

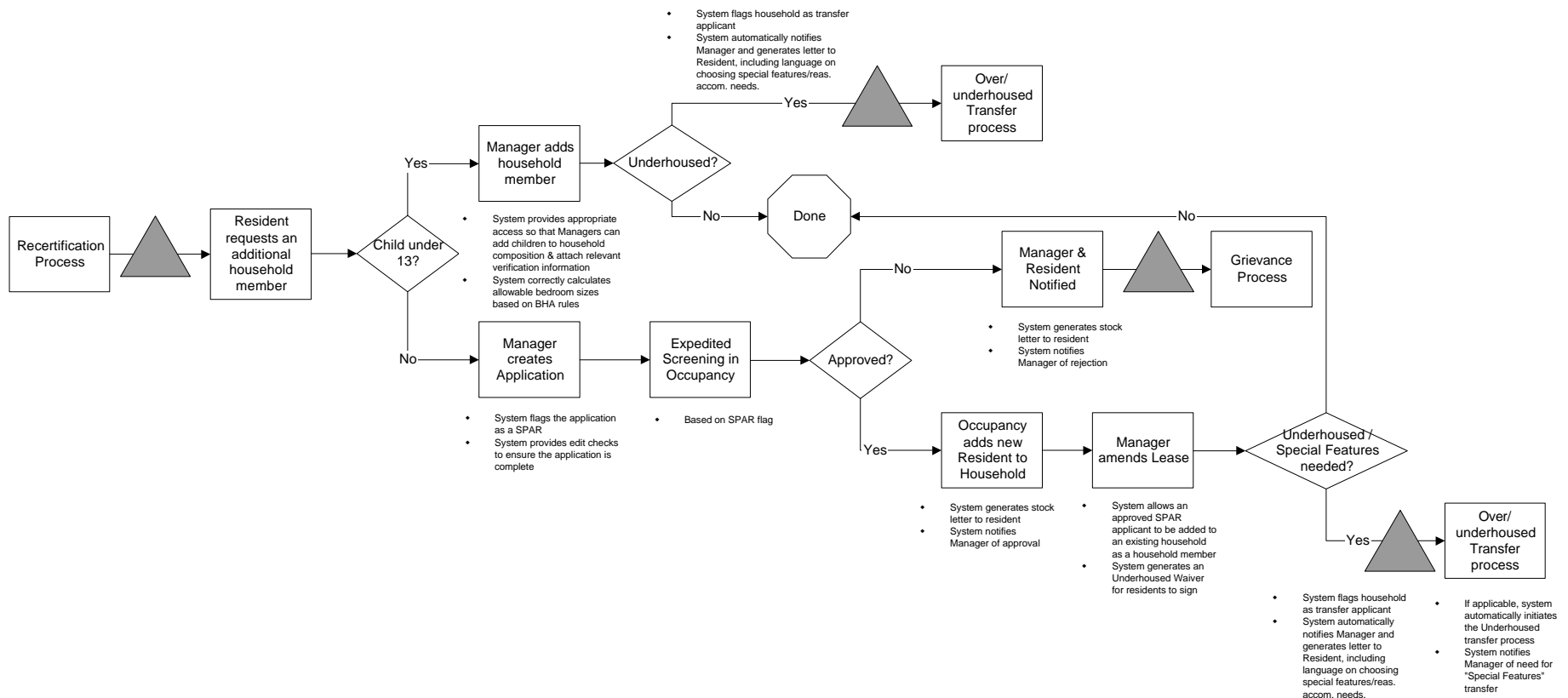
## Public Housing – Transfers:

### Overview

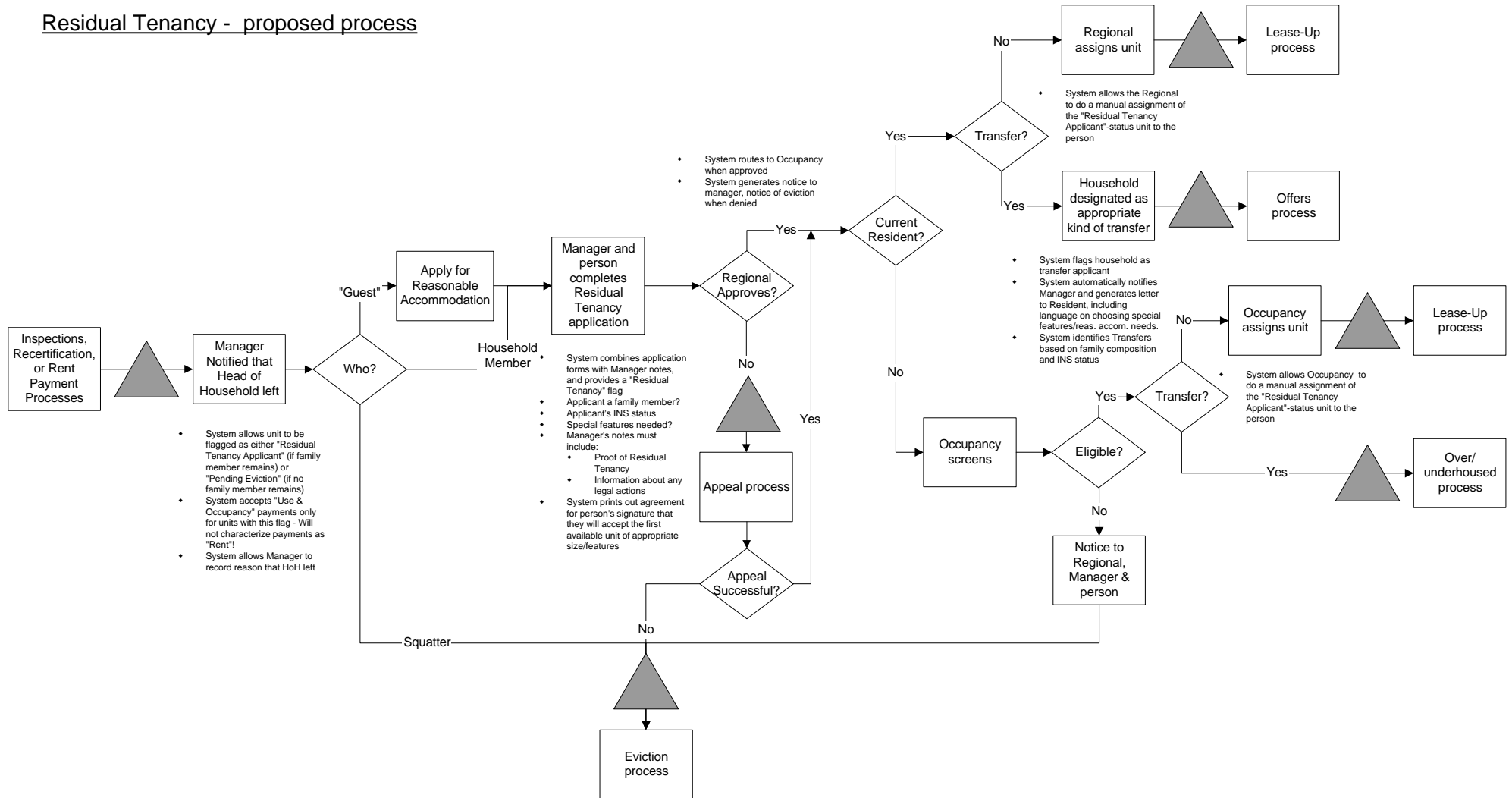
The current Transfer/Relocation process is a time consuming manual process that touches many hands for signature and review before the request can be approved or the offer of housing made to the resident. With the new system, the BHA is proposing decentralized approval on SPAR Applications, Residual Tenancy Applications, Over/Under Transfers and Administrative Transfers. Civil Rights Transfers, Public Safety Transfers and Reasonable Accommodation transfers should be reviewed with the Managers, Assistant Directors and Regionals throughout the process. This will expedite the process and provide efficient customer service to our residents as questions can be answered by quickly checking the status on the system.

### Future Workflow Process Maps:

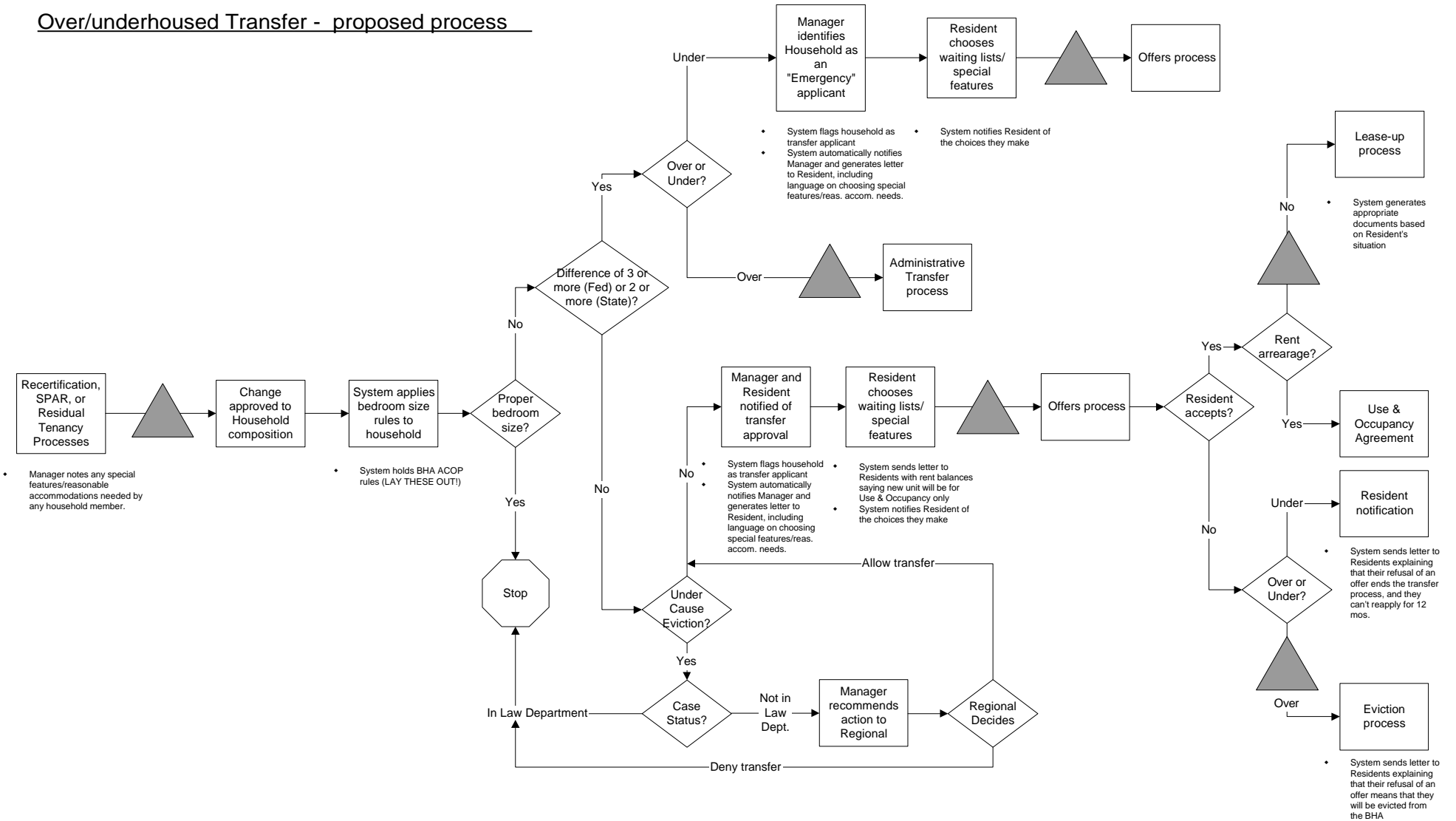
#### Screening of Proposed Additional Residents (SPAR) - proposed process



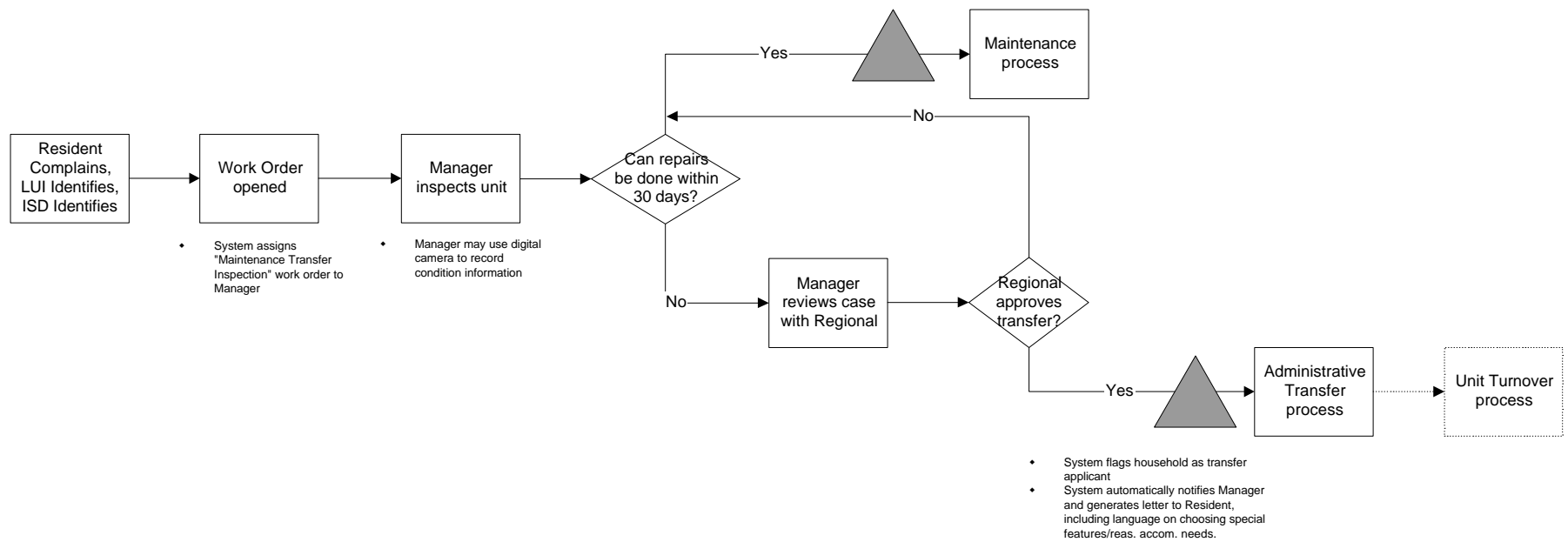
Residual Tenancy - proposed process



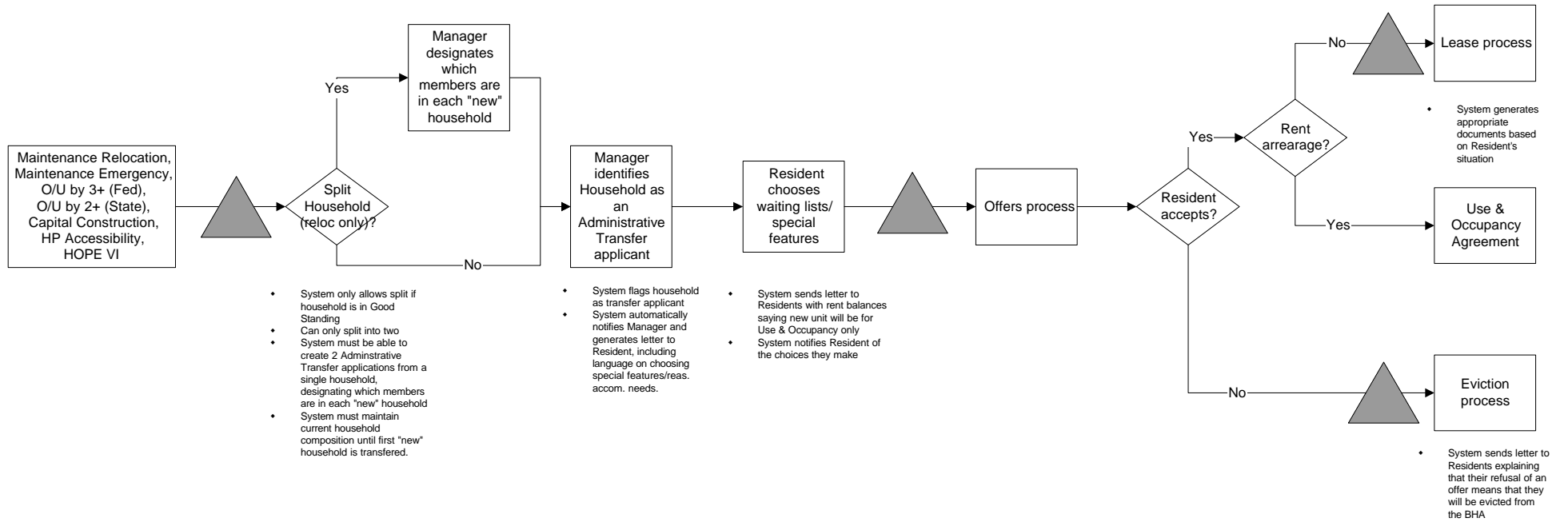
Over/underhoused Transfer - proposed process



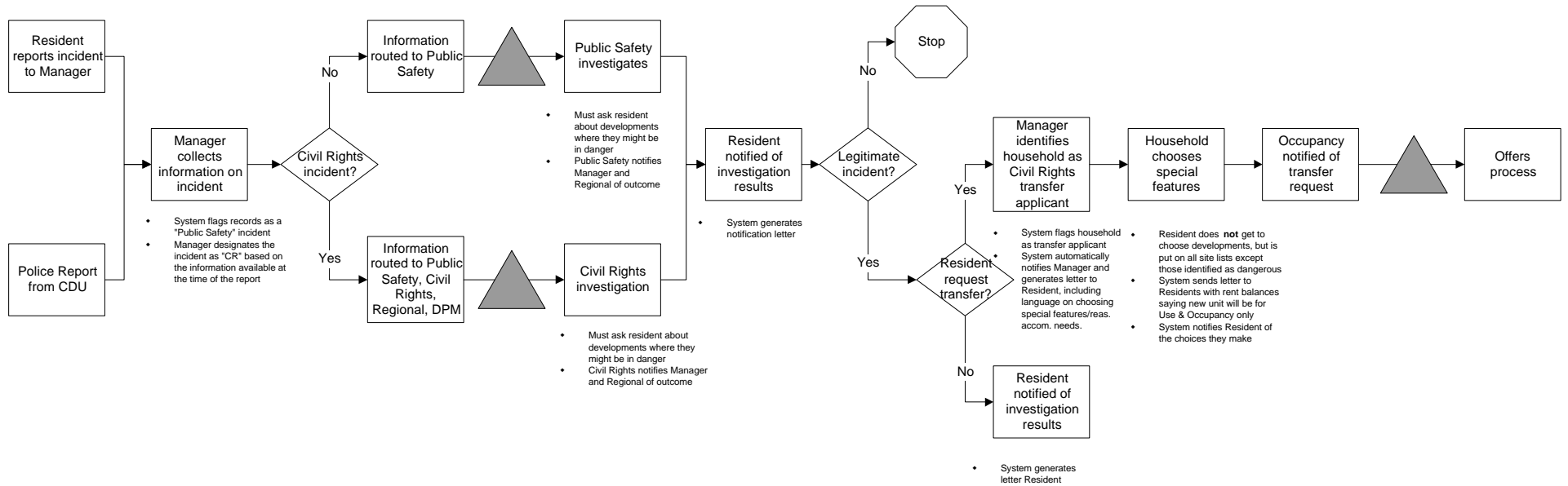
Maintenance Transfer - proposed process



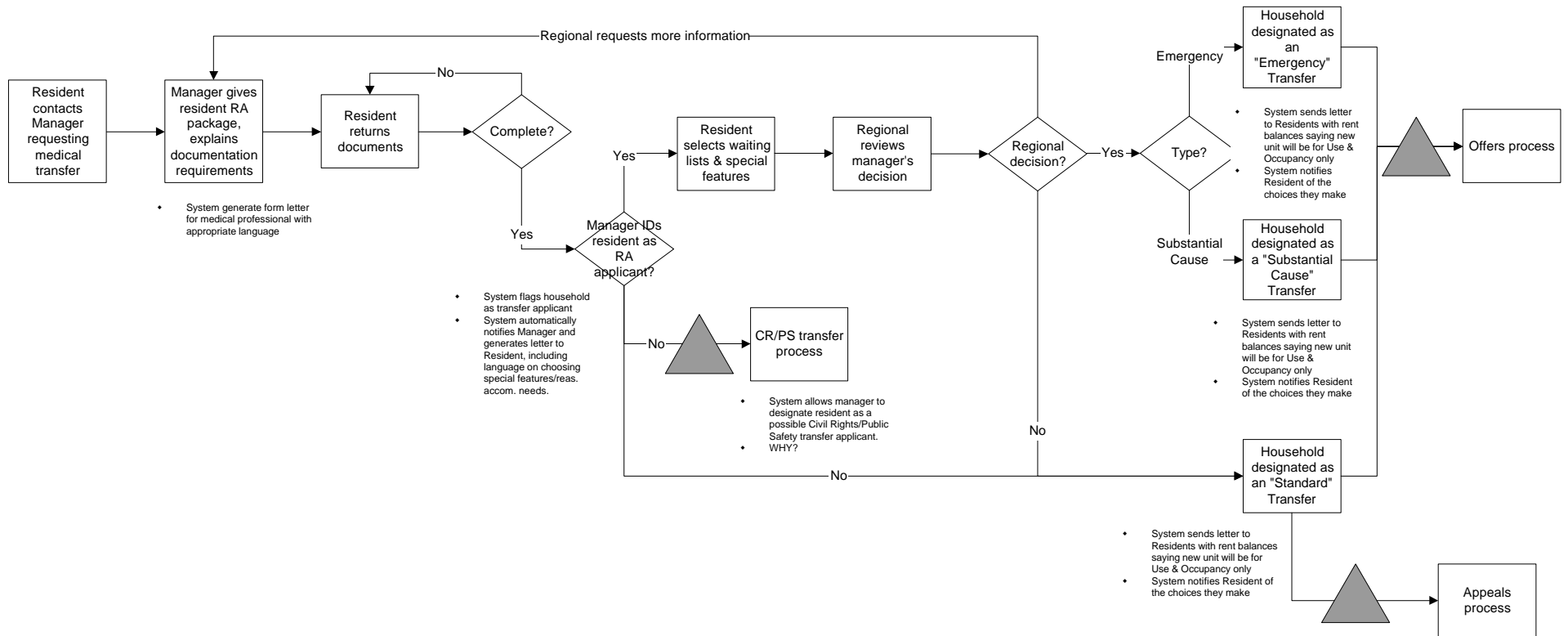
Administrative Transfer - proposed process



Civil Rights/Public Safety Transfer - proposed process



Reasonable Accommodation Transfer - proposed process (incorporates Medical Transfers)



No.	Process	Requirement Description	P*	Comments
1.	Additional Residents – SPAR	System provides appropriate access so Managers can add children to household composition & attach relevant verification information	2	
2.	Additional Residents – SPAR	System correctly calculates allowable bedroom sizes based on BHA rules	1	
3.	Additional Residents – SPAR	System flags the application as a SPAR	1	
4.	Additional Residents – SPAR	System provides edit checks to ensure the application is complete	3	
5.	Additional Residents – SPAR	System flags household as transfer applicant	2	
6.	Additional Residents – SPAR	System automatically notifies Manager and generates letter to Resident, including language on choosing special features/reasonable accommodation needs.	2	
7.	Additional Residents – SPAR	Expedited Screening in Occupancy based on SPAR flag	2	
8.	Additional Residents – SPAR	System generates SPAR approval or denial letter to resident	3	
9.	Additional Residents – SPAR	System notifies Manager of transfer rejection or approval of SPAR application	3	
10.	Additional Residents – SPAR	System allows an approved SPAR applicant to be added to an existing household as a household member	2	
11.	Additional Residents – SPAR	System generates an Under-housed Waiver for household residents to sign after SPAR approval	3	
12.	Additional Residents – SPAR	If applicable, system automatically initiates the Under-housed transfer process	1	
13.	Additional Residents – SPAR	System notifies Manager of need for "Special Features" transfer	1	
14.	Residual Tenancy	System allows unit to be flagged as either "Residual Tenancy Applicant" (if family member remains) or "Pending Eviction" (if no family member remains)	1	
15.	Residual Tenancy	System accepts "Use & Occupancy" payments only for units with this flag - Will not characterize payments as "Rent".	1	

Legend:

<b>P*riority</b>	1 = Mandatory	2 = Important	3 = Nice to Have
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No.	Process	Requirement Description	P*	Comments
16.	Residual Tenancy	System allows Manager to record reason that HoH left	1	
17.	Residual Tenancy	System combines application forms with Manager notes, and provides a "Residual Tenancy" flag	2	
18.	Residual Tenancy	System records if the Residual Tenancy applicant is a family member	1	
19.	Residual Tenancy	System records the Residual Tenancy Applicant's INS status	1	
20.	Residual Tenancy	System records if the Residual Tenancy needs special features	1	
21.	Residual Tenancy	Manager's notes must include: <ul style="list-style-type: none"> <li>• Proof of Residual Tenancy</li> <li>• Information about any legal actions</li> </ul>	1	
22.	Residual Tenancy	System prints out agreement for person's signature that they will accept the first available unit of appropriate size/features	3	
23.	Residual Tenancy	System routes to Residual Tenancy application to Occupancy when approved	1	
24.	Residual Tenancy	System generates notice to manager, notice of eviction when denied	2	
25.	Residual Tenancy	System allows the Regional to do a manual assignment of the "Residual Tenancy Applicant"-status unit to the person, if current resident is in unit of appropriate size.	1	
26.	Residual Tenancy	System flags approved Residual Tenancy application household as transfer applicant	1	
27.	Residual Tenancy	System automatically notifies Manager and generates letter to Resident, including language on choosing special features/reasonable accommodation needs.	2	
28.	Residual Tenancy	System identifies Transfers based on family composition and INS status	1	
29.	Residual Tenancy	System allows Occupancy to do a manual assignment of the "Residual Tenancy Applicant"-status unit to the person, if applicant is not a current resident and the unit is of appropriate size.	1	

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No.	Process	Requirement Description	P*	Comments
30.	Over/Under-Housed	Manager notes any special features/reasonable accommodations needed by any household member.	1	
31.	Over/Under-Housed	System holds BHA rules on bedrooms and family composition	1	
32.	Over/Under-Housed	Under-housed by 3 bedrooms or more (Fed) or 2 bedrooms or more (State), system flags household as Emergency transfer applicant	1	
33.	Over/Under-Housed	Under-housed by less than 3 bedrooms (Fed) or 2 bedrooms (State), system flags household as transfer applicant	1	
34.	Over/Under-Housed	System automatically notifies Manager and generates letter to Resident, including language on choosing special features/reasonable accommodation needs.	2	
35.	Over/Under-Housed	System notifies transfer applicant of the development choices they make	3	
36.	Over/Under-Housed	System flags household as transfer applicant	1	
37.	Over/Under-Housed	System sends letter to transfer applicant with rent balances saying new unit will be for Use & Occupancy only	1	
38.	Over/Under-Housed	If an under-housed transfer applicant refuses offer, system sends letter explaining that their refusal of an offer ends the transfer process, and they can't reapply for 12 months, <b>under the same circumstances</b> , and system flags household to prevent reapplication during that period	1	
39.	Over/Under-Housed	If an over-housed transfer applicant refuses offer, system sends letter explaining that their refusal of an offer means that they will be evicted from the BHA, and system flags household for eviction	1	
40.	Maintenance Transfer	With manager and regional manager approval, system flags household as transfer applicant, automatically notifies Manager and generates letter to Resident, including language on choosing special features/reas. accom. needs.	1	
41.	Administrative Transfer/Relocation	System only allows split if household is in Good Standing	1	

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No.	Process	Requirement Description	P*	Comments
42.	Administrative Transfer/Relocation	Household can only split into two	1	
43.	Administrative Transfer/Relocation	System must be able to create 2 Administrative Transfer applications from a single household, designating which members are in each "new" household	1	
44.	Administrative Transfer/Relocation	System must maintain current household composition until first "new" household is transferred.	1	
45.	Administrative Transfer/Relocation	System flags household as administrative transfer applicant	1	
46.	Administrative Transfer/Relocation	System automatically notifies Manager and generates letter to Resident, including language on choosing special features/reasonable accommodation needs.	2	
47.	Administrative Transfer/Relocation	System sends letter to administrative transfer applicants explaining that their refusal of an offer means that they will be evicted from the BHA.	1	
48.	Civil Rights/Public Safety Transfer	System records "Public Safety" incident associated with a Resident record, and flags the record	1	
49.	Civil Rights/Public Safety Transfer	Manager designates the incident as "CR" based on the information available at the time of the report	1	
50.	Civil Rights/Public Safety Transfer	System used to note developments where the Resident might be in danger	1	
51.	Civil Rights/Public Safety Transfer	Public Safety notifies Manager and Regional of outcome	1	
52.	Civil Rights/Public Safety Transfer	System flags household as a Public Safety/Civil Rights transfer applicant	1	
53.	Civil Rights/Public Safety Transfer	System automatically notifies Manager and generates letter to Resident, including language on choosing special features/reasonable accommodation needs.	2	
54.	Civil Rights/Public Safety Transfer	Public Safety/Civil Rights transfer applicant does not get to choose developments, but is put on all site lists except those identified as dangerous	1	

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No.	Process	Requirement Description	P*	Comments
55.	Civil Rights/Public Safety Transfer	System sends letter to Residents with rent balances saying new unit will be for Use & Occupancy only	1	
56.	Civil Rights/Public Safety Transfer	System notifies Resident of the choices they make	3	
57.	Reasonable Accommodation Transfer	System generate form letter for medical professional with appropriate language	2	
58.	Reasonable Accommodation Transfer	System flags household as a Reasonable Accommodation transfer applicant	1	
59.	Reasonable Accommodation Transfer	System automatically notifies Manager and generates letter to Resident, including language on choosing special features/reasonable accommodation needs.	2	
60.	Reasonable Accommodation Transfer	System sends letter transfer applicant with rent balances saying new unit will be for Use & Occupancy only	1	
61.	Reasonable Accommodation Transfer	System notifies Resident of the choices they make	3	

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