendor relations, employee productivity and quicker unit turnaround.

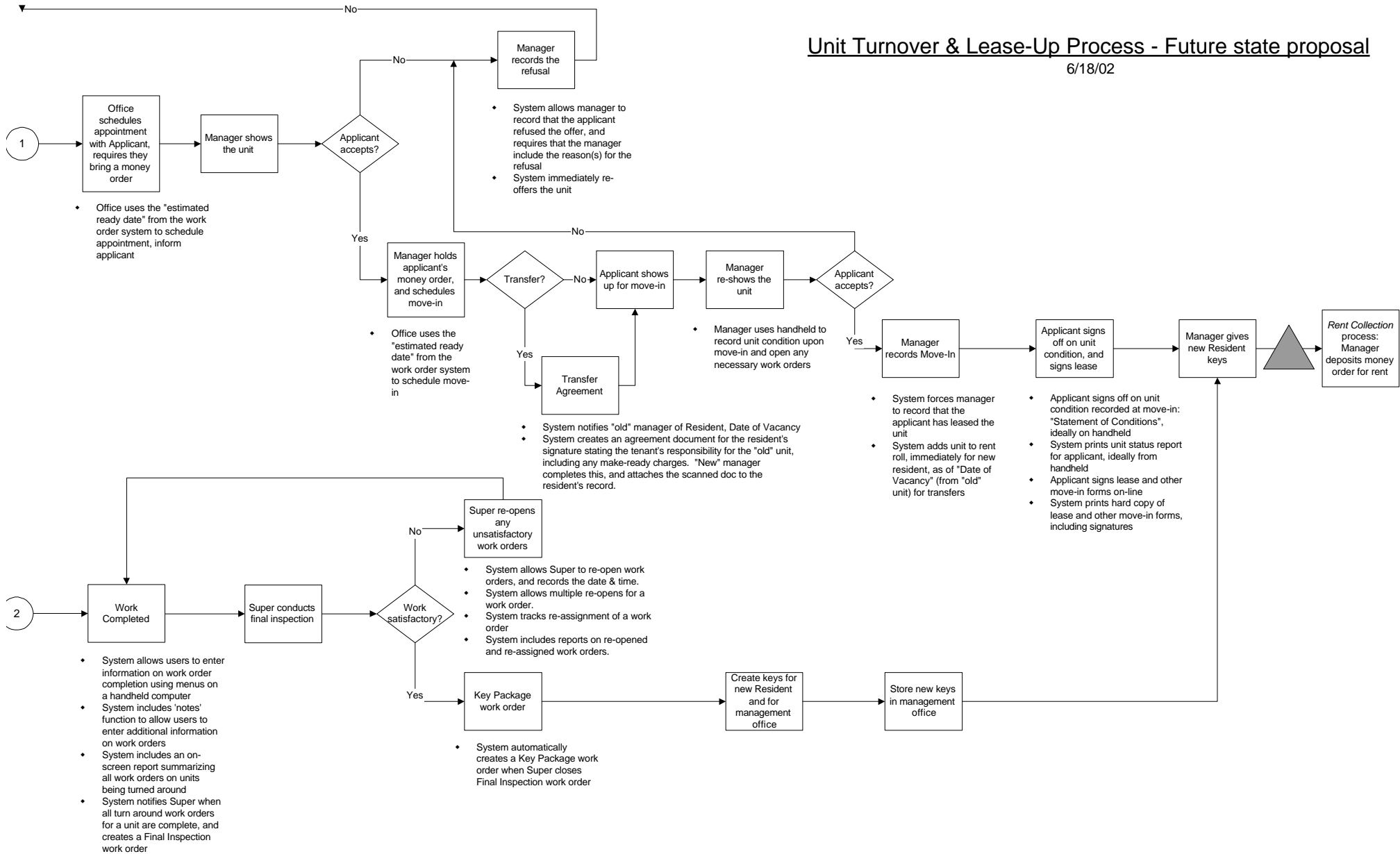
The proposed lease up changes will allow for quicker applicant notification, scheduling of unit showing, inter-department communication on transfers, reduced paper processing, automatic assignments when units are refused, efficient tracking of unit turnaround and accountability of staff.

### Future Workflow Process Maps:



**Unit Turnover & Lease-Up Process - Future state proposal**

6/18/02



No.	Process	Requirement Description	P*	Comments
1.	Lease-Up	System allows manager to generate appropriate letters to resident's Contact address	1	
2.	Lease-Up	"Abandonment" code for vacate automatically flags the resident for legal action and notifies the Law Department	3	
3.	Lease-Up	System allows authorized staff to record move-out	1	
4.	Lease-Up	Move-out triggers: <ul style="list-style-type: none"> <li>• Notification of Manager and Maintenance Super</li> <li>• Work Orders for Visual Inspection and Broom-sweep</li> <li>• Rule for assignment of these work orders should be specific to the development</li> <li>• Final balance due for Resident</li> <li>• Signals "end-of-participation" or "transfer out" in resident record</li> <li>• If "transfer out", move-out date triggers move-in date at new development, and a notification to that manager.</li> </ul>	1	
5.	Lease-Up	System requires that "reason for vacate" and "forwarding address" be recorded, generates form letter for resident's signature	1	
6.	Lease-Up	System provides the ability to pre-date move-outs	3	
7.	Lease-Up	System allows for rule that for notice between the 1st - 15th of the month, move out date should be actual date, between 16th and end of the month, move out date is the 1st of the following month.	1	
8.	Lease-Up	System pro-rates rent due based on move-out date	1	
9.	Lease-Up	Recording a change in unit status triggers the appropriate action: <ul style="list-style-type: none"> <li>• Vacant - automatically begin "Offers" process</li> <li>• Uninhabitable/Other - Notification to Regional Manager for approval to take unit off-line</li> </ul>	1	
10.	Lease-Up	System has tickler notifying manager and super when the unit has been off-line for 30 days.	1	
11.	Lease-Up	System automatically notifies Manager of the offer.	1	

Legend:

<b>P*riority</b>	1 = Mandatory	2 = Important	3 = Nice to Have
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No.	Process	Requirement Description	P*	Comments
12.	Lease-Up	If the offer is a transfer, system also notifies "old" manager	1	
13.	Lease-Up	System provides access to applicant's records	1	
14.	Lease-Up	System calculates both flat- and prorated rent, including INS calculations	1	
15.	Lease-Up	System includes the date of rent calculation, and flags the record if the calculation has occurred more than 90 days prior to offer	1	
16.	Lease-Up	System provides option of generating a canned letter and/or an e-mail notification to applicant	1	
17.	Lease-Up	Office uses the "estimated ready date" recorded in the work order system to schedule appointment, inform applicant	2	
18.	Lease-Up	Office uses the "estimated ready date" from the work order system to schedule move-in	2	
19.	Lease-Up	System allows manager to record that the applicant refused the offer, and requires that the manager include the reason(s) for the refusal	1	
20.	Lease-Up	System immediately re-offers the unit if refused	1	
21.	Unit Turnover	Manager or Super uses a handheld to record the results of the Visual Inspection	1	
22.	Unit Turnover	Visual Inspection work order requires that "estimated ready date" for the unit be entered into system, and links this date to all other turn-around work orders for that unit	1	
23.	Unit Turnover	System automatically creates new work orders to address the problems identified	1	
24.	Unit Turnover	System links all of the work orders related to turning around a unit	1	
25.	Unit Turnover	Integrated digital camera to record images of problems for new work orders	3	
26.	Unit Turnover	System groups work orders by trade, and allows an unlimited number of work orders to be grouped together	1	
27.	Unit Turnover	Manager or Super uses scheduling software to assign staff based on time, skills, location	3	
28.	Unit Turnover	System checks for availability of necessary stock	1	

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No.	Process	Requirement Description	P*	Comments
29.	Unit Turnover	System automatically requisitions necessary stock from central warehouse	1	
30.	Unit Turnover	System sends super or manager electronic notification of stock availability, pick-up time, and back order availability	1	
31.	Unit Turnover	System automatically reorders stock based on minimum on-hand quantities	2	
32.	Unit Turnover	System includes on-line purchasing, including real-time budget and availability checks	2	
33.	Unit Turnover	System allows electronic POs if vendor can support	2	
34.	Unit Turnover	System has interface to Vendor catalogs & State contract info	2	
35.	Unit Turnover	System checks availability of stock at other BHA warehouses, and notifies Super	3	
36.	Unit Turnover	System automatically reorders stock based on minimum on-hand quantities	3	
37.	Unit Turnover	System allows on-line receiving and payment approval	1	
38.	Unit Turnover	System allows electronic payment to vendors	3	
39.	Unit Turnover	System allows users to enter information on work order completion using menus on a handheld computer	2	
40.	Unit Turnover	System includes 'notes' function to allow users to enter additional information on work orders	1	
41.	Unit Turnover	System includes an on-screen report summarizing all work orders on units being turned around	1	
42.	Unit Turnover	System notifies Super when all turn around work orders for a unit are complete, and creates a Final Inspection work order	1	
43.	Unit Turnover	System allows Super to re-open work orders, and records the date & time.	1	
44.	Unit Turnover	System allows multiple re-opens for a work order.	1	
45.	Unit Turnover	System tracks re-assignment of a work order	1	
46.	Unit Turnover	System includes reports on re-opened and re-assigned work orders.	1	

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No.	Process	Requirement Description	P*	Comments
47.	Unit Turnover	System automatically creates a Key Package work order when Super closes Final Inspection work order	1	
48.	Unit Turnover	Manager uses handheld to record unit condition upon move-in and open any necessary work orders	1	
49.	Unit Turnover	System forces manager to record that the applicant has leased the unit, or that the applicant has refused the unit. System automatically and immediately reassigns the unit to the next applicant on the waiting list.	1	
50.	Unit Turnover	System adds unit to rent roll, immediately for new resident, as of "Date of Vacancy" (from "old" unit) for transfers	1	
51.	Unit Turnover	Applicant signs off on unit condition recorded at move-in: "Statement of Conditions", ideally on handheld	1	
52.	Unit Turnover	System prints unit status report for applicant, ideally from handheld	1	
53.	Unit Turnover	Applicant signs lease and other move-in forms on-line	2	
54.	Unit Turnover	System prints hard copy of lease and other move-in forms, including signatures	1	
55.	Unit Turnover	System notifies "old" manager of Resident, Date of Vacancy	1	
56.	Unit Turnover	System creates an agreement document for the resident's signature stating the tenant's responsibility for the "old" unit, including any make-ready charges. "New" manager completes this, and attaches the scanned doc to the resident's record.	1	

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