Appendix C. Voucher and Transaction Counts

Voucher Counts

Please provide the following counts once prior to the start of RMS data collection and once at the end of RMS data collection.

Date Report Produced: [MM/DD/YY]	Vouchers Under Lease	Vouchers Under Lease by Household Type					
Voucher Type		Non-Disabled Small Family (1-5 members)	Non-Disabled Large Family (6+ members)	Non-Elderly Disabled	Elderly	Homeless (at Admission)	Not Able to Specify
Regular tenant-based HCV program							
Project-Based							
Homeownership							
HUD-VASH							
Family Unification Program							
5-yr Mainstream Vouchers							
Non-elderly disabled vouchers							
Tenant Protection or Enhanced Vouchers							
Disaster Voucher Program							
Other Voucher Type (SPECIFY)							

Number of households enrolled in FSS: _____

Transaction Counts Worksheet

Instructions:
- Please provide the following transactions counts for the 12-month period prior to the start of RMS data collection <u>and</u> for the two-month RMS data collection period: [DATE RANGE]. If you are not able to provide the numbers for the exact date range, please specify the dates that you are providing the data for.

- Enter "N/A" if a given count is not applicable.

- Enter "0" if the count is applicable but you did not have any transactions in this area during the RMS data collection period.

- Add columns as needed for additional voucher types.

- You do not need to fill in the shaded boxes.

- *If you have questions about any of the counts, please contact your study team liaison.*

Activity	Total Count	Date Range	Count by Voucher Type				Count by Household Type						
			Regular Vouchers	Special Voucher (*Specify*)	Special Voucher (*Specify*)	Special Voucher (*Specify*)	Non-Disabled Small Family	Non-Disabled Large Family	Non-Elderly Disabled	Elderly	Homeless	Not Able to Specify
1. Number of eligibility determinations completed												
2. Number of incoming ports processed (all activities from incoming request through initial billing/absorption)												
3. Number of households briefed												
4. Number of vouchers issued												

Activity	Total Count	Date Range	Count by Voucher Type				Count by Household Type						
			Regular Vouchers	Special Voucher (*Specify*)	Special Voucher (*Specify*)	Special Voucher (*Specify*)	Non-Disabled Small Family	Non-Disabled Large Family	Non-Elderly Disabled	Elderly	Homeless	Not Able to Specify
5. Number of RFTAs processed (all movers - new and transfers)												
6. Number of rent reasonableness tests conducted (all types												
7. Number of HAP contracts executed												
8. Number of initial inspections for new units *by PHA staff*												
9. Number of re-inspections for new units *by PHA staff*												
10. Number of initial inspections for annuals *by PHA staff*												
11. Number of re-inspections for annuals *by PHA staff*												
12. Number of QC inspections *by PHA staff*												

Activity	Total Count	Date Range	Count by Voucher Type				Count by Household Type					
			Regular Vouchers	Special Voucher (*Specify*)	Special Voucher (*Specify*)	Special Voucher (*Specify*)	Non-Disabled Small Family	Non-Disabled Large Family	Non-Elderly Disabled	Elderly	Homeless	Not Able to Specify
13. Number of complaint or emergency inspections *by PHA staff*												
14. Number of inspection (of any type) *by contractors*												
15. Number of outgoing ports processed (all activities from request through initial billing)												
16. Number of annual recertifications completed												
17. Number of move requests completed												
18. Number of reasonable accommodation requests received and processed												
19. Number of End of Participations (EOPs)												
20. Number of interim recertifications completed												

Activity	Total Count	Date Range	Count by Voucher Type				Count by Household Type						
			Regular Vouchers	Special Voucher (*Specify*)	Special Voucher (*Specify*)	Special Voucher (*Specify*)	Non-Disabled Small Family	Non-Disabled Large Family	Non-Elderly Disabled	Elderly	Homeless	Not Able to Specify
21. Number of HCV homeownership closings												
22. Number of quality control file reviews conducted												
23. Number of repayment agreements entered into												

Interview Questions Regarding Transaction Counts
These questions will be asked prior to the start of RMS and revisited at the end of the RMS data collection period.

1. Do you anticipate that the two-month time measurement data collection period will be unusual in any way that will affect transaction counts, staff productivity, or the portion of staff time spent on different activities? Examples include:
   - Intensive leasing effort
   - Short term opening of waiting list
   - High number of recent new hires still in training
   - New system of record or other ancillary software
   - Working to meet deadline for submission of applications for grants
   - Recent office move, expansion or preparation for move or expansion
   - Implementing new and dramatically different policy (e.g., reduce payment standards)
   - Transitioning some work to a contractor or new contractor
   - Responding to public relations crisis
   - Other

2. If any of these or other situations will exist during the two-month time measurement data collection period, can you identify how the data collected will be different from a "normal" two-month period for your agency:
    - Different transaction counts – In what areas? How would the counts be different?
    - Different level of staff productivity – What types of staff? What would be different?
    - Staff spending more time of one or more activities than usual – Time diverted from what activities and re-directed to what tasks? How many staff does this affect?