

## Recertification:

**Overview:** The Recertification process is currently handled separately for Leased Housing and Public Housing residents. The information is collected on site for public housing residents, recorded manually on client worksheets and sent to the Tenant Accounting unit for input into CCS. The system is similar for Leased Housing with information collected by leasing officers during interviews at central office, manually recorded on the 50058, checked and input into CCS by the Program Control section of the LH department. BHA is seeking a system that will allow the information provided by the resident or participant to be collected and entered into the 50058 by the interview and validated by the system.

## Future Workflow Process Maps:

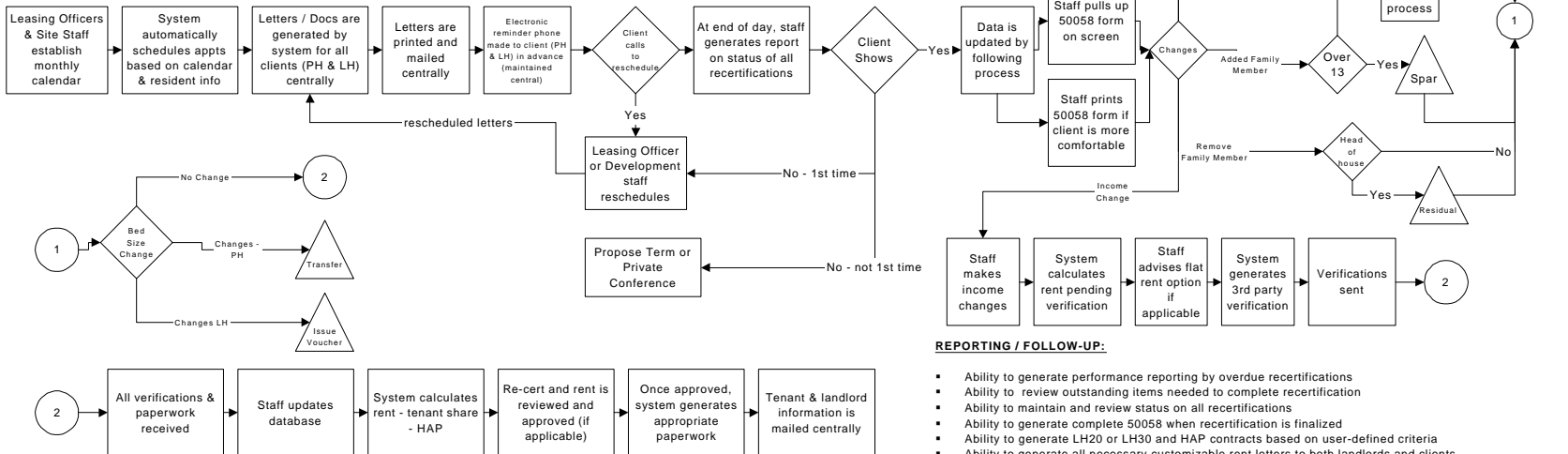
### RECERTIFICATIONS:

#### SCHEDULING:

- Ability to maintain a monthly calendar for each department and each Leasing Officer showing time available for re-certs
- Ability to maintain user-defined allotments based on type of re-cert (1 hour for annuals, 1/2 hour for follow-ups, etc)
- Ability to generate appointment schedules for each development and Leasing Officer based on user-defined criteria (last date, etc)
- Track dates on which client must be recertified based on user-defined criteria
- Ability to maintain a master schedule of all re-certifications scheduled by each program or development
- Ability to customize appointment letters
- Ability to maintain supporting documentation to be included with appointment letters
- Ability to maintain multiple addresses for each resident (physical address and mailing address)
- Ability to collate the recertification package in the printing process
- A printer which can change paper sizes within print jobs
- Ability to generate a re-cert package similar to jury duty packets (perforated instructions)
- Ability to print address on the re-certification package instead of stuffing envelopes
- Ability to meter booklet with postage during printing
- A call reminder system linked to the scheduling system
- Ability to generate a reminder call to residents and voucher holders at user defined intervals
- Ability to maintain most current telephone information
- Ability to allow client to reschedule the 1st appointment only
- Ability to generate proposed termination or private conference notification when client is a no-show
- Ability to generate customized letters automatically when clients are no-shows
- Ability to secure master schedule by user and/or development

#### APPOINTMENT:

- Ability to look up clients by SSN, Client #, Name, Unit, Vendor #
- Ability to review and/or print previous year's recertification
- Ability to customize 50058 screens and print outs by program (ex: Leased Housing or Public Housing)
- Ability to customize bedroom size calculations based on BHA policy (gender, age, generation, etc)
- Ability to override bedroom size calculation with supervisor security
- Ability to maintain 3rd party verifications which are consistent with intake and lease up
- Ability to create a checklist of all documents still required to complete recertification
- Flag when head of household or family member is listed in the family composition of another household receiving subsidy in the BHA
- Ability to maintain Flat rent tables by bedroom size and effective dates
- Ability to flag staff when Flat rent is cheaper
- Ability to maintain both current and historical utility standards
- Ability to determine appropriate utility standard based on user input
- Ability to maintain both current and historical payment standards
- Ability to determine appropriate payment standard based on user input
- System must comply with all federal rental calculations
- System must comply with all state rental calculations
- System must comply with all court-ordered calculations
- System must calculate retro-active rent based on appropriate standards
- System must warn supervisor of rental changes over a certain user-defined %



#### REPORTING / FOLLOW-UP:

- Ability to generate performance reporting by overdue recertifications
- Ability to review outstanding items needed to complete recertification
- Ability to maintain and review status on all recertifications
- Ability to generate complete 50058 when recertification is finalized
- Ability to generate LH20 or LH30 and HAP contracts based on user-defined criteria
- Ability to generate all necessary customizable rent letters to both landlords and clients
- Ability to stop rent from changing until recertification is approved by a supervisor

No.	Process	Requirement Description	P*	Comments
1.	Scheduling:	System must have the ability to maintain a monthly calendar for each department and each Leasing Officer showing time available for re-certs	2	
2.	Scheduling:	System must have the ability to maintain user-defined allotments based on type of re-cert (1 hour for annuals, 1/2 hour for follow-ups, etc)	2	
3.	Scheduling:	System must have the ability to generate appointment schedules for each development and Leasing Officer based on user-defined criteria (last date, etc)	2	
4.	Scheduling:	Track dates on which client must be recertified based on user-defined criteria	1	
5.	Scheduling:	System must have the ability to maintain a master schedule of all re-certifications scheduled by each program or development	2	
6.	Scheduling:	System must have the ability to customize appointment letters	3	
7.	Scheduling:	System must have the ability to maintain supporting documentation to be included with appointment letters	3	
8.	Scheduling:	System must have the ability to maintain multiple addresses for each resident (physical address and mailing address)	1	
9.	Scheduling:	System must have the ability to collate the recertification package in the printing process	2	
10.	Scheduling:	A printer which can change paper sizes within print jobs	2	
11.	Scheduling:	System must have the ability to generate a re-cert package similar to jury duty packets (perforated instructions)	3	
12.	Scheduling:	System must have the ability to print address on the re-certification package instead of stuffing envelopes	3	
13.	Scheduling:	System must have the ability to meter booklet with postage during printing	3	
14.	Scheduling:	A call reminder system linked to the scheduling system	3	
15.	Scheduling:	System must have the ability to generate a reminder call to residents and voucher holders at user defined intervals	3	

Legend:

<b>P*riority</b>	1 = Mandatory	2 = Important	3 = Nice to Have
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No.	Process	Requirement Description	P*	Comments
16.	Scheduling:	System must have the ability to maintain most current telephone information	1	
17.	Scheduling:	System must have the ability to allow client to reschedule the 1st appointment only	2	
18.	Scheduling:	System must have the ability to generate proposed termination or private conference notification when client is a no-show	2	
19.	Scheduling:	System must have the ability to generate customized letters automatically when clients are no-shows	3	
20.	Scheduling:	System must have the ability to secure master schedule by user and/or development	2	
21.	Appointment:	System must have the ability to look up clients by SSN, Client #, Name, Unit, Vendor #	1	
22.	Appointment:	System must have the ability to review and/or print previous year's recertification	1	
23.	Appointment:	System must have the ability to customize 50058 screens and print outs by program (ex: Leased Housing or Public Housing)	1	
24.	Appointment:	System must have the ability to customize bedroom size calculations based on BHA policy (gender, age, generation, etc)	1	
25.	Appointment:	System must have the ability to override bedroom size calculation with supervisor security	1	
26.	Appointment:	System must have the ability to maintain 3rd party verifications which are consistent with intake and lease up	1	
27.	Appointment:	System must have the ability to create a checklist of all documents still required to complete recertification	1	
28.	Appointment:	Flag when head of household or family member is listed in the family composition of another household receiving subsidy in the BHA	1	
29.	Appointment:	System must have the ability to maintain Flat rent tables by bedroom size and effective dates	1	

Legend:

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No.	Process	Requirement Description	P*	Comments
30.	Appointment:	System must have the ability to flag staff when Flat rent is cheaper	2	
31.	Appointment:	System must have the ability to maintain both current and historical utility standards	1	
32.	Appointment:	System must have the ability to determine appropriate utility standard based on user input	1	
33.	Appointment:	System must have the ability to maintain both current and historical payment standards	1	
34.	Appointment:	System must have the ability to determine appropriate payment standard based on user input	1	
35.	Appointment:	System must comply with all federal rental calculations	1	
36.	Appointment:	System must comply with all state rental calculations	1	
37.	Appointment:	System must comply with all court-ordered calculations	2	
38.	Appointment:	System must calculate retro-active rent based on appropriate standards	1	
39.	Appointment:	System must warn supervisor of rental changes over a certain user-defined %	2	
40.	Reporting / Follow-up:	System must have the ability to generate performance reporting by overdue recertifications	1	
41.	Reporting / Follow-up:	System must have the ability to review outstanding items needed to complete recertification	1	
42.	Reporting / Follow-up:	System must have the ability to maintain and review status on all recertifications	1	
43.	Reporting / Follow-up:	System must have the ability to generate complete 50058 when recertification is finalized	1	
44.	Reporting / Follow-up:	System must have the ability to generate LH20 or LH30 and HAP contracts based on user-defined criteria	1	
45.	Reporting / Follow-up:	System must have the ability to generate all necessary customizable rent letters to both landlords and clients	2	

Legend:

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No.	Process	Requirement Description	P*	Comments
46.	Reporting / Follow-up:	System must have the ability to stop rent from changing until recertification is approved by a supervisor	1	
47.	Reporting / Follow-up:	System must have the ability to validate 50058 information by individual client at the time of recertification	1	
48.	Reporting / Follow-up:	System must have the ability to generate warning messages to BHA staff and supervisors when 50058 warnings are ignored	3	
49.	Reporting / Follow-up:	System must have the ability to centrally submit 50058 data for all programs to PIC for a specific date range	1	

Legend:

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