Job Aids for the
Building and Unit Collection
Templates

Version 6.2

Building and Unit
Collection
PIH Information
Center

February 15, 2001

Table of Contents

Purpose

The purpose of the following Job Aids are to help you better understand the data fields required by the Building and Unit Collection templates. This document has been produced as a result of feedback received during visits to various Public Housing Authorities (PHAs). The Job Aids provide a definition of the field, the way it should be populated, and the acceptable characters for each field. An electronic version of the Building and Unit Collection templates may be downloaded from the PIH Information Center (PIC) Development sub-module which you may use to upload your PHA's data.

Building Template Job Aid

No.	Building Field	Description	Instructions	Data Type / Field Length
1.	Development Number	The code that HUD uses to uniquely identif developments managed by a Housing Authority.	Should not be blank. Should be a valid Development number in PIC. Character position 1- 5 is the Participant Code, character position 6 - 8 Development Number and character position 9 -11 optional suffix.	Alphanumeric Max 11
2.	Building Number	The code that uniquel identifies a building structure.	Should not be blank.	Alphanumeric Max 6
3.	Building Entrance Number[1]	The code that uniquel identifies a building entrance within a development / building.	Should not be blank. If only a single Building Entrance enter "1". The particular entrance corresponds to a unique postal address.	Alphanumeric Max 3
4.	Building Name	The name of the building.	Optional.	Max 50
5.	Building Type Code[2]	Provides a description of the architecture of a building or building entrance.	Should not be blank. The allowable values are: • ES - Elevator Structure • RW - Row or Townhouse Style • SD - Sem -Detached • SF - Single Family/Detached • WU - Walk-Up/Multifamily Apt.	Max 5
6.	Floor Count	The number of floors in the building where units that can be occupied exist.	Should not be blank.	Integer

---

[1] Please refer to page 8 in this Job Aid for examples of different structure scenarios.

[2] The following are the standard definitions of different building types:

Elevator Structure: Any high-rise structure for which an elevator is required under the Minimum Property Standards or local building codes.

Row Dwelling: A structure containing three or more living units, each separated by vertical walls, and generally having individual entrances and interior stairs.

Sem -Detached: A structure containing two living units separated by a common vertical wall.

Detached: A structure which consists of a single living unit and is surrounded by permanent open spaces.

Walk-Up Apartments: A multi-level lo -rise structure containing two or more living units, each separate horizontall (ceiling/floor), and by vertical walls.

Source: Reference Handbook 7417.1 REV-1, dated 10/80, sections 3-125, 3-126.

No.	Building Field	Description	Instructions	Data Type / Field Length
7.	Total Unit Count	Number of units within a building or building entrance. This total includes non-dwelling, and merged units. This total does not include fully demolished or disposed units.	Should not be blank. In the units template, the number of units assigned to this particular building cannot exceed this count.	Integer
8.	Construction Date	The completion date of the development. For developments with multiple buildings, this is the completion date of the last building that was complete.	Optional. A valid date in the format MM/DD/YYYY. The date should not be greater than the current date.	Date
9.	Comment Text	General comments about the building or building entrance.	Optional. General comments about the building or building entrance.	Max 255
10.	Address Line1 Text	Number and Street (Building or Building Entrance)	Should not be blank.	Alphanumeric Max 255
11.	Address Line2 Text	Street/Suffix (Building or Building Entrance)	Optional.	Max 255
12.	City Name	Cit (Building or Building Entrance)	Should not be blank.	Max 50
13.	County Name	Count (Building or Building Entrance)	Should not be blank.	Max 50
14.	State Code	State (Building or Building Entrance)	Should not be blank. A valid two-character code to identif the state.	Max 2
15.	Basic Zip	Zip code (Building or Building Entrance)	Should not be blank.	Numeric Max 5
16.	Zip Extension Code	Zip code suffix (Building or Building Entrance)	Optional.	Numeric Max 4

Unit Template Job Aid

No.	Unit Field	Description	Instructions	Data Type / Field Length
1.	Participant Code	The code that HUD uses to uniquel identify individual Housing Authorities.	Should not be blank. Should be a valid Participant Code.	Alphanumeric Max 5
2.	Development Number	The code that HUD uses to identify all developments that belong to the housing authorities.	Should not be blank. Should be a valid Development Number in PIC. Character position 1-5 Participant Code, character position 6 - 8 Development Number and character position 9 -11 optional suffix.	Alphanumeric Max 11
3.	Building Number	The code that uniquel identifies a building structure within a development.	Should not be blank.[3]	Alphanumeric Max 6
4.	Building Entrance Number	The code that uniquel identifies a building entrance within a development / building.	Should not be blank. If only a single Building Entrance enter "1". The particular entrance corresponds to a unique postal address.	Alphanumeric Max 3
5.	Unit Number	Unit number within a building.	Should not be blank.	Alphanumeric Max 10
6.	SSN Head	The social securit number of the head of the household for each unit.	Optional. Should be blank if the unit is vacant[4]. Should be blank if the Unit Type is ND (Non-Dwelling) or MU (Merged Unit).	Numeric Max 9
7.	First Name	First name of head of household occupying unit.	Optional. Should be blank if the unit is vacant. Should be blank if the Unit Type is ND (Non-Dwelling) or MU (Merged Unit).	Alphanumeric Max 25
8.	Last Name	Last name of head of household occupying unit.	Optional. Should be blank if the unit is vacant. Should be blank if the Unit Type is ND (Non-Dwelling) or MU (Merged Unit).	Alphanumeric Max 35

[3] The combination of the building number and building entrance number should be unique within a development.
[4] The Social Security Number field should be populated for all occupied units. If the unit is vacant, no social security number is required in this field.

No.	Unit Field	Description	Instructions	Data Type / Field Length
9.	Occupancy Date	The date that a tenant occupies a unit. This date must be the later of the lease date or move-in date.	Optional. A valid date in the format MM/DD/YYYY. Should be blank if the unit is vacant. Should be blank if the Unit Type is ND (Non-Dwelling) or MU (Merged Unit).	Date
10.	Door Number or Apartment Number	The code that is used to uniquely identify each unit within a specific building.	Should not be blank for multiple units for a single building entrance (For example, elevator structure or multifamily apt.). Should be blank for one unit for a single building entrance (For example, a Rowhouse, Townhouse or Single Family).	Alphanumeric Max 5
11.	Floor Number	Refers to the floor number on which each unit is located within a building.	Should not be blank. This value should be (1) for the following building types: • RW - Row or Townhouse Style • SD - Sem -Detached • SF - Single Family/Detached	Alphanumeric Max 3
12.	Bedroom Count	Number of bedrooms in a unit.	Should not be blank. Values can be 0, 1, 2, 3, 4, 5, 6, 7, 8, 9	Integer
13.	Unit Tenant Type	Indicates the type of tenant who is occupying the unit.	This field should not be blank if the unit is occupied: • EM - Employee • LE - Law Enforcement • RT - Regular tenant Should be blank if the unit type is ND (Non-Dwelling) or MU (Merged Unit). Should be blank if the unit is vacant. A HUD 50058 form is not required if the unit tenant type is EM or LE.	Max 5
14.	ACC Unit Ind.	Indicates whether a unit qualifies under the Annual Contribution Contract (ACC) program	Should not be blank. Must be either Y or N.	Max 1

No.	Unit Field	Description	Instructions	Data Type / Field Length
15.	Unit Details Complete Ind.	Indicates that the unit information which is being uploaded in the spreadsheet is complete and ready to be submitted to HUD for approval.	Should not be blank. This column should always be set to Y.	Max 1
16.	Unit type	Indicates the type of unit that is being uploaded.	Cross check in the code table if such a code exists. The allowable values are: • FA - Family Unit • EL - Designated as Elderly Unit • ND - Non-Dwelling • MU - Merged Unit	Max 5

Building and Unit Scenarios

The following are three examples of different building and unit scenarios that could exist within the Housing Authority's developments. A recommended solution is given for each scenario describing how to capture the information in the corresponding building and unit files.

Scenario I

Property B consists of a 6-unit rowhouse building with separate entrances for each unit. The unique mailing addresses for each unit is as follows: "125-A Smith Street" … "125-F Smith Street".

Solution: Property B is a rowhouse or townhouse structure that consists of one building with multiple entrances. Each of the entrances maps to a unique mailing address. The building file will consist of one building record with six unique building entrance numbers. The unit file will consist of six records, and the apartment numbers will be left blank.

Scenario II

Property C contains a multi-family structure with ten stories and eight apartments on each floor. The structure has multiple physical entrances. The building also uses a single mailing address such as "110 Hope Street".

Solution: Property C is a single structure, with multiple physical entrances, and a single unique mailing address. The building file will consist of one building record with a single building entrance. The unit file will consist of 80 unit records with 80 unique apartment numbers.

Scenario III

Property D is comprised of a multi-family structure with five stories and eight apartments on each floor. The structure has multiple physical entrances, and uses two mailing addresses. One entrance opens on 120 10th Street and leads to 20 units. Another entrance opens on 140 11th Street and leads to 20 units.

Solution: Property D contains one building, with multiple physical entrances, and two separate mailing addresses. The building file will consist of two building records with the same building number and with unique building entrance numbers. In this example, the unit file will consist of 20 unit records associated with building entrance "1", and 20 unit records associated with building entrance "2". The unit file will have a total of 40 unit records.

Scenario IV

Property E consists of one structure which is used for non-residential purposes such as a storage facility. This building may or may not be uniquely identified with an address.

Solution: Property E consists of one building with one physical entrance and may or may not have a mailing address. The building file will consist of one building record with a building type code that most closely resembles the physical characteristics of the facility.

If a mailing address is present, enter that address else use a default value for Address Line 1 as "not applicable".

In this example, the unit file will consist of one unit record with the ACC unit indicator set to "N" and the unit type to "ND".

Pipe Delimited CSV File Format for Building and Unit Collection

A pipe delimited CSV file allows you to export the values in a database table as a series of ASCII text lines. A pipe symbol (|) separates each column value from the next column value, and each row starts a new line. When you decide to submit your data in the CSV format you must ensure that the text file is correctly formatted. Each row of data must be structured in the order that is specified in the detailed instructions listed below. If a specific column for a row of data is not available and is not required you must still insert a placeholder for that column by adding a pipe (|). Please follow the detailed instructions on the file layout and content.

File Format
You will be required to submit separate files for your building and unit records.
1. All files should have **.csv** as the file extension. For example: buildingfile.csv.
2. The first row of all files must contain a header that identifies the subsequent records.
3. All rows of data records must be separated by a new line or hard return.

Examine the examples below for guidance on how to format your data for submission to HUD.

Example of two Building records in CSV format. File name: buildingfile.csv
development_number|building_number|building_number_entrance|building_name|building_type_code|floor_count|unit_count|construction_date|comment_text|address_line1_text|address_line2_text|city_name|county_name|state_code|basic_zip_code|zip_extension_code

AKP001005 | 300 | 1 | Plaza 1 | EL | 12 | 10000 | 06/06/2000 | high rise Building | 1401 SOUTH Street | | Some City | Some County | AK | 20001 | 1002
AKP001005 | 302 | 1 | Garden | EL | 12 | 10000 | 06/06/2000 | high rise Building | 1401 SOUTH Street | | Some City | Some County | AK | 20001 | 1002

Example of two Unit Records in CSV format. File name: unitfile.csv
participant_code|development_number|building_number|building_number_entrance|unit_number|ssn_head|first_name|last_name|occupancy_date|door_number|floor_number|bedroom_count|unit_tenant_type_code|acc_unit_ind|unit_details_complete_ind|unit_type_code

AK001| AK00100511 | 3 | 1 | A1234 | 111111111 | FIRST NAME | LAST NAME | 05/18/00 | A1 | 3 | 2 | RT | Y | Y | F
AK001| AK00100511 | 3 | 1 | A1236 | 111111111 | FIRST NAME | LAST NAME | 05/18/00 | A1 | 3 | 2 | RT | Y | Y | F

Excel File Format for Building and Unit Collection

The following outlines the Excel file format available for the Building and Unit Collection that users may download within the PIC Development sub-module. The Job Aids directly correlate to the fields within this template. The format illustrated below outlines the two worksheets for the building and unit data that are found within one Excel file.

Excel Worksheet 1: P113PT_DEVELOPMENT_BUILDING_ENT

development_number	building_number	building_number_entrance	building_name	building_type_code	floor_count	unit_count	construction_date	comment_text	address_line1_text	address_line2_text	city_name	county_name	state_code	basic_zip_code	zip_extension_code
AK001005	A1	1	This is a test	WU	22	150	06/06/00	This building is a high rise one	1401	North Scott Street	Arlington	Washington	DC	22201	1234

Excel Worksheet 2: P113PT_PH_UNIT

participant_code	development_number	building_number	building_number_entrance	unit_number	ssn_head	first_name	last_name	occupancy_date	door_number	floor_number	bedroo_count	unit_tenant_type_code	acc_unit_ind	unit_details_complete_ind	unit_type_code
AK001	AK001005	A1	1	137	111000222	Major	Robert	03/26/00	A12	6	2	EM	Y	Y	FA

Note: When using the Excel worksheet from PIC, please delete the sample record from the template file before submitting the data.

Summary of Modifications to Job Aid
dated February 15, 2001

The following modifications were incorporated into the Job Aids for Building and Unit Collection Templates, version 6.1, dated February 15, 2001.

- Inserted a page break between the Unit and Building Templates.

- On page 6, instructions on the bedroom count now reads "Values can be 0, 1, 2, 3, 4, 5, 6, 7, 8, 9".

- On page 6, instructions on the unit tenant type now reads "Should be blank if the unit is vacant."

- Changed IIII to III on the Scenario on page 8.

- Added Scenario IV to the list of scenarios on page 9.

- On page 10, under the CSV file example, corrected spelling for the building_type_code.

Troubleshooting the Building/Unit Upload Process

Key Questions That You Must Ask the User
1. What PHA Code are you accessing to upload data
2. What is the development number for which you are uploading data
3. What file type are you uploading? Excel or Pipe Delimited CSV
4. What is the file extension of the file that you are attempting to upload? (For example: .xls, .csv)
5. What time did you upload the file
6. Did any errors occur in the upload error list

Common File Upload Problems

No.	Problem	Steps to Solution and Solution
1.	User cannot upload a file; a validation error occurs that states the file is not a valid excel or .csv file. The user clicked browse fro the data transfer page and selected the file to be uploaded from their computer. The error occurs immediately once the user clicks the upload button.	This problem occurs when the file that is being uploaded has an invalid file extension.. The only valid file extensions that can be uploaded are .xls and .csv. Solution: Have the user change the file extension to one of the approved extensions and upload the record.
2.	User uploaded a .csv unit file and no buildings or units were saved in their building or unit list page.	This problem may occur if the users are using a .csv file that does not contain a header record. Solution: The user must ensure that the file is in the correct format as outlined in the job aid and .csv template. The user should insert a header record and upload the record. The building file heading should be **P113PT_DEVELOPMENT_BUILDING_ENT** and the unit file heading should be: **P113PT_PH_UNIT**
3.	User uploads a file and encounters more errors than they had records in the file that was uploaded.	This situation could occur if the user uploaded the file more than one time in the same day.

4.	User uploads an excel file to the server and no records were added to the list of buildings and units.	Check to ensure that the user is looking at the correct development.
5.	User uploaded a .csv unit file and no units were saved in their unit list page.	Check to ensure that the user is looking at the correct development.
6.	User encounters a validation error in the upload error report that states: **Alpha-numeric in Numeric Only field.**	Compare the data type with what is in the actual file that was uploaded and have the user make the necessary modification.
7.	User encounters a validation error in the upload error report that states: **Invalid building type code**	Check to ensure that the codes are valid as per the job aid.
8.	User encounters a validation error in the upload error report that states: **Invalid Building Number**	Verify that the building number exists in the building file or sheet.
9.	User encounters a validation error in the upload error report that states: **Invalid Floor No**.	Crosscheck in the building file or sheet
10.	User encounters a validation error in the upload error report that states: **Invalid Participant Code**	Crosscheck against the building record or the job aid.
11.	User encounters a validation error in the upload error report that states: **Invalid/Blan character found**	Crosscheck against the building record or the job aid.

Verify that all the spreadsheet fields have the apostrophe (') character on front of the values. |
| 12. | User encounters a validation error in the upload error report that states: **Invalid development number or development does not belong to this HA.** | Verify that the user has the access rights to upload data for the development in question.

Verify that the development number does not contain any characters like "dashes" (-). The correct format is state code + ha number + project number. For example, TX326001.

Verify that the user is selecting the HA code that corresponds to the HA code in the file to be uploaded. |

13.	User encounters a validation error in the upload error report that states: **Invalid State Code.**	Check to ensure that the codes are valid as per the job aid.
14.	User encounters a validation error in the upload error report that states: **Invalid tenant type code**	Check to ensure that the codes are valid as per the job aid.
15.	User encounters a validation error in the upload error report that states: **Total No. Units do not match unit count on building.**	Cross check with the building record.
16.	User encounters a validation error in the upload error report that states: **Vacant Unit contained Head of household information**	Verify that this is indeed the issue.
17.	User encounters a validation error in the upload error report that states: **The occupancy date cannot be earlier than the construction date of 06/01/1969 JavaScript Error: http://pic.hud.gov/pic/picunits/unitexceptionlist.asp, line 443: syntax error if (dtmFromDate ! = "" && dtmToDate ! == "")**	Ask the user what internet browser has been used to access PIC. If the browser is Netscape 4.5, please ask the user to upgrade the browser or to use Internet Explorer.
18.	User encounters a validation error in the upload error report that states: **Invalid Social Security Number**	Verify that the social security number does not contain any characters like "dashes" (-).
19.	User encounters a validation message in the upload error report that states: **No matches were found**	Verify that the uploaded information is in the Building Profile page and Unit List page. No matches found means that no errors occurred.
20.	User encounters a validation message in the upload error report that states: **Unit information cannot be added before the construction date**	Verify that the Occupancy Date is greater than the Building Construction Date.

Approval of Housing Authority Information

After the Housing Authority (HA) user has submitted changes in the building/unit information to the Field Office, the Field Office has the ability to approve or reject this information.

The **Housing Authority Approval** page provides a summary of any changes to the building/unit information.

1. Review the unit information in the table, and the associated comments. Click on the **Reviewed** check box to indicate a development has been reviewed.

2. Click on the **Approve** button. Clicking the **Approve** button approves the building/unit upload information for the respective HA. To have the HA rework their information and resubmit their data click on the **Reject** button.

   Note: Make sure to click on the Save button after marking a group of developments as reviewed.

Development Sub-module FAQs

What is the purpose of the Development sub-module?

The Development sub-module provides a flexible method of submitting development and unit occupancy information to HUD. As a result of automating the collection/approval process for unit information, HUD has a better understanding of housing resources nationwide.

If I already have a log-in for the PIC system, will I need an additional password for the Development sub-module?

No, you will only need one User ID and password for the entire PIC system. Your PIC User ID and password will give you access to the other sub-modules. Remember User IDs, passwords, and Secret Answers are all case sensitive.

How long can the user access PIC before their password expires?

Passwords expire after 60 days. The expiration date of the password is not related to the expiration date of the user's access.

What is the online unit collection process?

You may upload your unit information in batch form by using the template provided on the **Building/Unit Data Transfer**. Once you upload the information to the system, it is saved and will be officially submitted by the Housing Authority Executive Director or their delegate. Once submitted, the Field Office will approve the information before its final submission to HUD.

In what ways am I able to manipulate the development and unit information?

Users with the appropriate access rights are allowed to add, modify, and delete information. If you need to add a development, please submit a written request to HUD through your Field Office.

Can I delete building and unit information?

Yes, the delete functionality is now available in PIC.

What types of files can be uploaded?

The system currently offers two templates to download and modify with your information: Pipe Delimited CSV File and Excel. Once modified, either of these file types may be uploaded to the system. (For more information, see the Pipe Delimited CSV File Format for Building and Unit Collection Excel File Format for Building and Unit Collection on pages 10 - 11.)

Once the uploading process is complete, will subsequent uploads override all of the existing data?

The subsequent uploads will not override existing information if the uploads contain new ke numbers. For example, if the building information being uploaded has new building numbers and new building entrance numbers, that information will be appended to the existing uploaded information. If the numbers are the same, the new upload will override the existing information. The same scenarios apply for the unit information upload. The PIC database keys are the building number and building entrance number for building information and the unit number for unit information.

Where can the uploaded information be viewed?

The uploaded information can be viewed on the Building Profile page or the Unit List page within the Development sub-module. If the information does not appear on these pages, please review the upload errors on the Upload Error Report page.

How long does it take the upload data to appear in PIC?

If there are no upload errors, the information should be displayed between 15 minutes and one hour.

Will the PIC Hotline be able to see the file that I uploaded to the system?

No, the PIC Hotline will not be able to pull up your file and view it while giving assistance unless you send it to them separately. Current security restrictions prevent widespread, immediate access to the uploaded information.

I am a new user of the Development sub-module and need assistance. How do I get help?

There are two forms of on-line help. If you click the Help link on the left side of the page, you will receive information for the specific page you are on. Also, you may click on the Guided Tour link on the left side of the page to walk through the entire Development sub-module. You may also call the PIC Hotline at 1-800-366-6827.

Instructions for Enabling Macros

The purpose of this guide is to explain to PIH Information Center (PIC) users how to enable macros in the Microsoft Excel template used in the building/unit upload process of the Development sub-module. Users should find these step-by-step instructions easy to follow. We have created a program within Excel called a macro that will check for common formatting errors in the Excel spreadsheet. Users are requested to run the macro any time before they upload the excel file to PIC. This macro is harmless and will not affect the running of your computer. Once you run the macro it will:

- format any columns that have been inadvertently unformatted during the data entry process, and

- it will check to ensure that the Excel worksheet names are correct.

By enabling macros within the Excel template and running the macro, many of the upload errors previousl experienced should be eliminated.

1. Download the Excel template from the PIC Development sub-module's **Building/Unit Data Transfer** page. Choose to "Save it to disk" rather than opening the file immediately.

2. When you open the spreadsheet you *may* be presented with a dialog box warning you about the danger of harmful macros. If you are presented with a warning message, click on the **Enable Macros** button. If you do not receive the message, this means that your computer has been configured to enable all macros, and you ma skip this step.
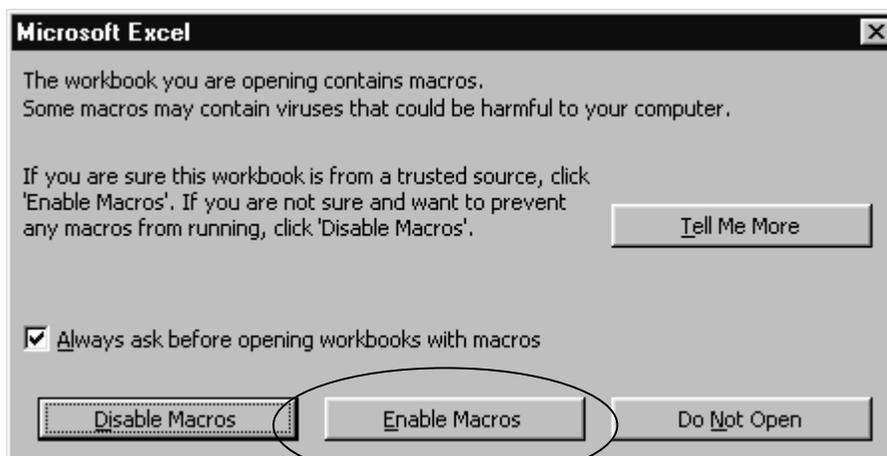
3. Enter your data into the spreadsheet.

4. To run the macro, while your spreadsheet is open, go to the Excel toolbar and select **Tools**. Then select the **Format columns for upload** menu choice.
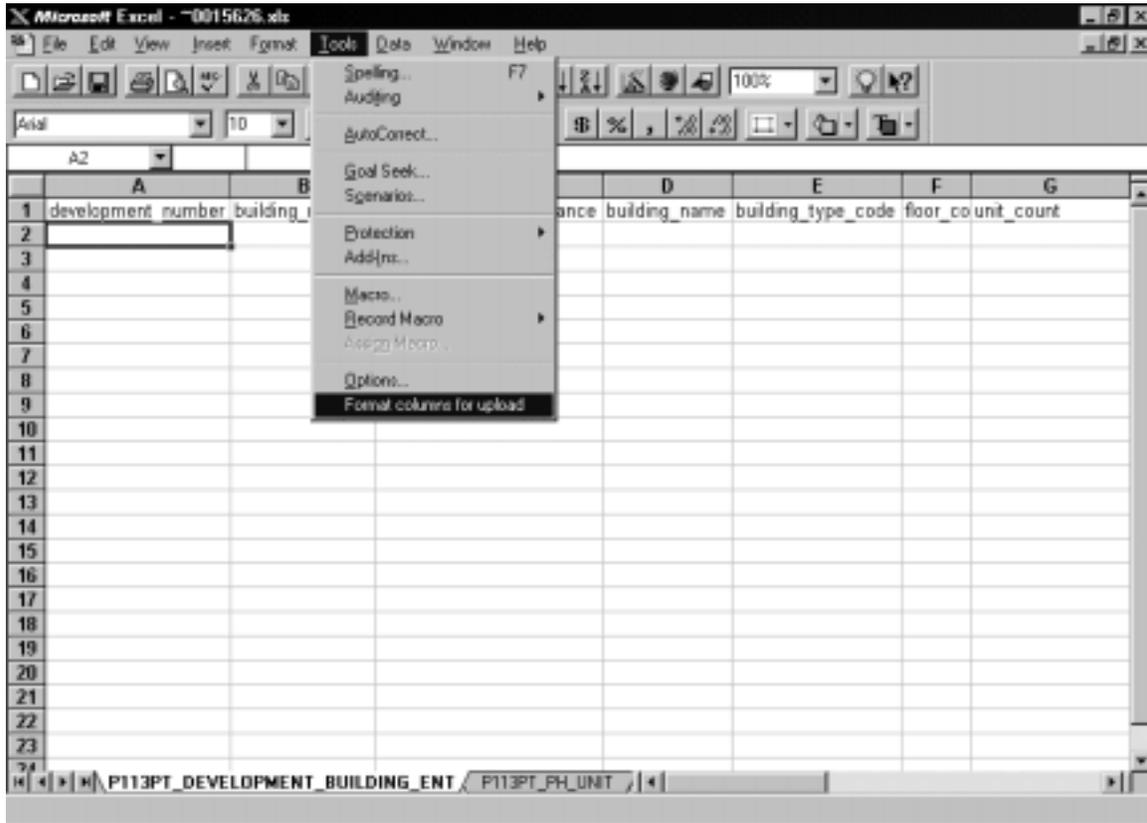
The macro will automatically run and format your data for submission.

5. Save and submit your data as usual.