Port Manager
# Port Manager – Port Out Table of Contents

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<td>Description of columns on the Port Out tenant tab</td>
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OVERVIEW

About Port Manager

Port Manager was created to effectively manage your paperwork trail and with built in wizards, helps staff to more easily do the port in/port out process from the beginning to end. All of the forms that need to be sent to another housing authority are at a click of a button (52665, Voucher, 50058), making the tedious paperwork much easier for you. This product was programmed based on client, training and support input and requests to have a better way to input, record, track and report on Section 8 Port Ins and Port Outs.

While creating the Port Manager, we referenced Notice PIH 2011 – 3 (HA) at www.hud.gov/offices/pih/publications/notices/11/pih2011-3.pdf. Following are some short excerpts from this document that helped us determine dates to be tracked for portabilities. Please note that is only a very small part of the 18 page document.

Part I of the form provides the date by which the initial billing notice provided by the receiving PHA must be received by the initial PHA. The initial billing submission must be completed and mailed by the receiving PHA within 10 working days of the HAP contract execution but no later than 60 days following the expiration date of the family voucher issued by the initial PHA.

The initial PHA must contact the receiving PHA via email or other confirmed delivery method to determine whether the receiving PHA will bill or absorb the family’s voucher. HUD encourages PHAs to communicate this information via email in order to expedite the families’ requests. Based on the receiving PHA’s response, the initial PHA must determine whether they will approve or deny the portability request.

Part I of the form provides the date by which the initial billing notice provided by the receiving PHA must be received by the initial PHA. The initial billing notice provided by the receiving PHA must be received by the initial PHA. The initial billing submission must be completed and mailed by the receiving PHA within 10 working days of the HAP contract execution but no later than 60 days following the expiration date of the family voucher issued by the initial PHA.

If the initial PHA has not received a billing notice by the deadline and intends not to accept a late billing, the initial PHA must inform the receiving PHA of this decision in writing. If the initial PHA informs the receiving PHA that it will not honor a late billing, the initial PHA is not required to honor any billing notice received after the billing deadline. If the initial PHA still subsequently receives a late billing notice on behalf of the family, it simply returns the late Form HUD-52665 to the receiving PHA, and the receiving PHA must absorb the family.

Abbreviations used in this manual

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI</td>
<td>port in</td>
</tr>
<tr>
<td>PO</td>
<td>port out</td>
</tr>
<tr>
<td>I-PHA</td>
<td>Receiving PHA</td>
</tr>
<tr>
<td>R-PHA</td>
<td>Initial PHA</td>
</tr>
<tr>
<td>PM</td>
<td>Port Manager</td>
</tr>
</tbody>
</table>
Getting Started

Where to Access Port Manager

Port Manager (PM) is available under the Managers tab in Encompass. From Encompass – Tenant/Applicant Mgt – winHAP – HMS Applications.

From the Section 8 Manager and Related HMS Applications.
Setup

Initial Setup

When purchasing the PM, scripts will be run to import your existing Pls and Po's into the PM. Support will contact you after the purchase to run these scripts and setup a PI Waiting List and enter default 'Port Statuses' and 'Stop Reasons'.

Basic Setup

This option allows the user to choose a project(s) to work on in the PM.

Access to Staff Security but only if the user has access to this module. The Staff Security login and password is required.

Allows a user to choose a printer.
This is the same Manager Report Groups as set up in the Section 8 Manager. It allows groupings of projects under the ‘Port Out Tenants’ tab in the PM. This is especially helpful if there is more than one housing authority being reported for.

Additional Port Statuses can be added here. The following list of Port Statuses are included when purchasing the PM. To add a new status just click on the ‘New’ button.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Default?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABS</td>
<td>Absorbed</td>
<td></td>
</tr>
<tr>
<td>APPR</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>BILL</td>
<td>Billed</td>
<td></td>
</tr>
<tr>
<td>DENY</td>
<td>Denied</td>
<td></td>
</tr>
<tr>
<td>DIS</td>
<td>Disregard Record</td>
<td></td>
</tr>
<tr>
<td>EOP</td>
<td>End Participated</td>
<td></td>
</tr>
<tr>
<td>EXP</td>
<td>Voucher Expired</td>
<td></td>
</tr>
<tr>
<td>FORCE</td>
<td>Force Absorb</td>
<td></td>
</tr>
<tr>
<td>POPI</td>
<td>Port Out Returned</td>
<td></td>
</tr>
</tbody>
</table>

Additional ‘Stop Reasons’ can be added here. The following list of ‘Stop Reasons’ are included when purchasing the PM. To add a new status just click on the ‘New’ button.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Default?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABSOR</td>
<td>Absorbing Next Annual</td>
<td></td>
</tr>
<tr>
<td>ANNSG</td>
<td>Annual Searching</td>
<td></td>
</tr>
<tr>
<td>HOLD</td>
<td>Tenant on Hold</td>
<td></td>
</tr>
<tr>
<td>LLAB</td>
<td>Landlord Abatement</td>
<td></td>
</tr>
<tr>
<td>MOVE</td>
<td>Tenant Moving: On Hold</td>
<td></td>
</tr>
<tr>
<td>TERM</td>
<td>Tenant Terminated</td>
<td></td>
</tr>
<tr>
<td>WAIT</td>
<td>Waiting on R-RHA</td>
<td></td>
</tr>
</tbody>
</table>
Help

This manual will be provided at the purchase of the PM. Additional copies can be found under ‘Help’ and ‘Search our Website’ under the ‘Help’ tab.
The Basics

Port Manager Screen

The PM contains four tabs – Port In Applicants, Port In Tenants, Port Out Looking, and Port Out Tenants. Each tab contains different information and color coding but all the tabs contain the same format and lookup options.
Look Up Options

The ‘New’ button is available on the PI Applicants, PO Looking and PO Tenants tab to create a new PM record. This button will be explained in more detail during the port processes later in this manual.

Clicking on the ‘Find’ button will find ALL the Port applicants or tenants for the selected PM tab.

To find a specific Port applicant or tenant, the look up options available in the PM are described here. They work similarly to the search options in Encompass.

Type in one word in this search box – either the first name, last name or SSN of the port tenant or applicant that is being searched for. Once it is typed in click on the ‘Find’ button.

The ‘Sound-Ex’ is available to type in after a search to narrow down your search results. As you type, the software will find your result.

This search option is similar to the advanced option in Encompass with last name, first name and SSN being the available search option. Click on the ‘Find’ button.

The ‘Clear’ button will clear the last search typed in for either search option.
Save or Cancel

Click on the ‘Save’ button to save any changes made on the PM tab.

Clicking on the ‘Find’ button will prompt a save if changes have been made to the portability tab being worked on so that changes will not be lost when doing a new ‘Find.’

The ‘Cancel’ button allows an exit without saving changes that have been made to a portability tab.

Export to Excel

As in all HAB products, the ‘E’ button is available to export the portability information to Excel. Click on this button and the information will be imported to Excel.
Port In Applicant

Getting familiar with the Port In Applicant screen and options

When checked, this will exclude completed PI Applicant processes. It is defaulted to “checked” but can be unchecked to see completed PI Applicant processes.

- **Past 60 Day Deadline**: Any names will be highlighted if they are past the ‘60 Day Deadline’ from the ‘I-PHA Voucher Expire’ date.
- **Voucher Not Currently Issued**: No voucher has been issued yet by the R-PHA.
- **HAP Execute > 60 Day Deadline**: Any names will be highlighted if the ‘Date HAP Executed’ is past the ‘60 Day Deadline.’
- **Applicant has PI Tenant Record**: PI applicants will be highlighted in a light green if they have a PI tenant record. This is a warning that this PI process has been completed and just needs the ‘Done’ checked.
### Description of columns on the Port In Applicants tab

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>SSN</th>
<th>Done</th>
<th>Initial PHA</th>
<th>Admin Fee</th>
<th>Paperwork Received</th>
<th>Date Responded to I-PHA</th>
<th>Port Status</th>
<th>R-PHA Absorb or Bill</th>
<th>I-PHA Voucher Expire</th>
<th>60 Day Deadline</th>
<th>R-PHA Voucher Expire</th>
<th>Date HAP Executed</th>
<th>Date 52665 Sent</th>
<th>N of Days</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Last Name and SSN
- Name and social security number of the PI applicant.

#### Done
- This option should be checked when the PI process is completed either by being absorbed or is billing. Must be entered manually.

#### Initial PHA
- Name and admin fee of the I-PHA and the date the paperwork (52665, Voucher, and 50058) was received by the R-PHA. This information is taken from the 'PI Update' information that was entered from the 'New' button.

#### Date Responded to I-PHA
- This is the date of the initial contact to the I-PHA. Must be entered manually.

#### Port Status
- This field can be updated if the absorb or billing status changes. Additional statuses can be added under setup. Must be updated manually.

#### R-PHA Absorb or Bill
- 'R-PHA Absorb or Bill' is the information received initially from the R-PHA at the beginning of the PO process. This information is taken from the 'PI Update' information.

#### I-PHA Voucher Expire
- This is the expiration date of the I-PHA's voucher. This information is taken from the 'PI Update' information.

#### 60 Day Deadline
- The '60 Day Deadline' from the I-PHA voucher expiration date. This is automatically calculated from the 'I-PHA Voucher Expire' date.

#### R-PHA Voucher Expire
- Expiration date of the R-PHA, which is also filled in from the 'PI Update' information.
The date the HAP contract was executed. *Must be entered manually.*

Date the 52665 was sent to the I-PHA. *Must be entered manually.*

This calculates the number of days between the HAP contract being executed and the date the 52665 was sent. This is automatically calculated.

Any note can be typed pertaining to the PI applicant process.

Name of the voucher issued to the PI applicant.

PHA Email address.

The remaining fields (Family ID, Person ID, PHA ID, APP ID, Current Voucher, Modified Date, Modified Login, Create Date, Create Login) to the far right are available to track who and when a record was modified.
Adding a new Port In Applicant

To add a new PO Applicant, click on the ‘New’ button and enter the information received on the paperwork, namely the 52665, from the R-PHA. This process will enter the basic applicant information into the system and apply them to the PI Waiting List.

The following screen displays to enter in the PI Applicant information. The fields with an asterisk (*) are required.
This box contains the applicant family information and the required fields have an asterisk (*) by them.

<table>
<thead>
<tr>
<th>Last Name:</th>
<th>* Novak</th>
<th>* required</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
<td>* Angela</td>
<td></td>
</tr>
<tr>
<td>SSN:</td>
<td>877-55-1414</td>
<td></td>
</tr>
<tr>
<td>Date of Birth:</td>
<td>09/14/1978</td>
<td></td>
</tr>
<tr>
<td>Main Phone:</td>
<td>888-777-2222</td>
<td></td>
</tr>
<tr>
<td>Address-1:</td>
<td>100 Good Place</td>
<td></td>
</tr>
<tr>
<td>Address-2:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City/State/Zip:</td>
<td>Mankato MN 56489</td>
<td></td>
</tr>
<tr>
<td>E-Mail:</td>
<td><a href="mailto:ancvak@GMAIL.COM">ancvak@GMAIL.COM</a></td>
<td></td>
</tr>
<tr>
<td>Application ID:</td>
<td>0</td>
<td>Bedroom Size: * 3</td>
</tr>
<tr>
<td>Paperwork Received:</td>
<td>08/01/2014</td>
<td></td>
</tr>
</tbody>
</table>

The I-PHA information from the 52665 Part I is entered here.

### ISSUING PHA Information

<table>
<thead>
<tr>
<th>PHA Name:</th>
<th>Add PHA</th>
<th>PHA Nr Billed:</th>
</tr>
</thead>
<tbody>
<tr>
<td>* St. Paul Public Housing Agency</td>
<td></td>
<td>MN001</td>
</tr>
</tbody>
</table>

Ongoing Admin Fee: $45.00

From Issuing PHA 52665 Part I:

| 4. Bedrooms: | 3 |
| 6. Expire Date: | 09/15/2014 |
| 9. Date Initial Billing must be r’cd by: | 11/14/2014 |

60 Days Calc’d:

| 09/15/2014 | 11/14/2014 |

Choose the PHA from the dropdown. There is a prompt to add the admin fee if there is not one.

If the PHA is not there, click on the ‘Add PHA’ button to add the PHA.

The ‘Maintain Admin Fees’ option is available to change/add the admin fee.

This information is from the 52665 and must be added manually. Once the ‘6. Expire Date’ is entered, the ‘60 Days Calc’d’ date will be filled automatically.
The ‘9. Date Initial Billing must be r’cvd by’ is available to enter in case it is different from the ‘6. Expire Date.’

Make sure to enter if this PI applicant is a tenant or applicant at the I-PHA. If the PI applicant is a tenant at the I-PHA, make sure to enter the ‘Date of Admission to program: (58,2h)’ so that information can be added to the 50058 during the finalization process.

Once this information is entered, click on the ‘Save’ button.
Now the ‘Issue Voucher’ button is available to issue a voucher.

Choose the voucher and the following screen will pop up to make any necessary changes to the date issued and bedroom size. The Voucher and the 50058 can be printed.

The PI Applicant is now added.
Port In Applicant Action Bar

This section of the manual will explain each option on the PI Applicant Action Bar.

Port In Applicant Action Bar

Port In Applicant Update

This option brings up the original ‘New’ entry screen for the PI applicant to view and/or make changes.
Applicant Update

This option brings up the applicant update screen so additional information such as household members, income, etc. could be added to the applicant record.

Port In Move In

This option is used to move in the PI applicant. Choose the landlord, unit, and type in the move in date as shown here. Click on the ‘Move In’ button.
Click on ‘Yes’ to proceed with the move in.

Click ‘Yes’ if keeping current voucher. Choosing ‘No’ will bring up the voucher issue option. If the tenant is being absorbed, a voucher from the project the applicant is being moved into may be chosen.

Click on ‘Yes’ to update the applicant address.

Usually the option ‘Just this list’ is chosen to update the waiting list status to ‘Housed PI’ only on the PI waiting list.

Once this is chosen, the tenant recertification screen pops up so that the 50058 can be finalized. In this example, the tenant is being absorbed and was an applicant at the I-PHA. Therefore, the effective reason is ‘New Admission’ and the move in date under ‘Admiss Info’ will be the current move in (9-1-2014 in this example). There is no information under the ‘Port In Info.’
Print Voucher

This option is available to print the voucher.

Print 52665

Available to create and print the 52665. It will default to Part II-A to fill in the R-PHA information.
**Tenant Recertification**

Access to the tenant recertification screen and is only available after the PI move-in has been completed.

**Show PHA**

Access to the PHA information to view or modify.

**Issue Voucher**

Option to issue a voucher if it was not been issued during the adding a new PI applicant.
**Voucher Update**

Option available to make changes to the voucher.

![Voucher Maintenance](image)

**Port Note**

Any note can be added here for the PI tenant record. This displays here and on the port in applicant screen.
HMS Notes

Availability to HMS Notes.

![HMS Person Tracker](image)
**Port In Letter**

Letter Assistant group available for PI applicants.

**E-Mail PHA**

This option is available to send an email to the PHA. The email information in the ‘Show PHA’ must be filled in.
Port In Tenants

Getting familiar with the Port In Tenants screen and options

Options to exclude absorbed, completed and vacated PI tenants.

Description of columns on the Port In Tenant tab

Name and social security number of the PI tenant.

This option should be checked when the PI applicant update process is completed either by being absorbed or billed. *Must be checked manually.*
Name of the I-PHA.

Effective date and reason of the last 50058 finalized.

The date the 52665(Part II) was sent for the last 50058. The number of days will calc from the effective date of the last 50058 and the date the 52665(Part II) was sent.

This is the status of the PI tenant. Other statuses can be entered under ‘Basic Setup’ to customize this field for use at your housing authority. *Must be checked manually.*

If the PI tenant is absorbed, the absorb date can be entered here. *Must be checked manually.*

If the HAP payment is stopped, the date and reason can be entered here. Please note that this does NOT put the recurring HAP amount on hold. That would be done under the ‘HAP Update’ option on the PI Tenant Action bar.

This is the current HAP/UAP/ADMIN information from the HAP Update screen.
Any note can be typed pertaining to the PI tenant/process.

Move in and move out date of the PI tenant.

Name of the voucher issued to the PI tenant.

The remaining fields (Family ID, Person ID, PHA ID, APP ID, Current Voucher, Modified Date, Modified Login, Create Date, Create Login) to the far right are available to track who and when a record was modified.

PHA Email address.
Port In Tenant Action Bar

**Tenant Recertification**
Access to the tenant recertification screen.
HAP Update

This option will bring up the HAP Tenant Update screen for review or modification, especially on the ‘Rent Information’ tab for updating the next annual recert date, staff, and billing information.

Absorb Tenant

Option to absorb a current PI Tenant that is being billed. This option will be described in the Port In Process – Absorb Tenant on page # here
Show PHA

Access to the PHA information to view or modify.

Show LL

Access to the PHA information to view or modify.
**Voucher Update**

Option available to make changes to the voucher project, bedroom size, or dates.

![Voucher Maintenance](image-url)
This option is available if the PI tenant is planning to PO and is in the process of looking for a unit in another jurisdiction and will move out the PI tenant and create an IL voucher.

Type in the move out date as shown here and click on next.

Click yes to confirm the move out.

Choosing yes will keep the current voucher but change the status to IL.

Choosing no will allow the user to choose a different voucher, for instance, a voucher from the PI project that may have a voucher name of “PI.” In this example a PI voucher with a name of “PI1008” will be issued. Choose the voucher and click on Issue.
The voucher maintenance screen will pop up so that dates can be modified if needed. Click on ‘Save’. There is also an option to print the voucher.

The pro-rate option is available.
Forwarding and vacate information can be added.

**Move/EOP/Port Out**

This option is available to move out a PI tenant or PO the PI tenant.

**Move Out**

Fill in the move out date and the rent end date will fill automatically. Entering the notification date is optional. Next click on the 'Move-Out' button.
Click 'Yes' to release the voucher.

Click 'Yes' to print the EOP 50058.
Option to prorate if needed.

Fill in Vacate Information and Forwarding Information.

<table>
<thead>
<tr>
<th>Tenant Name</th>
<th>Leer, Linda</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>09/15/2014</td>
</tr>
<tr>
<td>Move Out Date</td>
<td>11/01/2016</td>
</tr>
<tr>
<td>Move Out Reason 1</td>
<td>None</td>
</tr>
<tr>
<td>Move Out Reason 2</td>
<td></td>
</tr>
<tr>
<td>Balance Owed</td>
<td></td>
</tr>
<tr>
<td>Misc Code 1</td>
<td></td>
</tr>
<tr>
<td>Misc Code 2</td>
<td></td>
</tr>
<tr>
<td>Misc Code 3</td>
<td></td>
</tr>
<tr>
<td>Vacate Notes</td>
<td></td>
</tr>
</tbody>
</table>

(254 characters)
Update the status on the waiting list.

To select multiple lists, hold the ctrl key and click.

Select a status for the lists:
- Master Record
- Wait for Assistance
- 1st Refusal
- 2nd Refusal
- Housed - PH
- Housed - S8
- HQS Not Passed
- Incomplete App
- Initial Letter Sent

Update Active Date

UPDATE

Cancel / Exit

Updates Done!

Tenant/Unit Move-Out Complete!

OK
**Port Out**

Fill in the PO date and the rent end date will fill automatically. Entering the notification date is optional. Make sure to check the ‘Portability Out’ option. Next click on the ‘Move-Out’ button.

Release the voucher if the tenant is being absorbed by the R-PHA, ‘No’ if not being absorbed as instructed by this screen.

Click yes to print the Portability Out 50058.
Option to prorate if needed.

Fill in Vacate Information and Forwarding Information.
Update the status on the waiting list.
**Print Voucher**

This option is available to print the voucher.

**Print 52665**

Available to create and print the 52665. It will default to Part II-A to fill in the R-PHA information.

**Port Note**

Any note can be added here for the PI tenant record. This displays here and on the port in tenant screen.
**HMS Notes**

Availability to HMS Notes.

**S8 History**

This option is available to view or print the 50058 records for the 50058 that is highlighted.
Schedule Appt/Appt Letter

These options are available to schedule recerts. It is the same option available in Encompass and S8 Manager.

Instructions for this process is in the 'Features of Encompass' HELP doc under Help/Search our Website.
Port In Letter

Letter Assistant group available for PI tenants.

E-Mail PHA

This option is available to send an email to the PHA. The email information in the 'Show PHA' must be filled in.
Port IN Processes

This section of the manual will go through the individual processes for PI’s. During the steps, references will be made to where in this manual you can see the detailed steps for the processes.

Port In Applicant – Absorbed

Step 1: The R-PHA is notified of the family porting in and receives the supporting paperwork.

Notice PIH 2011 – 3 (HA) Once the family is approved to move using portability, the initial PHA completes Part I of the Form HUD-52665 and mails or faxes it to the receiving PHA, along with a copy of the family’s voucher issued by the initial PHA, a current copy of Form HUD-50058, and copies of the income verification supporting the form. (Note that in the case of an applicant, the initial PHA has not completed the HUD-50058 and submitted the information to HUD because the family is not yet a new admission. However, the PHA must provide the family information and income information to the receiving PHA by completing a format similar to the HUD-50058 so that the information is easily available for use by the receiving PHA. HUD expects the receiving PHA to process the family’s paperwork and issue the incoming family’s voucher for its jurisdiction within two weeks of receiving the HUD-52665 and supporting documentation, provided the information is in order, the family has contacted the receiving PHA, and the family complies with the receiving PHA’s procedures. (More information about the responsibilities of the R-PHA and I-PHA is included in this Notice).

In the Port Manager: The portability in applicant or tenant is added to the Port Manager. During this process a voucher is issued. (Adding a new Port In Applicant – page 18)

Once added, the port in applicant will appear as follows.
Step 2: The R-PHA notifies the I-PHA if the family’s voucher will be billed or absorbed.

Notice PIH 2011 – 3 (HA) states that the processing responsibilities include the receiving PHA must respond by email or other confirmed delivery method to the initial PHA’s inquiry to determine if the family’s voucher will be billed or absorbed. HUD encourages PHAs to communicate this information via email in order to expedite the families’ requests. If the receiving PHA notifies the initial PHA that they will be absorbing the voucher, the receiving PHA cannot reverse its decision at a later date. This prevents placing a financial hardship on the initial PHA and putting a family that has already terminated the lease and vacated their assisted unit and moved to the new jurisdiction at risk of losing their assistance.

In the Port Manager: Fill in the ‘Date Responded to I-PHA’ and what the ‘Port Status’ is.

The Port In Applicants screen displays the following information.

Step 3: The Port In Applicant is moved in.

Notice PIH 2011 – 3 (HA) Portability-Receiving PHA Responsibilities: Part II of Form HUD-52665: The receiving PHA sends Part II of Form HUD-52665 to the initial PHA. If the receiving PHA will bill the initial PHA, the receiving PHA not only completes Part II of the Form HUD-52665, but also attaches a copy of the new Form HUD-50058 before returning it to the initial PHA. The instructions of the Form HUD-52665 provide that the receiving PHA must complete and mail (which may include electronic mail or fax) Part II of the form within 10 working days from the date a HAP contract is executed on behalf of a family but no later than 60 days following the expiration date of the family voucher issued by the initial PHA.

In the Port Manager: Once the unit is inspected and ready for move-in, the PI applicant is moved in. Choose the ‘PI Move In’ option from the PI Applicant Action Bar. Part II of Form-52665 must be completed and mailed within ten days of executing the HAP contract but no later than 60 days following the expiration (Port In Move In – page 25)
Step 4: Save/Finalize the 50058.

If the port in applicant was an applicant at the I-PHA, the effective reason is ‘New Admission’ and the move in date under ‘Admiss Info’ will be the current move in date. There is no information under the ‘PI Info.’

If the PI applicant was a tenant at the I-PHA, the effective reason is ‘Portability In’ and the move in date under ‘Admiss Info’ will be the ‘Date of Admission to program: (58,2h)’ from the ‘PI Update’ information. There is no information under the ‘Port In Info’ but the 50058 line will be marked for absorbed.
The 52665 can be filled in and printed during the process.

And finally print the 50058, HAP contract and any other documents required for a Section 8 move in.

**Step 5:** Fill in the ‘Date HAP Executed’ and the ‘Date 52665 (Part II) sent.’ The ‘# of Days’ will fill in automatically.

Any ‘Note’ can be added and the ‘Done’ can be checked if everything is completed for this move in. This tenant will NOT show up under the ‘Port In Tenants’ tab because they have been absorbed.
Port In Applicant – Billed

Step 1: The R-PHA is notified of the family porting in and receives the supporting paperwork.

Notice PIH 2011 – 3 (HA) Once the family is approved to move using portability, the initial PHA completes Part I of the Form HUD-52665 and mails or faxes it to the receiving PHA, along with a copy of the family’s voucher issued by the initial PHA, a current copy of Form HUD-50058, and copies of the income verification supporting the form. (Note that in the case of an applicant, the initial PHA has not completed the HUD-50058 and submitted the information to HUD because the family is not yet a new admission. However, the PHA must provide the family information and income information to the receiving PHA in a format similar to the Form HUD-50058 so that the information is easily available for use by the receiving PHA. HUD expects the receiving PHA to process the family’s paperwork and issue the incoming family a voucher for its jurisdiction within two weeks of receiving the HUD-52665 and supporting documentation, provided the information is in order, the family has contacted the receiving PHA, and the family complies with the receiving PHA’s procedures. (More information about the responsibilities of the R-PHA and I-PHA is included in this Notice).

In the Port Manager: The PI applicant or tenant is added to the Port Manager. During this process a voucher is issued.

(Adding a new Port In Applicant – page 18)

Once added, the PI applicant will appear as follows.

![Port Manager Screen shot]

Step 2: The R-PHA notifies the I-PHA if the family’s voucher will be billed or absorbed.

Notice PIH 2011 – 3 (HA) states that the processing responsibilities include the receiving PHA must respond by email or other confirmed delivery method to the initial PHA’s inquiry to determine if the family’s voucher will be billed or absorbed. HUD encourages PHAs to communicate this information via email in order to expedite the families’ requests. If the receiving PHA notifies the initial PHA that they will be absorbing the voucher, the receiving PHA cannot reverse its decision at a later date. This prevents placing a financial hardship on the initial PHA and putting a family that has already terminated the lease and vacated their assisted unit and moved to the new jurisdiction at risk of losing their assistance.
In the Port Manager: Fill in the ‘Date Responded to I-PHA’ and what the ‘Port Status’ is.

The PI Applicants screen displays the following information.

![PI Applicants screen](image)

Step 3: The Port In Applicant is moved in.

Notice PIH 2011 – 3 (HA) Portability-Receiving PHA Responsibilities: Part II of Form HUD-52665: The receiving PHA sends Part II of Form HUD-52665 to the initial PHA. If the receiving PHA will bill the initial PHA, the receiving PHA not only completes Part II of the Form HUD-52665, but also attaches a copy of the new Form HUD-50058 before returning it to the initial PHA. The instructions of the Form HUD-52665 provide that the receiving PHA must complete and mail (which may include electronic mail or fax) Part II of the form within 10 working days from the date a HAP contract is executed on behalf of a family but no later than 60 days following the expiration date of the family voucher issued by the initial PHA.

In the Port Manager: Once the unit is inspected and ready for move-in the PI applicant can be moved in. Choose the “PI Move In” option from the PI Applicant Action Bar. Part II of Form-52665 must be completed and mailed within ten days of executing the HAP contract but no later than 60 days following the expiration (Port In Move In – page 25)
**Step 4: Save/Finalize the 50058.**

If the port in applicant was an applicant at the I-PHA, the effective reason is ‘New Admission’ and the move in date under ‘Admiss Info’ will be the current move in date.

The PHA and admin fee will be automatically filled in under the ‘Port In Info’ from the information entered under the ‘PI Update’ screen.
If the PI applicant was a tenant at the I-PHA,, the effective reason is ‘Portability In’ and the move in date under ‘Admiss Info’ will be the ‘Date of Admission to program: (58,2h)’ from the PI Update information.

The PHA and admin fee will be filled in under the ‘Port In Info.’
Insert the HAP, tenant rent and admin fee during the finalization process.

<table>
<thead>
<tr>
<th>Month/Year</th>
<th>Cert Type</th>
<th>Status</th>
<th>Contract</th>
<th>HAP</th>
<th>Tenant</th>
<th>UAP</th>
<th>Admin</th>
<th>Hold Type</th>
<th>Hold Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/2014</td>
<td>Initial</td>
<td>UnApproved</td>
<td>$465.00</td>
<td>$340.00</td>
<td>$125.00</td>
<td>$0.00</td>
<td>$45.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Prorate if needed.
The 52665 can be filled in and printed during the process.

Print the 50058, HAP contract and any other documents required for a Section 8 move in.

**Step 5:** Fill in the ‘Date HAP Executed’ and the ‘Date 52665 (Part II) sent.’ The “# of Days” will fill in automatically.

Any ‘Note’ can be added and the ‘Done’ can be checked if everything is completed for this move in. The tenant’s last name is highlighted in green because they are now a PI Tenant.

This tenant will now display on the PI Tenants tab.
**Port In Tenant – Annual Update**

The ‘Port In Tenants’ tab helps the R-PHA track that the I-PHA receives an updated 50058 and 52665 annually.

**Notice PIH 2011-3 Portability-Receiving PHA: On-going Responsibilities:** The receiving PHA must send the initial PHA a copy of the updated Form HUD-50058 at each annual recertification for the duration of time the receiving PHA is billing the initial PHA on behalf of the family, regardless of whether there is a change in the billing amount. The Form HUD-50058 should be sent to the initial PHA as soon as the family’s annual reexamination is complete but no later than 10 working days following the effective date of the annual reexamination. The purpose of this notification is to serve as an annual “reconciliation” to assist both PHAs in fulfilling its accounting and record-keeping responsibilities.

**Step 1: The R-PHA completes the annual certification.** The ‘# of Days’ calculates from the ‘Effective Date’ on the ‘Port In Tenants’ tab. The ‘Next Annual Date’ also displays to easily track who has an upcoming annual certification.

The current HAP, UAP and ADMIN information is also available.

The scheduling can be done right from the ‘Port In Tenants’ tab by using the ‘Schedule Appt’ and ‘Appt Letter’ options.
**Step 2:** Once the recertification and the 52665 is completed (either an annual or an interim), another record is created in the ‘Port In Tenants’ tab for the new effective date, reason, and HAP, UAP and ADMIN amounts.

**In the Port Manager:** Fill in the ‘Date 52665 (Part II) Sent’ and the ‘Port Status.’ The ‘Done’ box can be checked if everything is completed and sent to the I-PHA with the updated billing information and 50058.

Now only the most current record will display unless you take the check off ‘Exclude Completed History.’
**Port In Tenant – Absorb**

If a current PI tenant is being absorbed by your HA, the following steps will be taken.

**Notice PIH 2011-3** states that if the receiving PHA is absorbing a family for which it has been billing or if the housing assistance payments are terminated for any reason, the receiving PHA is encouraged to provide adequate notice of the effective date of the absorption or termination to avoid having to return a payment. In any event the receiving PHA must notify the initial PHA no later than 9 or 10 working days following the effective date of the termination of the billing arrangement. The receiving PHA may not retroactively absorb families for which the receiving PHA was previously billing for any time period that commences before 10 working days from the time the receiving PHA notifies the initial PHA of the absorption, with one exception.

**Step 1 Absorb the PI Tenant.** Highlight the tenant that is being absorbed and click on the ‘Absorb Tenant’ option on the PI Tenant Action Bar.

This option is available to issue a different voucher. Currently the tenant may have a PI Voucher that is tied to the PI project and since the tenant is being absorbed, a regular HCV voucher can be issued. Click on ‘No’ to issue a different voucher or ‘Yes’ to keep the current voucher.

If ‘No’ is chosen above, this message will appear.
Look up the voucher to be issued by choosing the correct project. Highlight the voucher and then click on ‘Ok.’

Make any changes to bedroom size or dates. The voucher can be printed or just ‘Saved.’ Then ‘Exit’ the screen.
Step 2 Create the 50058. The recertification screen will pop up so that a 50058 can be finalized. Change the effective date and reason and other changes needed before finalizing the 50058. The system will automatically record this as an absorbed tenant for the 50058. Save and finalize the 50058 record.

Once finalized, 12e of the 50058 will be marked with a ‘0’ for absorbed.
**Step 3 Create the 52665.** The 52665 can be completed from the recertification screen under reports or from the PI Tenant action bar.

**Step 4 Complete the Port In Tenant record.** Fill in the ‘Date 52665 (Part II) Sent,’ ‘Port Status’ and ‘Date Absorbed.’ The record can also be checked as ‘Done.’ This record will now only appear if ‘Exclude Absorbed Tenants’ is unchecked.
Port In Tenant (Billing) – Porting Out

If the port in tenant is porting out to another agency, contact the I-PHA so that the tenant can be transferred back to their jurisdiction.

Notice PIH 2011-3 states that in the case where a family currently under a billing arrangement subsequently decides it wants to move under portability to yet another jurisdiction, the receiving PHA does not issue the family a voucher in order to do so. Instead, the receiving PHA notifies the initial PHA of the family request to port to another jurisdiction. The initial PHA is responsible for issuing the family's voucher and sending the Form HUD-52665 and supporting documentation to the new receiving PHA. Good communication between all three PHAs is very important in such a circumstance.

In the Port Manager: Highlight the PI tenant and choose the 'Move/EOP/Port Out' option on the PI Tenant Action Bar.

Type in the 'Move Out' date and make sure to check the 'Portability Out' option. Click on 'Move-Out.'
Click on ‘Yes’ to release the voucher. The I-PHA will be responsible for issuing a voucher and taking over the administration of this tenant and contacting the PHA that the tenant is porting to.

Next, the option to print the PortabilityOut 50058 is available.

Continue with the move.

*(Move Out – page 40)*
**Port OUT Looking**

Getting familiar with the PO Looking screen and options

- **Exclude Completed?**
  When checked, this will exclude completed PO Looking processes. It is defaulted to checked but can be unchecked to see completed PO Looking processes.

- **Issued Tenant (No IL Voucher)**
  PO Looking tenants that do not have an issued looking voucher are highlighted in coral. This is a notification that this PO Looking tenant still has a voucher status of ‘Issued Tenant.’

- **App/Tenant has PO Tenant Record**
  PO Looking applicants or tenants will be highlighted in a light green if they have a PO Tenant record. This is a warning that this PO process has been completed and just needs the ‘Done’ checked.
Description of columns on the Port Out Looking tab

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>SSN</th>
<th>A/T</th>
<th>V St</th>
<th>Done</th>
<th>Receiving PHA</th>
<th>Initial Contact to R-PHA</th>
<th>Initial Contact from R-PHA</th>
<th>Port Status</th>
<th>R-PHA Absorb or Bill</th>
<th>52065 Part 1 Sent</th>
<th>PHA Voucher Expiration</th>
<th>60 Day Deadline</th>
<th>Data HAP Executed</th>
<th>Date 52065 (Part II) Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anders</td>
<td>Benjamin</td>
<td>5687</td>
<td>IT</td>
<td></td>
<td></td>
<td>City Of Mesa Housing Authority</td>
<td>04/15/2014</td>
<td>04/15/2014</td>
<td>Approved</td>
<td>E</td>
<td>05/22/2014</td>
<td>07/21/2014</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Name and social security number of the PO tenant or applicant.**

- **A/T**

  “A” is for applicant and “T” is for tenant.

- **V St**

  This is the voucher status of the applicant or tenant. “IL” is for Issued Looking and “IT” is for Issued Tenant.

- **Done**

  This option should be checked when the port out process is completed either by being absorbed or is billing. *Must be entered manually.*

- **Receiving PHA**

  The Receiving PHA name which is chosen when the port out applicant or tenants is found to add as a PO Looking applicant or tenant.

- **Initial Contact to R-PHA**

  This is the date of the initial contact to the R-PHA. *Must be entered manually.*

- **Initial Contact from R-PHA**

  This is the date of the initial contact from the R-PHA. *Must be entered manually.*

- **Port Status**

  This field can be updated if the absorb or billing status changes. Additional statuses can be added under setup. *Must be updated manually.*

- **R-PHA Absorb or Bill**

  R-PHA Absorb or Bill is the information received initially from the R-PHA at the beginning of the port out process. *Must be entered manually.*
The date the 52665 is sent to the R-PHA. *Must be entered manually.*

This is the expiration date of the I-PHA’s voucher. This will be filled with the voucher information for the existing IL applicant or tenant or IT tenant. This date can be changed and entered right on the screen to be used for tracking a IT tenant that has not moved out.

The 60-day deadline from the Initial PHA voucher expiration date. This is automatically calculated from the ‘I-PHA Voucher Expire’ date. *See note below.*

The date the HAP contract was executed. *Must be entered manually.*

Date the 52665 was received from the I-PHA. *Must be entered manually.* *See note below.*

This calculates the number of days between the Hap contract being executed and the date the 52665 was received. This is automatically calculated.

**NOTE:** Reference from Notice PIH 2011 – 3 (HA)
Part I of the form provides the date by which the initial billing notice provided by the receiving PHA must be received by the initial PHA. The initial billing submission must be completed and mailed by the receiving PHA within 10 working days of the HAP contract execution but no later than 60 days following the expiration date of the family voucher issued by the initial PHA.

Displays the next annual recert date for the IL or IT tenant. This information comes from the ‘Rent Information’ tab from “HAP Update” option shown below.

Displays the HAP-UAP-ADMIN information for a port out billing. This will be filled after a Port Out move-in with the information entered on the ‘Rent Information’ tab from the ‘HAP Update’
option as shown below.

![Rent Information](image)

Any note can be typed here the PO applicant or tenant.

Displays the move in and move out dates of the PO applicant or tenant.

Name of the voucher issued to the applicant or tenant.

The remaining fields (Family ID, Person ID, PHA ID, Unit ID, LL ID, WL Group ID, Current Voucher, Modified Date, Modified Login, Create Date, Create Login) to the far right are available to help HAB Support Technicians and track who and when a record was modified.
Adding a new Port Out Tenant or Applicant

When a tenant or applicant decides to PO to another housing authority, the first step is to find the tenant or applicant record by clicking on the ‘New’ button.

The following screen displays tenants and applicants, their voucher status and if they are an applicant or a tenant. Select the person that is porting out and ‘Fetch Applicant/Tenant.’
After selecting the tenant or applicant, the following screen will appear. Choose the R-PHA from the dropdown and click on ‘Save.’

The tenant or applicant will now appear on the PO Looking tab for tracking. All PO actions are available on the PO Looking Tenant Action Bar for tenants and the PO Looking Applicant Action Bar for applicants.
Port Out Looking Action Bar

The PO Looking action bars for tenants and applicants are almost the same except the Tenant Action Bar has two more options, the Voucher Searching and PO Return. Each option is described in this section of the manual.

Applicant Port Out Looking Action Bar

![Applicant Port Out Looking Action Bar](image)

Tenant Port Out Looking Action Bar

![Tenant Port Out Looking Action Bar](image)
Print 52665, Print Voucher, 58 History

This option will bring up the 52665 form to be filled in and printed.

Will print the current voucher issued to the tenant. The ‘Voucher Searching’ and ‘Voucher Update’ actions are available to modify or issue an IL voucher. More information on these options will follow.

This option will bring up the 50058 history so that the latest 50058 can be printed.

Port Out Update

This option is available so that the PHA can be changed for a port out tenant. It is the same screen that pops up after choosing a new PO tenant or applicant.
Voucher Searching

This option moves out the PO tenant and creates an IL voucher. Type in the move out date as shown here and click on next.

Click yes to confirm the move out.

Choosing yes will keep the current voucher but change the status to IL.

Choosing no will allow the user to choose a different voucher, for instance, a voucher from the PO project that may have a voucher name of “PO.” In this example a port out voucher with a name of “PO1020” will be issued. Choose the voucher and click on Issue.
The voucher maintenance screen will pop up so that dates can be modified if needed. Click on ‘Save.’ There is also an option to print the voucher.

The pro-rate option is available.
Forwarding and vacate information can be added.

The tenant is now moved out and has an IL voucher. This process creates the IL 50058.

The tenant information will be displayed as follows with a status of IL and the IL voucher expiration date.
Port Out Move In

Once the paper work has been received from the R-PHA and they are billing the I-PHA, this option will move in the PO tenant so that billing amounts can be entered into winHAP for payment. Notice the 52665 information has been received by the R-PHA.

Highlight the tenant and then click on the PO Move In option.

- **Port Out Landlord** is filled in automatically.
- Click on the Unit button to choose a unit. Remember that the unit can be a “made up” address as shown here.
- Type in the move-in date and the rent start date will fill automatically. Click on the Move In button.

Click on Yes to do the move in. A Portability Out 50058 is automatically created.

Choosing yes will keep the current voucher but change the status to issued tenant.

Choosing no will allow the user to choose a different voucher, for instance, a voucher from the PO project that may have a voucher name of “PO” and change the voucher status to IT.
Choose yes or no.

Next, the rent information can be entered in winHAP/HAP Update on the Rent Information tab.

Verify that the Next Annual Recert Date and the staff information is correct.
Then click on Insert to insert the billing/rent information.

The PO Looking process is completed and the tenant last name is highlighted in green to notify that this tenant has a PO Tenant record. Check the ‘Done’ option as shown below. Future tracking for this tenant will be done on the Port Out Tenant screen.
**Port Out Absorbed (Applicant)**

This process will automatically create an Expiration of Voucher 50058. A Portability Out 50058 is not needed since this person was only an applicant.
Port Out Absorbed (Tenant)

This option is used when the tenant is being absorbed by the R-PHA.

Type in the effective date of the PO absorb and click on save.

Click on yes and the PO 50058 will be automatically created.
The pro-rate option is available if needed.

Forwarding and vacate information can be added.
Show PHA

Choosing this option will bring up the HAP PHA Update screen for modification or review.
HAP Update

This option will bring up the HAP Tenant Update screen for review or modification, especially on the ‘Rent Information’ tab for updating the next annual recert date, staff, and billing information.

Port Out Return

Future Option
Port Note

Any note can be added here for the PO tenant record. This displays here and on the PO looking screen.

HMS Notes
Port Out Letter

Letter Assistant group available for PO Tenants.

E-Mail PHA

This option is available to send an email to the PHA. The email information in the ‘Show PHA’ must be filled in.
Port OUT Tenant

The Port Out Tenant tab allows tracking of the on-going responsibilities of the R-PHA. Excerpts of the Notice PIH 2011 – 3 (HA) at www.hud.gov/offices/pih/publications/notices/11/pih2011-3.pdf referenced in this document read as follows:

Notification of Change in Billing Amount or Other Action – The R-PHA notifies the initial PHA of any change in the billing amount as soon as possible (preferably before the effective date to avoid retroactive adjustments) but in no circumstance any later than 10 working days following the effective date of the change.

If the R-PHA fails to send the Form HUD-52665 within 10 working days following the effective date of the change in the billing amount, the I-PHA is not responsible for paying any increase in the monthly billing amount incurred prior to the notification.

There are also instances in which the R-PHA would be forced to absorb if proper notification is not made to the I-PHA. Please see the Notice PIH 2011 – 3(HA) for complete details.

Getting Familiar with the Port Out Tenant screen and options

This dropdown will display any MGR Report Groups that have been set up. This helps in looking up PO tenants that may be in different report groups such as different housing authorities. In this example, the HA does process port outs for two different housing authorities and these can be chosen to only select tenants from that housing authority or project.

These report groups can be created in Port Manager/MGR Report Groups.
These two options are available to exclude port out tenant records that are marked Done(Completed) and port out tenants that were vacated/absorbed. They are defaulted to checked and can be unchecked to see these completed or vacated records.

- Exclude Completed History?
- Exclude Vacated/Absorbed?
Description of columns on the Port Out Tenant tab

Name and social security number of the PO tenant.

**Done**

This option should be checked when the updated port out billing information is updated. *Must be entered manually.*

**Receiving PHA**

Name of the R-PHA that is billing for this port out tenant.

**Next Annual Recert**

Date of the next annual recert. This date can be changed under the ‘HAP Update’ option.

**Effective Date**

This will display the effective date of the last inserted HAP/Admin fee billing amounts from the 52665 Part II received from the R-PHA.

**Effective Reason**

When a new 52665 Part II is received from the R-PHA, the date and effective reason for the change is entered here.

**# of Days**

The number of days between today’s date (sysdate) and the effective date to track that the 52665 was received by the R-PHA within the required 10 days.

**Port Status**

Port status of the PO tenant. This is a drop down and additional statuses can be set up under Setup/Maintain Port Statuses.

**Date Absorbed**

If the PO tenant is absorbed, the date can be typed in here.
If the payment to the R-PHA should be stopped, that date can be typed here. If the payment is stopped, a hold must be placed on the recurring amounts. This can be done under “HAP Update” on the “Rent Information” tab.

Stop Reason can be chosen here. This is a drop down and additional reasons can be set up under Setup/Maintain Stop Reasons.

Scroll to the right and other columns are available.

This is the current HAP/UAP/ADMIN information from the HAP Update screen.
Any note can be typed here for the PO tenant.

Move in and Move out dates are displayed here.

Voucher name is displayed here.

Scroll all the way to the right for the remaining fields. These fields are available to help HAB Support Technicians and track who and when a record was modified.
Port Out Tenant Action Bar

The Port Out tenant action bar has all the options needed for your PO tenants such as updating billing information, absorbing, adding notes, etc. These options are described here. Many of these options have been discussed previously in this manual.

This option will bring up the HAP Tenant Update screen for review or modification, especially on the ‘Rent Information’ tab for updating the next annual recert date, staff, and billing information when a 52665 is received from the R-PHA.
Choosing this option will bring up the HAP PHA Update screen for modification or review.
If the R-PHA absorbs the PO tenant, this step can be taken.

Click on the option and type in the move out date on the screen and then choose the ‘Move Out’ button.

Choose ‘Yes’ to complete the move PO Absorb/Move Out.
Option to fill in Vacate Information.

Port Note

Any note can be added here for the PO tenant record. This displays here and on the PO looking screen.
**HMS Notes**

Letter Assistant group available for PO Tenants.

**Port Out Letter**

This option will bring up the 50058 history so that the latest 50058 can be printed.
Port Out Processes

This section of the manual will go through the individual processes for portability outs. During the steps, references will be made to where in this manual you can see the detailed steps for the processes being done.

Port Out Looking Applicant - Absorbed

Step 1: The applicant notifies the I-PHA of their intent to port out.

Notice PIH 2011 – 3 (HA) states that the family must inform the I-PHA of the area to which the family wishes to move. In the case of an applicant, the I-PHA must determine if the family is income eligible in the area to which the family wishes to move. If the family is not income eligible in the area to which the family wishes to move, the PHA must inform the applicant family they may not move to the area in question and receive voucher assistance.

In the Port Manager: Once the family is determined eligible for the area they are moving to, the applicant can be added to the PO Looking tab by choosing the ‘New’ button. Make sure the IL voucher is issued to the applicant prior to adding them to the PO Looking tab. (Adding a new Port Out Tenant or Applicant – page 73)

Once added, the applicant will display on the Port Manager Looking screen along with the voucher expiration date and the 60 day deadline filled in.

Step 2: The I-PHA notifies the R-PHA.

Notice PIH 2011 – 3 (HA) states that the I-PHA must contact the R-PHA via email or other confirmed delivery method to determine whether the receiving PHA will bill or absorb the family’s voucher. HUD encourages PHAs to communicate this information via email in order to expedite the families’ requests.

In the Port Manager: Fill in the ‘Initial Contact to R-PHA’ with the date of this initial contact.

The Port Out Looking screen displays the following information.
Step 3: The R-PHA notifies the I-PHA if they are billing or absorbing.

Notice PIH 2011 – 3 (HA) Based on the receiving R-PHA’s response, the initial PHA must determine whether they will approve or deny the portability request. Once the portability request is approved, the I-PHA must contact the R-PHA on the family’s behalf and send the 52665 Part I, a copy of the IL Voucher, and family and income information in a format similar to the 50058 form.

In the Port Manager:

a) Fill in the ‘Initial Contact from R-PHA’ with the contact date.

b) Fill in the ‘R-PHA Absorb or Bill’ with what the R-PHA intends to do (absorb or bill). In this example, ‘A’ for absorb is chosen.

c) Fill in the Port Status with the I-PHA’s approval or denial to the ‘R-PHA Absorb or Bill.’

From the Port Out Looking Applicant action bar, print the 52665 Part I and a copy of the IL voucher and 50058.

d) Type in the date the 52665 Part I (and additional documents) was sent.

The Port Out Looking screen will display as follows with the updated information from Step 3.
Step 4: The R-PHA sends the I-PHA the 52665 Part II and III

Notice PIH 2011 – 3 (HA) Part I of the 52665 form provides the date by which the initial billing notice provided by the receiving PHA must be received by the initial PHA. The initial billing submission must be completed and mailed by the receiving PHA within 10 working days of the HAP contract execution.

In the Port Manager: Even though the PO Applicant is being absorbed a 52665 should be received from the R-PHA. When the 52665 Part II and III is received verifying that the applicant is being absorbed by the R-PHA, the ‘Date HAP Executed’ and the Date 52665(PartII) Received can be filled in. The ‘# of Days’ will be automatically calculated by the software.

Now the ‘PO Absorbed’ option from the Port Out Looking Applicant Action Bar can be used to finish the PO process and unissued the applicant IL voucher.

(Port Out Absorbed (Applicant) – page 83)

Step 5: Completing the PO Absorbed Applicant process

In the Port Manager: Once the process is completed, click on the ‘Done’ checkbox.

These steps are optional:

a) Update the ‘Port Status’ to “Absorbed.”

b) Enter a Port Note to easily see the outcome of this PO Applicant process. This can be done from the Port Out Looking Applicant Action Bar.
The completed record will display as follows. This record will NOT appear on the Port Out Tenant tab because they were absorbed. Notice that the voucher status is blank because the voucher was released during the PO Absorb process.

![Port Out Tenant Record](image)

- Last Name: Betz
- First Name: Sheila
- SSN: 980-01-0007
- Receiving PHA: City Of Ketter Housing Auth
- Initial Contact to PHA: 08/01/2014
- Initial Contact from PHA: 09/05/2014
- Part Status: Absorbed
- PO Date: 06/04/2014
- PHA Absorbed On: 05/19/2014
- PHA Voucher Expiration: 07/14/2014
- 60 Day Deadline: 07/01/2014
- Number of Days: 14
- Date PO Received: 07/05/2014
- Next Action Date: 07/08/2014
Port Out Looking Applicant - Billing

Step 1: The applicant notifies the I-PHA of their intent to port out.

Notice PIH 2011 – 3 (HA) states that the family must inform the I-PHA of the area to which the family wishes to move. The I-PHA must determine if the family is income eligible in the area to which the family wishes to move. If the family is not income eligible in the area to which the family wishes to move, the PHA must inform the tenant family they may not move to the area in question and receive voucher assistance.

In the Port Manager: Once the family is determined eligible for the area they are moving to, the applicant can be added to the PO Looking tab by choosing the ‘New’ button. *(Adding a new Port Out Tenant or Applicant – page 73)*

Once added, the applicant will display on the Port Manager Looking screen along with the voucher expiration date and the 60 day deadline filled in.

![Port Manager Looking screen](image)

Step 2: The I-PHA notifies the R-PHA.

Notice PIH 2011 – 3 (HA) states that the I-PHA must contact the R-PHA via email or other confirmed delivery method to determine whether the receiving PHA will bill or absorb the family’s voucher. HUD encourages PHAs to communicate this information via email in order to expedite the families’ requests.

In the Port Manager: Fill in the ‘Initial Contact to R-PHA’ with the date of this initial contact.

The Port Out Looking screen displays the following information.
**Step 3: The R-PHA notifies the I-PHA if they are billing or absorbing.**

**Notice PIH 2011 – 3 (HA)** Based on the receiving R-PHA’s response, the initial PHA must determine whether they will approve or deny the portability request. Once the portability request is approved, the I-PHA must contact the R-PHA on the family’s behalf and send the 52665 Part I, a copy of the IL Voucher, and the last 50058.

**In the Port Manager:**

a) Fill in the ‘Initial Contact from R-PHA’ with the contact date.

b) Fill in the ‘R-PHA Absorb or Bill’ with what the R-PHA intends to do (absorb or bill). In this example, ‘B’ for absorb is chosen.

c) Fill in the Port Status with the I-PHA’s approval or denial to the ‘R-PHA Absorb or Bill.’

d) From the Port Out Looking Tenant action bar, print the 52665 Part I, a copy of the voucher and 50058.

e) Type in the date the 52665 Part I (and additional documents) were sent.

The Port Out Looking screen will display as follows with the updated information from Step 3.

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**Step 5: The R-PHA sends the I-PHA the 52665 Part II and III**

**Notice PIH 2011 – 3 (HA)** Part I of the 52665 form provides the date by which the initial billing notice provided by the receiving PHA must be received by the initial PHA. The initial billing submission must be completed and mailed by the receiving PHA within 10 working days of the HAP contract execution.

**In the Port Manager:** Even though the PO Tenant is being absorbed a 52665 should be received from the R-PHA. When the 52665 Part II and III is received verifying that the applicant is being absorbed by the R-PHA, the ‘Date HAP Executed’ and the Date 52665(PartII) Received can be filled in. The ‘# of Days’ will be automatically calculated by the software.
Now the ‘PO Move In’ option from the Port Out Looking Applicant Action Bar can be used to finish the PO process and unissue the PO tenant’s voucher.

*(Port Out Move In (Applicant) – page 80)*

**Step 5: Completing the PO Move In Applicant process**

Notice the last name is highlighted green which confirms that this record will appear on the Port Out Tenant tab to track annuals and other updates as new 52665’s are submitted from the R-PHA.

**In the Port Manager:** Once the process is completed, click on the ‘Done’ checkbox.

**These steps are optional:**

a) Update the ‘Port Status’ to “Billing.”

b) Enter a Port Note to easily see the outcome of this PO Applicant process. This can be done from the Port Out Looking Tenant Action Bar.

The completed record will display as follows. This record will NOT appear on the Port Out Tenant tab because they were absorbed. Notice that the voucher status is blank because the voucher was released during the PO Absorb process.
Port Out Looking Tenant - Absorbed

Step 1: The tenant notifies the I-PHA of their intent to port out.

Notice PIH 2011 – 3 (HA) states that the family must inform the I-PHA of the area to which the family wishes to move. In the case of an applicant, the I-PHA must determine if the family is income eligible in the area to which the family wishes to move. If the family is not income eligible in the area to which the family wishes to move, the PHA must inform the applicant family they may not move to the area in question and receive voucher assistance.

In the Port Manager: Once the family is determined eligible for the area they are moving to, the tenant can be added to the PO Looking tab by choosing the ‘New’ button. (Adding a new Port Out Tenant or Applicant – page 73)

Once added, the applicant will display on the Port Manager Looking screen along with the voucher expiration date and the 60 day deadline filled in.

Step 2: The I-PHA notifies the R-PHA.

Notice PIH 2011 – 3 (HA) states that the I-PHA must contact the R-PHA via email or other confirmed delivery method to determine whether the receiving PHA will bill or absorb the family’s voucher. HUD encourages PHAs to communicate this information via email in order to expedite the families’ requests.

In the Port Manager: Fill in the ‘Initial Contact to R-PHA with the date of this initial contact.

The Port Out Looking screen displays the following information.
Step 3: Voucher Searching

If the tenant has moved out of their unit the 'Voucher Searching' option is available. This option will move them out of their unit and create an IL voucher. *(Voucher Searching – page 77)*

Step 4: The R-PHA notifies the I-PHA if they are billing or absorbing.

Notice PIH 2011 – 3 (HA) Based on the receiving R-PHA’s response, the initial PHA must determine whether they will approve or deny the portability request. Once the portability request is approved, the I-PHA must contact the R-PHA on the family’s behalf and send the 52665 Part I, a copy of the Voucher, and the most recent 50058.

In the Port Manager:

a) Fill in the ‘Initial Contact from R-PHA’ with the contact date.

b) Fill in the ‘R-PHA Absorb or Bill’ with what the R-PHA intends to do (absorb or bill). In this example, ‘A’ for absorbed is chosen.

c) Fill in the Port Status with the I-PHA’s approval or denial to the ‘R-PHA Absorb or Bill.’

From the Port Out Looking Tenant action bar, print the 52665 Part I and a copy of the voucher and a copy of the most recent 50058.
d) Type in the date the 52665 Part I (and additional documents) were sent.

The Port Out Looking screen will display as follows with the updated information from Step 3.

![Port Out Looking Screen]

**Step 5: The R-PHA sends the I-PHA the 52665 Part II and III**

**Notice PIH 2011 – 3 (HA)** Part I of the 52665 form provides the date by which the initial billing notice provided by the R-PHA must be received by the I-PHA. The initial billing submission must be completed and mailed by the R-PHA within 10 working days of the HAP contract execution.

**In the Port Manager:** Even though the PO Tenant is being absorbed, a 52665 should be received from the R-PHA. When the 52665 Part II and III is received verifying that the tenant is being absorbed by the R-PHA, the ‘Date HAP Executed’ and the Date 52665(PartII) Received can be filled in. The ‘# of Days’ will be automatically calculated by the software.

![Port Manager Screen]

Now the ‘PO Absorbed’ option from the Port Out Looking Tenant Action Bar can be used to finish the PO process and unissue the applicant IL voucher.

*(Port Out Absorbed (Tenant) – page 83)*
Step 5: Completing the PO Absorbed Applicant process

In the Port Manager: Once the process is completed, click on the ‘Done’ checkbox.

These steps are optional:

  c) Update the ‘Port Status’ to “Absorbed” if not already done.

  d) Enter a Port Note to easily see the outcome of this PO Tenant process. This can be done from the Port Out Looking Tenant Action Bar.

The completed record will display as follows. This record will NOT appear on the Port Out Tenant tab because they were absorbed. Notice that the voucher status is blank because the voucher was released during the PO Absorb process.
Port Out Looking Tenant – Billing

Step 1: The tenant notifies the I-PHA of their intent to port out.

Notice PIH 2011 – 3 (HA) states that the family must inform the I-PHA of the area to which the family wishes to move. In the case of an tenant, the I-PHA must determine if the family is income eligible in the area to which the family wishes to move. If the family is not income eligible in the area to which the family wishes to move, the PHA must inform the applicant family they may not move to the area in question and receive voucher assistance.

In the Port Manager: Once the family is determined eligible for the area they are moving to, the tenant can be added to the PO Looking tab by choosing the ‘New’ button. (Adding a new Port Out Tenant or Applicant – page 73)

Once added, the tenant will display on the Port Manager Looking screen along with the voucher expiration date and the 60 day deadline filled in.

Step 2: The I-PHA notifies the R-PHA.

Notice PIH 2011 – 3 (HA) states that the I-PHA must contact the R-PHA via email or other confirmed delivery method to determine whether the receiving PHA will bill or absorb the family’s voucher. HUD encourages PHAs to communicate this information via email in order to expedite the families’ requests.

In the Port Manager: Fill in the ‘Initial Contact to R-PHA’ with the date of this initial contact.

The Port Out Looking screen displays the following information.
Step 3: Voucher Searching

If the tenant has moved out of their unit the ‘Voucher Searching’ option is available. This option will move them out of their unit and create an IL voucher.

(Voucher Searching – page 77)

Once this option is taken, the Voucher status will be ‘IL’ as shown here.

Step 4: The R-PHA notifies the I-PHA if they are billing or absorbing.

Notice PIH 2011 – 3 (HA) Based on the receiving R-PHA’s response, the initial PHA must determine whether they will approve or deny the portability request. Once the portability request is approved, the I-PHA must contact the R-PHA on the family’s behalf and send the 52665 Part I, a copy of the IL Voucher, and the most recent 50058.

In the Port Manager:

a) Fill in the ‘Initial Contact from R-PHA’ with the contact date.

b) Fill in the ‘R-PHA Absorb or Bill’ with what the R-PHA intends to do (absorb or bill). In this example, ‘B’ for billed is chosen.

c) Fill in the Port Status with the I-PHA’s approval or denial to the ‘R-PHA Absorb or Bill.’
From the Port Out Looking tenant action bar, print the 52665 Part I, a copy of the voucher and a copy of the most recent 50058.

d) Type in the date the 52665 Part I (and additional documents) were sent.

The Port Out Looking screen will display as follows with the updated information from Step 3.

Step 5: The R-PHA sends the I-PHA the 52665 Part II and III

Notice PIH 2011 – 3 (HA) Part I of the 52665 form provides the date by which the initial billing notice provided by the R-PHA must be received by the I-PHA. The initial billing submission must be completed and mailed by the R-PHA within 10 working days of the HAP contract execution.

In the Port Manager: When the 52665 Part II and III is received verifying that the R-PHA will be billing, the ‘Date HAP Executed’ and the Date 52665(PartII) Received can be filled in. The ‘# of Days’ will be automatically calculated by the software.
Now the ‘PO Move In’ option from the Port Out Looking Tenant action bar can be used to finish the PO process and set up the billing information. *(Port Out Move In – page 80)*

**Step 6: Completing the PO Billed Tenant process**

Notice the last name is highlighted green which confirms that this record will appear on the Port Out Tenant tab to track annuals and other updates as new 52665’s are submitted from the R-PHA.

In the Port Manager: Once the process is completed, click on the ‘Done’ checkbox.

These steps are optional:

a) Update the ‘Port Status’ to “Billed.”

b) Enter a Port Note to easily see the outcome of this PO Applicant process. This can be done from the Port Out Looking Tenant Action Bar.
Port Out Tenant – Update billing information from a 52665

The “Port Out Tenants" tab displays the current port out tenants that have a status of “Billed" to track when their next annuals are due. This allows easy updating of the port out billing information.

NOTE: Notice PIH 2011 – 3 (HA) states If the receiving PHA fails to send the Form HUD-52665 within 10 working days following the effective date of the change in the billing amount, the initial PHA is not responsible for paying any increase in the monthly billing amount incurred prior to the notification.

Step 1: The R-PHA sends the I-PHA the 52665 along with the Form HUD-50058 for a change in the billing amount.

Step 2: Update the billing information under the Port Out Tenant tab

Highlight the tenant and go to “HAP Update.”

Type in the new billing information on the ‘Rent Information’ tab. In this example, an annual for 07/2015 is entered. Make sure to update the next annual date.
Step 3: Update the two records that display on the ‘Port Out Tenants’ tab.

One record is the previous “Interim” record which can be marked completed.

**In the Port Manager:** Once the process is completed, click on the ‘Done’ checkbox.

The following fields can be entered for the new billing information. The ‘# of days’ will calculate the number of days from the effective date to the date the 52665 was received.

When doing a new ‘Find’ on the ‘Port Out Tenants’ tab, only the most recent record will display as long as the ‘Exclude Completed History?’ is checked.
**Port Out Tenant – PO Absorb/Move Out**

If a R-PHA decides to absorb the family for which it has been billing, the following steps will be taken on the ‘Port Out Tenants' tab. The same step is taken if the tenant has moved out from the R-PHA’s jurisdiction.

**NOTE:** Notice PIH 2011 – 3 (HA) states If the receiving PHA is absorbing a family for which it has been billing or if the housing assistance payments are terminated for any reason, the receiving PHA is encouraged to provide adequate notice of the effective date of the absorption or termination to avoid having to return a payment. In any event the receiving PHA must notify the initial PHA no later than 10 working days following the effective date of the termination of the billing arrangement. The receiving PHA may not retroactively absorb families for which the receiving PHA was previously billing for any time period that commences before 10 working days from the time the receiving PHA notifies the initial PHA of the absorption, with one exception.

Choose the ‘PO Absorb/Move Out’ option from the ‘Port Out Tenant Actions' toolbar.

*(PO Absorb/Move Out – page 100)*

Once this action is performed, the ‘Date Absorbed’ date will be filled in. Notice that this record will only be displayed if the “Exclude Vacated/Absorbed?” box is unchecked.
In the Port Manager: Once the process is completed, click on the 'Done' checkbox.

A 'Port Note' may be added.