SOUTHEASTERN MINNESOTA MULTI-COUNTY HOUSING & REDEVELOPMENT AUTHORITY

WABASHA, MINNESOTA

REQUEST FOR PROPOSALS

FOR HOUSING MANAGEMENT SOFTWARE

ISSUE DATE: WEDNESDAY, July 7, 2021 **DUE**

DATE: FRIDAY, September 10, 2021 By 5pm

LATE PROPOSALS WILL NOT BE ACCEPTED

134 East Second Street ● Wabasha, MN 55981 ● phone (651) 565-2638 ● fax (651) 565-3836 ● www.semmchra.org

REQUEST FOR PROPOSALS
FOR HOUSING MANAGEMENT SOFTWARE

The Southeastern Minnesota Multi-County Housing & Redevelopment Authority (SEMMCHRA) requests proposals for the provision of housing management software for general utilization, and specific application, in the overall management of theagency's programs.

Issue Date:	Wednesday, July, 7, 2021
Closing Date:	Friday, **September 10, 2021 by 5:00 PM**
Submit Proposals to:	Southeastern Minnesota Multi-County Housing & Redevelopment Authority Attention: Maggie Gallagher
By email:	admin@semmchra.org
RFP Contact:	*For all questions, contact:* Maggie Gallagher Administrative Human Resource Director Southeastern Minnesota Multi-County Housing & Redevelopment Authority Telephone: 651-565-2638 x 201 Email: admin@semmchra.org

I. INTRODUCTION

A. Purpose

The Southeastern Minnesota Multi-County Housing & Redevelopment Authority (SEMMCHRA) requests proposals from qualified and experienced softwareproviders ("Proposers") to provide SEMMCHRA with a housing management software system, as well as setup and installations services.

As a result of this solicitation, SEMMCHRA intends to award either a single or multiple contract(s) for the provision ofthe above referenced items.

B. Southeastern Minnesota Multi-County Housing & Redevelopment Authority

The SEMMCHRA is governed by a Board of Commissioners representing the counties Wabasha, Winona, Dodge, and Goodhue County, the city of Winona, plus one Housing Authority Resident Commissioner. With an annual operating budget of approximately $20 million, SEMMCHRA maintains (545) public housing units, (1,656) Housing Choice Vouchers, and (357) units of affordable andspecial needs housing.

Our agency is currently using HAB housing management software. In order to properly entertain all of our options, SEMMCHRA is currently soliciting proposals from qualified firms providing software applications specifically suited for the needs of a Public Housing Authority ("PHA"). The new software must clearly demonstrate ability toconform to all requirements and specifications set forth in the remainder of this Request for Proposals ("RFP").

C. Project Overview

SEMMCHRA seeks qualified proposals from any software vendor, specializing in software specifically designed (and suited for) use by PHA's, with interest in providing a proposal and sharing their product offerings. SEMMCHRA intends to select the software that best meets the needs and requirements of our agency. We expect this RFP process toensure thorough analysis and consideration on the part of both SEMMCHRA and the respondents. SEMMCHRA advises all interested firms to carefully review the requirements of this RFP. Written proposals will serve as the basis for initial selection, but final selection will be based on the scores established from the evaluation criteria as outlined in Section IV Exhibit A.

II. SCOPE OF SERVICES

Scope of Services

General
The Software selected shall provide the capacity to manage the following functions of the SEMMCHRA: (Theincorporation and/or use of these functions are at the sole discretion of SEMMCHRA.)

1. Financial Applications to include:
    a. General Ledger
    b. Budgeting
    c. Accounts Payable
    d. Tenant Billing
    e. Purchasing & Requisitioning
    f. Contract Management
    g. Financial Reports
    h. Accounts Receivable
    i. Capital Assets

    j. Capital Fund Management
    k. Grant Management
    l. Facilitate Online Banking with Direct Deposit
    m. Direct Deposit of Housing Assistance Payments (HAP)
2. Housing Applications
    a. Applicant Waiting List(s) (must handle multiple programs)
    b. Appointment Management (multiple programs)
    c. Unit Management (multiple programs)
    d. Vacancy Tracking (multiple programs)
    e. Low Income Public Housing Tenant/Case Management
    f. Section 8 Housing Choice Voucher Tenant/Case Management
    g. LIHTC Program Management
    h. Family Self Sufficiency
    i. Work Order / Maintenance System / Inventory
    j. Creation & Submission of 50058/50059 form
    k. Rent Calculation
    l. SEMAP, WVHAS, Family Self-Sufficiency Reporting,
    m. Rent Calculations, Contracts, and Tracking Forms
    n. UPCS Inspections
    o. HQS Inspections
    p. Mobile Application for HQS Inspections
    q. Non-Subsidized Rental Management
    r. Other Desired Features
        i. Executive Dashboard – allows quick and effortless assessment, in real-time, of the agency's business functions including, but not limited to, vouchers being utilized versus vouchers available, wait-list status, units leased up versus units vacant, units under repair, budgets by departments, etc.
        ii. Capabilities for integration with online banking applications and facilitate direct deposit of housing assistance payments (HAP).
        iii. Ability for clients to submit applications through an on-line portal.
        iv. Ability for clients to check wait-list status on-line.
        v. Ability for landlords to access their accounts with SEMMCHRA through an on-line portal.
        vi. Ability for clients to pay through an on-line portal.
        vii. Integrated Document Imaging system – By either providing integration with FileVision or other solution to allow the continuation of SEMMCHRA's paperless office environment.
3. Data Conversion
    a. Project Management to include:
        i. Full data conversion from existing system to new (36 months of history minimum).
            1. Active and Inactive Landlords
            2. Active waiting lists
            3. Bank accounts
            4. General Ledger (including chart of accounts for each fund)
            5. Active and Inactive Voucher holders
            6. Active and Inactive Tenants
                a. Receivables
                b. Deposits and accrued interest
                c. Contracts
                d. Dependents
                e. Tenant Notes
            7. Units/Buildings/Properties
        ii. Successful installation and implementation of new product.
            1. Describe your plan to coordinate any required hardware upgrades.

2. Describe data conversion assistance you will provide during implementation from current system.

iii. Testing of the accuracy, validity, and integrity of the new software and hardware incorporated into SEMMCHRA's computer network.

b. SEMMCHRA currently uses the following software applications:
   i. HAB
   ii. Microsoft Office applications
   iii. FileVision
   iv. Happy Software
   v. Sage (Fixed Assets)
   vi. Data Conversion is required from HAB, Happy, Sage, and FileVision.

c. Training
   i. Training will need to be provided to all SEMMCHRA staff and shall include End-user, Intermediate, and Technical level training; all as necessary for SEMMCHRA to operate independently. Proposers must have sufficient resources to provide end-user training for all staff and technical training for SEMMCHRA IT staff in all application modules. Technical training shall include a conceptual overview ofall modules and how they interface and interact with each other. Any, separate training costs shall be clearly stated in detail in the RFP response. Describe the offering for training new employees of SEMMCHRA who are hired after implementation.

d. Technical Support and Software Updates
   i. Provision of ongoing technical support and software updates in order to maintain compliance with Federal directives, fix bugs / glitches, and roll out product enhancements.
   ii. Does your company outsource programming/development? If so, please describe.
   iii. Each proposal must include a full description of the software capabilities, maintenance and support agreements, and a detailed itemization of annual costs associated with these services. The maintenance agreements must provide for periodic updates to the software for the purposes delineated in. Each proposal must also fully document the firm's policy (and associated costs) on product upgrades that may fall outside the standard maintenance contract.
   iv. When describing customer and/or technical support availability, proposals must specify all of the conditions surrounding that availability, including: time zones, response times, resolution and escalation processes (for end-user support, as well as, technical staff.)
   v. Describe how your customers influence and contribute to the content of the enhancement update.

e. For licensing and pricing purposes, Respondents should assume a total of (~41) users or (~48) licensed seats if based on device. This total number includes:
   i. 11-Section 8 employees
   ii. 8-SEMMCHRA central office employees
   iii. 11-Public Housing office employees
   iv. 11-Maintenance staff working on the sites with workstations available for necessary use.

4. Respondent Experience
   a. The Respondent must be thoroughly familiar with the application areas specified and have an historic base of customers currently using the proposed products. The Respondent must have the staff, technical, and financial resources to reliably install and support the proposed system.
   b. The Respondent will thoroughly document its experience in Public Housing, Section 8, LIHTC, and Agency Owned Rentals through the inclusion of the qualifications of the staff they will be assigning to this project.

   c. The Respondent shall also provide an overview of their firm's history and current, financial resources.

5. System Set-up, Installation, and Support
   a. The Respondent shall assist SEMMCHRA in preparing for the successful implementation of the new system. Preparations shall include organizing, planning, scheduling, and designing the implementation plan whilefocusing on the best incorporation, manipulation, and/or utilization of the data for optimal performancewithin the parameters of the respondent's system's design.
   b. The Respondent shall be responsible for the successful installation and testing of the system with the ultimate provision of an end product that can be readily utilized by SEMMCHRA personnel in conducting all ofthe day-to-day operations of the entire agency in an efficient and effective manner.
   c. Additionally, the Respondent must have the demonstrated ability to support the system after installation is completed and accepted by SEMMCHRA. The support must be provided in the form of on-goingprogramming and management support accommodating regulatory changes and timely resolution of user problems.
   d. Furthermore, on-going programming support must have the capability of using online, remote desktop sharing for problem solving and analysis.

6. Hardware and Network Environment
   a. Respondents must include specifications for a computer hardware platform that will support the proposed software. The specifications should include minimum, recommended, and optimal specifications for the application software to operate within SEMMCHRA's infrastructure. In addition, the successful proposer will be required to coordinate any hardware upgrades with SEMMCHRA, as desired by theSEMMCHRA. Respondents chosen will be required to provide the support services necessary to ensure successful conversion and operation of the system(s).
   b. Respondents must have a demonstrated ability in performing the necessary modifications and providing necessary support for the system after the installation is completed and accepted.

7. Software Specifications
   a. Integration
      i. Each software module must provide for optimum integration to other modules, as well as to the Microsoft Office products, to reduce redundant data input and transcribing errors. The vendor should discuss this integration scheme for each software module proposed and how it interfaces with other modules. Illustrations would be helpful in this matter.
   b. Source Code
      i. Source code should be obtainable by SEMMCHRA in the event the software provider's business ceasesoperations.
   c. Security
      i. Each program shall have its own set of security levels of access. Management staff shall be trained on how to set the security for each user and the levels of access available in each program. Written documentation for this activity shall be provided to the appropriate staff personnel during the training.
      ii. Setup questionnaires outlining the security levels and providing space for management to designate which operator can access which data shall be provided to SEMMCHRA prior to the installation of the system.
   d. Printer Management
      i. Each housing program shall be capable of selecting or changing to any normally available local or network "system" printer (for all functions) without exiting the program.
   e. User-Defined Fields
      i. The database should allow to add and pull any related data which corresponds with the requested report by allowing an unlimited field selection in each primary database for use by the operator in developing specific listing reports through the report generator.

f. Data Integrity
   i. The software should be designed to operate in a concurrent multi-user environment. Numerous users should be able to look at the same record simultaneously, but only one should be able to "edit" at a time. Several operators should be able to change and add several records simultaneously in the same database without any problems.

g. Data Availability
   i. The data is the sole property of SEMMCHRA. All data must be available to SEMMCHRA regardless of support options, yearly, quarterly, or time and materials support option SEMMCHRA chooses to purchase. If the proposed software requires any type of software activation, beyond the initial purchase, to activate or grant access to SEMMCHRA users, SEMMCHRA will severely lower the scoring of the software. SeeSection III for proposal response details.

h. Programming Language
   i. Vendor should explain the language in which the programs are written and any future plans to migrate to another language.

i. Windows-Based Version
   i. The vendor should indicate the availability of a true 32 or 64-bit Windows based version of their software. If the vendor is planning to "migrate" their clients to the new version, please describe the proposed timetable and cost, as well as any factors involved in implementing the new Windows version.

j. Processing
   i. The processing of the programs should generally be immediate and in real-time. However, there shouldn't be any automatic batch routines in the system; allowing SEMMCHRA to determine preferences for batch or real-time settings on functions we choose.

k. Audit Trails
   i. Vendor should explain what kind of audit trails the program contains for keeping track of the date and time of a change, the name of the users making the change, the field(s) and/or the amount of the changes.

l. Documentation
   i. Vendor should explain what types of documentation are available with the system. At the least, one complete set of Operator's Manuals must be provided with the system. Anytime the system is updated/patched/upgraded with new features, updates or fixes, the Operator's Manual must be updated and available to SEMMCHRA.

m. On-Line Help
   i. Vendor should explain what on-line help screens are available and how they are accessed from the programs. In addition, the ability to create a copy of the production data to a training and testing environment should be provided to facilitate additional training.

n. Submission Deadline and Delivery Address
   i. All bid proposals must be received at SEMMCHRA's main office no later then September 10th, 2021 at 5:00 PM Central Daylight Time. Late bids will not be accepted. Proposals must be submitted with1 original and 5 (five) copies. All bid packets received shall indicate the project name and RFP #. One copy of all "sales literature" should be included with the ORIGINAL proposal.

ii. Delivery Address:

Southeastern Minnesota Multi-County
Housing & Redevelopment Authority
134 East Second Street
WABASHA, MINNESOTA 55981

o. Inquiries

i. All inquiries will be in submitted via email to admin@semmchra.org . The deadline for all inquiries is September 10th, 2021 at a 5:00PM. Receipt of inquiry will be confirmed within a 24-hour period of normal office hours. If receipt is not confirmed, please call Maggie Gallagher at (651-
565-2638 x 201).

ii. If, in the opinion of SEMMCHRA, additional material or interpretation is needed, it will be provided asan Addendum to the RFP and will be communicated to all other vendors.

iii. Any instruction or information, pertaining to the specifications of this project that is provided to prospective respondents in any form other than writing shall not bind SEMMCHRA.

III. SUBMISSION REQUIREMENTS

A. Minimum Requirements

To be qualified to respond, respondents must not be debarred, suspended, or otherwise ineligible to contract with SEMMCHRA, and must **not** be included on the General Services Administration's "List of Parties Excluded from Federal Procurement and Non-Procurement Programs" or the Department of Housing and Urban Development's"Limited Denial of Participation" list.

B. General

Brevity is strongly encouraged. Respond only to items listed below and include only relevant information. The reviewers will not consider materials that are not requested below.
Once submitted, no additions, deletions, or substitutions may be made to proposals.

C. Submission Requirements

To be considered responsive and responsible, each respondent shall respond to the following requirements. Responses must be specific and complete unto themselves. Any submittal that, in the opinion of SEMMCHRA, does notfully and completely address these requirements will not be reviewed**. Limit your proposal to the equivalent of**
(20) single-sided pages. Page limit does not include cover letter and/or required attachments.

1. Cover Letter

Limit letter to a maximum of two (2) pages. Introduce your firm and describe your general philosophy and relevant experience for the contemplated work.

2. Firm Description

a. Discuss the firm's history, organization and size including number of staff in each work area.

b. Describe the overall staffing approach to be used in connection with this contract. Provide information regarding staff experience and qualifications that demonstrates the respondent's capacity to perform the required services. If the firm is multi-disciplinary, please describe the resources and skills it brings. If the firm is small or is a sole proprietorship, please describe the approach to involving 3rd party contractors for task orders requiring multiple disciplines.

c. Identify by name and title, and provide resumes of key personnel who will be assigned to work on Task Orders. Resumes should include specific information regarding experience in providing the types of services outlined in Section I of this RFP.

d. Identify a Project Manager for the firm.

3. Similar Project Experience

a. Describe your firm's relevant experience within the areas under Section IIA, Scope of Services. Please describe your firm's experience as it relates to similar size system implementations. Please make sure to address all of the items listed in Section IIA.

b. Describe in detail two projects that your firm is currently working on and/or has completed in the last two years. How many Housing Authorities are current clients?

c. Please describe your firm's specific experience working with Housing Authorities and/or Public Agencies.

4. References

Provide (3) references, previous and/or current, including the name and title of the contact person, their mailing address, email address, phone number and fax number. If available, please provide one reference from a public housing authority similar in size to SEMMCHRA.

5. Fee Proposal

Include a fee proposal and schedule that identifies the reasonable hourly fee for services for all staff that might be required for work under the contract resulting from the RFP. The fee schedule shall include all software costs, professional services and all administrative costs. Respondents will not be reimbursed for general overhead.

6. Third Party Billings

It is anticipated that SEMMCHRA may require the services of not-yet-identified 3rd parties (consultants). Pleaseprovide the proposed markup (if any, as a percentage of 3rd party billing) to be charged to SEMMCHRA in such instances.

7. Required Forms

The following forms must be fully completed and signed by the appropriate person and included in the qualifications package:

a. Specification Checklist
b. Lobbying Certificate
c. Debarment Certificate
d. Form HUD 5369-B: Instructions to Offerors Non-Construction
e. Form HUD 5369-C: Certifications and Representations of Offerors – Non-Construction Contract
f. Form HUD 5370-C: General Conditions for Non-Construction Contracts

8. Format Requirements

Please consider this format when assembling the submittal:

a. An 8.5" X 11" format, either vertical or horizontal; and
b. A font size no smaller than 12 points.

IV. EVALUATION

A. Method of Award

SEMMCHRA will appoint a Selection Committee to evaluate the Proposals. The Committee will evaluate written responses to the RFP and shall apply the evaluation criteria and scoring set forth below. The scores will be used to identify the highest ranked firm(s). The Committee will make its recommendation for contract award to the firm(s) determined to be the most highly qualified based on the ranking.

B. Demonstration

A product demonstration is not a requirement of the RFP; however, SEMMCHRA may request a demonstration fromvendor(s) and if so the demonstration shall be provided.

C. Evaluation Criteria

Scoring	Points
Strength and Expertise of Vendor The software meets the function requirements listed in the RFP without requiring modification of current equipment or future development of software.	30
Cost Costs including but not limited to: cost of data conversion, software, licenses, installation, implementation, project management, training, and first year's support. SEMMCHRA may, at its discretion, select part or all of the software and support services set forth in the vendor's proposal. The vendor must itemize the costs for software, installation, support, maintenance, and other costs separately. No adjustment may be made without SEMMCHRA request/permission.	15
Support Services and Service Level Agreement Support services include ongoing maintenance, new releases; support of HUD mandated changes and service level agreement related to issue resolution and overall responsiveness. Other factors include change management and documentation.	20
Implementation, Methodology, and Conversion Services The current lead-time before implementation. The ability to convert, deliver, and install software within an acceptable timeframe determined solely by SEMMCHRA. Ability for SEMMCHRA staff to access software without restriction should SEMMCHRA decide not to purchase yearly maintenance and purchase support based on Time and Materials.	20
Training Services Training services include training approach, education options, and training with like or test systems.	15
Total	**100**

V. CLARIFICATIONS AND ADDENDA

A. Questions and Comments

Any respondent requiring clarification of the information must submit specific questions or comments to the RFP contact via email. **The deadline for submitting such questions is Tuesday, July 9th, by 5:00 PM,** If in SEMMCHRA's opinion, additional information or interpretation is necessary; such information will be supplied in theform of an Addendum that will be posted to the SEMMCHRA website: http://www.semmchra.org/

Such addenda shall have the same binding effect as though contained in the main body of the Request for Proposals. Oral instructions given to prospective respondents by SEMMCHRA employees or its agents shall not bindSEMMCHRA. All Addenda shall be issued by SEMMCHRA not less than three (3) calendar days prior to the qualifications deadline.

B. Required Information

The successful respondent must be licensed to do business in the State of Minnesota and must be licensed (ifrequired by law) to perform the services proposed.

C. Minority Business (MBE) Goals

The firm submitting a proposal shall be aware of the SEMMCHRA goals of consistency with Presidential Executive Orders 11625, 12138 and 12432 and Section 3 of the HUD Act of 1968. SEMMCHRA's goal is to make efforts to ensurethat small and minority-owned business, women's business enterprises, labor surplus area business, and individuals or firms located in or owned in substantial part by persons residing in the area of a SEMMCHRA project are used when possible

D. Award of Contract; Clarification or Rejection of Proposals

SEMMCHRA will use a competitive proposal procedure for the acquisition of Software and Services as described inSection IV of this document.

SEMMCHRA will evaluate proposals and will rate proposals using the scoring methodology described in Section IV of thisdocument.

SEMMCHRA reserves the right to seek clarification of the written Proposals from respondents.

SEMMCHRA reserves the right to reject any and all proposals and to waive any informality in proposals receivedwhenever such rejection or waiver is in the interest of the Housing Authority.

SEMMCHRA reserves the right to reject the proposal of any proposer including those who have previously failed to perform properly, or to complete on time, contracts of a similar nature; who is not in a position to perform the contract, or who has neglected the payment of bills or otherwise disregarded their obligations to subcontractors, material suppliers, or employees. SEMMCHRA also reserves the right to reject the proposal of any proposer listed in the current issue of "List of Parties Excluded from Federal Procurement and Non-procurement Programs" U.S. General Services Administration, Office of Acquisition Policy or listed in the HUD Limited Denial of Participation, current edition.

Professional services contracts will not have terms exceeding five years without HUD Approval.

The successful firm shall sign and file with SEMMCHRA all documents necessary to the successful execution of thecontract within ten calendar days after the notice of award.

E. Right to Protest

Any actual proposer who is adversely affected or aggrieved by SEMMCHRA's award of the contract to another proposer on the same solicitation shall have fourteen (14) calendar days after notice of intent to award has been issued to submit to the Executive Director a written protest of the award. The written protest shall specify the grounds upon which the protest is based. A protest must meet the requirements of ORS 279B.410. SEMMCHRA will not entertain protests submitted after the time period established in this rule.

F. Insurance Requirements

Prior to executing a contract, the selected vendor shall provide the following documents:

1. Proof of $1,000,000 per occurrence ($2,000,000 general aggregate) general liability insurance,
2. Proof of $1,000,000 automobile liability insurance,
3. Proof of $1,000,000 combined single limit per occurrence ($2,000,000 general annual aggregate) professional errors and omissions liability insurance,
4. Proof of $1,000,000 employers liability insurance,
5. Proof of Worker's Compensation insurance, and

<u>All required insurance other than Professional Liability, Worker's Compensation, and Personal Automobile Liability shall include the "Southeastern Minnesota Multi-County Housing & Redevelopment Authority, its agents, officers, and employees" as anadditional insured.</u>

G. RFP Terms & Conditions

All proposals shall remain valid for a period of one hundred twenty (120) calendar days after the date specified for receipt of proposals. SEMMCHRA reserves the right to cancel or reject any or all Proposals, and to cancel award ofthis contract at any time before execution of the contract by both parties if cancellation is deemed to be in SEMMCHRA's best interest. In no event shall SEMMCHRA have any liability for cancellation of award.

H. Cost of Preparation

Costs incurred by respondents in preparation of a response to this RFP shall be borne by the respondents.

I. References

SEMMCHRA reserves the right to investigate references including other than those listed in the response to this RFP.Investigation may include past performance of any consultant team member with respect to its successful performance of similar projects, compliance with specifications and contractual obligations, completion, or delivery of a project on schedule or on budget, and its lawful payment of subcontractors, employees, and workers. If demanded by SEMMCHRA, supportive references must be furnished.

J. System Installation and Support

The Proposer shall be responsible for installation and testing of the system to the point of independent operation by SEMMCHRA personnel. In addition, the Proposer, as part of the proposal, shall provide support servicesnecessary to ensure successful operation of the system including, but not limited to, the following:

- Acceptance testing after installation
- Maintenance support for bug fixes and enhancements
- End user, intermediate user and staff training

K. Confidentiality

Proposals are public records. All information submitted by respondents shall be public record and subject to disclosure pursuant to the Minnesota Public Records Act, except such portions of the Proposal for which respondent requests exception from disclosure consistent with Minnesota Law. All requests shall be in writing, noting specifically which portion of the proposal the respondent requests exception from disclosure. Respondents shall not copyright, or cause to be copyrighted, any portion of any said document submitted to theSEMMCHRA as a result of this RFP.

VI. EXHIBITS

A. Specification Checklist
B. Lobbying Certificate
C. Debarment Certificate
D. Form HUD 5369-B: Instructions to Offerors Non-Construction
E. Form HUD 5369-C: Certifications and Representations of Offerors – Non-Construction Contract
F. Form HUD 5370-C: General Conditions for Non-Construction Contracts

- END -

Exhibit A: SPECIFICATION CHECKLIST

The following section is intended to provide a better understanding to the evaluation panel of the capabilities of the software module(s) you are proposing. For each item in the list, please indicate "yes" this feature is currently available or "no" it is not. You are encouraged to add comments via an addendum, clearly identifying the software feature by section and number, to make your responses as complete and accurate as possible.

#	***General Functions***	***Yes/No***	***Comment***
1	Does your software require users to exit the system during any month-end or yearend functions?		
2	Is there a limit to how many users can be in any one module at a given time? If so, how many?		
3	Can users be "locked out" or can data be "captured" prior to system taxing functions being performed.		
4	Ability to track user productivity a. Ability to track the number of locked actions per each user b. Ability to track the users access to a participant file/record c. Can user's access be blocked at any time by the system administrator?		
5	A fully integrated document imaging system with the ability to archive, view, print, email, and fax documents directly from the system. Paper documents can be scanned and attached to client or landlord records. -Items outside the system can be archived, such as digital pictures, TIF, ADOBE PDF, and Microsoft Office documents.		
6	Provide detailed rent and utility allowance calculations, kept up to date with latest HUD requirements and formulas		
7	Integrated appointment calendar		
8	Integrated reminder system (like pop-up messages)		
9	A validation program that is fully compliant with the current HUD-50058 Technical Reference Guide		
10	Unlimited number of notes for tenants to indicate balances owed or previous problems with residents		
11	Ability to list the current HUD regulations and the current A&O Policy		

	while entering the income, or deductions for a resident		
12	Tenant reports that can be filtered by project number, caseworker, and user defined codes and programs		
13	Reports on PIC submissions that will help maintain 95% or higher on all submission rates		
14	RIM audit verification procedure		
15	Ability to submit files to PIC without using the PIC Website		
16	The ability to exclude submissions by program type: e.g. - a button to exclude GRANT programs from submitting to PIC		
17	Ability to retrieve PIC error reports and store ticket numbers and PIC error reports		
18	Validation program that is fully compliant with the current HUD-50058 Technical Reference Guide		
19	Translate PIC errors into user friendly directions for corrections		
20	Ability to compare PIC records with System records to identify any records not currently in PIC system that are in our system		
21	Keep history of prior residents in unit		
22	Ability to set levels of security for users (i.e.: not everyone can change Master File of resident, not everyone can do adjustments to accounts)		
23	Search for a tenant account using the unit number, address, lease date, termination date, SSN or tenant name		
24	Tracks and maintains all data required for PHAS Reporting		
25	HUD compliance and error checking prior to completion of 50059 and/or voucher processing.		
26	Project Based Section 8 (New Construction) – 50059 processing capability and voucher submission processing.		
27	Initial training of all users by the software vendor.		
28	GAAP compliant accounting		
29	Dashboard features for the accounting modules		
30	Software Modules are arranged in a logical manner according to order of processing		

31	All modules integrated without needing to enter data for a second time in a different module.		
32	Data entry fields are arranged in a logical manner for ease of data entry; with pertinent information summarized on initial screen.		
33	Ability to review data integrity and accuracy before populating other modules		
34	Time / date fields are displayed in a standardized manner		
35	Database is SQL compliant		
36	Database is ODBC compliant		
37	Database fields can be exported to and imported from MS Office products		
38	Vendor has user group		
39	Vendor uses feedback from user group to determine software direction.		
40	Provide security (user & group level) by: a. Application b. Menu item/function within application c. Reports d. Queries		
41	Provide audit trails tracking user access to system and activity.		
42	Flexible, robust, user-friendly report writer feature available in all subsystems. Ability to modify canned reports and design own reports.		
43	Intelligent archive routines for all modules		
44	Complete test environment for all modules		
45	Users have the ability to print from system to local and network printers		
46	Queuing system for reports/printers and ability to check print status		
47	Ability to create fill-able custom forms and letters to be sent out to participants, applicants, tenants, and owners, including mailing labels		
48	Minimum of six (6) user data fields that can be used to input text of dates codes for searching/tracking and reporting		
49	System must include capability to attach electronic files, such as digital images and electronic documents, directly to specific entities, (i.e. applicant, landlord, unit, etc)		
50	Ability to distribute reports via email		

51	Ability to export data to Excel or similar program		
#	***General Ledger***	***Yes/No***	***Comment***
52	Inter fund balancing – Software must comply with HUD's asset management model and be able to post inter fund A/R's and A/P's down to the AMP level. Able to have both Manual and Automatic inter-fund transactions between Funds and Projects.		
53	Project based accounting – The software must comply with HUD's project based accounting format and be able to post at the project level as well as multiple fund level. This posting also applies to budgeting and producing balance sheets and income statements. Produce Project Based Financials for Projects for both the Balance Sheet and Income Statement.		
54	Able to handle charging fee for service between projects and from a central cost center to the projects.		
55	Ability to block/control transaction posting to prior periods so no posting is done to the wrong year.		
56	Module posting – The posting to the general ledger provides the option of summary or detail level.		
57	Account set up – Multiple segment account numbers should be available and the ability to use any combination of segments between funds. How many segments are available?		
58	Recurring Entries – Monthly recurring entries must be available for the posting of manual journal vouchers.		
59	FDS – The Financial Data Schedule for HUD's REAC submission must be made available based on the monthly/annual general ledger processing and postings. Able to pull FDS by Fund/Project.		
60	Monthly postings – Ability to maintain multiple months open at any particular time to process in the future or at year end to process the yearend adjustments. Manage multiple year ends.		
61	Accommodate minimum of 6 account number segments (including Fund)		
62	Ability to designate "cross-walks" between FDS and G/L Accounts		
63	Ability for more than one user to print		

	reports simultaneously		
64	User defined inter-fund account numbers		
65	Ability to create inter-fund transactions automatically		
66	Ability to assign inter-fund accounts		
67	Ability to run a GL by user defined parameters		
68	Ability to drilldown to detail information from the GL system to all interfacing subsystem		
69	Ability to view Transaction source and origin in Accounts		
70	Ability to support multiple allocation tables		
71	Capability to process subsequent year transactions before completely closing previous year.		
72	Capability to deactivate accounts from further posting without deletion.		
73	Capability to tie GL number to FDS number and facilitate transmission to REAC.		
74	Ability to hide or mask deactivated accounts.		
#	***Budget***	***Yes/No***	***Comment***
75	Project Based – The software should allow for input and posting of multiple budgets within a specific fund for project based budgeting.		
76	Monthly reporting – Reporting should be available for any reporting period even if the month is closed and also the reports should be capable of combining two or more projects within a fund.		
77	Dashboard feature – A dashboard feature showing summary totals as well as detail total should be available to non-finance department personnel. The feature should be restricted to a read only and access only after security set up.		
78	Per Unit Month (PUM) – Income and expense statements must contain data showing the PUM for each project. This feature is to comply with HUD's asset management model.		
79	Financial Reporting – After monthly postings, a feature allowing the user to email statements to other users. a) Ability to export and import data for the budget.		

	b) Able to spread automatically over 12 months		
80	Ability to enter annual approved budget amounts for each department or cost center		
81	Ability to track all actuals against approved budget amount by division, project or fund		
82	Automatic and seamless interface to all other software modules		
83	Full bank reconciliation part of program		
84	Prohibit posting of out of balance JEs		
85	Capability to automatically allocate portions or percentages of budgets between accounts.		
#	***Grant Management***	***Yes/No***	***Comment***
86	Able to display all invoices and by which BLI they are related to the grant.		
87	Able to manage grants spanning multiple years.		
88	Ability to automatically update Budget and General Ledger when grant is modified.		
89	Ability to set milestones for each grant including target dates and actual dates.		
90	Ability to track costs by grant, phase, budget line items, budget categories and by contract.		
#	***Capital Assets***	***Yes/No***	***Comment***
91	Entry – Ability to post to the capital asset system manually or an interface from accounts payable.		
92	Ability to enter capital assets at zero book value to track the asset.		
93	Depreciation – Ability to post from capital assets to the general ledger based upon the cost center/project purchased from on either a monthly or annual basis.		
94	Ability to determine the useful life years and the method of depreciation.		
95	Balancing – Reports must be available to balance the posted capital asset system to the general ledger system by fund/cost center/projects.		
96	Physical inventory reports – Annual physical inventories require listings of capital assets. These reports must list the physical location of all capital assets by site (not project charged, assets may be located at a site other than where it was purchased).		

97	Inventory tags – Ability to have the tags scanned.		
98	Warranties – Capital asset inventories must be tracked through the system.		
99	Disposition – All disposed assets must still be maintained in a disposed file in the event of assets requiring reinstatement.		
100	Ability to produce reports at the AMP or fund level for disposal and /or additions for any part of the fiscal period.		
101	Ability to track assets by fund or account in the general ledger.		
102	Ability to reinstate a capital asset which has previously been written off or disposed of.		
103	Integrated electronic filing system (document imaging system) to maintain warranties, purchase agreements, service contracts, etc.		
104	Ability to group assets by user defined type of asset (vehicles, office equipment, computers, etc.)		
#	***Purchasing***	***Yes/No***	***Comment***
105	Ability to enter on-line requisitions		
106	Ability to automatically e-mail notifications to alert approvers when a requisition needs to be reviewed.		
107	Ability to inquire from vendor level all open and closed purchase orders		
108	Ability to inquire for user entered Buyer all open and closed purchase orders		
109	Ability to set and hold to budget parameters for a purchase order		
110	Ability to print receiving documents by: Purchase order number, date, receiver		
111	Ability to enter contracts and edit at any time		
112	Ability to track purchase orders against a particular contract.		
113	Ability to identify vendor as minority vendor		
114	Ability to enter and update vendors be restricted by security levels		
#	***Accounts Payable***	***Yes/No***	***Comment***
115	Record each vendor record with the following basic criteria: a. Vendor Name b. Attention Line c. Address d. City, State, and Zip Code e. Phone Number		

	f. Tax Identification g. 1099 if meet defined criteria and allow for various types – Misc, Int, etc. h. Vendor Type i. Minority and Classification codes j. Vendor terms k. Alternate address feature		
116	Automatically warns user if a duplicate entity number is entered (Social Security/ Federal Tax Identification), from any module within the software program		
117	Organize vendor database by both vendor name and unique vendor number		
118	Include list of individual invoices in each vendor's record		
119	Vendor records split between outstanding and history invoices		
120	Invoice number query by vendor		
121	Each invoice record can have an unlimited number of line items		
122	Real-time and/or batch posting and data entry		
123	Multiple levels of holds for invoices		
124	Automatic warning of duplication of Accounts Payable invoices		
125	Automatic posting of a current payment to a future accounting period		
126	Global payment of invoices to be run by due date		
127	Set-up features for recurring payments that are amendable		
128	MICR check encoding		
129	Positive Pay bank verification capability		
130	Produce check registers with multiple levels of detail		
131	Automatic check voiding and invoice reinstatement		
132	Unlimited banks and bank accounts with the ability to print checks from any account self-balances between funds and projects for A/P entries.		
133	ACH payment files to Tenants and Landlords		
134	ACH pre-note functionality to test the file submissions prior to funds transfer		
135	Ability to email payment advice to tenants and landlords.		
136	Easy to navigate screens that allow tabs, arrows, or graphics based screens with drilldown and shortcut icons		

137	The Accounts Payable program to integrate with all, other modules.		
138	Generate separate vendor and landlord audit reports prior to 1099 production		
139	Combine vendor and landlord data from Accounts Payable and Section 8 programs		
140	Produce 1099 form for each tax entity (individual or organization)		
141	Print 1099 forms and mailers and produces a data submission file for transmission to the IRS		
142	Archive 1099 history		
143	Process 1099 MISC forms via laser printer		
144	Ability to distribute costs across funds and projects based on agency defined distribution rules (percentages to each).		
145	Integrated electronic filing system (document imaging system) to original invoices, vendor contracts, 1099s, W-9s, etc.		
146	Able to have separate fund checking accounts or to have one central bank account for numerous funds/projects rather than individual project accounts.		
147	Ability to enter manual check into the system.		
#	***Tenant Accounting (LIPH)***	***Yes/No***	***Comment***
148	Ability of automatic posting of payments to resident's accounts		
149	Maintain security and pet deposits separately		
150	Accrue interest on security and pet deposits based on user defined table		
151	Write-off feature for inactive tenants		
152	Bankruptcy feature for active and inactive tenants		
153	Ability to select which charges to or account payment is to be applied to		
154	Ledgers with current and past transactions on all accounts (both active and vacated). Complete audit trail for all activity on tenants accounts		
155	Customized letters for notifying residents of billing on their accounts (Pull information directly from file)		
156	Periodic reporting module to provide audit tracking and review information for both daily and monthly financial data		
157	Process for month end reports and printing rent statements		

158	Ability to enter alternate addresses for residents for either evictions or second party processing paperwork		
159	Ability to create ad hoc reports for reporting requirements		
160	Ability to track move-in and move-out dates by family member		
161	Ability to enter and bill residents living in units owned by Housing Authority that are not under any HUD program		
162	Ability to manage tenants in two programs (i.e. a voucher holder living in an SEMMCHRA owned tax credit building)		
163	Ability to charge maintenance charges, etc.		
164	Ability to set up repayment agreements for either rent, maintenance charges, or pet deposits		
165	Ability to apply late fees to accounts in different programs – automatically based on set parameters or manually (different rules for separate programs)		
166	Ability to interface to Accounts Payable for automated Tenant UAP check processing.		
167	Ability to vendor pay UAP payments.		
168	Ability to integrate with other software modules i.e., Wait list, Recertification, General Ledger, Inspections, Work Order, Custom or third party report writer.		
169	Maintains audit trail on resident accounts.		
170	Prepares delinquent listings and notices.		
171	Ability to post maintenance charges from the work order program.		
172	When moving in a resident, automatic check to determine if unit is vacant.		
173	Tracks lease terminations – court dates and court numbers. Provides summary reports to take to court.		
174	Able to update the utility allowances in the unit records without affecting the resident's rent calculation.		
175	The ability to stop an applicant from being sent to a unit unless all information is on file (i.e.: Social Cards, Birth Certificates, and current income verification for all family members).		
176	Tracks tenant movement within units and programs		
177	Ability to enter promo/free rent in		

	tenant accounts		
178	Ability for multiple employees to run aging reports at the same time		
179	Ability to search by unit		
180	Ability to track credit adjustments on tenant accounts		
181	Report showing rent or HAP amount changes		
182	Ability to adjust Public Housing rent amounts if the software calculates different from PIC		
183	Ability to deactivate automatic rent proration at move-in and move-out		
184	Tracking of elderly and handicap households		
#	***Inspections***	***Yes/No***	***Comment***
185	Comprehensive HQS inspection system Ability to schedule various types of inspections for Section 8 units		
186	Inspection system interfaces with Section 8 units to reduce data entry		
187	Inspection system notification letters for tenant and landlord (or agent)		
188	Interface of HQS inspection subsystem with handheld		
189	Please identify handheld device name/manufacture currently supported		
190	Ability to reschedule and re-notify tenant / landlord for cancelled / no show inspections		
191	Ability to track and update results of HQS inspections and owner repair.		
192	Integrates with work order system to generate work orders, if needed.		
193	Ability to track HQS failures by landlord		
194	Ability to hold landlord payments pending unit repair.		
195	Ability to track inspection history by inspector, unit, inspection type and inspection result		
196	Ability to track days to re-inspection for units which failed initial inspection		
197	Ability to flag clients who have not had HQS inspection within user defined timeframe and produce report		
198	Ability to flag clients who have not had income reexamination within user defined timeframe and produce report		
199	Ability to track clients who with missed/rescheduled appointments and reason		
200	Maintain historical data on unit		

	inspection, to include initial date and status and unit pass date		
201	Ability to link inspection photo's electronically to inspection screen		
202	Follows the complete UPCS inspection protocol.		
#	***Section 8 Housing Choice Vouchers***	***Yes/No***	***Comment***
203	Month-end processing can be performed while users are logged in the system		
204	Ability to issue HAP payment any time before, after, or on the 1st of the month		
205	Automatically calculates Earned Income Disallowance		
206	Does your system offer an Online Landlord Portal? If Yes, can Landlords: a. View check history with detailed information? b. Re-print 1099s? c. View property information for their units? d. View contract information (HAP, TTP, URP, etc) for each unit? e. View upcoming inspection schedules? f. View detailed results of property inspections, including deficiencies? g. Communicate with inspectors? h. Download various forms as defined by the housing authority?		
207	Ability to identify landlords that are no longer eligible due to non-compliance		
208	Portability, including Port-ins and Port-outs, and the ability to automatically generate HUD Form 52665 at the click of a button.		
209	Electronic memorandums that document, date, and time stamp user notes and "offline" activities.		
210	Family language indicator		
211	Letters that are to be used by all staff that have been approved by the forms/letter committee to have the capability to add or change information on the letter (Merge).		
212	Historical data for units that have been on the program (Tenant/Landlord History).		
213	Capability to key monthly recurring adjustments with an area to key information in as to why these		

	adjustments are recurring.		
214	Check processing to be efficient as well as accurate in payments to be disbursed with reports to back up any and all payments and deductions.		
215	Software should alert staff member when they have keyed a previous change in for a tenant as well as alert them if an adjustment is in the system to be paid from that previous change.		
216	Software should have the capability to invoice a Landlord that owes money to the housing authority.		
217	Type 13 – 50058: Inspection dates must update any pending 50058.		
218	Data validation prior to HUD IMS/MTCS/PIC submission: System verification required to prevent PIC errors to the greatest extent possible.		
219	Automatically up-date ages of all household members when keying based on effective date of 50058		
220	Flag any incomplete fields required by HUD IMS/PIC/MTCS systems and block further processing until complete with valid entries		
221	Retroactive rent and utility payments: Generate calculations automatically based on updated information.		
222	Utilization: Real time reporting of end of month and first-of-month utilization for VMS reporting as required by HUD, including "drill down" feature to reconcile numbers.		
223	SEMAP Requirements for Annuals and HQS: “Hot list” of annual re-exams 120 days prior to annual re-exam date, with a count-down of days remaining until the re-exam date for those not keyed/completed.		
224	SEMAP Requirements for Annuals and HQS: “Hot list” of HQS inspections due, i.e. 240 days after the last annual inspection date, with a count-down to the deadline for completion.		
225	Correct accounting/invoicing adjustments for landlords: Flag landlords (EIN) no longer participating in the program with balances due to automatically deduct any balances when a new unit is put under contract. Include automatic generation of a letter/invoice		

	to the landlord explaining the deduction. (Across all programs – i.e. if a landlord owes us for an HCV but we owe them for SPC – it should deduct the amount owed from the SPC amount.)		
226	Generate monthly landlord payments.		
227	Capable of producing VMS data for HUD reporting.		
228	HAP charged to correct month for reporting.		
229	Mid-Month HAP tracking and reporting.		
230	Voucher count for end of month along with the 1st of the month.		
231	Capability to maintain a master list of rental units including all information to perform HCV rent reasonableness test and provide sortable rental listings reports to applicants and participants.		
232	Ability to pay HAP multiple times per month		
233	Report for statistics of ending of participation in program and move-out, including reason for action		
234	FSS specific reporting fields for calculating and tracking escrow, goal assessment; enrollment progress and exit forms (Contract Participation (HUD 52560)); referral information, Logic Model reporting, etc.		
#	***Section 8 - Recertification***	***Yes/No***	***Comment***
235	Maintain individual records which contain complete income, assets, expenses and references to include: a. Personal, bank and credit b. Track community service c. Automatically calculates Earned Income Disallowances d. FSS contracts, forms, escrow calculations, tracking and maintenance		
236	Tracking of minimum rent and zero income households.		
237	History of past 50058's and history of unit, listing past residents even if they have moved out.		
238	Ability to put certifications on hold, start/complete another certification for the same tenant, and resume the original certification.		
239	Tracks needed signatures on lease riders, for all adult members in the unit.		
240	Supervisors can track the progress of recertification's.		

241	Reasonable Accommodations tracking of extra bedrooms a. Tracking/Flagging all participants granted reasonable accommodations like extra bedrooms in the inspection paperwork to verify client is utilizing room for intended purpose.		
242	Per user calendar or pop-up notifications for upcoming and/or missed: recertification's, paperwork due dates, and appointments		
#	***Wait List Management***	***Yes/No***	***Comment***
243	Need to verify Social Security Numbers for both accuracy in the PIC system and also that the applicant is not a resident in any other of our subsidy programs. Needs to be able to check for duplicate subsidy in other Housing Authorities or programs.		
244	Estimate rent calculations using the income, assets, expenses and deductions.		
245	Ability for applicants to apply online via website and have application information flow into Wait List program.		
246	Ability for applicants to check the status of the Wait List		
247	Ability to pull vacant unit information daily. To identify and schedule them quickly with the developments is critical to our lease up time.		
248	To identify clients that need accessible housing and units that meet these needs.		
249	Applications/Waiting List – multiple waiting lists w/preference points ranking, income targeting categories.		
250	Application data transfers to Move In data.		
251	Ability to track information on LEP to identify applicants and participants that require an interpreter.		
252	Report for statistics of denied applicants, including reason for denial.		
#	***Contract Administration***	***Yes/No***	***Comment***
253	Project Based Section 8 (New Construction) – 50059 processing capability and Voucher submission processing.		
254	Market-Rent or non-subsidized portfolio.		
255	Post Rent/HAP to accounts.		
256	Move in and Move out accounting.		

257	HUD compliance and error checking prior to completion of 50059 and/or voucher processing.		
258	Manual and automated adjustments on Voucher processing.		
259	Capability to receive TRACS error messages.		
260	Work Order system – capability to track individual staff person data also needs to allow multiple line items per work order for tracking.		
261	Interface to A/P module to automatically generate utility allowance checks and direct pay utility vendors.		
262	History of previous 50059s are stored and available for viewing.		
263	Verification processing – ability to automatically generate for each household member w/merged data (would prefer some type of tracking system).		
264	Special Claims processing, vacancy loss processing.		
265	202c TRACS compliance.		
266	iMAX TRACS submission.		
267	Waiting list history (showing who and when moved in).		
#	***Work Orders***	***Yes/No***	***Comment***
268	User-defined fields – How many per module?		
269	User-defined and 1000 (minimum) task code capability – minimum 4-digit field preferred.		
270	User-defined work descriptions on a pulldown menu		
271	Pull Work Orders for PHAS Reporting		
272	Unlimited lines and character spacing in the work order description area		
273	Available space for side notes that do not appear on the printed work order		
274	Generate work orders by unit #, address, AMP/site or tenant name		
275	Generate multiple work orders for one address by selecting the address only once		
276	Have multiple work items and multiple employees appear on a single work order		
277	Designate "Pet In Unit" once for an address and have the designation default on subsequent work orders for the same address.		

278	Copy and paste a work description from one work order to another		
279	Ability to notify someone of a Skilled Trades work order issued for their area by someone in another area (FYI with "Read only" capability).		
280	Ability to repeat standard labor information for the same employee when entering several labor entries on one work order (e.g. employee #).		
281	Inventory and labor together on the work order for cost per work order		
282	Track the date, time and function performed by users of a specified work order		
283	Track data to determine PHAS percentages by AMP or multiple selection criteria and produce a worksheet containing a breakdown of same.		
284	Flag or color-code emergency work orders not abated within 24 hours		
285	Flag non-emergency work orders not completed within 3 days.		
286	Ability to schedule monthly, weekly and daily planned periodic maintenance		
287	Preventive maintenance scheduling		
288	Option to specify a start time to appear on all preventive/periodic work orders		
#	***Market Rate Units***	***Yes/No***	***Comment***
289	Database for Market Rate Rental Units.		
290	Track Market Rate tenants similar to Public Housing.		
291	Software allows the transfer of clients between programs (From Market to Section 8 or Section 8 to Market).		
292	Software can maintain clients in multiple programs (a voucher holder in a Market unit).		
293	Software maintains separate accounts for Market High-Rise Tracking.		
294	Maintain and print Market Lease Up packets		
295	Software contains an “Executive Summary” of current status of Market Rate Lease Ups, Vacant units, Work Orders, and Damage Claims.		
#	***Construction Management***	***Yes/No***	***Comment***
296	Ability to link Construction Documents on line (original contract, drawings, etc.)		
297	Ability to track capital expenditures by unit and project or development by year		

	of grant		
298	Ability to track costs by project		
299	Ability to track purchase orders by project		
300	Ability to track costs by budget line item		
301	Ability to track subcontractor's and subcontract costs/budgets		
302	Ability to track payments made on a contract to General or Subcontractor		
303	Ability to calculate retention withheld and to reduce percentage of retention withheld on Periodic Estimate payments to contractors. System allows for a "pay retention" function to cut a check once contract is successfully completed, for multiple progress payment retention withheld.		
304	Ability to modify Job Cost Codes for construction costs		
305	Ability to track the number, amount and description of each change order in a contract. System can track multiple change orders		
306	Ability to track construction schedule and the % of contract expended		
307	Ability to enter multiple simultaneous project budget amounts		
308	Ability to add user defined fields		
309	Ability to set up new jobs based upon previous jobs completed in the system		
310	Interface with purchase order, accounts payable and general ledger systems		
311	Ability to user define which General Ledger Account is linked with each specific Job Cost Code, and updates General Ledger real time.		
312	Includes a "draw" process for job funding which includes the ability to produce the AIA G702 and G703		
313	Construction budget revisions are secured by users and provide for an audit trail of who and date/time completed the revision.		
314	Ability to track daily reports		
315	Ability to download into Excel spreadsheet format		
316	Reports to track contracts, their payments and retention amounts		
317	Reporting to track construction schedules		
#	***Resident & Community Services***	***Yes/No***	***Comment***

318	Ability to track all residents annual income and income type for history of clients		
319	Ability to track education, vocational training and certificate programs client has received		
320	Ability to track languages spoken by resident and in a translator is needed for communications purposes		
321	Ability to track employment history for each family member, including all section 3 hires		
322	Ability to track services needed for clients and all family members services to include:		
323	Ability to track clients various civic involvement and time spent on each obligation		
324	Produce reports and mailing labels for user entered criteria such as sites, age groupings, and support services		
325	Produce family composition reports within each housing function (wait list, housing program, etc.) based on user defined criteria		
326	Produce reports for each client's case management assessment		
327	Produce reports for each client's support services requested		
328	Produce reports for each client's follow through on all referral made		
329	Produce reports for each client's civic involvement		
330	Produce reports by case manager for all clients serviced		