

Inspections:

Overview

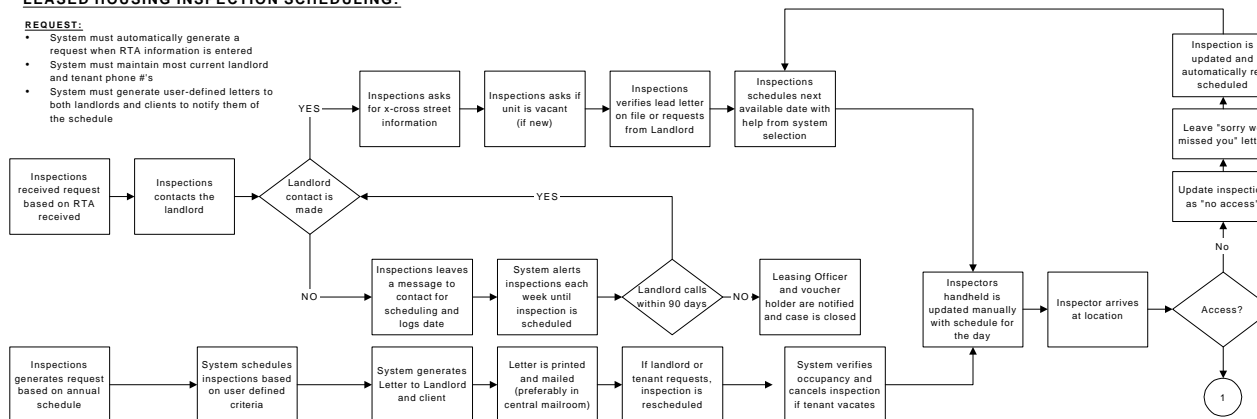
Currently, the BHA performs or oversees approximately 32 different types of inspections between the Public Housing, Leased Housing and Risk Management Departments. The BHA processes approximately 14,000 Public Housing Living Unit Inspections and approximately 15,000 Leased Housing Inspections annually. The current process is very paper- and labor-intensive which causes execution on the results to be delayed. Because the process is manual, Leased Housing information is generated several months in advance which limits the usefulness of the data. The BHA is seeking an inspection system that increases efficiencies, accuracy and standardization through the use of handhelds. The BHA requires a new system to interface directly with both Public Housing and Leased Housing client data to automatically schedule inspections based on user defined parameters. The BHA would like the results of Public Housing inspections to automatically generate work orders for buildings and / or units grouped by user-defined trades. The BHA would like the results of Leased Housing inspections to automatically generate results to leasing officers, landlords and tenants. The BHA would also like a system that automatically holds or stops vendor payments when inspections are failed.

Future Workflow Process Maps:

LEASED HOUSING INSPECTION SCHEDULING:

REQUEST:

- System must automatically generate a request when RTA information is entered
- System must maintain most current landlord and tenant phone #'s
- System must generate user-defined letters to both landlords and clients to notify them of the schedule



SCHEDULING:

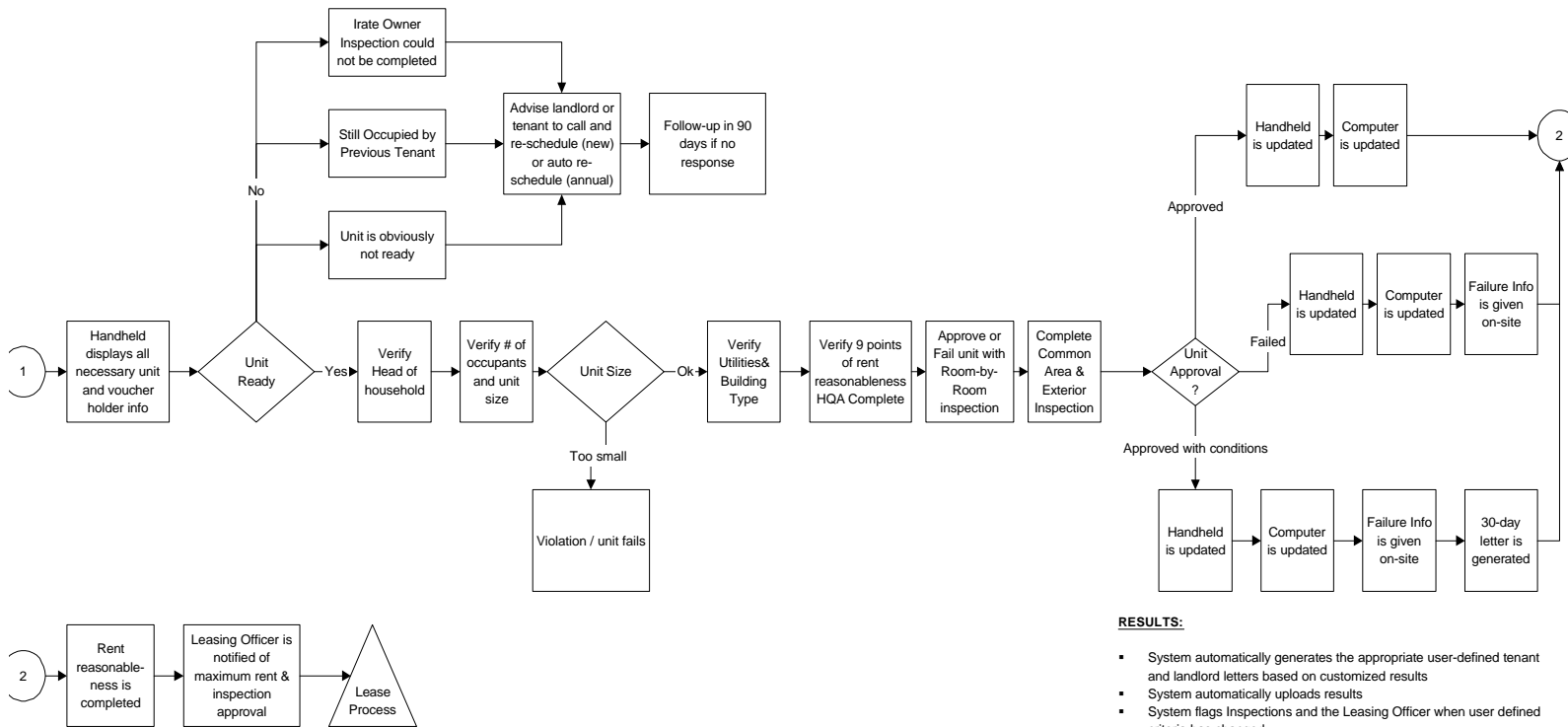
- System must track availability by type of inspector (new or annual)
- System must track availability by zip code
- System must manage availability by user-defined classifications such as no inspections in an area in the afternoon
- System must track number of inspections scheduled by morning and afternoon
- System should weight the time needed for an inspection by inspection type (ex: 2 re-inspections for every annual inspection)
- System must show availability based on user defined data (ex: all appointments between 9/1 - 9/10 in the morning)
- System must prompt scheduler to ask if unit is vacant on initial inspection
- System must maintain unit status (occupied / vacant)
- System must maintain scanned copies of the lead letter provided by the landlord.
- System should prompt scheduler when no lead letter is available
- System should auto schedule all annual inspections based on user defined parameters
- System should generate all scheduling letters based on user-defined criteria
- System maintains x-street information to be downloaded into the handheld
- System should allow supervisors to override any scheduling criteria

HANDHELD TRACKING:

- Inspections on handheld are sorted and prioritized geographically by GPS software
- System must track length of inspection from the time the inspector reaches the door until completion
- System must track actual arrival time and departure time
- Handheld must maintain directions such as x-cross streets
- Handheld must maintain child tested for lead paint information
- Handheld must maintain # of occupants and bedroom size required
- Handheld must maintain blank inspections forms to be used for emergency requests
- System must maintain customizable inspection forms by room
- System allows notes by component of the inspection to be maintained and updated in the handhelds
- System allows inspection status to be updated via handheld
- System allows results to be printed on site
- System should maintain last inspection results (especially for re-inspections)
- System should maintain utility information
- System should maintain building type information
- System should only allow results chosen from a user-defined pick list for each space
- Handhelds need to attach to a printing device
- System should maintain dimensions of each room

TRACKING:

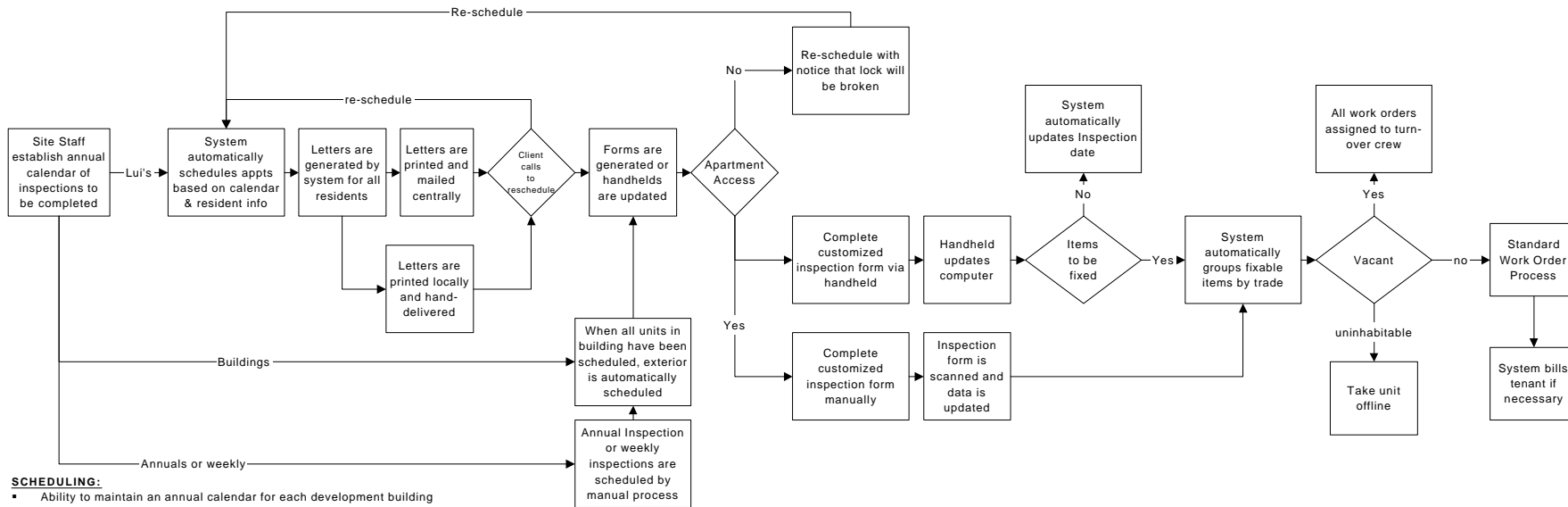
- System must maintain an accurate record of the status of all inspections
- System must automatically generate reminder letters as needed to both the landlord and the client
- System must automatically flag the inspections department as well as the Leasing Officer when inspections cannot be completed timely
- System should maintain last inspection date
- System should flag all units where last inspection date is more than nine months
- System should maintain results of all prior inspections and all prior inspection dates
- System should flag Leasing Office and Supervisors when user-defined criteria is changed (utilities, building type, etc)
- System should flag scheduled inspections when resident status, landlord or family composition changes
- System should flag all pending inspections (older than 90 days) without a pending lease
- System must maintain accurate tenant information



RESULTS:

- System automatically generates the appropriate user-defined tenant and landlord letters based on customized results
- System automatically uploads results
- System flags Inspections and the Leasing Officer when user defined criteria has changed

PUBLIC HOUSING INSPECTIONS
(LUI's, Weekly, Annual):



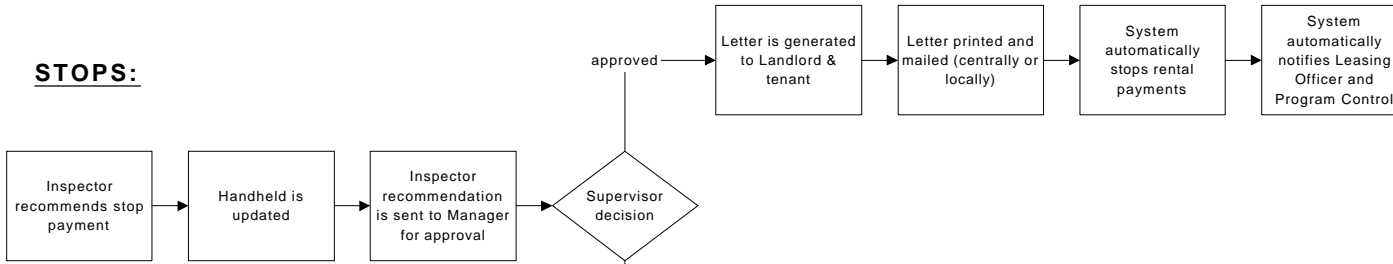
SCHEDULING:

- Ability to maintain an annual calendar for each development building
- Ability to maintain a separate calendar for each type of inspection
- Ability to schedule a user-defined number of inspections per day
- Ability to assign a user-defined number of inspections per employee per day
- Ability to maintain user-defined allotments based on user defined criteria
- Ability to maintain multiple addresses for each resident (physical address and mailing address)
- Ability to generate customized letters automatically when access is denied
- Ability to secure master schedule by user and/or development
- Ability to generate a building inspection once all units in the building have been scheduled
- Ability to print appointment letters in a central location or locally based on user-defined parameter
- Ability to print letters as the mailer
- Ability to meter letters for postage when letter is printing
- Ability to continue automatically scheduling a past-due unit or building daily until all units in building are completed
- Ability to override automatic scheduling
- Ability to download unit information to a handheld computer
- Ability to generate pre-printed forms for each unit or a building
- Ability to manually schedule inspections
- System should only schedule those units which are coded as inhabitable and as living units

INSPECTION:

- Ability to interface inspections to work orders
- Ability for work order system to group all items by trade once entered
- Ability to customize inspection forms based on user-defined standards
- Ability to maintain results tables to expedite results process (ex: hole in wall more than 6 inches)
- Ability to differentiate which trade should be assigned the work order
- Ability to generate notes
- Ability to interface notes to assigned work orders
- Ability to identify if work should be billed to tenant
- Ability to interface annual inspection results to forms for 5-year plan strategies (when applicable)
- Ability to flag results to different individuals based on inspection type

STOPS:



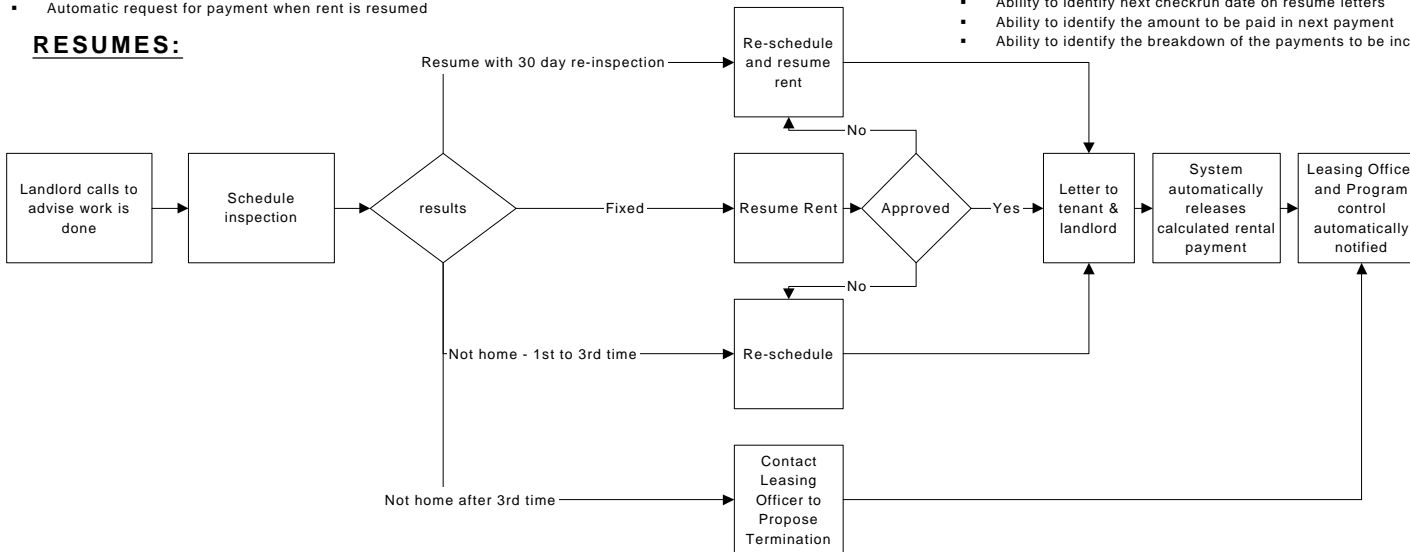
STOPS & RESUMES:

- Ability to recommend stop or resume payments as part of the inspection results
- Inability to stop or resume rental payments unless approved by a Manager
- Ability to stop rental payment without stopping calculation of rent due to recertifications
- Notification to all necessary BHA staff when rent is stopped or resumed
- Ability to resume rent based on an effective date
- Ability to decrease outstanding rent payment owed by time period of the stop
- Automatic request for payment when rent is resumed

STOP & RESUME LETTERS:

- Ability to customize letters
- Ability to include inspection results with letter
- Ability to copy both landlord and tenant on stop letter
- Ability to identify next checkrun date on resume letters
- Ability to identify the amount to be paid in next payment
- Ability to identify the breakdown of the payments to be included

RESUMES:



No.	Process	Requirement Description	P*	Comments
1.	Tracking:	System must maintain an accurate record of the status of all inspections	1	
2.	Tracking:	System must automatically generate reminder letters as needed to both the landlord and the client	3	
3.	Tracking:	System must automatically flag the inspections department as well as the Leasing Officer when inspections cannot be completed timely	1	
4.	Tracking:	System should maintain last inspection date	1	
5.	Tracking:	System should flag all units where last inspection date is more than nine months	1	
6.	Tracking:	System should maintain results of all prior inspections and all prior inspection dates	1	
7.	Tracking:	System should flag Leasing Officer and Supervisors when user-defined criteria is changed (utilities, building type, etc) by a tenant at the tenant's request	2	
8.	Tracking:	System should flag scheduled inspections when resident status, landlord or family composition changes	1	
9.	Tracking:	System should flag all pending inspections (older than 90 days) without a pending lease	2	
10.	Tracking:	System must maintain accurate tenant information	1	
11.	Handheld Tracking:	Inspections on handheld are sorted and prioritized geographically by GPS software	3	
12.	Handheld Tracking:	System must track length of inspection from the time the inspector reaches the door until completion	2	
13.	Handheld Tracking:	System must track actual arrival time and departure time	2	
14.	Handheld Tracking:	Handheld must maintain directions such as x-cross streets	3	
15.	Handheld Tracking:	Handheld must maintain child tested for lead paint information	1	
16.	Handheld Tracking:	Handheld must maintain # of occupants and bedroom size required	1	

Legend:

P*riority	1 = Mandatory	2 = Important	3 = Nice to Have
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No.	Process	Requirement Description	P*	Comments
17.	Handheld Tracking:	Handheld must maintain blank inspections forms to be used for emergency requests	1	
18.	Handheld Tracking:	System should maintain customizable inspection forms by room	1	
19.	Handheld Tracking:	System should allows notes by component of the inspection to be maintained and updated in the handhelds	1	
20.	Handheld Tracking:	System should allows inspection status to be updated via handheld	1	
21.	Handheld Tracking:	System should allows results to be printed on site	1	
22.	Handheld Tracking:	System should maintain last inspection results (especially for re-inspections)	1	
23.	Handheld Tracking:	System should maintain utility information	2	
24.	Handheld Tracking:	System should maintain building type information	2	
25.	Handheld Tracking:	System should only allow results chosen from a user-defined pick list for each space	1	
26.	Handheld Tracking:	System should allow a printing device to be attached to a handheld	1	
27.	Handheld Tracking:	System should maintain dimensions of each room	2	
28.	Scheduling:	System should maintain a daily schedule for each inspector based on availability	1	
29.	Scheduling:	System should not schedule inspections for an inspector who is listed as unavailable	1	
30.	Scheduling:	System must track availability by type of inspector (new or annual)	1	
31.	Scheduling:	System must track availability by zip code	2	
32.	Scheduling:	System must manage availability by user-defined classifications such as no inspections in an area in the afternoon	1	

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No.	Process	Requirement Description	P*	Comments
33.	Scheduling:	System must track number of inspections scheduled by morning and afternoon	2	
34.	Scheduling:	System should weight the time needed for an inspection by inspection type (ex: 2 re-inspections for every annual inspection)	1	
35.	Scheduling:	System must show availability based on user defined data (ex: all appointments between 9/1 - 9/10 in the morning)	2	
36.	Scheduling:	System must prompt scheduler to ask if unit is vacant on initial inspection	1	
37.	Scheduling:	System must maintain unit status (occupied / vacant)	1	
38.	Scheduling:	System must maintain scanned copies of the lead letter provided by the landlord	2	
39.	Scheduling:	System should prompt scheduler when no lead letter is available	1	
40.	Scheduling:	System should auto schedule all annual inspections based on user defined parameters	1	
41.	Scheduling:	System should generate all scheduling letters based on user-defined criteria	1	
42.	Scheduling:	System should allow supervisors to override any scheduling criteria	3	
43.	Scheduling:	System maintains x-street information to be downloaded into the handheld	1	
44.	Request:	System must automatically generate a request when RTA information is entered	1	
45.	Request:	System must maintain most current landlord and tenant phone #'s	1	
46.	Request;	System must generate user-defined letters to both landlords and clients to notify them of the schedule	1	
47.	Results:	System automatically generates the appropriate user-defined tenant and landlord letters based on customized results	1	

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No.	Process	Requirement Description	P*	Comments
48.	Results:	System automatically schedules re-inspection based on user-defined results	1	
49.	Results:	System automatically uploads results from handheld	1	
50.	Results:	System flags Inspections and the Leasing Officer when user defined criteria has changed as a result of inspection	1	
51.	Scheduling – Public Housing:	System must have the ability to maintain an annual calendar for each development building	2	
52.	Scheduling – Public Housing:	System must have the ability to maintain a separate calendar for each type of inspection	2	
53.	Scheduling – Public Housing:	System must have the ability to schedule a user-defined number of inspections per day	1	
54.	Scheduling – Public Housing:	System must have the ability to assign a user-defined number of inspections per employee per day	1	
55.	Scheduling – Public Housing:	System must have the ability to maintain user-defined allotments based on user-defined allotments	1	
56.	Scheduling – Public Housing:	System must have the ability to maintain multiple addresses for each resident (physical address and mailing address)	1	
57.	Scheduling – Public Housing:	System must have the ability to generate customized letters automatically when access is denied	1	
58.	Scheduling – Public Housing:	System must have the ability to secure master schedule by user and/or development	1	
59.	Scheduling – Public Housing:	System must have the ability to generate a building inspection once all units in the building have been scheduled	1	
60.	Scheduling – Public Housing:	System must have the ability to print appointment letters in a central location or locally based on user-defined parameter	1	

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No.	Process	Requirement Description	P*	Comments
61.	Scheduling – Public Housing:	System must have the ability to print letters as the mailer	3	
62.	Scheduling – Public Housing:	System must have the ability to meter letters for postage when letter is printing	3	
63.	Scheduling – Public Housing:	System must have the ability to continue automatically scheduling a past-due unit or building daily until all units in building are completed	2	
64.	Scheduling – Public Housing:	System must have the ability to override automatic scheduling	1	
65.	Scheduling – Public Housing:	System must have the ability to download unit information to a handheld computer	1	
66.	Scheduling – Public Housing:	System must have the ability to generate pre-printed forms for each unit or a building	1	
67.	Scheduling – Public Housing:	System must have the ability to manually schedule inspections	1	
68.	Scheduling – Public Housing:	System should only schedule those units which are coded as inhabitable and as living units	1	
69.	Inspection – Public Housing:	System must have the ability to interface inspections to work orders	1	
70.	Inspection – Public Housing:	System must have the ability for work order system to group all items by trade once entered	1	
71.	Inspection – Public Housing:	System must have the ability to customize inspection forms based on user-defined standards	1	
72.	Inspection – Public Housing:	System must have the ability to maintain results tables to expedite results process (ex: hole in wall more than 6 inches)	1	

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No.	Process	Requirement Description	P*	Comments
73.	Inspection – Public Housing:	System must have the ability to differentiate which trade should be assign the work order	2	
74.	Inspection – Public Housing:	System must have the ability to generate notes	1	
75.	Inspection – Public Housing:	System must have the ability to interface notes to assigned work orders	1	
76.	Inspection – Public Housing:	System must have the ability to identify if work should be billed to tenant	1	
77.	Inspection – Public Housing:	System must have the ability to interface annual inspection results to forms for 5-year plan strategies (when applicable)	3	
78.	Inspection – Public Housing:	System must have the ability to flag results to different individuals based on inspection type	3	
79.	Stops & Resumes:	System must have the ability to recommend stop or resume payments as part of the inspection results	1	
80.	Stops & Resumes:	System should not have the ability to stop or resume rental payments unless approved by a Manager	1	
81.	Stops & Resumes:	System must have the ability to stop rental payment without stopping calculation of rent due to recertifications	1	
82.	Stops & Resumes:	Notification to all necessary BHA staff when rent is stopped or resumed	1	
83.	Stops & Resumes:	System must have the ability to resume rent based on an effective date	1	
84.	Stops & Resumes:	System must have the ability to decrease outstanding rent payment owed by time period of the stop	1	
85.	Stops & Resumes:	Automatic request for payment when rent is resumed	1	
86.	Stop & Resume Letters:	System must have the ability to customize letters	1	

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No.	Process	Requirement Description	P*	Comments
87.	Stop & Resume Letters:	System must have the ability to include inspection results with letter	1	
88.	Stop & Resume Letters:	System must have the ability to copy both landlord and tenant on stop letter	1	
89.	Stop & Resume Letters:	System must have the ability to identify next checkrun date on resume letters	2	
90.	Stop & Resume Letters:	System must have the ability to identify the amount to be paid in next payment	2	
91.	Stop & Resume Letters:	System must have the ability to identify the breakdown of the payments to be included	2	

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