Tenmast Software

Making Your Job Easier!

WinTen² Section 8 Desktop Inspections

Preliminary User Manual

User Manual Edition: 11/15/2004

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INTRODUCTION

The WinTen² Section 8 Desktop Inspections program is designed for use on computers running the Windows NT, 2000, or XP operating system. The interface is designed in a Windows environment and includes point-and-click mouse actions, pull-down menus, and Windows-based help functions. This manual contains all of the information you need to use the WinTen² Section 8 Desktop Inspections program (hereafter referred to as Section 8 Inspections or S8 Inspections).

Version Information

This is a *preliminary* user manual written as of 11/15/2004. Some sections of this manual may be incomplete in regard to the program released as of that date. Some sections may be inaccurate in regard to later versions of the program. It does not apply to previous versions of the program (including MS-DOS-based ones).

When Tenmast issues an update to a piece of software, we post a documentation update on our Web site at **www.tenmast.com**. If you have a current Update & Support Agreement for Section 8 Inspections, you may download both the updated program and the updated documentation at no charge. See the Client Service Area of our Web site for detailed instructions.

Getting Help

Although we have made every effort to make this manual as comprehensive as possible, no document can cover all contingencies. If you encounter problems with Section 8 Inspections, please call the Tenmast Training & Support Department toll-free at **(877) 359-5492** or send e-mail to **support@tenmast.com**.

Revisions

To better serve our clients, we constantly update our manuals, just as we constantly make improvements in our programs. If you find an error or omission in this documentation or have a suggestion for improving it, please call the Tenmast Marketing/Communication Services Department toll-free at **(877) 836-6278** or send e-mail to **info@tenmast.com**.

WINTEN² BASICS

The WinTen² programs are designed to provide quick and easy access to commands and data throughout Tenmast's programs. In WinTen², you can use the keyboard and/or the mouse to navigate through programs and execute commands.

The WinTen² system consists of more than 20 independent housing authority data management programs that are capable of sharing data with one another. Although each program has its own unique functions and features, they all share certain common ones. This introduction explains these common functions and features and how to use them.

Navigation

Mouse Actions

In many instances, this manual will instruct you to "click" something in order to give the program a command. This refers to executing a command with your mouse. These are the different ways in which you may need to "click" to execute a command:

Click or Point-and-Click
Position the mouse pointer over the indicated object on the screen, then press and release the left mouse button once.

Double-Click
Position the mouse pointer over the indicated object on the screen, then quickly press and release the left mouse button twice.

Right-Click
Position the mouse pointer over the indicated object on the screen, then press and release the right mouse button once.

Drag and Drop
Position the mouse pointer over the indicated object on the screen, then press and hold down the left mouse button. While still holding down the button, move the mouse pointer to where you want to place the object and then release the button.

the mouse pointer

Keyboard Actions

There also are many ways to issue commands in the WinTen² programs with your *keyboard*. When the manual instructs you to "press" a key or keys, it is referring to the keys on your keyboard. The manual indicates a key by enclosing it in less-than and greater-than signs. For example, <Enter> means "the Enter key."

Moving Focus
When you first enter a screen, "focus" will be on a particular button or data field. Focus is shown by a dotted line around the inside of a button (as shown at right) or a flashing cursor in a data field. When a button has focus, you can activate it by pressing <Enter>, which will have the same effect as if you had clicked on it. When a data field has focus, you can type data into it. You can move focus in either situation by pressing <Tab>. If you are on a menu of buttons, you can also move focus by using the arrow keys.

with focus   *without focus*

Keyboard Shortcuts
Some commands have "keyboard shortcuts." This means you can execute the command through a combination of keys. Keyboard shortcuts will use a combination of a letter or number key plus either the <Alt> (Alternate) or <Ctrl> (Control) key. The manual abbreviates these commands in the format <key+key>. For example, a command that you give "by pressing <Alt+X>" is performed by holding down <Alt> and pressing <X>.

The <Ctrl> and <Alt> keys are keys that modify the way that the computer interprets other keys, much like <Shift> does. When a key combination includes one of these keys, it's best to press and hold the modifying key before pressing the other key in the combination, because the modifying key won't type anything. To continue the previous comparison, this is like using <Shift> to capitalize the letter "a" while doing word processing. If you pressed and held <A> before pressing <Shift>, you'd type something like "aaaaaaaA." However, if you pressed and held <Shift> first, you'd just type "A." The same holds true for issuing commands with key combinations that include <Alt> or <Ctrl>.

Buttons

In all WinTen² programs, the screens contain ***buttons*** to access functions. Buttons are square or rectangular and may contain pictures, text, or both. This manual indicates a button with its name ("the Reports button") and/or a picture (as shown at right). Buttons can be used in three ways:

1. Point-and-Click

2. Move focus to the button and press <Enter> (remember, you move focus with <Tab> or the arrow keys).

3. Press the key that corresponds to the underlined letter on the button (on the Reports button shown to the right, this would be <R>).

Standard Buttons

Several buttons are standard in all WinTen² programs. This means they always have the same function regardless of the program in which they are found.

Main Menu Buttons

These standard buttons are found on the Main Menu screen.

Version Button
This button opens an information box (shown at far right) that displays the version date of the program.

Reports Button
The Reports button opens the program's Reports screen. The specific reports you can view and print from this screen vary depending on the program in question. Please see the appropriate chapter of this manual for details.

Setup Button
The Setup button opens the program's Setup screen. This screen allows you to change the basic information that the program uses to generate reports and/or track and present data. Please see the appropriate chapter of this manual for more details on setup specifics.

Exit Button
The Exit button shuts down the program and closes all associated windows.

Other Standard Buttons

The following buttons appear throughout the WinTen² programs. They allow you to make choices on screens and in dialog boxes.

OK and Yes Buttons
Click the OK or Yes button if you want to accept the data presented or continue the action you started. Some dialog boxes which only display information without giving you command options will have OK buttons that close them when clicked.

Cancel and No Buttons
Click the Cancel or No button if you want to abandon the current screen or the action you started.

Grayed Out Options

Some controls, buttons, or data fields may appear light gray rather than appearing with their normal full-color images (these buttons are colorized in the WinTen² programs, even though they may appear in black-and-white in this manual). This condition is referred to as "grayed out." This indicates that those options are disabled and cannot be accessed at the present time. Grayed out options will be their normal colors and accessible once the program reaches a set of conditions that allows the option to work again.

Dialog Boxes

Occasionally, a small window will appear on top of the screen in which you're currently working. This is called a *dialog box*. The contents of a dialog box will vary. Some contain pertinent information and have a single button which makes them disappear, while others allow you to specify options for a procedure that you've told the program to perform.
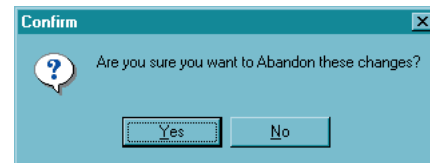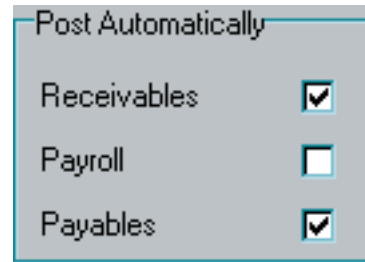
Drop-Down Selection Boxes

Some screens have a data entry field with a small black downward-pointing triangle at its immediate right. Clicking on this triangle opens a small list of pre-set options for that data field's contents. This is known as a *drop-down selection box*. Click an option to select it.
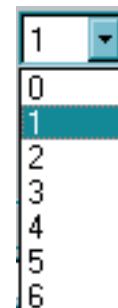
Check Boxes

A small white box like the one shown to the right is a **check box**. You can "check" and "uncheck" the selection by clicking in the box. These are used just like check boxes on pencil-and-paper forms — they are simple yes-no conditions. In the example at right, Receivables and Payables are checked and Payroll is not checked.

Radio Buttons

A cluster of small white circles, each with a label, is a set of **radio buttons**. They have this name because they work in a manner similar to the preset station buttons on your car radio — you can only have one radio station selected at a time. To select a radio button, click on it and a black dot will appear in the circle. Radio buttons are used when you have two or more choices but only one of those choices applies at any given time.

Scrollbars

Many times, a table of records holds more records than the program can fit on the screen. The **scroll-bar** is found on the right edge of the table. To move up or down through the table, click on the small black triangles at the top and bottom of the scrollbar. The small box between the triangles is a rough indicator of where you are within the table; think of it as being similar to an elevator's display that shows how close to the top or bottom of the building the car is.

Some tables also have **horizontal scrollbars** if they contain more information than will fit across the screen. You can use the small black triangles at the bottom left and right corners of the table to move from side to side within it.

NOTE: Some drop-down selection boxes have vertical scrollbars if they have more options than will fit in the selection box when it is open. These function in exactly the same manner as the scrollbars on tables of records.

Tabs

Some screens have lots of information that must be divided to be easier to track and access. In the WinTen² programs, these screens are divided into **tabs**, which are so named because they resemble the index tabs on file folders. Clicking on a tab will change the data displayed on the screen and the toolbar options available.
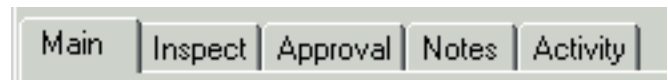
PROGRAM OVERVIEW

The WinTen² Section 8 Desktop Inspections program is designed to facilitate all aspects of Section 8 housing inspections under the HQS standards. It draws data from the WinTen² Section 8 Tenant and Landlord program in order to compile its database of Section 8 tenants, landlords, and units. The program's standard configuration includes the complete set of HQS inspections requirements. If your agency needs more detail or needs to fulfill other inspection requirements, you can customize the inspection protocols to suit your preferences and needs.

THE INSPECTION LIFE CYCLE

The diagram on the facing page shows the life cycle of a Section 8 inspection, from the initial identification of need through a passing result. Three conditions can generate the need for an inspection: a request for lease approval (RFLA), a lease anniversary, or a request for quality certification of a Section 8 unit. Any of these conditions can generate a request for an inspection, which, in turn, generates a scheduled inspection.

The WinTen² Section 8 Desktop Inspections program is designed to be used with handheld computers for a "paperless" system of inspection data gathering. However, you can use more traditional printed inspection forms and enter the data by hand if you so choose. Depending on whether you are using a hand-held unit or paper forms, the method in which you record the results of the actual inspection will differ.

If you are using a handheld unit, you will need to send the data file for the scheduled inspection from your workstation to the unit. This gives you a blank "electronic form" on your handheld unit for the inspection. Once you have sent the file to the handheld unit, you can perform the inspection and record its results. After performing the inspection, you will retrieve the completed inspection form from the handheld unit to your workstation to complete the inspection process and save it in your inspection records.

If you are using a printed HQS form, print a blank form and perform the inspection with it. When the inspection is complete, sit down at your workstation and enter the inspection's results in the program to save it in your inspection records.

Once the inspection has been performed and the results are in the program's inspection records, you are ready to print. Your print run should include notification letters for both the tenant and the landlord, as well as any reports or printed inspection forms that you need.

If the unit passed the inspection, the inspection cycle is now complete. If it failed, the notification letters will inform the tenant and the landlord of the critical deficiencies and the deadlines by which these must be corrected. You also should schedule a follow-up inspection within a reasonable period of time after these deadlines.

```
┌─────────────────────────┐   ┌─────────────────────┐   ┌─────────────────────────┐
│ Request for Lease Approval │   │     Anniversary     │   │   Quality Certification   │
└─────────────────────────┘   └─────────────────────┘   └─────────────────────────┘
```

Inspection Request

Schedule Inspection

Using Hand-Held Device?
— N
— Y

Y branch:
Send Form to Handheld

Perform Inspection

Retrieve Form from Handheld

N branch:
Print Blank HQS Form

Perform Inspection

Input Inspection Results

Print Letters and Reports

Pass or Fail?
— F
— P

Inspection Cycle Complete
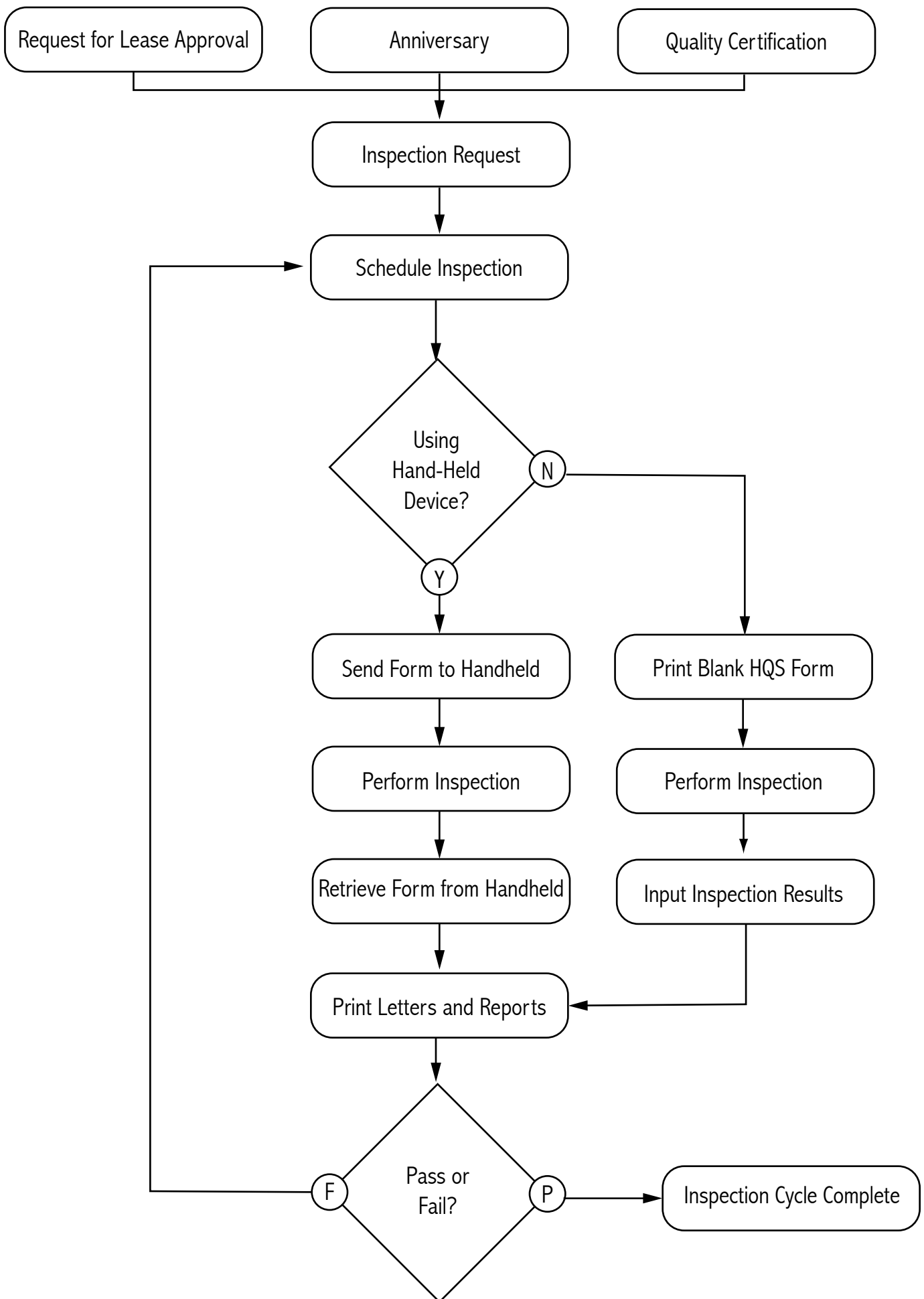
MAIN MENU

This screen is the starting point for using each of the Section 8 Inspections functions. Each function is detailed in its respective chapter.
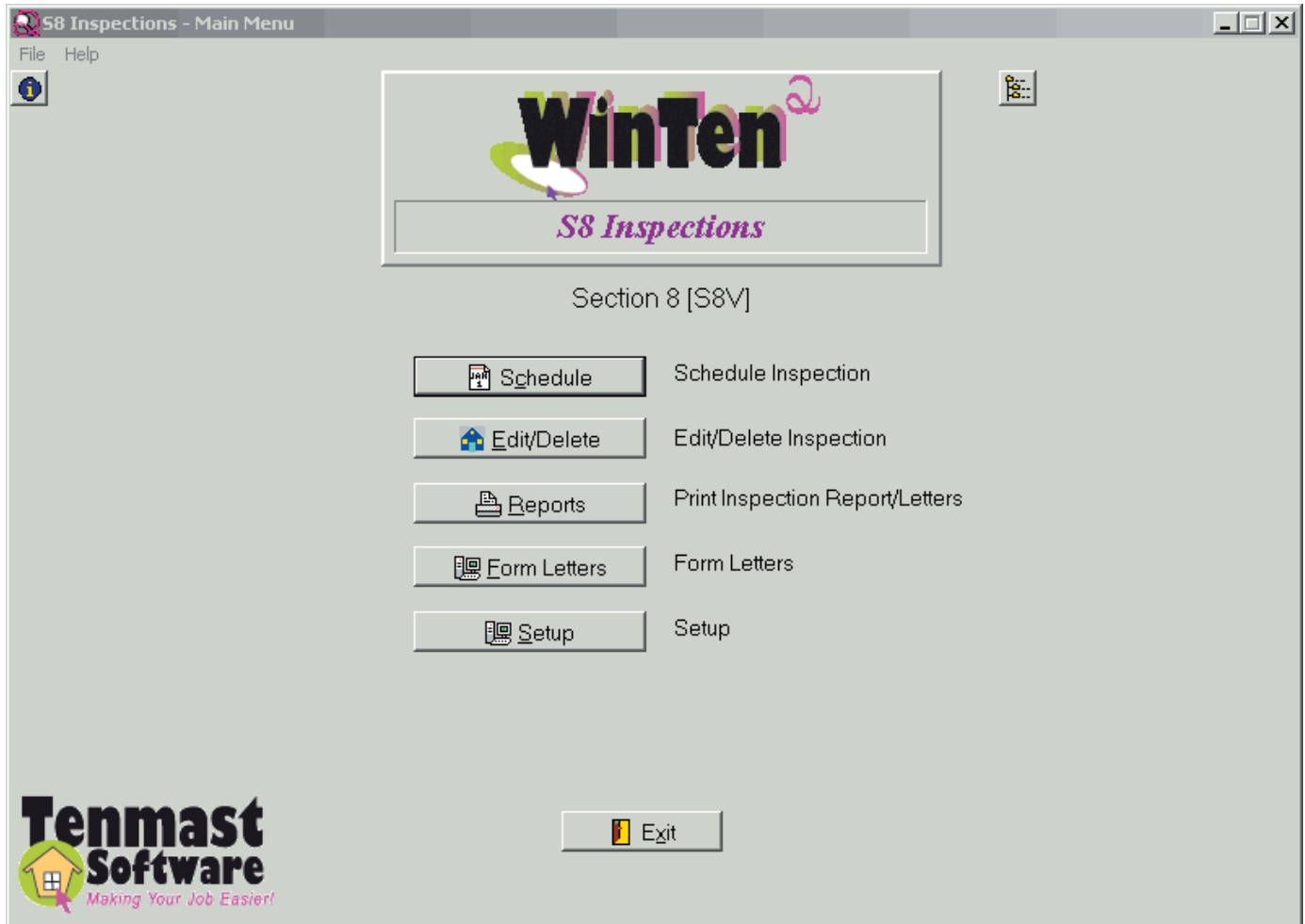
SETUP

The first time you run Section 8 Inspections, the first option you should select from the Main Menu is Setup. All WinTen² programs have Setup functions. The settings in the Setup screen control the program environment, and you can change many aspects of the program through these settings. You should take care to enter the proper information, as inaccurate settings can cause Section 8 Inspections to function incorrectly or to report incorrect data. The individual in charge of your WinTen² programs should periodically review each program's Setup to ensure that it is still correct. To use the Setup functions, click the Setup button or press <S> at the Main Menu.
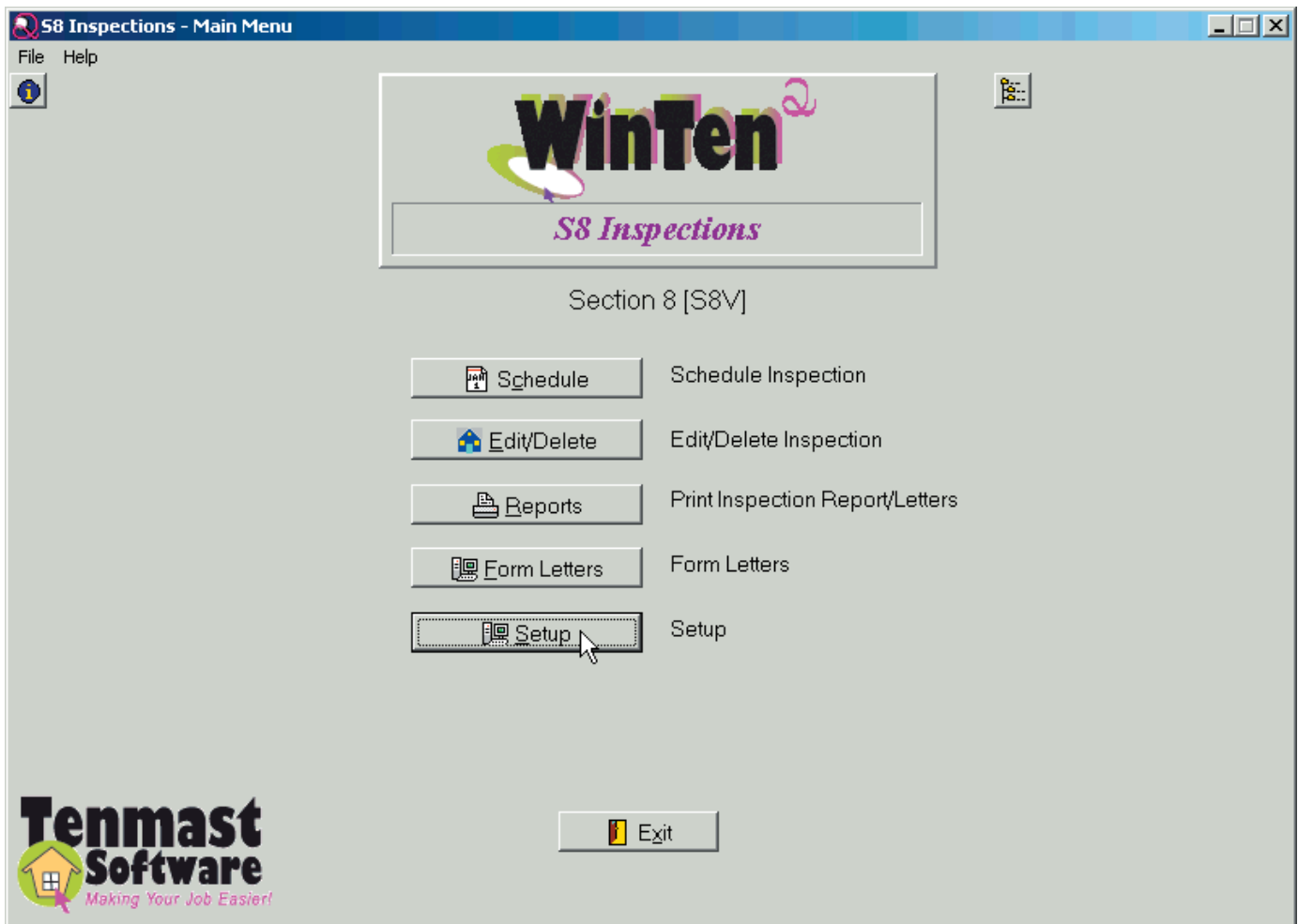
Setup Screen

The Setup screen has four function areas, accessed by a set of four buttons. Each of the four primary setup function buttons opens a corresponding screen or dialog box for setting up that aspect of the program.

This manual addresses the Maintain Inspectors and Maintain Protocols functions.

The Settings function contains only your agency's contact or "return address" information.

For help on using the Maintain Form Letters function, please see the user manual for WinTen² Form Letters.
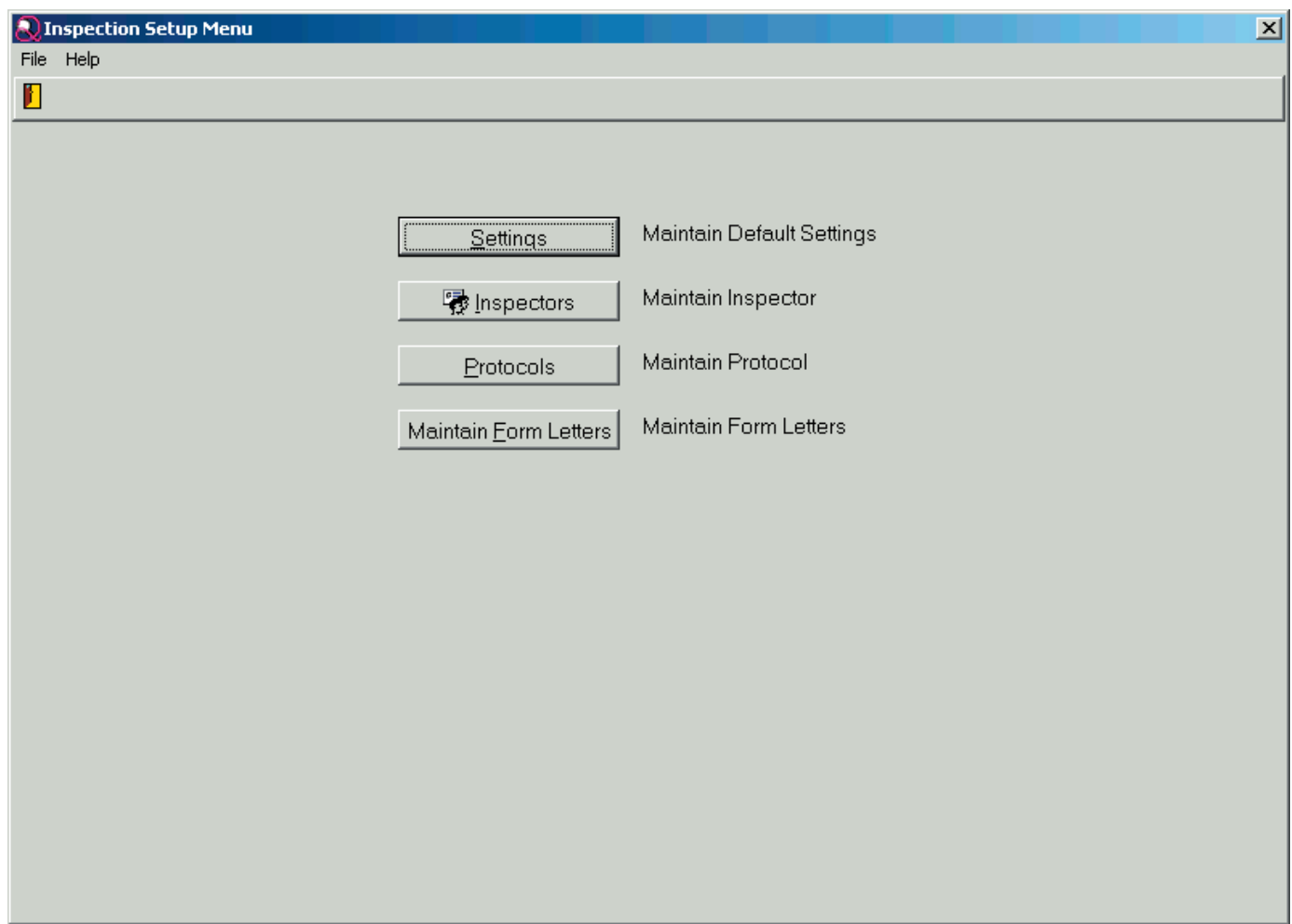
Browse Inspectors Screen

The Section 8 Inspections program organizes inspections by the inspector who is assigned to perform them. The Browse Inspectors screen opens when you click the Inspectors button on the Inspection Setup Menu screen. This screen displays a table of all inspectors currently set up in the program and allows you to select an existing inspector record for editing or deletion or to add a new inspector. If you choose to edit or add an inspector, the Maintain Inspectors screen opens.
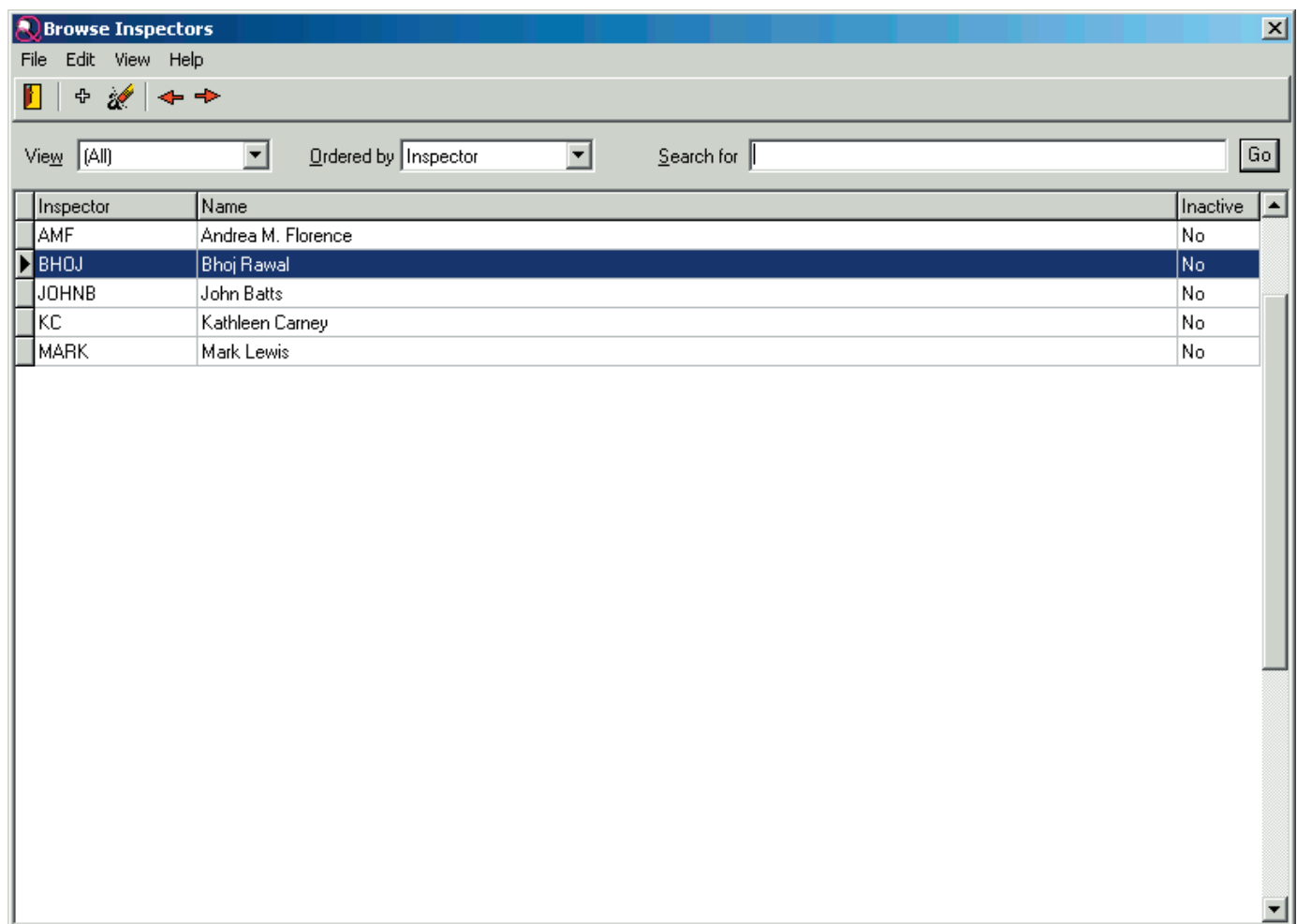
Maintain Inspectors Screen

The Maintain Inspectors screen allows you to edit the data for the currently selected inspector, or to add a new inspector.

Maintain Inspectors Screen Data Fields

Inspector
This is a short code to identify the inspector. It can be up to five characters long.

Inspector Name
This is the inspector's full name.

System User
This is the computer user name this inspector uses to log in to the Section 8 Inspections program.

Inactive
Check this box to remove this person from your list of active inspectors.

Browse Inspection Protocols Screen

The heart of any system of inspections is the inspection protocol: the set of criteria by which the unit being inspected is judged. For Section 8 inspections, the inspection protocol is the Housing Quality Standards (HQS). The HQS inspection protocol can be divided into several levels and sub-levels, as shown in the diagram below. Each sub-level has a corresponding screen or dialog box that allows the user to edit the elements of that sub-level. The first screen associated with the protocol editing process is the Browse Inspection Protocols screen, which you open by clicking the Protocols button.

Each inspection protocol has multiple inspection areas. In the case of HQS, these correspond to the physical areas of a dwelling unit (bedrooms, kitchen, etc.) and/or the unit's overall qualities (health & safety). Each area has one or more "items," which are individual attributes that must be inspected (electrical hazards, floor condition) for that area. Each item has one or more "deficiencies," which are specific problems that the inspector can identify with that item (broken or frayed wiring, missing switch cover plate). The HQS protocol in the WinTen² Section 8 Desktop Inspections program includes all of the inspectable areas and items found on the HQS inspection form.

Tenmast also extracted a detailed list of deficiencies from the HQS definitions. By including a detailed set of deficiencies for each inspectable item, we have minimized the need for the inspector to record separate comments in order to accurately record the deficiencies.

In addition, each protocol has its own set of status codes, which indicate a given inspection's current condition (passed, failed, requested, scheduled).

Protocol (HQS)

Status Codes

Inspection Areas

Inspection Items

Inspection Deficiencies
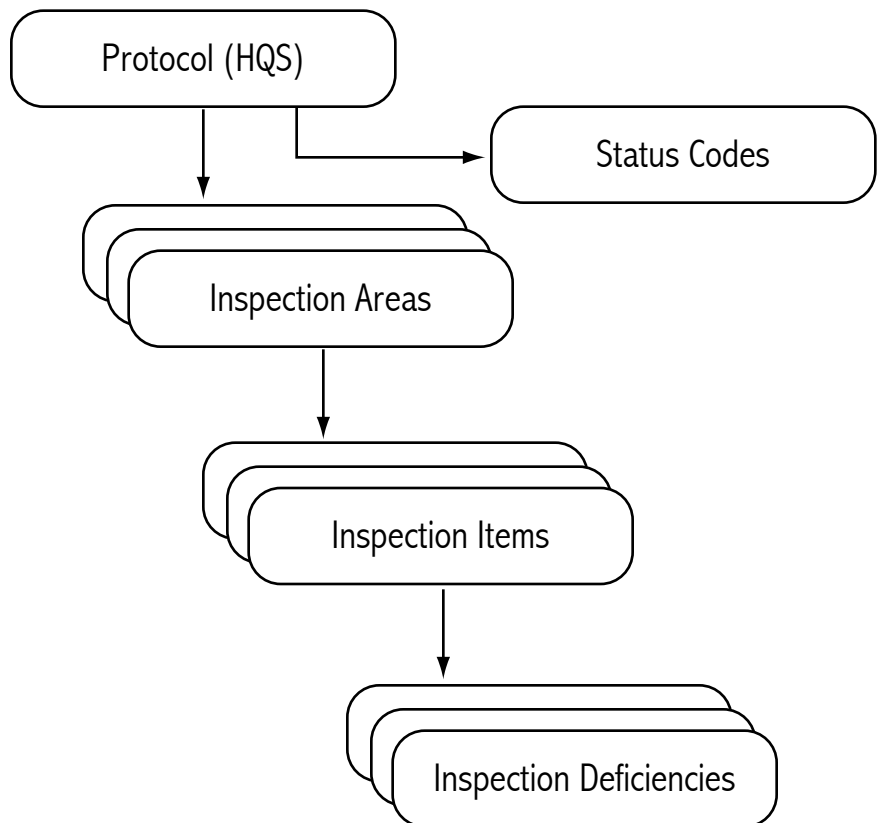
The Browse Inspection Protocols screen is where you can create a new inspection profile or edit the areas, items, and deficiencies of an existing one. This screen shows a table of all inspection protocols that are currently defined in the program. The "default" inspection protocol is the Section 8 HQS protocol. Many agencies will find this protocol sufficient without modification. However, some will want to create their own inspection protocols or add their own specialized criteria to the HQS inspection protocol. On the Browse Inspection Protocols screen, you can also make a copy of an existing protocol, which you can modify to suit your needs.

Protocol	Description	Version
AMF	Andrea's Inspection Protocol	
HQS	HQS	09122003
HQS2	HQS2	09302004
HQS3	HQS3	10012004
TENMAST	Tenmast Defined Protocol	01012003
UPSC	PHA Protocol	10122003
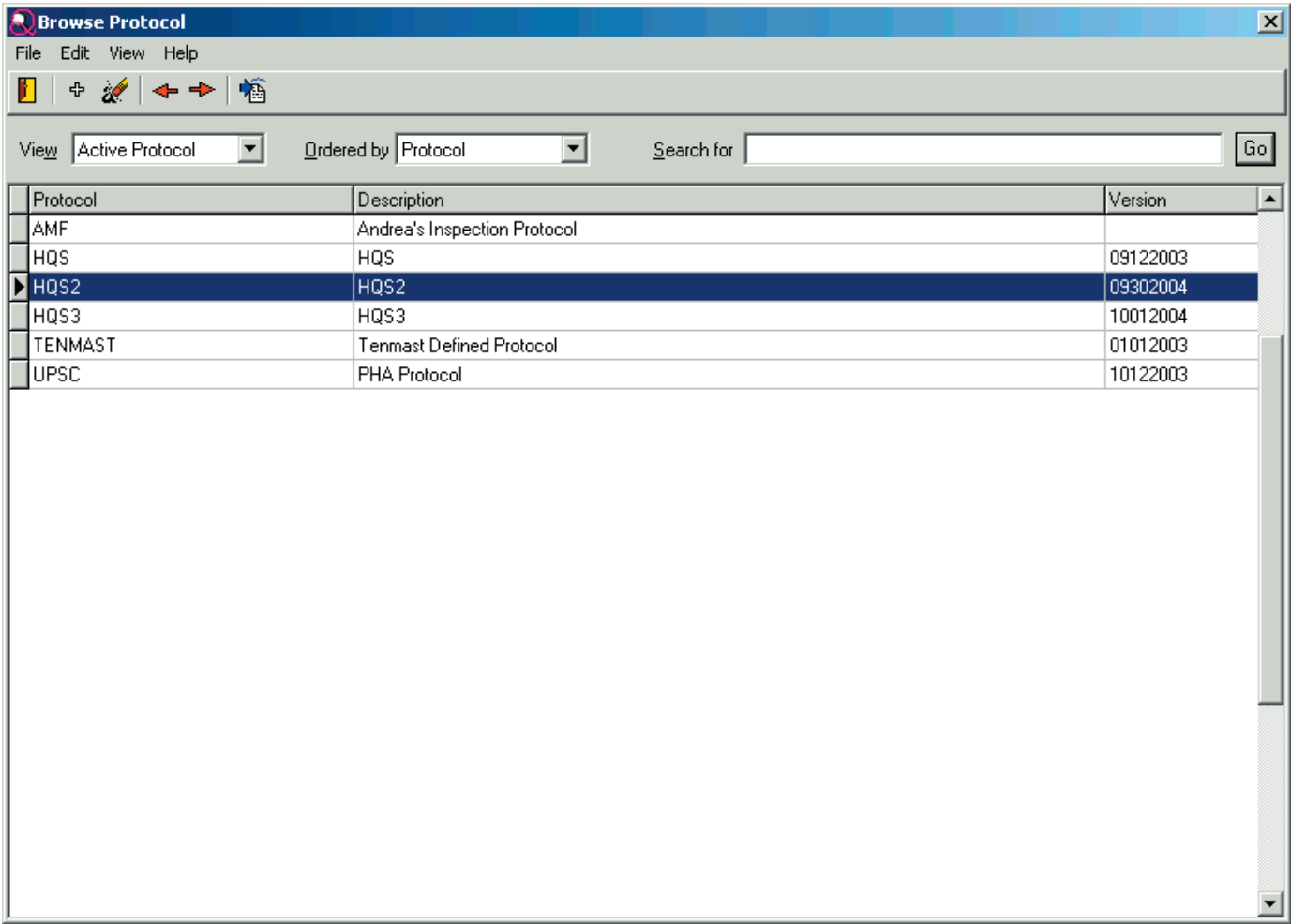
Adding an Inspection Protocol

To add a protocol, click the Add New Protocol button. This opens the Maintain Inspection Protocols screen, described on the following pages. This screen allows you to enter the basic settings for the new inspection protocol and to add new areas.

Editing an Inspection Protocol

To edit an existing protocol, click on it in the table of protocols and click the Edit Protocol button. This opens the Maintain Inspection Protocols screen with the selected protocol's information in the data fields. This screen allows you to add, edit, or delete the areas, items, and deficiencies.

Copying an Inspection Protocol

Some users may want to develop their own protocols that are based on existing protocols. Copying an existing protocol allows you to make changes to the copy while maintaining the integrity of the original. To make a copy of a protocol, click on it in the table of protocols and click the Copy Selected Protocol button. This opens the Copy Protocol wizard. Enter the new protocol information and complete the wizard to make the copy.

Maintain Inspection Protocols Screen

The Maintain Inspection Protocols screen allows you to add, edit, or delete the areas, items, and deficiencies and related status codes for a new or existing protocol. It has four tabs: Protocol, Areas, Status, and Severity. The screen always opens on the Protocol tab.

Protocol Tab

The Protocol tab contains basic inspection protocol information.
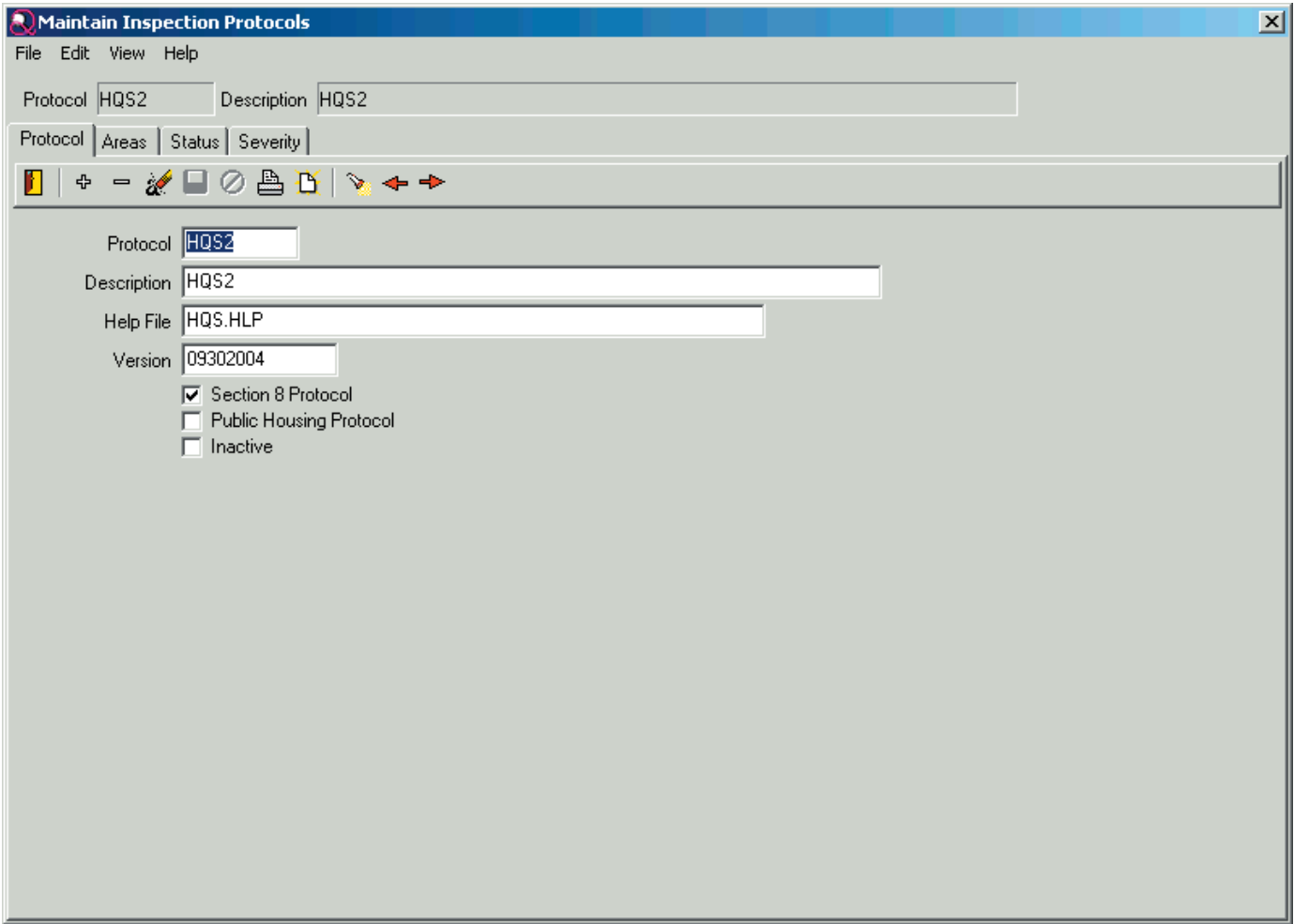
Protocol Tab Data Fields

Protocol
This is a short identifying code for the inspection protocol. It can be up to ten characters long. This will be used to select a protocol for a given inspection to follow.

Description
This is an extended description of the inspection protocol.

Help File
This is the name of the standard Windows help file that corresponds to the protocol. Agencies can use a variety of third-party software to create detailed Windows help files for their custom protocols. Tenmast includes a help file for the HQS inspection protocol with the Section 8 Inspections program.

Version
This is your agency's version number or version date for the inspection protocol.

Section 8 Protocol
Check this box if you use this inspection protocol for Section 8 inspections.

Public Housing Protocol
Check this box if you use this inspection protocol for public housing inspections.

Inactive
Check this box to disable this inspection protocol.

Deleting an Inspection Protocol

To delete an existing protocol, open it on the Protocol tab and click the Delete Protocol icon. A dialog box appears that asks you whether or not you want to delete the selected record. Click Yes to delete the protocol or No to cancel the deletion.

NOTE: You cannot delete the HQS protocol that is provided with the program.
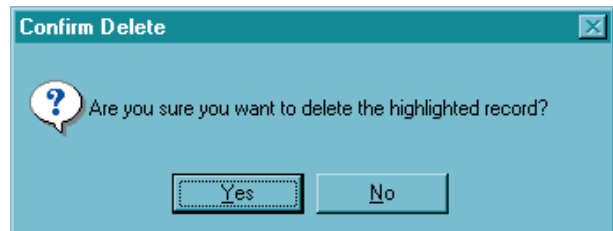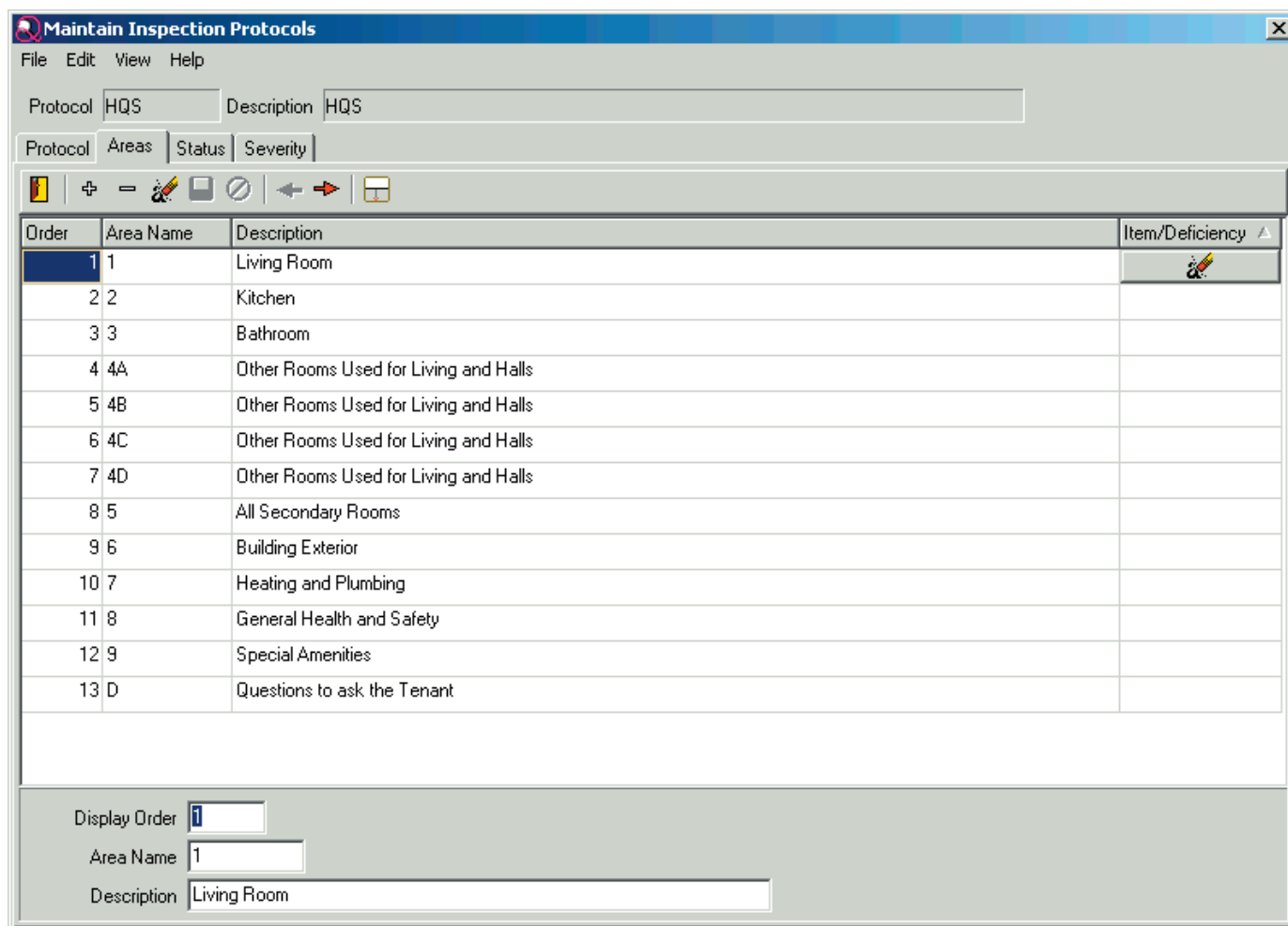
Areas Tab

The Areas tab contains a list of inspection areas defined for the currently selected protocol.

Each area can have a list of specific inspectable items within that area. Each item, in turn, can have its own list of deficiencies — specific things that an inspector can find wrong with the item. We will discuss these options in a later section. (See *Maintain Inspection Items/Deficiencies Screen*, below.)

CAUTION

For HQS inspection protocols, do not change the Area Name if you want to print Form HUD-52580. These must remain the same so the program knows where to put the inspection results.
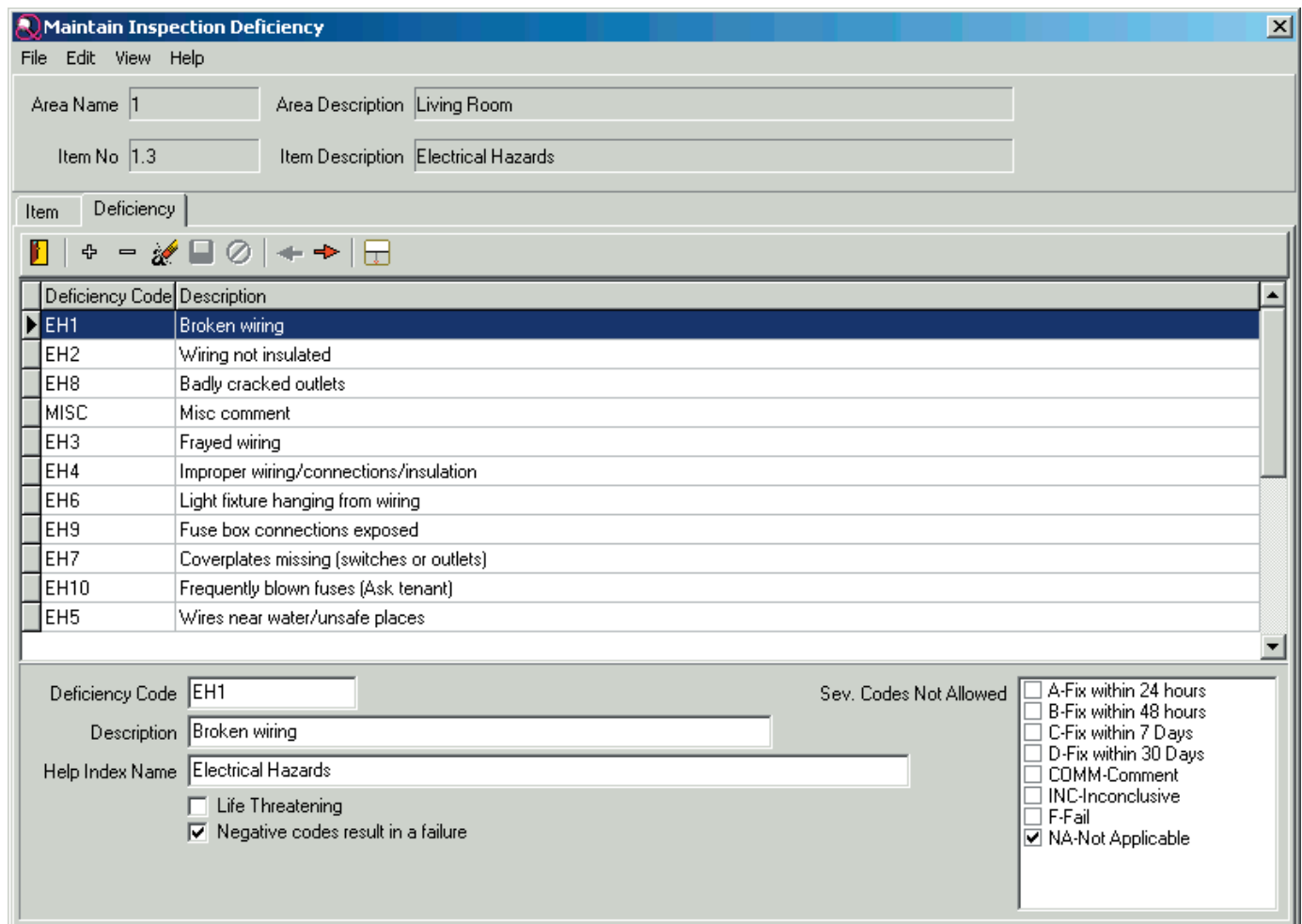
Areas Tab Data Fields

Display Order
This field sets the order in which the areas appear on the screen.

Area Name
This is a five-character code for the area. In the HQS inspection protocol, each area is assigned a two-digit number.

Description
This is an extended description of the area.

Maintaining Inspection Items and Deficiencies

To view and maintain the inspectable items for any area (and, in turn, the deficiencies for any item), select the area on the Areas tab and then click the Edit button to the right of that area. This will open the Maintain Inspection Items/Deficiencies screen.

For help on maintaining this information, see *Maintain Inspection Items/Deficiencies Screen*, below.
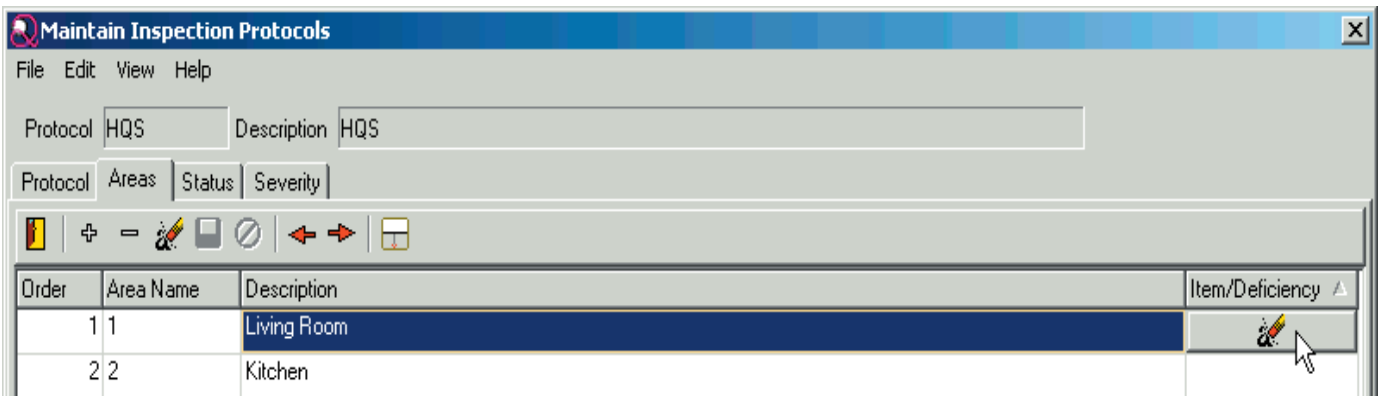
Status Tab

The Status tab of the Maintain Inspection Protocols screen allows you to maintain the available status codes for specific inspections that follow this protocol. You can add new status codes, edit status codes, or delete status codes.

The four default status codes for an inspection are Fail (inspection was performed and the unit failed inspection), Pass (inspection was performed and the unit passed inspection), Requested (inspection of the unit has been requested but not yet scheduled to be performed), and Scheduled (inspection of the unit has been scheduled but not yet performed).

Status Tab Data Fields

Status
This is the code that denotes the inspection status. It can be up to ten characters long.

Description
This is an extended description of the inspection status.

Fail Inspection
Check this box if this is a "failed" status for an inspection.

Severity Tab

Section 8 Inspections uses a predefined set of severity codes to record the relative conditions of each deficiency that the inspector observes. The Inspection Severity tab allows you to add, edit, or delete these codes, which can be applied to any deficiency.

Severity Tab Data Fields

Severity Code
The severity code itself can be up to five characters long.

Description
This is an extended description of the severity code.

PHAS Code
Select the PHAS code, if any, that corresponds to this severity code. This PHAS code will be applied to any work order(s) generated by a deficiency of this severity.

Work Order Priority
Select the priority, if any, to be applied to any work order(s) generated by a deficiency of this severity.

Generate WO
Check this box if a deficiency of this severity should automatically generate a work order.

HINT

PHAS codes and work orders are typically used only for public housing, not Section 8.

Print on Landlord Letters
Check this box if you wish to print deficiencies of this severity on landlord letters.

Print on Tenant Letters
Check this box if you wish to print deficiencies of this severity on tenant letters.

Fail Inspection Item
Check this box if a deficiency of this severity causes an inspection item to fail.

Maintain Inspection Items/Deficiencies Screen

The Maintain Inspection Items/Deficiencies screen allows you to add, edit, or delete the inspectable items for any area within a protocol and the deficiencies for any of those items.

To view and maintain the inspectable items for any area (and, in turn, the deficiencies for any item), select the area on the Areas tab (see *Areas Tab*, above) and then click the Edit button to the right of that area. This will open the Maintain Inspection Items/Deficiencies screen.
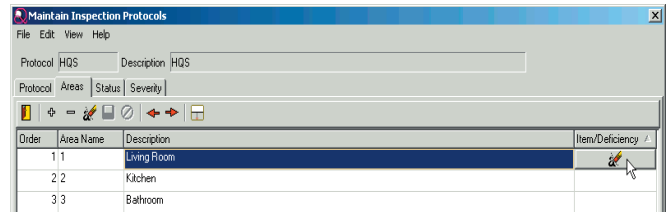
This screen has two tabs: Item and Deficiency. It always opens on the Item tab.

Item Tab

The Item tab contains a list of all inspectable items for the area currently selected on the Areas tab of the Maintain Inspection Protocols screen.

Item Tab Data Fields

Display Order
This field sets the order in which the items appear on the screen.

Map to 52580 Line
Select the line item of Form HUD-52580 to which this item corresponds.

Item Number
This code identifies the item. It can be up to ten numbers and/or letters.

In the HQS inspection protocol, each item is pre-assigned a specific item number.

Description
This is an extended description of the item.

Help
Enter the identifier of the Help topic, if any, that corresponds to this item.

Answer Type
This is the set of results that are possible for the item. When the inspector is conducting the inspection, one of these results will appear depending on which deficiencies, if any, the inspector cites for the item. The HQS inspection protocol uses Pass/Fail results. The UPCS inspection protocol uses NOD/OD/NA (No Observed Deficiency/Observed Deficiency/Not Applicable) and Health & Safety results. Both inspection protocols use Yes/No answers (which have no deficiency codes) for questions directed to tenants.

The "Check Box" answer type is used to indicate whether or not the item exists. It is used for amenities in the HQS protocol.

A "Question (Free Form)" answer type allows you to confirm that a question has been answered.

NOTE: The answer types you select for a given item will apply to all deficiencies related to that item. The deficiency types determine how the deficiency is displayed on the inspection.

CAUTION

For HQS inspection protocols, do not change the Item Number if you want to print Form HUD-52580. These must remain the same so the program knows where to put the inspection results.

Deficiencies Tab

The Deficiencies tab contains a list of all possible deficiencies for the item currently selected on the Item tab.

Deficiencies Tab Data Fields

Deficiency Code
This is the unique identifying code that identifies this deficiency within the inspection item. No other deficiency within the item can have this code. The code can be a maximum of five characters long.

Description
This is the extended description of the deficiency.

Help Index Name
This is the name under which this deficiency is listed in the index of the Windows help file for this protocol. If you do not have a Windows help file for this protocol, leave this field blank.

Life Threatening
If the deficiency is considered life-threatening to the unit's residents, check this box. You can create a report of all life-threatening deficiencies for each unit.

Negative Codes Result in a Failure
If the deficiency being cited should generate a failure for the entire inspection, check this box.

Sev. Codes Not Allowed
Check all severity codes that are *not* applicable for this deficiency.

SCHEDULE INSPECTIONS

The primary purpose of the WinTen² Section 8 Desktop Inspections program is to record the results of your Section 8 unit inspections. It also assists you in managing your inspection schedules. Scheduling an inspection is one way to begin tracking that inspection. The scheduling task is performed on the Schedule Inspections screen. To enter this screen, click the Schedule button or press <C> from the Main Menu.
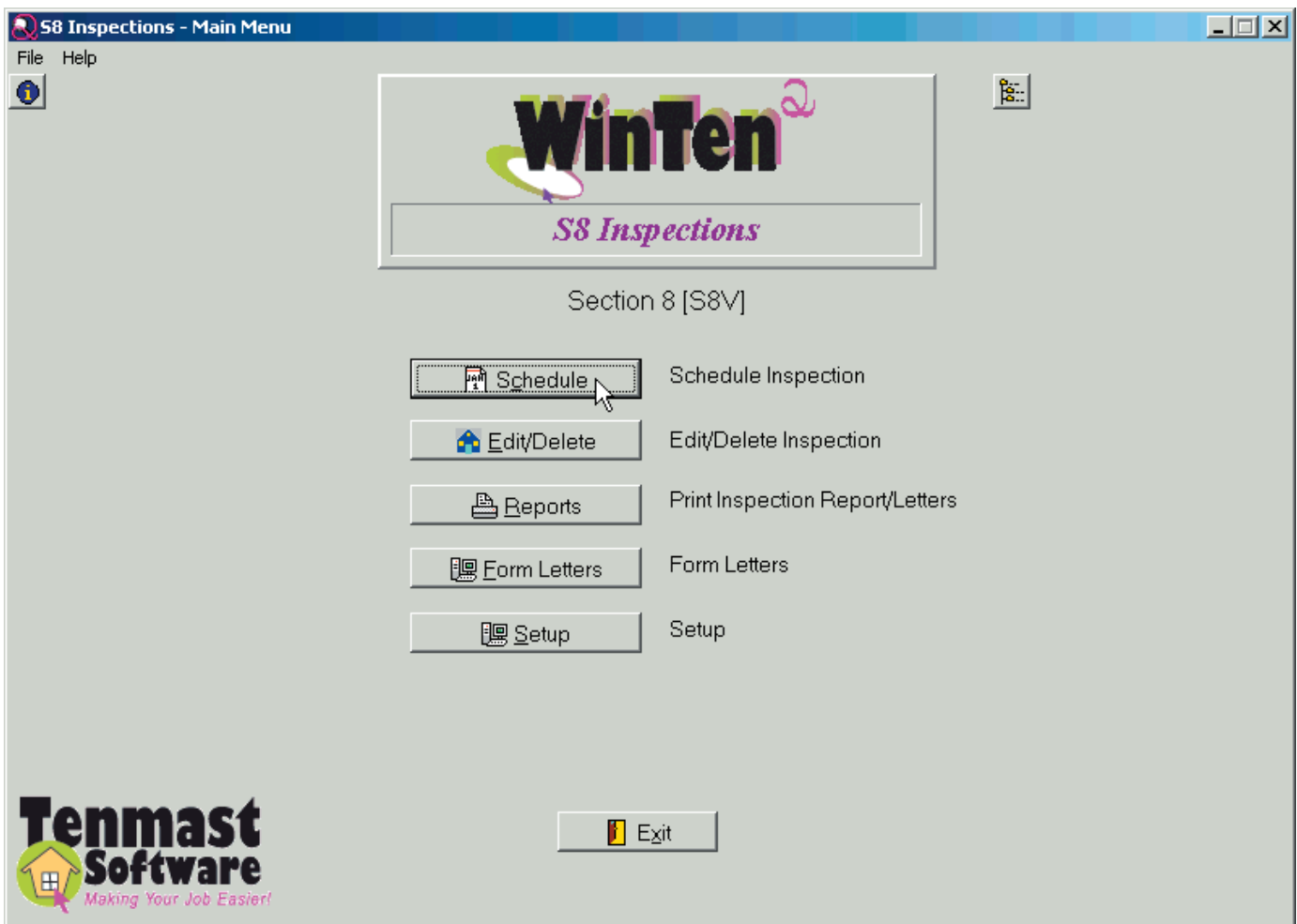
Schedule Inspections Screen

The Schedule Inspections screen is where you schedule inspections for Section 8 tenants. The top portion of the screen contains a table of all tenants who live in Section 8 units in the selected data area. The tenant table can be sorted by tenant last name, landlord last name, address, next inspection date, or tenant social security number.

The bottom portion of the screen contains a table of all currently scheduled inspections for the inspector shown in the Inspector field near the middle of the screen.

Sort Order Options

You can change the sort order of the tenant table at the top of the screen by clicking the drop-down arrow after the Ordered By field and then clicking Last Name, Landlord, Address, Next Inspection, or SSN.
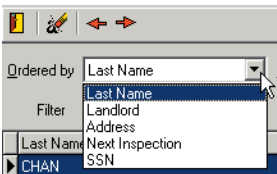
These options correspond to the column headers of this table. You can also change the sort order by clicking any column header itself.

Filtering the Data

If you are dealing with a large number of tenant records, scrolling through the entire tenant table to find a specific record may be rather time-consuming. The Schedule Inspections screen includes a filtering feature that allows you to display only tenant records that match a filtering criterion that you select. This also allows you to set a filter criterion for adding a batch of inspections. (See *Scheduling a Batch of Inspections*, below.)
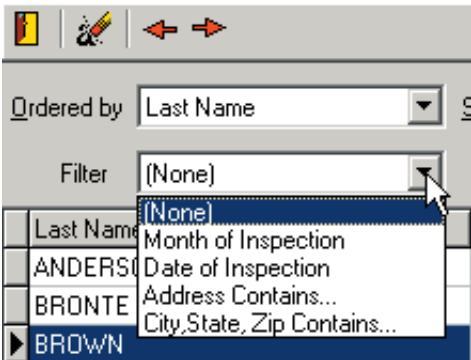
To filter the tenant records, first click the drop-down arrow after the Filter field and then click the option on which you wish to filter. (We discuss these options below.) This causes a criterion field and an Apply Filter button to appear to the right of the Filter field.

To complete the filtering, enter your specific filter criterion in the criterion field and then click the Apply Filter button.
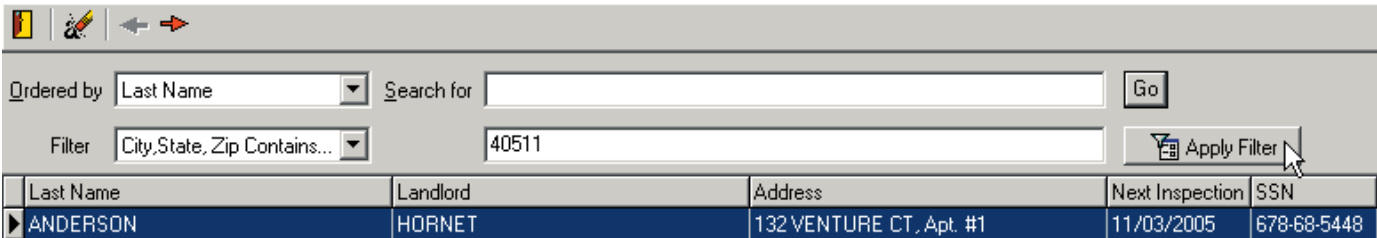
Tenant Filtering Options

None

This option shows all records. You can also use this option if you have filtered the records and now want to see all of them again.

Month of Inspection

This is the month in which the tenant's next inspection should take place, entered as a two-digit number. Enter "01," e.g., for January.

Date of Inspection

This is the date on which the tenant's next inspection should take place, entered in MM/DD/YYYY format.

Address Contains...

This option filters records for those whose unit addresses contain a specific word or part of a word. For example, filtering on "WOOD" will return all units whose addresses include "Woodwind Drive," "Dogwood Lane," "Woodhaven Road," and so forth.

City, State, Zip Contains...

This option filters records for those whose city, state, and zip code fields contain a specific word/number or part of a word/number. For example, filtering on "405" would return all units with the zip codes "40511," "40512, "40585," and so forth.

Schedule Inspections Screen Data Fields

Table Data Fields

Last Name
This is the tenant's last name.

Landlord
This is the name of the tenant's landlord. If the landlord is an individual, only the person's last name appears.

Address
This is the street address of the unit.

Next Inspect
This is the next inspection date for the unit.

SSN
This is the tenant's social security number.

Screen Data Fields

Search For
The Search For field lets you type a value and press Enter to search for the first match in the table. Your choices for the other option fields affect the behavior of the Search For field.

You can search only for records that are currently showing, based on the Filter field.

The value you search for must correspond to what is in the Ordered By field. If you order by last name, for example, you must type a tenant's last name as your search. If you order by SSN, you must type a social security number as your search.

You can type the complete search value or only the first few characters.

Activate the search by pressing Enter or clicking the Go button.

The program will find the first match for what you type. If the record you want is not the first match, it should be nearby; press DownArrow to move down the table one record at a time until you find the one you want.

Schedule Date

When you schedule an inspection, the inspection will be scheduled to be performed on this date.

Schedule Time

When you schedule an inspection, it will be scheduled to be performed at this time.

Protocol

This drop-down selection box allows you to select from all inspection protocols that are set up in the program. When you schedule an inspection, the definition for the selected protocol will appear in the inspection file for that inspection.

Inspector

This drop-down selection box allows you to select from all inspectors who are set up in the program. When you schedule an inspection, the selected inspector will be assigned to perform that inspection. The table at the bottom of the screen displays only those inspections assigned to the selected inspector.

Hint

Due to the flexible schedules of many housing inspectors, you may be unable to schedule an exact time for the inspection. We recommend scheduling an approximate time.

View Tenant Information Dialog Box

The View Tenant Information dialog box appears when you click the Edit icon at the top of the screen (above the tenant table). This dialog box displays the tenant information that is contained in the inspections database. When you are done editing, click the OK button to save your changes and close the dialog box or the Cancel button to close the dialog box without saving your changes.

NOTE: In this dialog box, you can edit only the next inspection date and time. All other data must be edited in the Section 8 Tenant & Landlord program.

View Tenant Information Dialog Box Data Fields

Tenant
This is the name of the tenant.

SSN
This is the tenant's social security number.

Address
This is the full street address of the unit.

Phone
This is the tenant's phone number.

Family Size
This is the number of residents in the tenant's family.

Number of Bedrooms
This is the number of bedrooms in the unit.

Contract Rent
This is the tenant's contract rent.

Next Inspection Date
This is the date of the next inspection of the unit.

Time
This is the time of the next inspection of the unit.

Scheduling an Inspection

To schedule an inspection, select the unit you want to inspect by clicking on that unit in the table at the top of the screen. Enter the date and time at which to schedule the inspection and select the inspection protocol to use and the inspector who will perform the inspection in the appropriate data fields. Then click the Add button. The selected tenant is added to the inspection schedule with the selected inspection date, inspection protocol, and inspector and an inspection time of midnight (you will probably want to edit this inspection time).

Scheduling a Batch of Inspections

To schedule a batch of inspections, filter the table of tenants to display all of the tenants you want to schedule. Enter the date on which to schedule the inspection, the inspection protocol to use, and the inspector who will perform the inspection in the appropriate data fields. Then click the Add Batch button. Every tenant in the table of tenants is added to the inspection schedule with the selected inspection date, inspection protocol, and inspector and an inspection time of midnight (you will probably want to edit this inspection time). Typically, you will use this function to schedule inspections for every tenant whose next inspection falls in a specific month or on a specific date.

Scheduling a Vacant Unit Inspection

The Schedule Inspections screen shows only units that are currently occupied by tenants. At times, you may need to inspect an unoccupied unit. To do this, enter the date and time at which to schedule the inspection and select the inspection protocol to use and the inspector who will perform the inspection in the appropriate data fields. Then click the Add Vacant Unit Inspection icon (near middle left of the screen). This opens the Vacant Unit Information dialog box. Enter all of the data that you have available in the data fields and click the OK button.

Vacant Unit Information Dialog Box

This dialog box allows you to enter the tenant and unit information for a vacant unit for which you are scheduling an inspection.

Vacant Unit Information

Field	Value
First Name	Jason
Last Name	Fwyman
Tenant SSN	937-32-4426
Address	850 Brook St., #2
City	Lexington
State	KY Zip 40514
County	Fayette
Phone	(__)__-____
Bedrooms	2 Census Tract 632
Unit Type	Singel Family Detached
Landlord Name	Douglas Fianchi
Landlord SSN	364-24-7340
Landlord Address	3035 Pimlico Pkwy.
City	Lexington
State	KY Zip 40517
Phone	(859)273-0959

Get Unit

✓ OK   ✗ Cancel

Vacant Unit Information Dialog Box Data Fields

First Name

This is the first name of the prospective tenant.

Last Name

This is the last name of the prospective tenant.

Tenant SSN

This is the prospective tenant's social security number.

Address

This is the vacant unit's street address.

Hint

You can click the Get Unit button to select the unit from the Browse Housing Units screen. If you do so, the unit fields on the Vacant Unit Information dialog box will populate automatically based on the unit you choose.

City

This is the city in which the vacant unit is located.

State

This is the state in which the vacant unit is located.

Zip

This is the vacant unit's zip code.

County

This is the county (or parish, for Louisiana) in which the vacant unit is located.

Phone

This is the phone number at which the prospective tenant can be reached.

Bedrooms

This is the number of bedrooms in the unit.

Census Tract

This is the unit's census tract code.

Unit Type

This drop-down selection box allows you to set the unit's type as Single Family Detached, Manufactured Home, Duplex or Two Family, Row House or Town House, or Low Rise.

Landlord Name

This is the name of the unit's landlord.

Landlord SSN

This is the social security number (or employee identification number) of the unit's landlord.

Landlord Address

This is the street portion of the landlord's mailing address.

City

This is the city portion of the landlord's mailing address.

State

This is the state portion of the landlord's mailing address.

Zip

This is the landlord's zip code.

Phone

This is the landlord's phone number.

Removing a Scheduled Inspection

To remove an inspection from the list of scheduled inspections at the bottom of the screen, select it in the table of inspections by clicking on it. Then click the Delete Inspection icon. A dialog box appears that asks you whether or not you want to delete the inspection record. Click Yes to delete the inspection or No to return to the Schedule Inspections screen.

Editing an Inspection Schedule

To edit an inspection's schedule, select that inspection in the table at the bottom of the screen and click the Review/Edit Selected Inspection icon (near the middle left, just above the bottom table). This opens the Review/Edit Schedule dialog box for the selected inspection.

Review/Edit Schedule Dialog Box

This dialog box allows you to edit the scheduling information for the selected inspection. The top of the screen displays the tenant's name and the unit's address, which you cannot edit. To change the inspection's schedule, edit the data fields you want to change and click the OK button. Click the Cancel button to exit without changing the inspection's schedule.

Review/Edit Schedule Dialog Box Data Fields

Inspector
This drop-down selection box allows you to change the inspector assigned to perform the inspection, selecting from the list of inspectors currently set in the program.

NOTE: If you change the assigned inspector, the inspection will not appear in the table of scheduled inspections when you return to the Schedule Inspections screen because it will have moved to the new inspector's schedule. To see it, you must change the selected inspector in the Inspector drop-down selection box on the Schedule Inspections screen.

Scheduled Date
This is the date for which the inspection is scheduled.

Scheduled Time
This is the time for which the inspection is scheduled.

Inspection Type
This field allows you to specify whether the inspection is an initial inspection, a recertification, or a special inspection of some type.

EDIT/DELETE INSPECTIONS

Once you have scheduled an inspection, you can view, edit, or delete it. To perform any of these functions, click the Edit button or press <E> at the Main Menu.
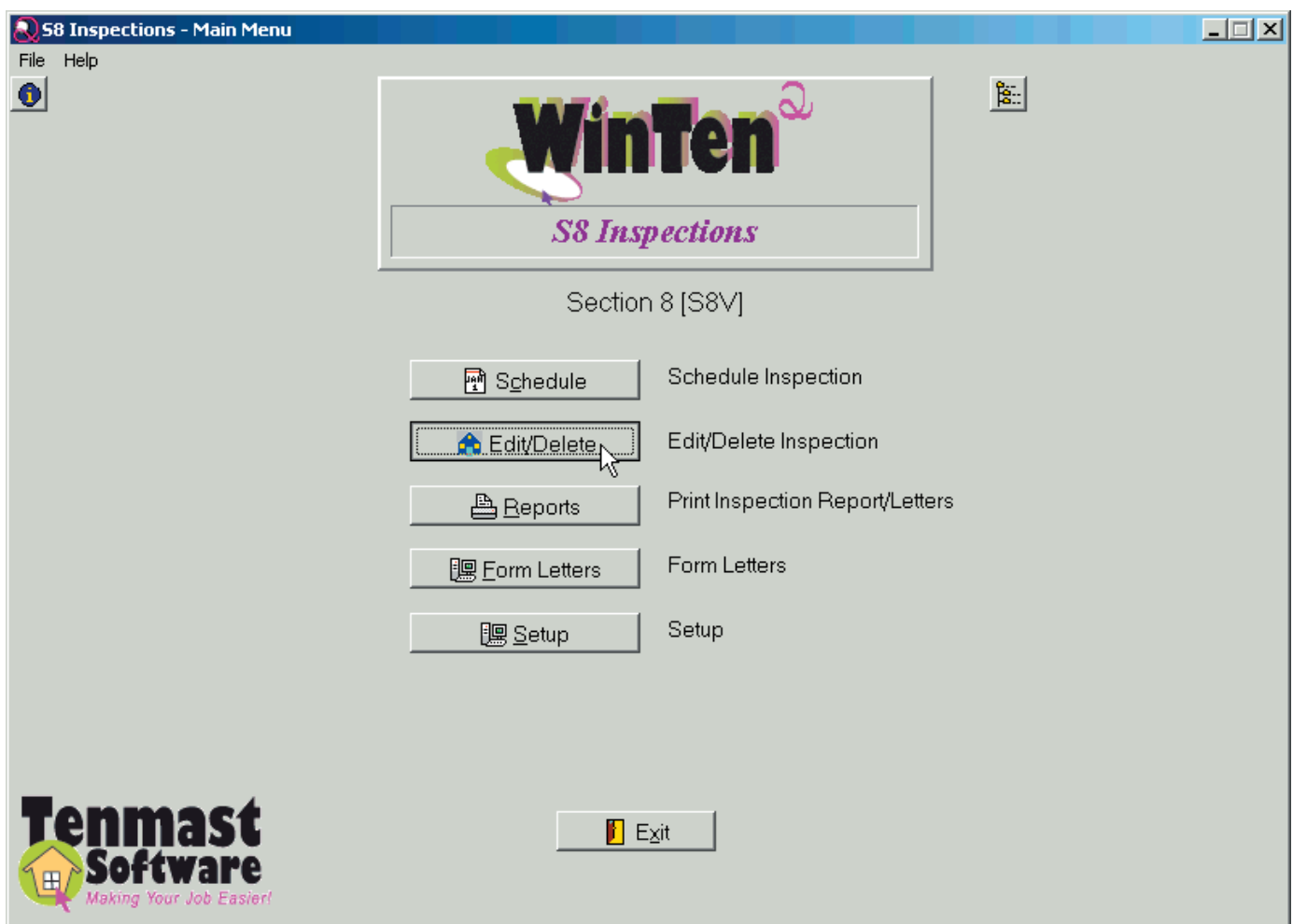
Browse Inspections Screen

The first thing you see when you choose to view, edit, or delete an inspection is the Browse Inspections screen. This screen displays a table of all inspections that are assigned to, or were performed by, the inspector whose name appears in the View field. To change the inspector whose inspections are displayed, use the View field drop-down selection box at the upper left corner of the screen.

Browse Inspections Screen Table Columns

The table of existing inspections displays several key pieces of information by which you can identify the inspection that you want to examine.

Inspection Date
This field displays the date on which the unit's last inspection was performed.

Status
This is the inspection's status: Requested, Scheduled, Pass, Fail, or a custom status defined in the inspection protocol setup.

Address
This is the street address of the unit.

Tenant Name
This is the name of the tenant who occupies the unit.

Landlord Name
This is the name of the unit's landlord.
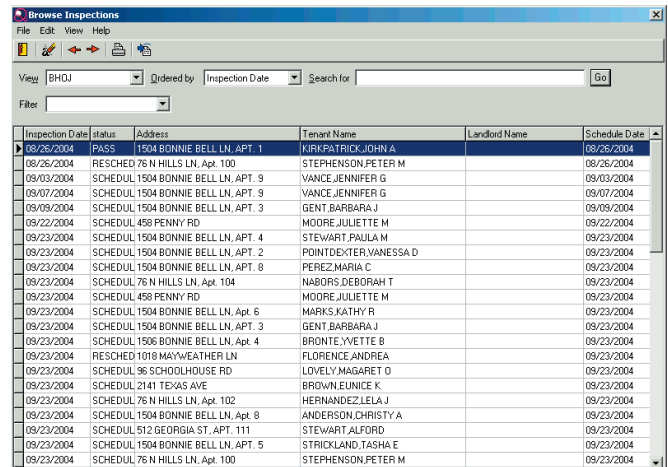
Schedule Date
This field displays the date on which the unit's next inspection is scheduled.

Printing Inspection Reports

To print one or more reports on an inspection, select it and click the Print icon. This opens the Print Inspection Reports dialog box. From here, you can choose to print any combination of five reports on the selected inspection.
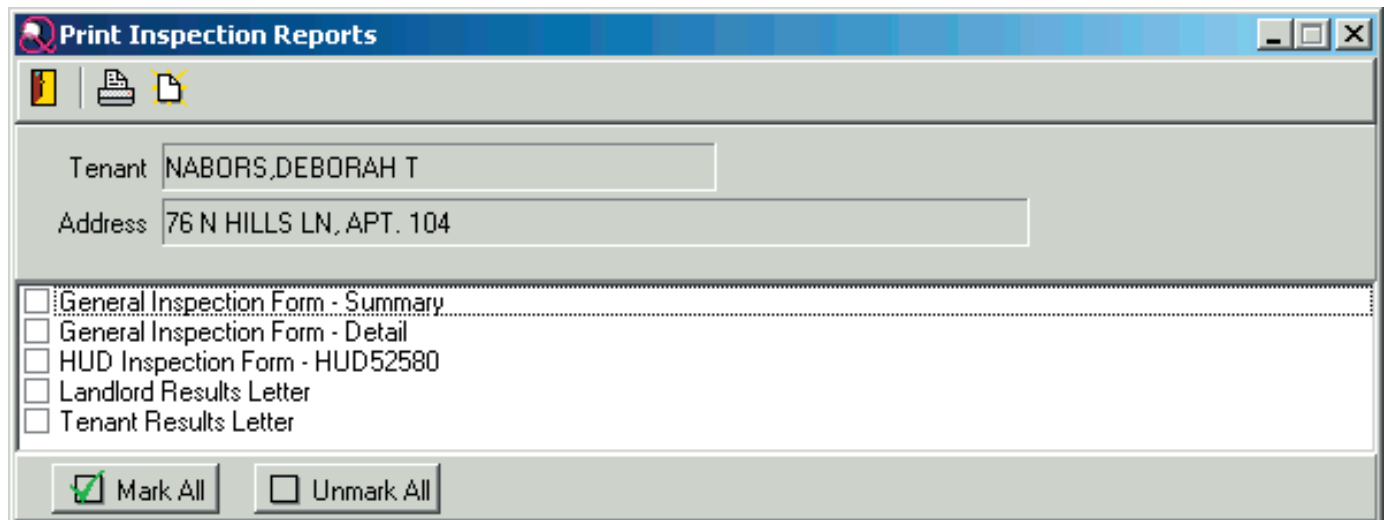
Print Inspection Reports Dialog Box

The Print Inspection Reports dialog box contains five check boxes, which allow you to select the reports you want to print for the selected inspection. To preview reports, check the boxes that correspond to the reports you want and click the preview icon. To print reports, check the boxes that correspond to the reports you want and click the print icon. Click the Exit icon to close the dialog box.

Inspection Reports

General Inspection Form — Summary
This report shows every failed area and item in the selected inspection, with status codes for each.

General Inspection Form — Details
This report shows every area, item, and deficiency in the inspection protocol for the selected inspection, with status codes for each. This specifically includes passed items.

HQS Inspection Form — HUD-52580
This option produces an official HQS inspection form (Form HUD-52580) for the selected inspection.

CAUTION

This option will not work properly if the inspection protocol used for this inspection has a different number of areas from the HQS protocol. You may, however, use a modified HQS protocol with additional items or deficiencies and still print the HQS inspection form.

Landlord Results Letter
This option produces a landlord notification letter detailing the results of the inspection. If the inspection has not yet been performed, this will produce an empty notification letter with no deficiency notifications.

Tenant Results Letter
This option produces a tenant notification letter detailing the results of the inspection. If the inspection has not yet been performed, this will produce an empty notification letter with no deficiency notifications.

Rescheduling an Inspection

To reschedule an inspection from the Browse Inspections screen, select it and click the Reschedule Current Inspection icon. This opens the Reschedule Inspection Wizard.

Hint

You can also access this wizard from the Wizards icon on the Main tab of the Inspection Detail screen.

Reschedule Inspection Wizard

Complete the three steps of the wizard to reschedule the inspection

Editing an Inspection

To edit an inspection, select it and click the Edit button. This opens the Inspection Detail screen for the selected inspection. This screen allows you to edit the selected inspection's record.

Inspection Detail Screen

Editing an inspection on the Browse Inspections screen opens it on the Inspection Detail screen. This screen contains all data for the selected inspection. It is divided into five tabs: Main, Inspect, Approval, Notes, and Activity. It always opens on the Main tab. The Main tab has two sub-tabs, General and Unit Info.

General Sub-Tab

The General Sub-tab contains general information on the inspection.

General Sub-Tab Data Fields

Inspection Protocol
This field identifies the inspection protocol that the inspection will use.

Inspector
This drop-down selection box allows you to select the inspector who will be assigned to perform the inspection.

Tenant
This is the name of the tenant whose unit the inspection is for. You cannot edit this field.

Inspection Type
This field allows you to specify whether the inspection is an initial inspection, a recertification, or a special inspection under HQS.

Status
This drop-down selection box allows you to set the inspection's status. Your options in this selection box depend on the status codes that are available for the selected inspection protocol. In the standard HQS protocol, the standard status codes are Requested, Scheduled, Fail, and Pass.

Requested Date
This is the date on which the inspection was requested.

Schedule Date
These two fields are the date and time at which the inspection was scheduled to be performed, if it already has been scheduled.

Inspection Date
This is the date on which the inspection was performed, if it already has been performed.

Start
This is the time at which the inspection was begun, if it already has been performed.

End
This is the time at which the inspection was finished, if it already has been performed.

Hint: Deleting an Inspection

To delete an inspection, open it on the Main tab and click the Delete button. A dialog box opens that asks you to confirm your intention to delete the selected inspection record. Click Yes to delete the inspection or No to abort the deletion.

Hint

If an inspection is scheduled but the inspector has not performed it yet, the Schedule Date, Start, and End fields should be left blank.

Unit Info Sub-Tab

The Unit Info sub-tab displays detailed information on the unit that the inspection examines. The top half of the tab displays the addresses and identifying information of the landlord and the tenant, which cannot be edited on this tab. The bottom half of the tab shows the unit's data.

Unit Info Sub-Tab Data Fields

Voucher Bedrooms
This is the number of unit bedrooms for which the tenant is qualified to receive Section 8 rent subsidies.

Actual Bedrooms
This is the actual number of bedrooms in the unit.

Number of Children under 6
This is the number of children under age 6 living in the unit.

Unit Type
This drop-down selection box allows you to set the unit's type as Single Family Detached, Manufactured Home, Duplex or Two Family, Row House or Town House, or Low Rise.

Census Tract
This is the unit's census tract code.

Year Constructed
This is the year in which the unit was constructed.

Last Inspection Date
This is the date on which this unit's last inspection took place.

Inspect Tab

The Inspect tab displays a table of the inspectable areas that are in the inspection protocol that has been selected for this inspection. From this tab, you perform the inspection by selecting an inspectable area, item, and deficiency and changing the status code (e.g. from Pass to Fail). To inspect an item and deficiency in a given inspectable area, select the area and click the Inspect button. This opens the Inspectable Items screen for the selected inspection area.

Inspectable Items Screen

The Inspectable Items screen allows you to view every item and deficiency within the selected inspection area. The main area of the screen displays a list of items, each with a plus sign (+) next to it. By clicking the plus sign next to an item, you can "expand" that item, or open it, to display the deficiencies associated with that item. When an item has been expanded, the plus sign turns to a minus sign (-). Click the minus sign to "collapse" that item's list of deficiencies, or close the list. You can also expand every item by clicking the Expand All icon or close every item by clicking the Collapse All icon.

Item/Deficiency	Status	Severity	Comments
+ : Condition of Foundation	Pass		
− : Condition of Stairs, Rails, Porches, Balconies, and De	Fail		
Porch railing missing/insecure	Pass		
No handrail (4 or more steps)	Fail	C	Broken off
Severe structural defects	Fail	F	Foundation cracks
Balcony railing missing/insecure			
Steps broken/rotting/missing			
Misc comment			
+ : Condition of Roof and Gutters			
− : Condition of Exterior Surfaces			
Requires painting			
Large holes/other defects with water/air entry			
Misc comment			
Buckling/bulging			

Inspectable Items Screen Data Fields

Severity / Result

This drop-down selection box allows you to set a severity code for the selected deficiency.

Hint

The remaining fields appear only if the Severity / Result field is set to some "failed" severity code.

Comment

This is a short (60 characters) comment on the selected deficiency.

Location

This is the location of the selected deficiency within the unit.

Approval Date

This is the date on which a subsequent inspection confirmed that the selected deficiency has been corrected.

Recording a Deficiency

All deficiencies have a default severity code of Pass. To record a deficiency, select that deficiency and change its Severity drop-down selection box to the appropriate severity code. The Comment, Location, and Approval Date data fields appear when you set the deficiency's Severity to something other than Pass. Record any comment you may have and the location of the deficiency within the unit. If this inspection is a follow-up inspection that records a correction of a previous deficiency, record the approval date here as well. If the severity code you have selected is one that results in a failure (as set in the inspection protocol setup), the program changes the status of the item, area, and inspection to Fail.

Approval Tab

The Approval tab contains a table of all deficiencies for the inspection and allows you to record approvals for each one. When you first enter the Inspection Detail screen to add a new inspection, this tab displays no deficiencies, because none have been recorded. However, if you record one or more deficiencies, this tab displays all of them.

Recording an Approval

To record an approval of a previously recorded deficiency, click on that deficiency and click the Approve button. This opens the Approve Deficiency dialog box, shown below. Enter the approval date and the name of the individual who approved the corrected deficiency in the data fields and click the OK button, or click the Cancel button to cancel approval.
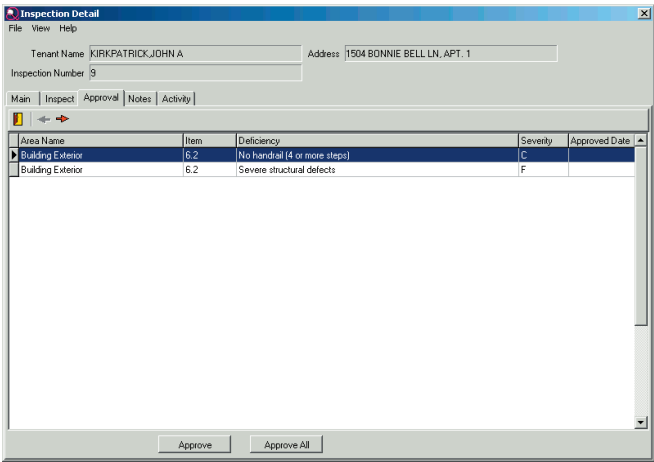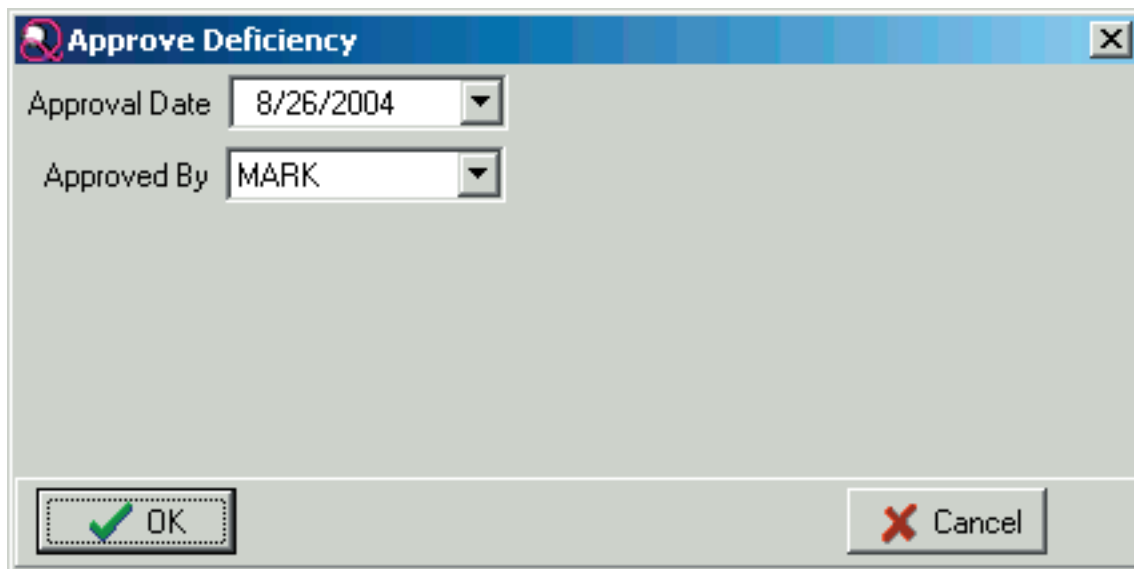
Approving an Entire Inspection

If you have an inspection that has a large number of corrected deficiencies and no remaining uncorrected ones, you may find it easier to approve all deficiencies at once than to individually approve each one. To do this, click the Approve All button. This opens the Approve All Deficiencies dialog box, shown below. Enter the approval date and the name of the individual who approved all of the deficiencies in the data fields and click the OK button, or click the Cancel button to cancel the mass approval.

Notes Tab

The Notes tab allows you to record any number of notes on the inspection. Any note you record here can be marked for inclusion on tenant and/or landlord failure letters, or it can be included on neither. If included on a letter, a note is printed between the list of deficiencies and the second failure paragraph.

The tab displays a table of all currently recorded notes for the inspection.
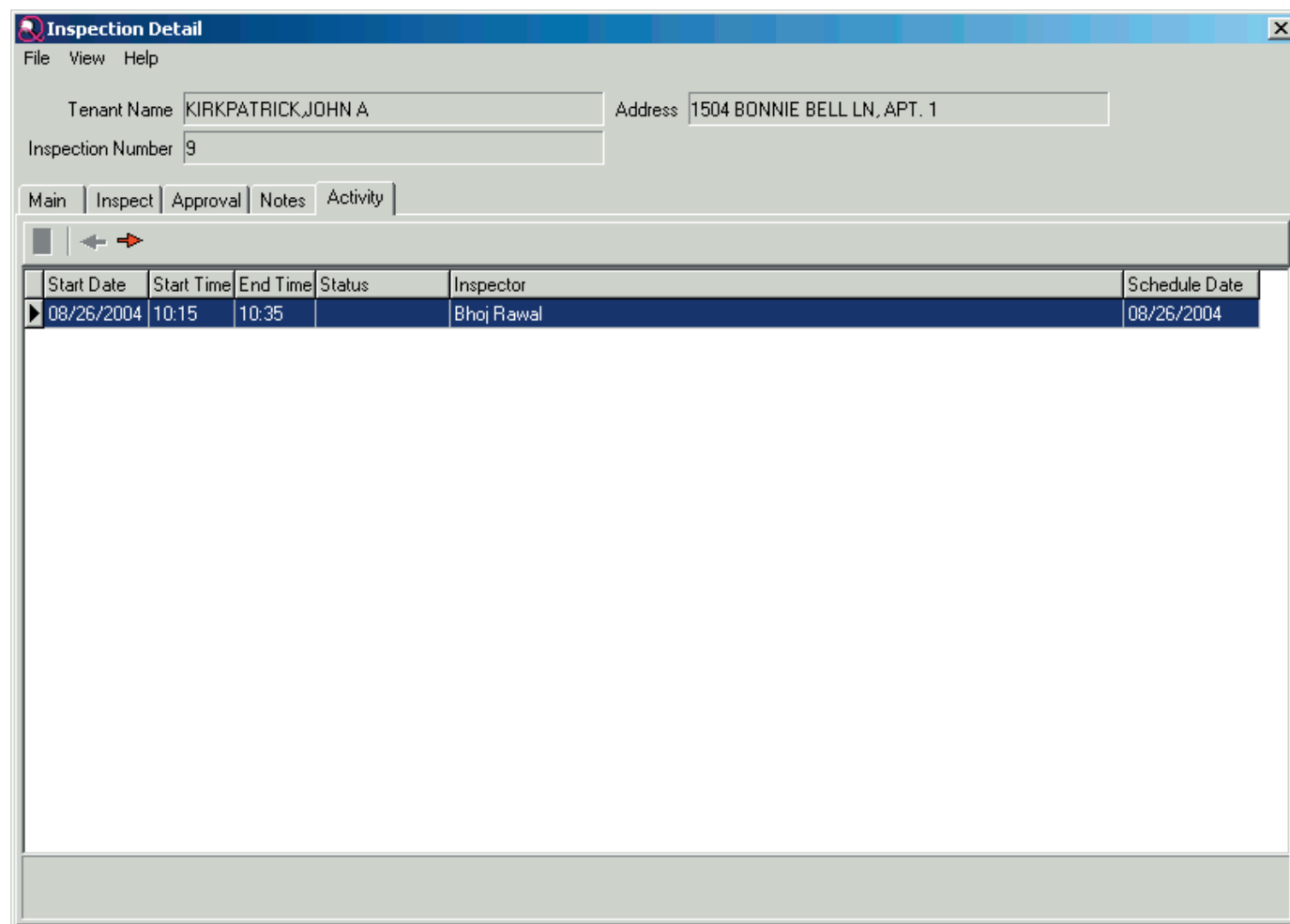
Activity Tab

The Activity tab displays a table that summarizes the inspection, including any re-inspections resulting from it.

Rescheduling an Inspection

To reschedule an inspection from the Inspection Detail screen, first open it on the Main tab of the Inspection Detail screen. Then click the Wizards icon drop-down arrow and click Reschedule. This opens the Reschedule Inspection Wizard.

Hint

You can also access this wizard from the Reschedule Current Inspection icon on the Browse Inspections screen.

Reschedule Inspection Wizard

Complete the three steps of the wizard to reschedule the inspection

Deleting an Inspection

To delete an inspection, open it on the Main tab and click the Delete button. A dialog box opens that asks you to confirm your intention to delete the selected inspection record. Click Yes to delete the inspection or No to abort the deletion.
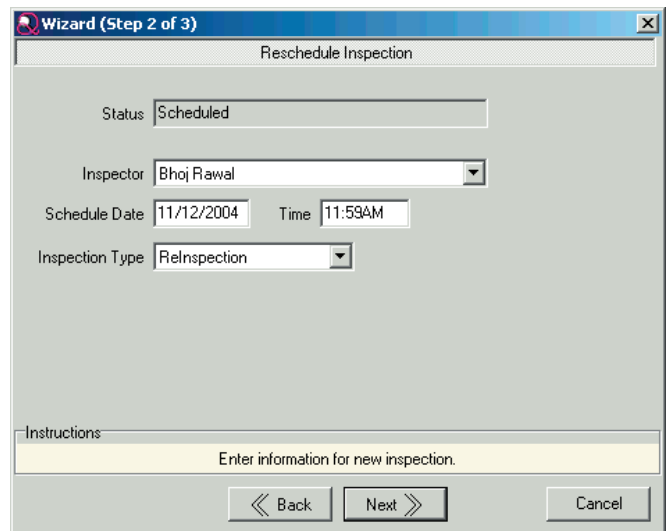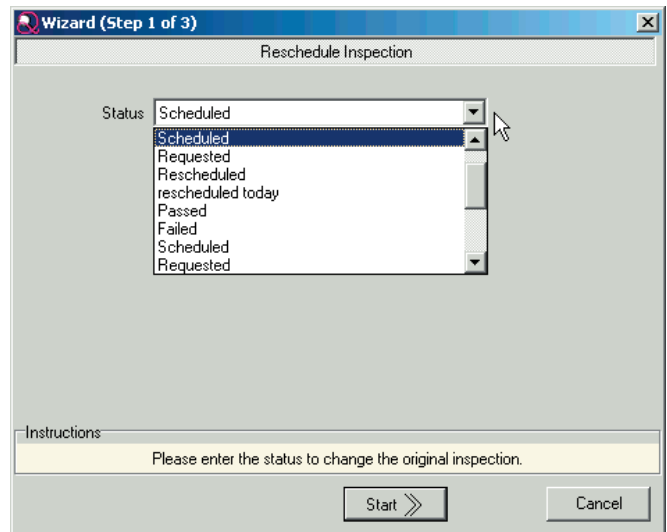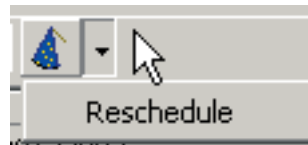
REPORTS

Information needs to be summarized and presented in an easy-to-understand form so the reader can make informed decisions. The Inspections Reports screen is where Section 8 Inspections turns all of its data into meaningful reports. You enter this screen by clicking the Reports button or by pressing <R> at the Main Menu.
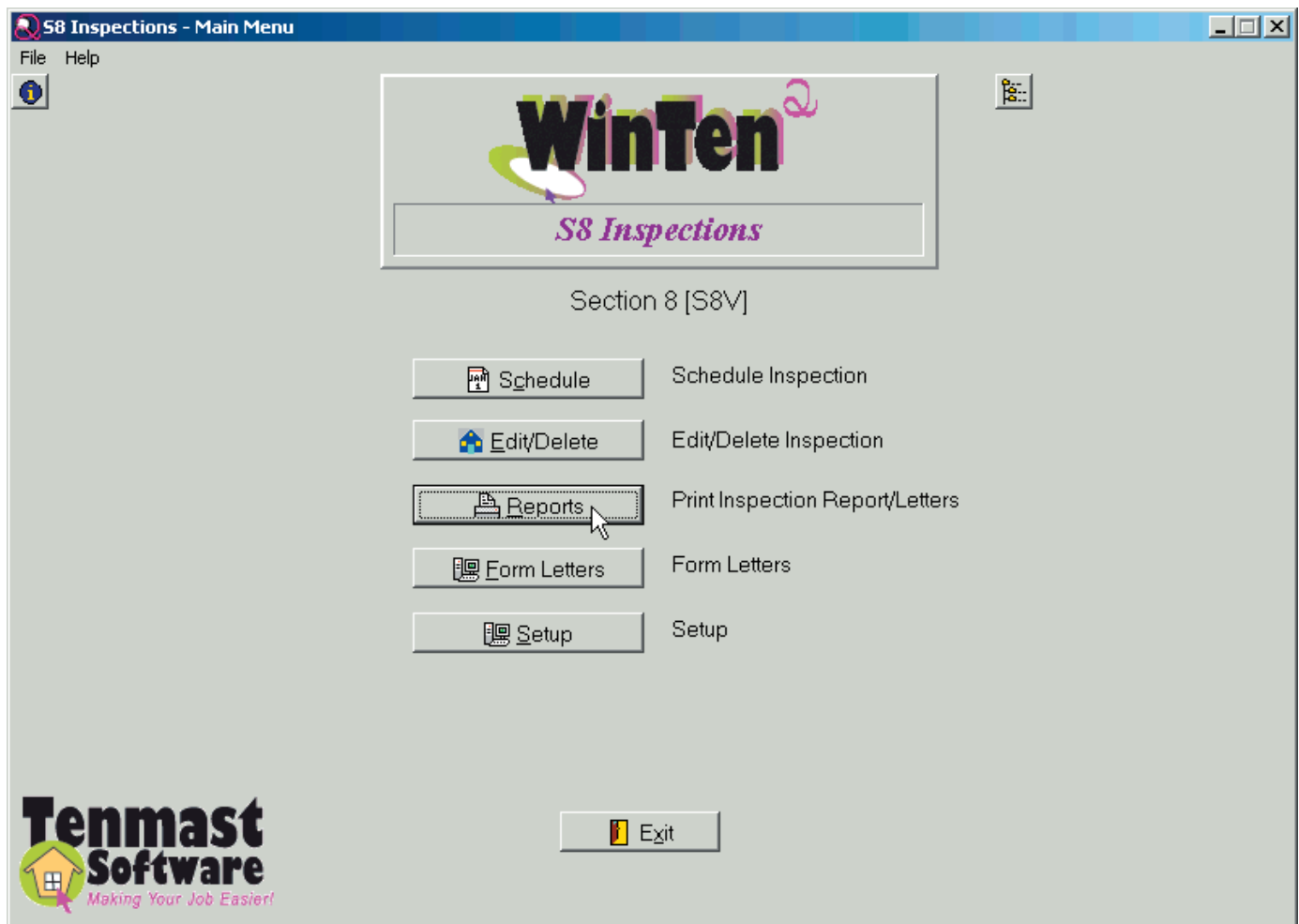
Inspections Reports Screen

The Inspections Reports screen is divided into two halves. The left half contains a set of radio buttons that allow you select a report to produce. The right half contains the formatting options for the currently selected report. As you move between selections on the left half of the screen, the options on the right half of the screen change to reflect the options for your current selection. However, some options are common to every report.

Standard Report Options

The following formatting options are common to every report that the Section 8 Inspections program produces. These allow you to filter the report data to only include certain inspection records. They are mutually inclusive. For example, if you select a specific date range, a specific inspector, and a specific inspection protocol, the report will only include those inspections which that inspector performed using that protocol between those dates.

Select Date Range
All reports produced by the Section 8 Inspection program cover inspection activity for a specific date range. These two data fields allow you to specify the starting and ending dates for this date range.

Selected Inspectors
This option allows you to report on inspections performed by all inspectors or only those performed by a specific inspector.

Select Inspection Protocols
This option allows you to report on inspections performed under all protocols or only those performed under a specific protocol.

Report-Specific Options

The following report options are only available for certain reports. Like the standard report options, they allow you to filter the report data to include only certain inspection records.

Select Status Codes
This option allows you to report on inspections with all statuses or only those with a specific status.

Use Detail Form
Some reports have both short and long forms. These reports print in their short forms unless you check this box.

Available Reports

All of the following reports or sets of reports will only include data on inspections that match the specified options.

Activity Log

The Activity Log report is a summary of all inspection activities for inspections matching the criteria you selected.

Requested Inspections

The Requested Inspections report is a summary of all requested inspections that match the criteria you selected.

Scheduled Inspections

The Scheduled Inspections report is a summary of all scheduled inspections that match the criteria you selected.

Rescheduled Inspections

The Rescheduled Inspections report is a summary of all follow-up inspections that are scheduled to be performed within the selected range of dates and that match the other selected options.
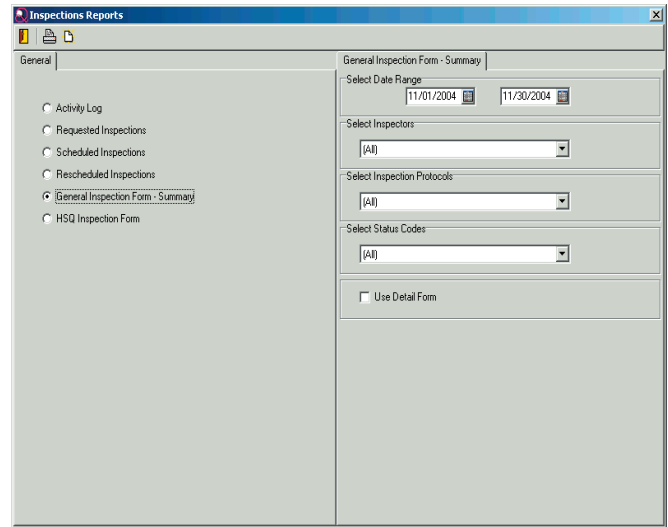
General Inspection Form — Summary

The General Inspection Form (Summary) option produces a report that lists every area and item in the inspection protocol for a selected inspection.

HQS Inspection Forms

This option produces an official HQS inspection form (Form HUD-52580) for a selected inspection.

CAUTION

This option will not work properly for any inspection that has a different number of areas from the HQS protocol. You may, however, use the report for a modified HQS protocol with additional items or deficiencies.

Hint

For the Requested Inspections report, the range of dates is based on requested date.

For the Scheduled Inspections report, the range of dates is based on scheduled date.

For the Rescheduled Inspections report, the range of dates is based on follow-up date.

For all other reports, the range of dates is based on inspection date.

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