Appendix B. PHA Staff Timesheets

Instructions for Completing Time Sheet	
This timesheet is intended to assist you in accurately reporting the activities that you complete in a day. You are being asked to stop working several times a day to record your activities over the last several hours. You will have multiple Time Sheets for one day. Recording your activities at different times during the day will help you recall what you were working on and how long you spent on that particular task. You should have your Time Sheet next to you as work so that you can "tick mark" activities as you complete them. You will only make "tick marks" until the end of the time period; at the end you will tally how often you performed the tasks and indicate the total length of time you spent on each. Please use the following instructions for accurately completing the Time Sheet	
Employee Identifier	Enter your name, badge number, or other assigned employee identifier
Date	Enter the date for which you are recording activities
Period Start	Enter the time you are starting this particular sheet. You will have multiple sheets for each day.
Period End	Enter the time you are ending this particular sheet.
Recording Activities: * Make one "tick mark" for each time you complete a particular activity during the period. If you "batch process" (complete the same task for multiple individuals at one time), that is one "tick mark." For example, if you mail briefing letters for 20 participants, that equals one "tick mark" under the "Prepare for Briefing" activity. * Include interaction with customers (applicants, participants, owners, etc.) under the specific task that caused the interaction. Examples include: - Requesting additional documents from applicants for income = "Verify income, assets, deductions, household composition, preferences if applicable" - Requesting birth certificate from participant at annual reexamination = "Non-Income Eligibility Tasks" - Speaking with owner in lobby about abatement = "HQS Enforcement" * Reception and front/common desk time should be included in specific tasks as indicated for customer interaction. * File correction from quality control reviews (file or otherwise) should be included in a specific task. For example, if the quality control review indicated that the income was calculated incorrectly, and you have to re-calculate the income and enter into the System of Record, you would record the time you spent re-calculating under "Calculating Annual Income" and the time you spent data entering under "System of Record Data Entry." * Each task has a descriptive list of activities. If you cannot find a place for your activity, please make a descriptive note on the sheet and enter your time there. * At the bottom of the page, you will find a place to record non-programmatic time. It does not matter which of the timesheets you record your paid lunch and breaks. It is important that you include those times for each day. * At the end of each period (when you are completing the Time Sheet," include how much time you spent filling out the Time Sheet in the "Research Administrative Tasks" activity. Also include in here any time you spent asking questions about the Time Sheet.	

Initial Occupancy

Employee Identifier	
Date	
Period Start	
Period End	

Activities	Times Completed (Tick Marks)	Times Completed per Period	Total Time Spent (minutes)
Waiting List Management (includes selecting applicants, administrative tasks such as schedule appts, prepare and send letters, make files, make copies, updating WL status(es))			
Prepare for interviews (includes first, second and third appointments for new admissions, may include file preparation, room preparation, etc.)			
Conduct interview (includes first, second and third appointments for new admissions, call them in, complete and collect documents, make copies, discuss program, request additional applicant docs, etc.)			
Verify income, assets, deductions, household composition, preferences if applicable (request third party, tenant supplied documents relating to adjusted annual income, make phone calls, send and receive faxes, etc.)			
Non-Income Eligibility Tasks (Send notices of ineligibility, update system(s), Criminal background request and return processing, process ineligibility notifications)			
Calculate annual income and certify initial eligibility or ineligibility (includes sending notices of income ineligibility, document files)			
Prepare for briefing (schedule, send notices, update system(s) and files, prepare voucher, rent burden and packets)			
Conduct briefing			
RFTA Processing (receipt, checking, logging, calling with questions, etc.)			
Process extension requests (receive and evaluate, approve or deny and send notifications); cancelling applications and processing expirations.			
Contracting (prepare, deliver HAP Contract/meet with owner and applicant to execute contract for initial move ins, reviewing and executing)			
Portability (sending and receiving HUD 52665s, communicating with initial and receiving PHAs about participants and billing, inquiries from applicants and tenants about porting in to your PHA)			

Activities	Times Completed (Tick Marks)	Times Completed per Period	Total Time Spent (minutes)
Rent Reasonableness (conducting comparability reviews for initial move ins, negotiating rent with owner, receiving and approving/denying rent increases, documenting file and updating systems)			
Processing Informal Review Requests (receive request and approve or deny, notify applicant of approval/denial, document file(s) and system(s), schedule hearing if approved and sending appropriate notifications)			
Prepare for Informal Review (collect documents, prepare chronology, etc.)			
Conduct Informal Review			
Customer Complaint Resolution (researching and resolving/responding to complaints from owners, tenants and other community members, includes complaints about inspections that are NOT related to abatement, may include reception desk time)			
Customer Inquiry Resolution (responding to non-complaint inquiries, primarily requests for information not related to complaint or specific tenant or owner based transaction, may include reception desk time)			
Scheduling Inspections (arranging inspections, sending notifications, calls and inquiries regarding inspection date/time, rescheduling)			
Supportive Services to Special Allocations (case management services provided to participants in special allocation programs such as FUP and VASH. Does not include FSS, Homeownership, other stand-alone programs)			
Community Meetings (attendance at meetings with local service providers such as the VA, DCFS, Legal Aid, etc., customer service meetings including community forums, program information sessions, etc., onsite meetings at public housing developments)			
System of Record Processing (including 50058 completion, check run)			

Paid Time Off			
Staff Meetings			
Research Administrative Tasks			
Lunch			
Breaks			
Training			
Filing			

Total Minutes

On-Going Occupancy

Employee Identifier	
Date	
Period Start	
Period End	

Activities	Times Completed (Tick Marks)	Times Completed per Period	Total Time Spent (minutes)
Prepare for interviews (includes first, second and third appointments for annual reexams and other interviews, may include file preparation, room preparation, etc.)			
Conduct interview (includes first, second and third appointments for annual reexams and other interviews, call them in, complete and collect documents, make copies, discuss program, request additional applicant docs, etc.)			
Verify income, assets, deductions, household composition, preferences if applicable (request third party, additional tenant supplied documents relating to adjusted annual income, make phone calls, send and receive faxes, etc.)			
Non-Income Eligibility Tasks (Existing Tenant Search, send notices of ineligibility, update system(s), Criminal background request and return processing, process ineligibility notifications)			
Calculate annual income and certify ongoing eligibility or ineligibility (includes sending notices of income ineligibility, document files)			
Prepare for briefing (schedule, send notices, update system(s) and files, prepare voucher, rent burden and packets)			
Conduct briefing			
RFTA Processing (receipt, checking, logging, calling with questions, re-issuing, etc.)			
Process extension requests (receive and evaluate, approve or deny and send notifications)			
Contracting (prepare, deliver HAP Contract/meet with owner and applicant to execute contract for unit transfers and rent increases, reviewing and executing)			

Activities	Times Completed (Tick Marks)	Times Completed per Period	Total Time Spent (minutes)
Rent Reasonableness (conducting comparability reviews for unit transfers and rent increases, negotiating rent with owner, receiving and approving/denying rent increases, documenting file and updating systems)			
Terminating Assistance (reviewing file and circumstances leading to decision to terminate assistance including inspection results, sending notification of pending termination action)			
Processing Informal Hearing Requests (receive request and approve or deny, notify applicant of approval/denial, document file(s) and system(s), schedule hearing if approved and sending appropriate notifications)			
Prepare for Informal Hearing (collect documentation, prepare chronology, etc.)			
Conduct Informal Hearing			
Receive and Process Interim Requests (receive phone calls, walk in participants making initial request for interim reexamination or requesting follow up information, includes income review 120 days after new admission and/or historical adjustment)			
Receive and Process Move Requests (receive phone calls, walk in participants making initial request for move, determine if eligible to move and notify family of PHA decision, includes requests for port out)			
Customer Complaint Resolution (researching and resolving/responding to complaints from owners, tenants and other community members, includes complaints about inspections that are NOT related to abatement, may include reception desk time)			
Customer Inquiry Resolution (responding to inquiries that are not complaints, primarily requests for information not related to complaint or specific tenant or owner based transaction, may include reception desk time)			
HQS Enforcement (evaluating inspection results and placing and/or lifting unit abatements, interactions with owners and tenants related to HQS enforcement)			
Scheduling Inspections (arranging inspections, sending notifications, calls and inquiries regarding inspection date/time, rescheduling)			
Supportive Services to Special Allocations (case management services provided to participants in special allocation programs such as FUP and VASH. Does not include FSS, Homeownership, or other stand-alone programs)			

Activities	Times Completed (Tick Marks)	Times Completed per Period	Total Time Spent (minutes)
Community Meetings (attendance at meetings with local service providers such as the VA, DCFS, Legal Aid, etc., customer service meetings including community forums, program information sessions, etc., onsite meetings at public housing developments)			
System of Record Processing (including 50058 completion, completing check run)			

Paid Time Off			
Staff Meetings			
Research Administrative Tasks			
Lunch			
Breaks			
Training			
Filing			

Total Minutes

Special Programs (FSS, H, Other)

Employee Identifier	
Date	
Period Start	
Period End	

Activities	Times Completed (Tick Marks)	Times Completed per Period	Total Time Spent (minutes)
FSS Marketing (outreach and/or information sessions, informational/promotional flyer preparation, conducting sessions, recruiting potential participants)			
FSS Enrollment (meeting with potential participant, describing program, establishing ITSP/goals, completing Contract of Participation)			
On-Going Individual Case Management (supportive services including referral, linkage, direct case management, updating goals, collecting paperwork and documentation, group case management sessions including financial management, job training, job clubs, etc.)			
FSS Exit (processing voluntary and involuntary program exits, successful program completions, documenting file)			
Escrow Monitoring (calculating monthly escrow credit, reviewing accounts to ensure accuracy, updating accounts, disbursing interest)			
Escrow Payouts (processing requests for interim and successful program completion payments, auditing accuracy of amount, cutting check)			
Occupancy Related Tasks (time spent assisting participant comply with occupancy requirements such as annual reexamination)			
Homeownership Marketing (outreach and/or information sessions, informational/promotional flyer preparation, conducting sessions, recruiting potential participants)			
Pre-Purchase Tasks (supportive services to prepare participant for homeownership, includes credit counseling, financial management, etc.)			
Home Closing (coordinating home close process, lender approval, etc.)			
Post-Purchase Support (supportive services provided after home close including financial management, budgeting, etc.)			
Other Program: ______________________________			
Program Meetings (PCC meetings, meetings with local service providers)			

Activities	Times Completed (Tick Marks)	Times Completed per Period	Total Time Spent (minutes)
Paid Time Off			
Staff Meetings			
Research Administrative Tasks			
Lunch			
Breaks			
Training			
Filing			

Total Minutes	

Field Inspections

Employee Identifier	
Date	
Period Start	
Period End	

Activities	Times Completed (Tick Marks)	Times Completed per Period	Total Time Spent (minutes)
Pre-Inspection Activities (time in office before daily itinerary starts, time at home downloading itinerary/schedule, any review activities needed before inspections)			
Drive Time (time between inspections)			
Annual Inspections			
Re-Inspections (first, second, third, etc. are included)			
Emergency Inspections			
Emergency Re-Inspections (first, second third, etc. are included)			
Complaint Inspections			
Complaint Re-Inspections (first, second, third, etc. are included)			
Initial/Move In Inspections			
Initial/Move In Re-Inspections (first, second, third, etc. are included)			
Quality Control Inspections			
Quality Control Inspections			
Quality Control Re-Inspections (first, second, third, etc. are included)			
Post-Inspection Activities (completing HUD 52641, uploading results from handheld, mileage reimbursement sheets, etc.)			

Paid Time Off			
Staff Meetings			
Research Administrative Tasks			
Lunch			
Breaks			
Training			
Filing			

Total Minutes	

Program Monitoring

Employee Identifier		
Date		
Period Start		
Period End		

Activities	Times Completed (Tick Marks)	Times Completed per Period	Total Time Spent (minutes)
HAP Payment Authorization (reviewing HAP register prior to check run, researching and correcting any discrepancies)			
Monitoring PIC (comparing PIC to SoR, correcting fatal errors and re-submitting records)			
EIV Required Reports (running and monitoring deceased tenants, identity verification, immigration, income discrepancy, multiple subsidy and new hires)			
Fraud Investigations(following up and resolving reports of program fraud)			
Recovery of Overpaid HAP (calculating overpaid HAP, preparing and entering into RPA with participant and/or owner, collecting funds)			

Paid Time Off			
Staff Meetings			
Research Administrative Tasks			
Lunch			
Breaks			
Training			
Filing			

Total Minutes

Supervisory

Employee Identifier	
Date	
Period Start	
Period End	

Activities	Times Completed (Tick Marks)	Times Completed per Period	Total Time Spent (minutes)
Case Review (working with direct report on their assigned cases)			
Evaluations			
Disciplinary Meetings			

Paid Time Off			
Staff Meetings			
Research Administrative Tasks			
Lunch			
Breaks			
Training			
Filing			

Total Minutes