

WAHA 2024

Portability

Agenda

1. Portability Overview

2. Initial Housing Authority (IHA) and Receiving Housing Authority (RHA)-Roles and Responsibilities

3. HUD Notice PIH 2016-19-Issued on June 6, 2016

4. Required Documents- 50058, 52665, Voucher, Income verifications


5. Administering and Absorbing

6. IHA and RHA- Communications and Payments



Portability References

- Regulations at 24 CFR § 982.353- allows moves through out United Stated provided there is a PHA that has jurisdiction over the area.
- 24 CFR §§ 982.353 through 982.355- Portability moves and responsibilities of a IHA and RHA
- Notice PIH 2016 – 09 (HA)- Issued on June 6, 2016

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- Can Payment standards, voucher size change at new Jurisdiction?
 - Can tenant's rent portion change?
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Family Responsibilities

- To notify their current landlord and give proper notice to the landlord and IHA.
- Must provide IHA with the name of the PHA or area in which the family wants to port out.
- Applicant family may be required to lease at the IHA PHA jurisdiction for a year if that's adopted in the PHA administrative plan.
- Applicant family must be income eligible in the RHA jurisdiction.

IHA Responsibilities

- Ensure proper notice was given to the landlord and HAP payments are suspended as of the lease termination date.
- Issue a voucher to the tenant timely and send the portability paperwork to the RHA in a timely manner.
- Ensure that the family has the correct contact information for the RHA.
- Send the most updated 50058, HUD-52646 (Voucher), along with income verifications, a current EIV report and a completed 52665.
- Participants: Income eligibility is not re-determined
- Applicants: Must be income eligible in the jurisdiction where the family will be admitted into the program under the initial lease.

RHA Responsibilities

- Review the information submitted by the IHA to ensure all documents were received. Check the 50058 for any special category vouchers.
- Briefing the family.
- Issue a voucher: Determine subsidy standard per RHA policies.
- Notify IHA of any extensions beyond the mandatory 30-days
- Notify IHA when family leases
- Notify IHA if voucher expires and family failed to lease.
- If absorbing: Send 52665 to notify IHA. No 50058 is needed.
- If billing: send 52665 and 50058 to notify IHA with every action type, annual re-exam, interim, move, EOP, Annual Re-exam Searching within 10 days of the effective date.

Voucher Extensions

- HUD expects the RHA to process the family's paperwork and issue the voucher within 2 weeks of receiving the completed Portability Packet (Notice PIH 2016-9).
- HUD regulations specify that the RHA's voucher must provide the family with a mandatory 30-day extension. The RHA's voucher must not expire before 30 calendar days from the expiration date of the IHA's voucher.

VOUCHER ISSUANCE EXAMPLE

IHA's voucher expires 10/30

RHA's voucher may not expire before 11/29

IHA extends voucher until 11/30

RHA's voucher may not expire before 12/30

HUD-52665

- HUD-52665 is the billing document.
 - Part I – Completed by IHA
 - Part II – Completed by RHA
- Initial billing submission must be received within 90 days of the IHA's voucher expiration date.
- The IHA is not required to honor late billings.
 - If the RHA fails to bill on time, it must absorb the family, unless it does not have funds.
- If changes occur, the RHA submits 52665 and 50058 to the IHA within 10 days of the effective date.



Family Portability Information
Housing Choice Voucher Program

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

OMB Approval No. 2577-0160
(exp. 04/30/2018)

Public reporting burden for this collection of information is estimated to average 30 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid OMB control number.

This collection of information is authorized under Section 8 of the U.S. Housing Act of 1937 (42 U.S.C. 1437f). The information is used to standardize the information submitted to the receiving Public Housing Agency (PHA) by the initial PHA. In addition, the information is used for monthly billing by the receiving PHA.

Sensitive Information. The information collected on this form is considered sensitive and is protected by the Privacy Act. The Privacy Act requires that these records be maintained with appropriate administrative, technical, and physical safeguards to ensure their security and confidentiality. In addition, these records should be protected against any anticipated threats or hazards to their security or integrity which could result in substantial harm, embarrassment, inconvenience, or unfairness to any individual on whom the information is maintained.

Privacy Act Statement. The Department of Housing and Urban Development (HUD) is authorized to collect the information required on this form by Section 8 of the U.S. Housing Act of 1937 (42 U.S.C. 1437f) and by the Housing and Community Development Act of 1997 (42 U.S.C. 8054(e)). Collection of this information, including SSN and annual income, is mandatory. This information is used to standardize the information submitted to the receiving Public Housing Agency (PHA) by the initial PHA. In addition, the information is used for monthly billing by the receiving PHA. The SSN is used as a unique identifier. HUD may disclose this information to Federal, State and local agencies when relevant to civil, criminal, or regulatory investigations and prosecutions. It will not be otherwise disclosed or released outside of HUD, except as permitted or required by law. Failure to provide any of the information may result in delay or rejection of a family port.

Part I Initial PHA Information and Certification
Instructions: This portion of the form is to be completed by the initial PHA for a family that is moving out of the initial PHA's jurisdiction under the portability procedures.

1. Head of household Name		2. Head of household Social Security Number		
3. Voucher Number (if applicable)	4. Bedroom Size	5. Issuance Date (mm/dd/yyyy)	6. Expiration Date (mm/dd/yyyy)	7. Current Last Income (Estimate) (mm/dd/yyyy)
8. Annual income if new admission (not currently a voucher participant)				\$
9. Date by which initial billing must be received (90 days following the expiration date of the initial PHA voucher) (mm/dd/yyyy)				
10. Initial PHA administrative fee rate (Note: include proration, if applicable. For example, if the proration factor for the year is 75% and your current fee rate is \$60, enter \$47.4)				\$
11. 80% of initial PHA ongoing administrative fee (line 10 x 0.8)				\$
12. Receiving PHA to which family has been referred:				

Attachments:

- A copy of the voucher issued by the initial PHA.
- The most recent form HUD-50058 and copies of all related verification information for the current form HUD-50058. (Note: This is the latest form HUD-50058 completed for either an applicant, a new admission, an annual reexamination, or an interim redetermination. It is not the form HUD-50058 that the initial PHA completes to report the portability move-out.)

Certification Statement:

Part II-A Receiving PHA Information and Certification
Instructions: The receiving PHA must always complete Part II-A.

1. Head of household Name		2. Head of household Social Security Number	
3. Voucher Bedroom Size (per receiving PHA's policy)	4. HAP Contract Number (if applicable)		
5. Receiving PHA administrative fee rate (Note: include proration, if applicable. For example, if the proration factor for the year is 75% and your current fee rate is \$60, enter \$47.4)			

Certification Statement:
I certify that the information contained on Part II of this form and, if applicable, the attached form HUD-50058, is true and correct and that my agency will promptly remit any overpayment to your agency.

Name of Certifying PHA Official _____ Type full Name and Address of Receiving PHA below

Signature _____

Receiving PHA Contact Name _____

Phone Number _____ Email _____

Form Submission Date (mm/dd/yyyy) _____

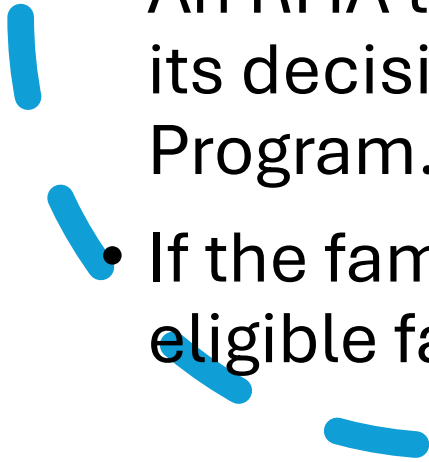
Part II-B Family Status, Initial HAP Contract Execution and Billing Changes After HAP Contract Execution
Instructions: For initial billings, Part II-B must be completed by the receiving PHA and received by the initial PHA within 90 days following the expiration date of the initial PHA's voucher. For changes in the family status or the billing amount, Part II-B must be completed and sent within 10 working days from the effective date of the change. The receiving PHA does not submit the billing form each month unless the monthly amount due changes or both PHAs agree to a different billing schedule that requires a more frequent billing submission.

Check all statements below that apply:

- 1. The above family has failed to submit a request for tenancy approval for an eligible unit within the allotted time period. You may therefore reissue your voucher to another family and, if applicable, modify any records concerning local preference usage and income targeting requirements. **STOP. Do not complete remainder of form.**
- 2. We have executed a HAP contract on behalf of the family and are absorbing the family into our own program effective _____



IHA-Inquiry to RHA to bill or absorb

- RHA must respond to the IHA inquiry immediately.
 - If the RHA notifies the IHA that the family's voucher will initially be absorbed, the RHA cannot reverse its decision at a later date and administer the voucher.
 - An RHA that initially decides to administer a voucher may change its decision at any time and absorb the family into its own HCV Program.
 - If the family is absorbed-IHA may issue that voucher to another eligible family.
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Billing Deadlines

- RHA- must submit Part II HUD-52665 and 50058 to IHA within **90 days** of expiration of IHA's voucher.
- IHA-must make initial payment within **30 days** from the receipt of initial billing.
- IHA-must make subsequent monthly payments no later than **5th business day.**
- RHA must submit and changes within **10 business days** of the effective date of the change.
- If billing is late, HUD may reduce the PHA's administrative fee.

Utilization- Impacted by portability

Record and track your PHA's monthly port in voucher issuance and leasing data to estimate your projections.

Use it in your Two-Year Tool (TYT) voucher issuance projections.

Port out bill payments are added in your utilization.

Port in bills cannot be added to your utilization. The RHA adds it to their utilization.

Absorbed ports are not tracked in your PIC turnover percentages as there is no EOP submitted. This could result in a higher turnover rate than you have in your TYT.

Keep track of port outs for whom you will be billed and those that will be absorbed.

Billing or Absorbing- Business decision

Using the Two- Year Tool analyze the data, factor in your port ins vouchers issued, and port out bills that you will be paying.

Gauge using the Two-Year Tool if you need to administer.

Factor in your port outs that will be absorbed but may not be showing under attrition in your TYT because there will be no EOP submitted in PIC.

Tracking, analyzing, managing the portability data will improve your resource allocation, financial stability, reporting, decision making, strategic planning and help enhance your PHA's performance.

Questions for you



What are the top three key benefits of tracking, analyzing, and managing portability data for your PHA?



What are the biggest challenges PHAs face in managing portability data effectively?



What impact can improved portability data management have on our relationship with other PHAs and HUD?



What are the immediate steps your PHA can take to improve your tracking and management of portability data?



How can PHAs train staff to be more proficient in handling portability-related tasks?

Questions for us?

