Appendix C. 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. We suggest that you stop working several times a day to record your activities over the last several hours. 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.	

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

Recording Activities:

1. **Customer interaction**: (applicants, participants, owners, etc.) Record time under the specific task that caused the interaction. Examples include:
   a. Requesting additional documents from applicants for income = "Verify income, assets, deductions, household composition, preferences if applicable"
   b. Requesting birth certificate from participant at annual reexamination = "Non-Income Eligibility Tasks"
   c. Speaking with owner in lobby about abatement = "HQS Enforcement"

2. **Reception and front/common desk time**: should be included in specific tasks as indicated for customer interaction.

3. **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."

4. 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.

5. **Non-Programmatic Time**: You will find a place to record non-programmatic time, such as lunch, breaks, and Non-HCV related activities. It is important that you include those times for each day.

6. **Research Administrative Tasks**: At the end of each day, include how much time you spent filling out the Time Sheet in the "Research Administrative Tasks" activity. Also include any time you spent on training or asking/answering questions regarding the Time Sheet.

7. **Notes**: On the last page, you will find a section to write notes regarding your daily tasks. This is solely for you to keep track of your completed tasks each day.

8. **Total Time**: For each section, please add up all the time for your tasks and report it in the total time at bottom of each section. This will ensure that you are recording the correct amount of time each day.

Initial Occupancy

Activities	Time			
	Regular Time		Overtime	
	Hrs.	Min.	Hrs.	Min.
1. Waiting List/ Selection • Waiting List Management (includes selecting applicants, administrative tasks such as schedule appts, prepare and send letters, make files, make copies, updating WL status(es))				
2. 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.)				
3. Other Eligibility Tasks • 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.)				
• 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)				
4. Issuance • Prepare for briefing (schedule, send notices, update system(s) and files, prepare voucher, rent burden and packets)				
• Conduct briefing				
5. Unit Approval & Leasing • RFTA Processing (receipt, checking, logging, calling with questions, etc.)				
• Process extension requests (receive and evaluate, approve or deny and send notifications); canceling applications and processing expirations.				
• Scheduling Inspections (arranging inspections, sending notifications, calls and inquiries regarding inspection date/time, rescheduling)				
• Rent Reasonableness (conducting comparability reviews for initial move ins, negotiating rent with owner, receiving and approving/denying rent increases, documenting file and updating systems)				
• Executing HAP Contracts (prepare, deliver HAP Contract/meet with owner and applicant to execute contract for initial move ins, reviewing and executing)				
• Entry of Tenant Data (enter all relevant tenant data related to initial lease-up, including income information, RFT, inspection, HAP contract etc. in tenant file and data systems).				

Activities	Time			
	Regular Time		Overtime	
	Hrs.	Min.	Hrs.	Min.
6. Reviews • 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				
7. Customer Service (Initial Occupancy) • 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)				
• 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)				
• Landlord recruitment and outreach				
8. Other • 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)				
• 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)				
• System of Record Processing (including 50058 completion and submission, check run)				

TOTAL TIME				

Ongoing Occupancy

Activities	Time			
	Regular Time		Overtime	
	Hrs.	Min.	Hrs.	Min.
1. <u>Annual Recert Mail or Interview</u> • <u>Prepare for interviews</u> (includes first, second and third appointments for annual reexams and other interviews, may include file preparation, room preparation, etc.)				
• <u>Conduct interview</u> (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.)				
2. <u>Verify income, assets, deductions, household composition, preferences</u> if applicable (request third party, additional tenant supplied documents relating to adjusted annual income, make phone calls, send and receive faxes, etc.)				
3. <u>Other Eligibility Tasks</u> • <u>Non-Income Eligibility Tasks</u> (Existing Tenant Search, send notices of ineligibility, update system(s), Criminal background request and return processing, process ineligibility notifications)				
• <u>Calculate annual income</u> and certify ongoing eligibility or ineligibility (includes sending notices of income ineligibility, document files)				
4. <u>Moves</u> • <u>Receive and Process Move Requests</u> (receive phone calls and letters, walk in participants making initial request for move, determine if eligible to move and notify family of PHA decision, includes requests for port out)				
• <u>Prepare for briefing</u> (schedule, send notices, update system(s) and files, prepare voucher, rent burden and packets)				
• <u>Conduct briefing</u>				
• <u>RFTA Processing</u> (receipt, checking, logging, calling with questions, re-issuing, etc.)				
• <u>Process extension requests (receive and evaluate, approve or deny and send notifications)</u>				
• <u>Rent Reasonableness</u> (conducting comparability reviews for unit transfers and rent increases, negotiating rent with owner, receiving and approving/denying rent increases, documenting file and updating systems)				
• <u>Executing HAP Contracts</u> (prepare, deliver HAP Contract/meet with owner and applicant to execute contract for unit transfers and rent increases, reviewing and executing)				
• <u>Entry of Tenant Data</u> (enter all relevant tenant data following an annual exam, interim reexam, inspection, abatement etc. in tenant file and data systems).				
5. <u>Terminating Assistance</u> (reviewing file and circumstances leading to decision to terminate assistance including inspection results, sending notification of pending termination action)				
• <u>Processing Informal Hearing Requests</u> (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)				
• <u>Prepare for Informal Hearing</u> (collect documentation, prepare chronology, etc.)				
• <u>Conduct Informal Hearing</u>				

Activities	Time			
	Regular Time		Overtime	
	Hrs.	Min.	Hrs.	Min.
6. Interims • Receive and Process Interim Requests (receive phone calls, walk in participants making initial request for interim reexamination or requesting follow up information, conduct interim interviews, conduct verifications of income (even if changes are not made), includes income review 120 days after new admission and/or historical adjustment)				
7. Customer Service (Ongoing occupancy) • 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)				
• 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)				
• Landlord recruitment and outreach				
8. Inspections • Scheduling Inspections (arranging inspections, sending notifications, calls and inquiries regarding inspection date/time, rescheduling)				
• HQS Enforcement (evaluating inspection results and placing and/or lifting unit abatements, interactions with owners and tenants related to HQS enforcement)				
• 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)				
• System of Record Processing (including 50058 completion and submission, check run)				

TOTAL TIME				

Special Programs (FSS, Homeownership, Other)

Activities	Time			
	Regular Time		Overtime	
	Hrs.	Min.	Hrs.	Min.
1. Development of Partnerships Working with other agencies to identify families for targeted vouchers including developing MOUs or other protocols and processes to assist vulnerable families.				
2. Housing Search Assistance Working with partner agencies to assist hard-to-house families find suitable units, including outreach to landlords, connecting applicants to organizations that provide security deposits and other services, etc.				
3. Marketing & Enrollment • 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)				
• Homeownership Marketing (outreach and/or information sessions, informational/promotional flyer preparation, conducting sessions, recruiting potential participants)				
4. Case Management • Ongoing Individual Case Management (supportive services including referral, linkage, direct case management, updating goals, collecting paperwork and documentation, group case management including financial management, job training, job clubs, etc.)				
• 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)				
• 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.)				
5. Exit or Termination • FSS Exit (processing voluntary and involuntary program exits, successful program completions, documenting file)				
6. Other				
• Program Meetings (PCC meetings, meetings with local service providers)				

TOTAL TIME				

Field Inspections

Activities	Time			
	Regular Time		Overtime	
	Hrs.	Min.	Hrs.	Min.
1. <u>Pre-Inspection Activities</u> (time in office before daily itinerary starts, time at home downloading itinerary/schedule, any review activities needed before inspections)				
2. <u>Drive time</u> • <u>Drive Time</u> (time to and from the field inspection)				
3. <u>Inspections</u> • <u>Initial/Move In Inspections</u>				
o Initial/Move In Re-Inspections (first, second, third, etc. are included)				
• <u>Annual Inspections</u>				
o Re-Inspections (first, second third, etc. are included)				
• <u>Emergency Inspections</u>				
o Emergency Re-Inspections (first, second third, etc. are included)				
• <u>Complaint Inspections</u>				
o Complaint Re-Inspections (first, second, third, etc. are included)				
• <u>Quality Control Inspections</u>				
o Quality Control Re-Inspections (first, second, third, etc. are included)				
4. <u>Post-Inspection Activities</u> (completing HUD 52641, uploading results from handheld, mileage reimbursement sheets, etc.)				

TOTAL TIME				

Program Monitoring

Activities	Time			
	Regular Time		Overtime	
	Hrs.	Min.	Hrs.	Min.
1. HAP Payment Authorization (reviewing HAP register prior to check run, researching and correcting any discrepancies)				
2. Monitoring PIC (comparing PIC to system of record, correcting fatal errors and re-submitting records)				
3. EIV Required Reports (running and monitoring deceased tenants, identity verification, immigration, income discrepancy, multiple subsidy and new hires)				
4. Fraud Investigations(following up and resolving reports of program fraud)				
5. Recovery of Overpaid HAP (calculating overpaid HAP, preparing and entering into RPA with participant and/or owner, collecting funds)				
6. Quality Control of Tenant Files (reviewing tenant files to ensure program requirements are met, including the required QC sample under SEMAP)				
7. Monitoring Utilization (ongoing monitoring of lease-up and HAP expenses to determine financial position of PHA and whether or not PHA should lease-up or reduce costs).				
8. Complete SEMAP Certification and associated activities				

TOTAL TIME				

Supervisory

Activities	Time			
	Regular Time		Overtime	
	Hrs.	Min.	Hrs.	Min.
1. Case Review (working with direct report on their assigned cases)				
2. Staff Evaluations				
3. Meetings with managers as a group (planning, issue status and resolution, etc. regular or ad hoc)				
4. Individual meetings with managers (issues resolution, status of action items, feedback, coaching, planning, etc.)				
5. Meetings with teams, work groups, or all staff (regular or ad hoc)				
6. Executive level meetings, preparation for board meetings, board meetings, etc.				
7. Evaluation and interpretation of HUD regulations and guidelines; draft procedures, processes, job instructions and develop solutions to accomplish scope of work required				
8. Review & approval of invoices; monitoring budget to actual costs				
9. Review and analysis of data and reports				
10. HR activities – outreach, interviews, actions relating to performance or other personnel issues				
11. Staff training and orientation				
12. Infrequent activities such as review of payment standard, admin plan, utility allowance, application for new funding				
13. Public relations, community meetings, troubleshooting issues with elected officials and others				

TOTAL TIME				

Non-Programmatic Time

Activities	Time			
	Regular Time		Overtime	
	Hrs.	Min.	Hrs.	Min.
1. Non-HCV Related Activities				
2. Paid Time Off				
3. Staff Meetings				
4. Research Administrative Tasks				
5. Lunch				
6. Breaks				
7. Training				
8. Filing				
9. Mail				
10. Payroll				

TOTAL TIME				

Notes