

Record Match Baseline Procedure – Public Housing Quick Start Guide

This Quick Start Guide briefly outlines the procedure for achieving a Record Match Baseline in PIC for Public Housing programs. A more detailed procedure is available from Tenmast Software at www.quicpic.com/spt/.

Step 1. Move households out of PIC that are no longer assisted

- a. Print Detailed Unit Report From PIC
 - i. Log on to PIC
 - ii. Go to Housing Inventory/Development sub-module
 - iii. Click on Reports tab
 - iv. Select Unit Reports option
 - v. Select Development(s) for report
 - vi. Place a check mark next to the Occupancy option
 - vii. Click Generate Report button
 - viii. On Report, Excel button to download report
 - ix. Print report from Excel
- b. Print a unit report with occupancy status from your software system
- c. Compare building number and unit number data in each report
 - i. Confirm that B&U data in PIC exactly matches B&U data in your software system
 - ii. If B&U data does not match, change data in your software system to match PIC data
- d. Compare occupancy status in PIC to occupancy status in your system
 - i. Identify households in PIC that you no longer assist
 - ii. Confirm that household is also in the PIC Viewer
 - iii. End participation using Online EOP in the PIC Viewer
 - iv. If household is in PIC Unit file but not in the PIC Viewer, resubmit EOP transaction to PIC to vacate PIC unit file

Note: Wait a day after using the Online EOP before proceeding to Step 2.

Step 2. Submit baseline records to PIC for missing households

- a. Print MTCS Transaction Report from PIC Viewer
 - i. Log on to PIC
 - ii. Go to Form 50058/Viewer sub-module
 - iii. Click on Reports tab
 - iv. Select MTCS Transaction Report option
 - v. Select Public Housing Program Type
 - vi. Select Development(s) for report

- vii. Enter a broad date range for Effective Dates
 - viii. Click Generate Report button
 - ix. On Report, Excel button to download report
 - x. Print report from Excel
- b. Print a tenant report from your software system
 - c. Compare reports and identify households on your tenant report that are not on PIC report
 - i. If household has not been in PIC before, submit Historical Adjustment to PIC with current effective date
 - ii. If household has been in PIC before, submit New Admission
 - iii. If occupant in both systems but in different units (resulting from rejected Change of Unit)
 - 1. Confirm that “new unit” in PIC is vacant
 - 2. Resubmit Change of Unit record to PIC

Step 3. Confirm That PIC Records Are Current

- a. Repeat Step 2(a) (reprint MTCS Transaction Report)
- b. Print tenant report from your software system with current Action Type and Effective Date
- c. Compare Action Types and Effective Dates of 50058 records in each report
 - i. If PIC record is behind, submit current 50058 from your system.
 - ii. If 50058 record in PIC is wrong
 - 1. Resubmit ‘replacement’ record (using the same Action Type and Effective Date) if Action Type is other than 1, 4, 5, 6 or 7.
 - 2. If Action Type is 1, 4, 5, 6 or 7, submit Void to delete wrong record in PIC, then submit correct record to PIC.