# Methodology and Schedule for Completion

**PM Plans** are a crucial part of keeping the property and staff running in top form. Learning what to expect before it happens, which only comes with many years of experience with the properties and their issues, which vary greatly form occupancy and building style. Through conducting several thousand property inspections through REAC, Per-REAC , PNA's, HQS, and RAD to name a few, we have mastered not only what REAC/HUD is looking for but the ability to teach housing agencies how to keep their scores on a consistent rise, and what it takes to keep properties gaining in Marketability and Sustainability.

**Work-Order flow** at times can seem to hit in waives, and by working hand in hand with the Maintenance Supervisor there is a correlation to these call-ins or more to the point the non-call-in work-orders that always comes up at the wrong time, usually during the REAC Assessment. Well there is a way to prepare a PM Plan tailored to predict this influx. Through using our comprehensive UPCS Inspections and PNA's, a working timetable is developed and has proven to be of great benefit to the staff for scheduling vacations and what  abilities to look for in new hires, training, and the redirection of capital to issues otherwise thought to be of no consequences. This comes very apparent when REAC gigs on items once overlooked by the previous REAC inspectors.

1. **Deciding on Report style for (best-fit) Inspection Service per property**
   a. Custom itemized Reports- All reports given have the same information except one key difference is the way the information (defects) is categorized. Upon setting up Schedule the Director of UPCS Services will review these options, neither option would increase fee, and there may be certain properties that should receive itemized reports and others that have no need for them.

# Methodology and Schedule for Completion

## 2. Deciding on Report Types

   **a.** We have customized a new type of reporting software, our software now is capable of issuing reports in such a manner that we can group all our defects according to Severity, Type, Point-Loss, and Items, This will be talked about before the project is started to determine which type/s of reports would best fit your needs, all the reports may be given the first couple of trips so the staff could use them all and see for themselves which ones work best with your work order repair style. All reports have the same information it's more about how you prefer to access that information.

   **b.** Along with having a wide range of reporting styles, we can also format the data reports for each property to be viewed in Word, Excel, or PDF.

   **c.** Inventory can be recorded on a per unit bases listing Model, Serial, Manufacture, and Condition and imported on a excel spreadsheet for each property, for an additional fee per unit. These reports would be given at the completion of the property.

## 3. Scheduling and Notification

   **a.** A timeline schedule will be made prior to any inspections. Scheduling the properties out to adjust for your preferred work load. On average a 100 unit property could produce 180 work orders.

   **b.** A detailed schedule would then be produced and sent to appointed officer/s, along with every Property manager in advance.

   **c.** Manager contact numbers and property information will be gathered prior to beginning inspection and rechecked during inspection to eliminate errors.

   **d.** The final decision of the preliminary schedule will need to be confirmed by both parties before being locked in. Some may prefer to conduct inspection into segments where others like to have inspections finished as soon as possible. Holidays and requested days off will need to be discussed prior to starting.

# Methodology and Schedule for Completion

### 4. REAC QA Process

Conducting the QA on a REAC Inspectors starts from moment one we work hand in hand with the office helping correlate PIC and Address numbers to get him out in the field without issue. Once the physical inspection starts we record and score onsite every item called out verifying its true HUD Level Codes and Critically along with verifying proper Area recording, of which are the most common 2 issues with REAC Inspectors. We help and housing be speeding up the inspection process so that some issues go unseen and by keeping them bogged down looking at the Computer is less time they will spend in anyone area.

We have mastered this by prepping the unit, one by requesting units to be inspected prior to site visit, which helps when staff is sent out to verify that said items are clear (well provide list and stall the inspector), two by preceding the inspector work just above his standard flow so that he has to touch nothing.

After the day is done we will have a complete list with Photos, exact locations, levels and points deducted, at the end of the property we will have a very good idea what the score is.

Score tracking is a very important part of the QA process because believe it or not a REAC inspector is not trained to know the point value of what they record. Knowing the value of each issue will keep you focused on higher level gigs.

Appeals is a part of the REAC QA, any and all variances in question will be submitted by use on the behalf of the Agency in full format with photos and rebuttals, The appeals process is the last line in defense and usually the most used the experienced QA tries to avert it being recorded in the first place, but ultimately it is up to the inspector what gets recorded, it takes a bit of fineness

# Methodology and Schedule for Completion

**5. Tenant Relations**

**a.** Tenants will be treated with respect while being instructed about what is and is not expected from them during an inspection to alleviate any concerns. We have learned that when the tenants understand why we conduct annual inspections and what we are looking for they are more likely to report their problem and generating work orders before REAC or another inspector finds them. A walk through list of what we were looking for can be left in the units, stating they have been inspected and detailing what are the top problems and concerns of HUD and Housing.

**b.** By getting not just the HA working with us, but also the tenants can make a huge difference in the difficulty of maintaining the REAC Unit Assessment scores of a property.

**c.** During a REAC inspection 5 different areas are reviewed and graded. Tenants control the Unit Assessments to a large extent; Building Assessments (System, Exterior, and the Common Areas) are left to the Maintenance staff, for the most part, to report any problems and maintain all repairs. While Maintenance, Managers, and Property managers should watch over the Site. Site Assessments are what QA/REAC inspector rely on to make, or break your overall Scores.

# Methodology and Schedule for Completion

## Service Reports Overview

U.P.C.S is dedicated to fulfilling your annual inspection needs by offering the new 4.0 fully detailed custom reports that is given to you via the inspector before they leave your office. Giving you and the inspector the opportunity to review the individual needs of each property.

U.P.C.S. inspection software is a break through program that can give detailed location and an exact diagnosis of each defect. Take a moment to review the sample reports. You will see the quality and the time saving nature that comes with these reports. All reports are included.

*1. Custom Report Rundown* -A total defect list broken down by Severity levels running from highest to lowest, Point-loss or Itemized. This is one of the best reports used for preparing your property for the REAC Assessment; this saves time by listing the items that need the most attention first. The PHA gets to pick the way they would prefer to run through the repair process. We can also group together identical items so you can get an exact count of how many doors, frig gaskets, etc need replaced and save a lot of time by grouping repairs such as painting, door replacements, flooring, etc.

*2. EH&S Report Health and Safety* -A complete list of all Exigent Items that need attention as soon as possible. List location in exact detail and list the key codes that you are used to seeing during your REAC assessments. This is given within 24hrs which enables you to repair the items ASAP.

*3. Deficiency Report Detail.* -A complete list of every defect (Site, Bldg Exterior, Bldg Systems, Common areas, and Units) along with location, Severity Level, Point Deductions, and Defect Description.

*4. Unit Work Order Report.* -This report takes you through each individual unit giving you a list of every defect located inside that unit. Along with listing the Item, Defect type, Severity Level; Point Deduction, and Defect Description. Giving you a work order number space, Tenants signature, date of repair, and parts used

# Methodology and Schedule for Completion

**5. _Property Profile Report._**    -This report lists every building and each unit in that building, along with all common buildings (Daycare, Community Rooms, etc.) All buildings will be addressed and unit numbered along with bedroom counts. This is a very valuable report to print out for contractors, inventory, and even meter reading.

**6. _Housekeeping Report._**    -This report comes in handy for identifying units that have housekeeping problems, hording, pet or smoking violations; and can help serve with a second opinion in conflict resolutions between Authority and tenant on the subject. We mark each unit from a level 1 to a level 3 depending on the severity of the problem, along with a very descriptive comment for each one.

**7. _Score Report._**    -This single page report combines all of the properties defects by using the most up to date REAC's scoring system, 4.0 Phase II. The score report will reflect your true REAC score for 100% of your property.

**8. _Mass Certificate Report,_**    -This will be useful in your annual Mass Reporting to HUD, this report will list all the vital information you will need to report a 100% inspection and receive the credit for doing so.

*UPCS Services provides- UPCS, HQS, GPNA, CPNA, PNA, Energy Audits, QA REAC Services, Training, Work order PM set up, general Contracting-structural, electrical, and HVAC, and last but not least REAC Inspections for Housing Authorities Nationwide. We look forward to hearing from you, and would love for you to join our family*