Inspection Review Quick Reference Guide for Contractors (Ver 1.0)

Physical Assessment Subsystem (PASS)
Release 3.1.0

U.S. Department of Housing and Urban Development
Real Estate Assessment Center (REAC)

07 / 27 / 2001

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CHAPTER 1 - INTRODUCTION

BACKGROUND

The Real Estate Assessment Center (REAC) is a U.S. Department of Housing and Urban Development (HUD) national management center created to centralize and standardize the way HUD monitors and evaluates the physical condition as well as the financial assessment of HUD properties. This includes over 3,000 Public Housing Authorities (PHA) and over 30,000 Federal Housing Administration (FHA) multifamily insured, direct loan, HUD-held, and Section 8 project-based subsidized properties.

The Physical Assessment Subsystem (PASS) is being developed by REAC to monitor the physical condition of HUD properties based on on-site physical inspections. One component of PASS is the Checklist. The Checklist compares the original data pulled from the source system with data collected during the physical inspection to identify and assess any discrepancies in the data. REAC personnel use the Checklist to analyze the quality of the physical inspections performed to determine if HUD should pay the contracted inspectors.

OBJECTIVES

The purpose of the PASS Checklist is to provide REAC users with accurate information to effectively manage physical inspections performed by contractors and QA inspectors. The Checklist provides information on the property, participant, scoring, site, buildings, and inspected items for completed inspections.

The Checklist displays any discrepancies between the Real Estate Management System (REMS) or Integrated Business System (IBS) data and the data collected by the contracted inspector for a given property. These “inspected items” are displayed on the screen for REAC users to review and challenge. Upon reviewing each inspected item, the user decides whether to accept the inspection and pay the contractors, or to reject the inspection and stop payment while REAC pursues further investigation.

Each physical inspection is reviewed by a REAC Engineer and/or Government Technical Monitor (GTM). Using the system, the GTM can send any challenged discrepancies to the Contractor for further clarification.

PASS Checklist is primarily used by REAC personnel responsible for auditing physical inspections. In addition, contracted Inspectors are notified of, and asked to clarify, any discrepancies in their inspections using PASS Inspection Review. Authorized users can access Inspection Review via the Internet through HUD secure systems.

ORGANIZATION OF MANUAL

This Quick Reference Guide provides instructions for using PASS Inspection Review. The following is a brief overview of the contents of the individual chapters and appendices:

- **Chapter 1 - Introduction** includes the purpose of PASS Inspection Review, a table of common terms and abbreviations, and information for getting answers to your questions on using the system.
- **Chapter 2 – Access Inspection Review** shows how to access, review, update and resubmit a challenged Inspection to REAC.
- **Appendix A – Browser Basics** contains an introduction to using an Internet browser.

TERMS AND ABBREVIATIONS

Term	Definition
CIDR	Centralized Integrated Data Repository
GTM	Government Technical Monitor
HUD	U.S. Department of Housing and Urban Development
PHA	Public Housing Authority
REAC	Real Estate Assessment Center
TAC	Technical Assistance Center
URL	Uniform Resource Locator (also known as a Web address or Internet address)

SOFTWARE AND HARDWARE REQUIREMENTS

The electronic inspection review of physical inspections using PASS Inspection Review software requires computer resources and an Internet browser. The optimum software and hardware resources are recommended for efficiency, although users can operate with the minimum required resources.

Minimum Hardware Resources
Processor: 486
RAM: 8 MB
Modem: 14.4 kb
Video card: 256k

Minimum Software Resources

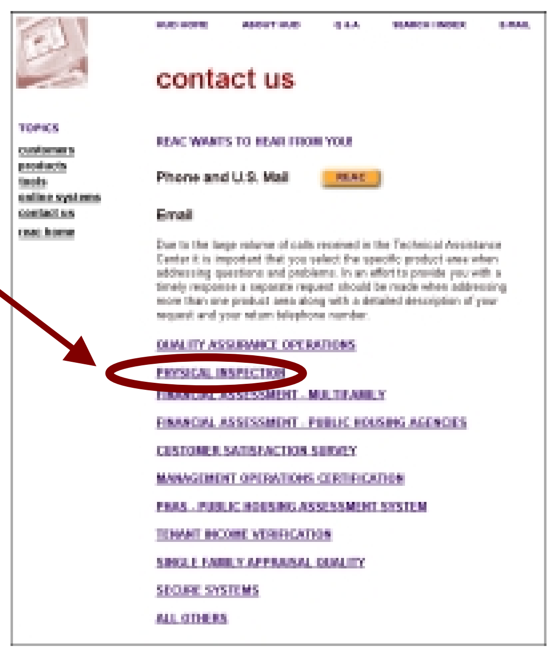
Windows 95 or higher
Netscape* 4.5 or higher
Microsoft Office 95 or higher
Adobe Acrobat 4 or higher
Internet Connection Software

IF YOU NEED HELP

If you have a question, comment, or problem regarding PASS, you can get help by contacting the REAC.   There are three methods for contacting the REAC:

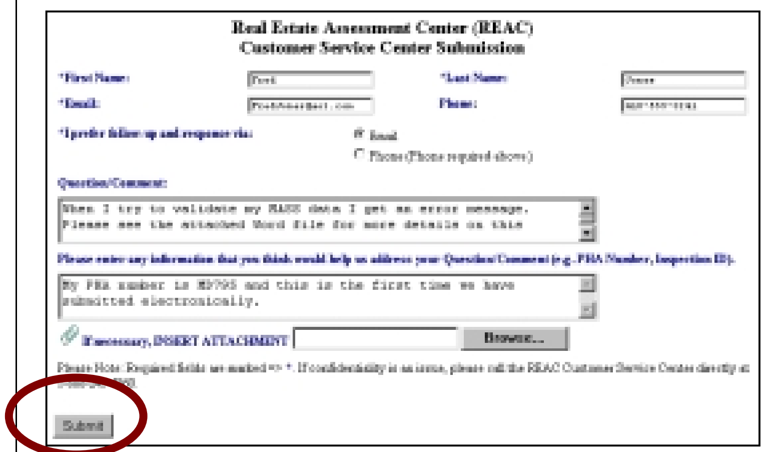
- e-mail
- telephone
- standard U.S. mail

CONTACT US BY E-MAIL

Action	*Example*
1. Access the *Real Estate Assessment Center (REAC)* home page. **2.** Click on the ***Contact Us*** link to display the *Contact Us* page.	 The URL address is: www.hud.gov/offices/reac
3. Click on the specific product area when addressing questions or problems. For Physical Inspection questions or comments, click on the ***Physical Inspection*** link.	

<table>
<tr><th>Action</th><th>Example</th></tr>
<tr><td>4. Click on the EMAIL button to display the Customer Service Center* Submission page.</td><td>
</td></tr>
<tr><td>5. Click in the First Name field, enter the information requested, then press tab and repeat for the remaining fields. (The table on the next page contains descriptions of each field.)

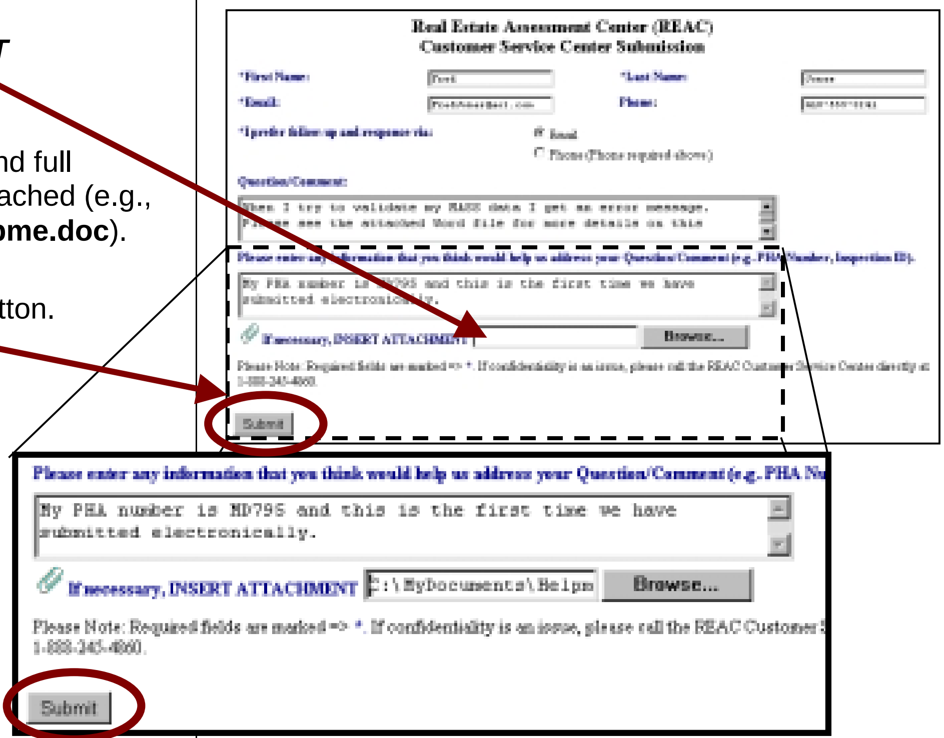
Note: If you wish to attach a file to this message, see page 1-8 for instructions.

6. Click the Submit button once all the fields are complete.</td><td>The Customer Service Center* Submission page:

</td></tr>
</table>

FIELD NAME	DESCRIPTION
*** First Name**	Click in this box and enter your first name. (This field is required.)
*** Last Name**	Tab and enter your last name. (This field is required.)
*** Email**	Tab and enter your full e-mail address. (This field is required.)
Phone	Tab and enter your phone number.
*** Response Preference**	Click on either the **Phone** or **Email** radio button to select your preferred response method.
Question/ Comment	Tab and enter your question or comments. Be as specific as possible.
Additional Information	Tab and enter any additional information pertaining to your question (e.g., PHA number).
Insert Attachment	If appropriate, attach a file by typing in the file's path or by clicking on the **Browse** button. See the following page for an explanation of this process.
** Fields with an asterisk * are required fields.*	

ATTACH A FILE TO A TAC E-MAIL

Overview: This process shows how to attach a file to a Technical Assistance Center (TAC) e-mail. For complete details on sending a help request to TAC via e-mail, see page 1-7.

Action	Example
1. Click inside the ***INSERT ATTACHMENT*** field. **2.** Type in the file name and full path of the file to be attached (e.g., **C:\MyDocuments\Helpme.doc**). **3.** Click on the **Submit** button.	The *Customer Service Center Submission* Form: 

NOTE: If you are familiar with browsing in Windows, you may use the **Browse** button next to the ***INSERT ATTACHMENT*** field to locate the file to attach, rather than typing in the file name and path manually.

CONTACT US BY PHONE

You can call the REAC Technical Assistance Center with system questions toll-free, Monday through Friday, 7:00 a.m. to 8:30 p.m., Eastern Standard Time at:

1-888-245-4860

The Contractor's Help Desk can contact staff in the Technical Support Service Center (Physical Inspection Operations area within REAC) for assistance Monday through Friday from 7:00 A.M. to 5: P.M. Eastern Standard Time at:

1-877-406-9220

CONTACT US BY STANDARD U.S. MAIL

The REAC Technical Assistance Center may be reached by standard U.S. mail at the following address:

U.S. Department of Housing and Urban Development (HUD)
Real Estate Assessment Center (REAC)
ATTN: Technical Assistance Center
1280 Maryland Avenue, SW, Suite 800
Washington, DC 20024-2635

CHAPTER 2 – ACCESS INSPECTION REVIEW

SECURITY

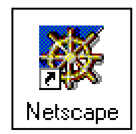
PASS Inspection Review is a secure, Web-based system containing sensitive public housing information. A HUD-issued user ID is required to access PASS Inspection Review. Authorized Contractors only have access to their inspection review information.

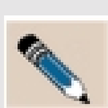
Authorized users for PASS Inspection Review includes:

- Contractors
- HUD REAC personnel responsible for monitoring HUD properties

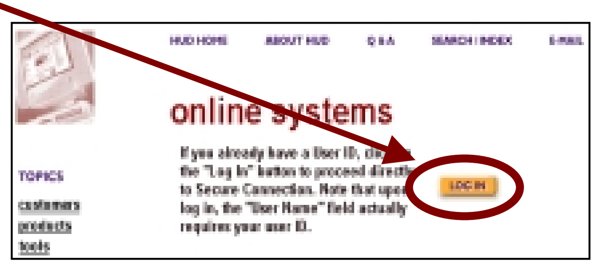
Authorized User Login

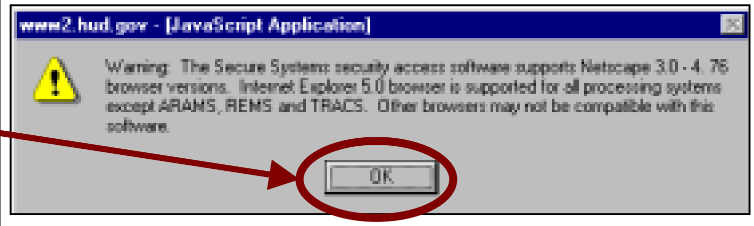
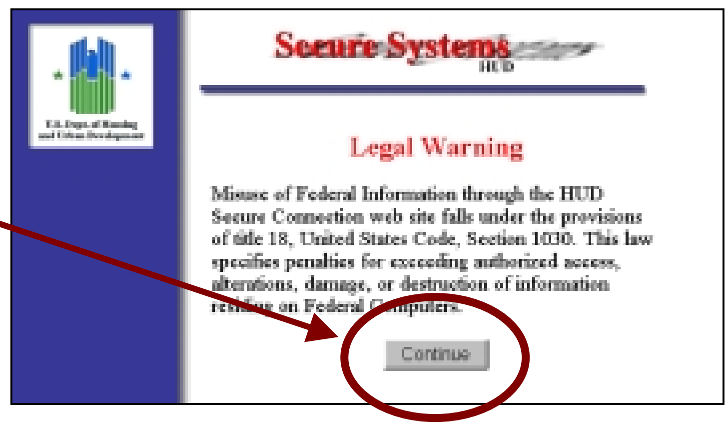
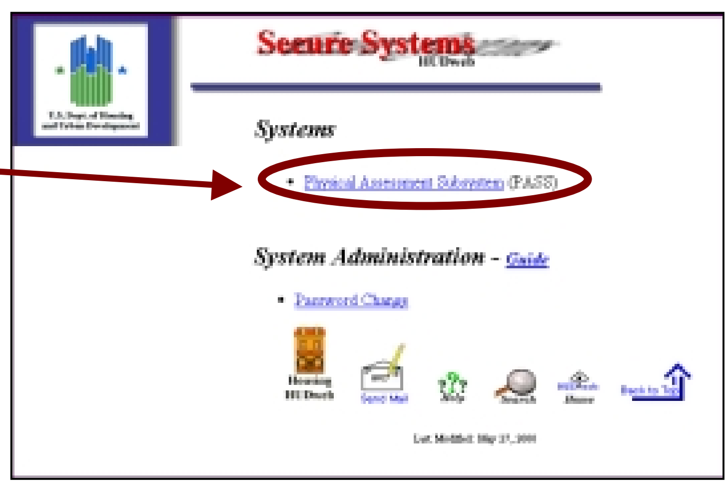
Overview: To access PASS Inspection Review, log in using your HUD-issued user ID (e.g., **M11111**).

Action	*Example*
1. Click on the browser icon on your Windows desktop to start your browser application. (For example, Netscape, Internet Explorer, or America On Line.) For more information on browsers, see "Appendix A – Browser Basics."	 The top of the browser window: 
2. Click in the ***Location**** field (see note below) and enter the Web address **www.hud.gov/offices/reac** **3.** Press **Enter** to display the *Real Estate Assessment Center* page:	*Note that the appearance of your browser's main page may vary slightly from the example shown above, but all browsers have a **Location** field.*



NOTE: The ***Location*** field may show the words "Location," or "Go To," "Netsite," or "Address."

Action	***Example***
4. Click on the **<u>online systems</u>** link to display the *Online Systems* page. *Screens are updated regularly, so what you see on your screen may appear slightly different from what is shown here.*	The *Real Estate Assessment Center* page: 
5. Click on the **LOG IN** button to display the *Username and Password* window.	The *Online Systems* page: 
6. Click in the ***User Name*** field and enter your user ID. *Don't forget to capitalize the initial letter of your user ID when you type it in the **User Name** field.* **7.** Tab to the ***Password*** field and type in your password. ***8.*** Click the **OK** button to display the *Browser Version Warning* window.	The *Username and Password* window: 

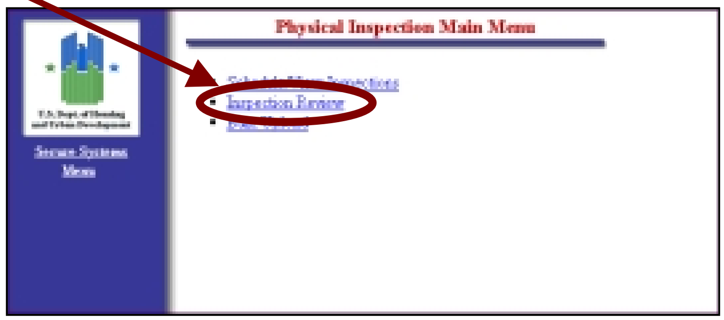
Action	Example
9. If this is the first time you've entered the system on a given day, you may receive a notice about Internet browser versions. If you do, read it and then click **OK** to display the *Legal Warning* page. *If you don't see the Browser Warning window, the Legal Warning page displays instead, as shown in the next step.*	The *Browser Version Warning* window MAY display: 
10. Click on the **Continue** button to display the *Secure Systems* page.	The *Legal Warning* page: 
11. Click on the link for the <u>**Physical Assessment Subsystem (PASS)**</u> to display the *Physical Inspection Main Menu* page.	The *Secure Systems* page:  *Depending on your user ID's configuration, you may see more links than those shown above.*

<table>
<tr><th>Action</th><th>Example</th></tr>
<tr><td>

12. Click on the **<u>Inspection Review</u>** link to display the *Inspection Review - Query* page or the *Inspection Review - Select Organization* page.

</td><td>

The *Physical Inspection Main Menu* page:



</td></tr>
<tr><td>

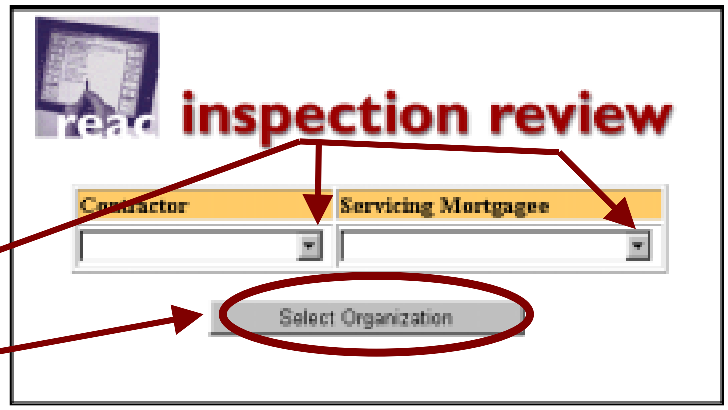
If you represent more than one organization, the Inspection Review – Select Organization page displays (shown at top right).

If you represent only one organization, you see the Inspection Review - Query page automatically, so you should skip step 13.

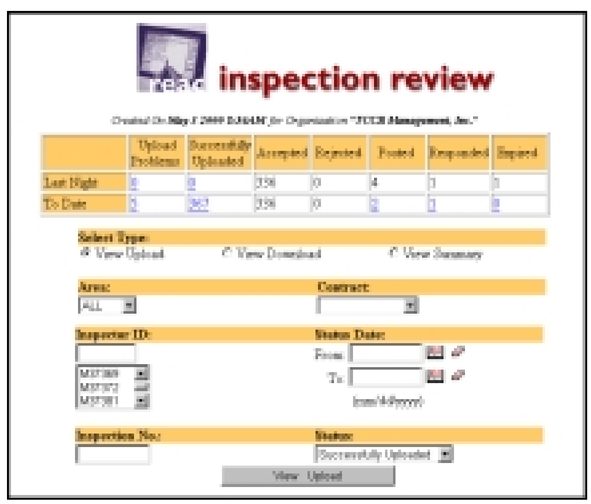
13. Click on the desired *Contractor* or *Servicing Mortgagee* from the drop down lists, then click on the **Select Organization** button to display the *Inspection Review – Query* page.

</td><td>

The *Inspection Review – Select Organization* page displays (if you represent more than one organization):



The *Inspection Review – Query* page:

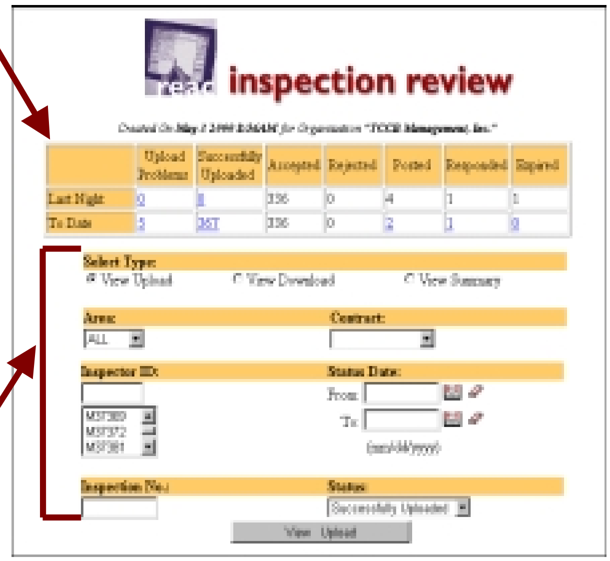


</td></tr>
</table>

INSPECTION REVIEW QUERY PAGE

The *Inspection Review Query* page consists of two sections: an *Inspection Uploaded* table and an *Inspection Query* section.

The *Inspection Uploaded* table
displays the number of physical inspection data transfer attempts, as well as the number of physical inspections successfully transferred (uploaded) to the central database by the Contractors. Links on the ***Upload Problems*** and ***Successfully Uploaded*** fields provide access to Summary Reports. The Summaries accessed through the *Inspection Uploaded* table list each inspection uploaded successfully as well as inspections that encountered errors in the upload process. In addition, data is provided on the number of inspections that are either accepted or rejected by REAC. The table also displays data on the number of challenged items posted, responded and expired. Links in the *Posted*, *Responded* and *Expired* columns provide access to the *Inspector Inbox*.



The *Query* Section
allows you to search for inspections based on specified criteria, such as the area, contract, inspector ID, status date, inspection number, and status. Queries allow you to view lists of uploaded and downloaded inspections, and a summary list of uploads and downloads.

INSPECTION UPLOADED TABLE

The *Inspection Uploaded* table is a summary table located at the top of the *Inspection Review Query* page.

	Upload Problems	Successfully Uploaded	Accepted	Rejected	Posted	Responded	Expired
Last Night	0	0	336	0	4	1	1
To Date	5	367	336	0	2	1	0

By clicking on the number links (i.e., **5**) in either category (*Upload Problems* or *Successfully Uploaded*), you can access the *Inspection Summaries* page, which lists the inspections, time uploaded, and any errors that occurred.

The ***Inspection Uploaded Table*** contains seven columns, each corresponding to a category. The categories are:

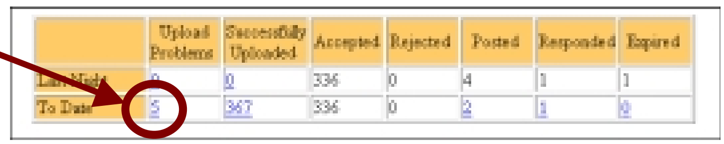
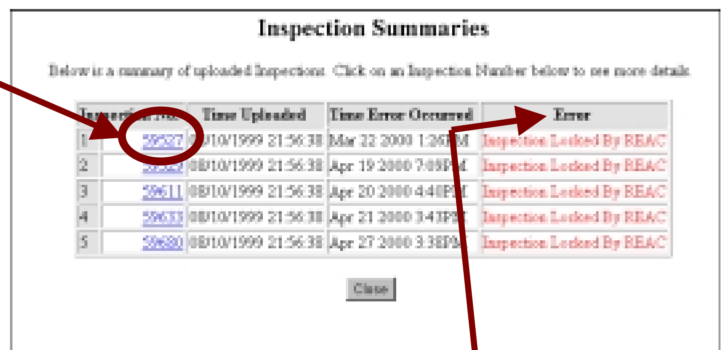
- **Upload Problems** category reflects the number of errors encountered during uploading inspection data. This number is the total number of inspections uploaded but not processed.
- **Successfully Uploaded** category reflects every inspection that was successfully uploaded to the Centralized Integrated Data Repository (CIDR) and processed.
- **Accepted** (third column) and **Rejected** (fourth column) provides the number of inspections rejected and accepted by REAC.
- **Posted** column informs the contractor of the number of inspections that have been challenged and sent for clarification.
- **Responded** column is updated once the contractor reviews the challenged inspection and sends the information back to the GTM.
- **Expired** column is updated if the Contractor does not answer the challenged inspection before the expiration date given by the GTM.

The ***Inspection Uploaded Table*** contains two rows, which are:

- **Last Night** indicates the total number of inspections in any category from the previous night.
- **To Date** indicates the total number of inspections to date for each category.

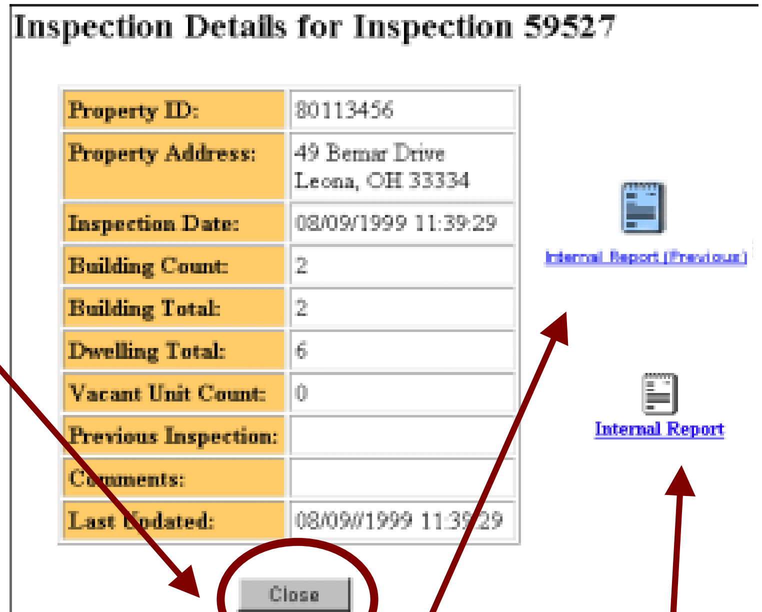
Inspection Summaries Page

Overview: Use this process to access inspection summaries in either category:

Action	Example
1. Click on a number link (e.g., **5**) in either the *Upload Problems* or *Successfully Uploaded* column to display the *Inspection Summaries* page.	The top of the *Inspection Review Query* page: 
2. Click on an inspection number link (e.g., **59527**) to display the *Inspection Details* page.	The *Inspection Summaries* page: 

NOTE: The *Inspection Summaries* page lists each problem item (error) encountered while uploading the inspections on a separate line.

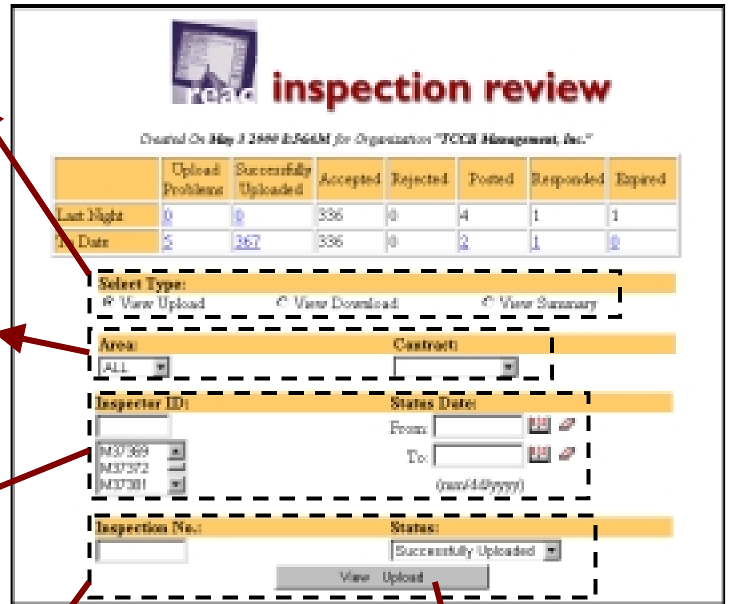
Action	Example
3. Click on the **Close** button to return to the *Inspection Summaries* page.	The *Inspections Details* page displays:



*The **Internal Report (Previous)** link displays the previous year's inspection summary report.*

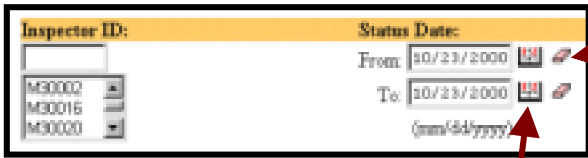
*The **Internal Report** link displays the current Inspection Summary Report for that inspection. When the **Internal Report** link is selected a disclaimer is displayed indicating that the report is not final or available for distribution.*

INSPECTION REVIEW QUERY FIELDS



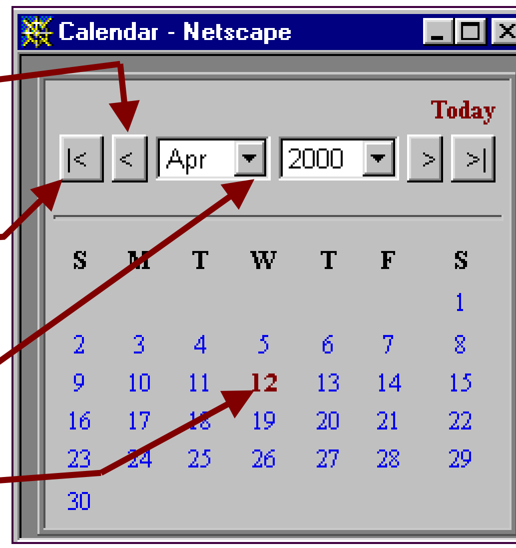
- **Select Type** radio buttons select the type of inspection information to be viewed (i.e. uploaded inspections, downloaded inspections or summaries).
- *Area* and ***Contract*** fields allow you to search for a specific physical inspection by clicking on the drop-down arrows and selecting an area and/or contract. To search all inspections, leave *Area* as "All" and leave *Contract* blank.
- ***Inspector ID*** field drop-down arrow lists inspector ID numbers. Leave this field blank to include all the inspectors in the search.
- *Status Date* searches inspections within a date range. Select the from and to dates in the fields by clicking on the ***Calendar*** icon (see next page).
- ***Inspection No.*** field allows you to search for a specific physical inspection by entering the inspection's number. Leave this field blank to include all inspection numbers in the search.
- ***Status*** field allows you to search by the inspection's status. Click on the right drop-down arrow to display the list of statuses. Leave this field blank to include all statuses in the search. The Status selections are:
  - Successfully Uploaded (including Accepted, Rejected, Posted, Responded, or Expired)
  - Not Yet Processed
  - Stuck In Staging
- The **View Upload / Download / Summary** button changes depending on which **Select Type** radio button is selected. For example, when the **View Summary** radio button is selected (in the "Select Type" area), the button's name changes to **View Summary**. Click on this button to view inspections based on the search criteria entered on the rest of the *Inspection Review Query* page.

To select a date using the *Calendar* window:



- If desired, click on the **Erase** icons to clear the date fields and generate a search with no dates.

The *Calendar* window:



- Click on the **Calendar** button to display the *Calendar* window.

- Click on the < or > to move forward or backward by month.

- Click on the |< or >| to move forward or backward by year.

OR

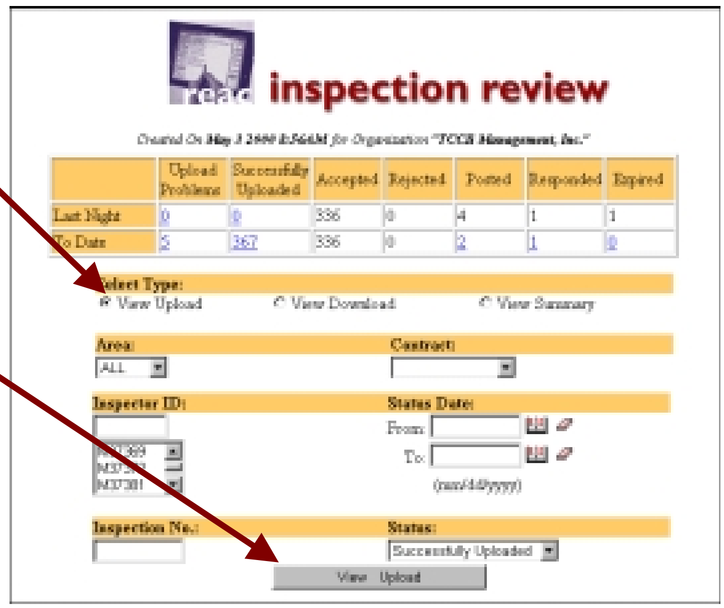
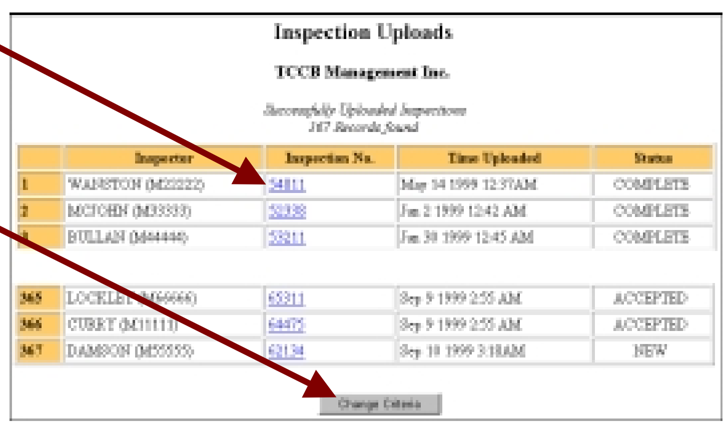
- Click on the drop-down arrows to select the month and year from the **Month** and **Year** menus.

- Click on a date (e.g.,12) to select a date in the current month.

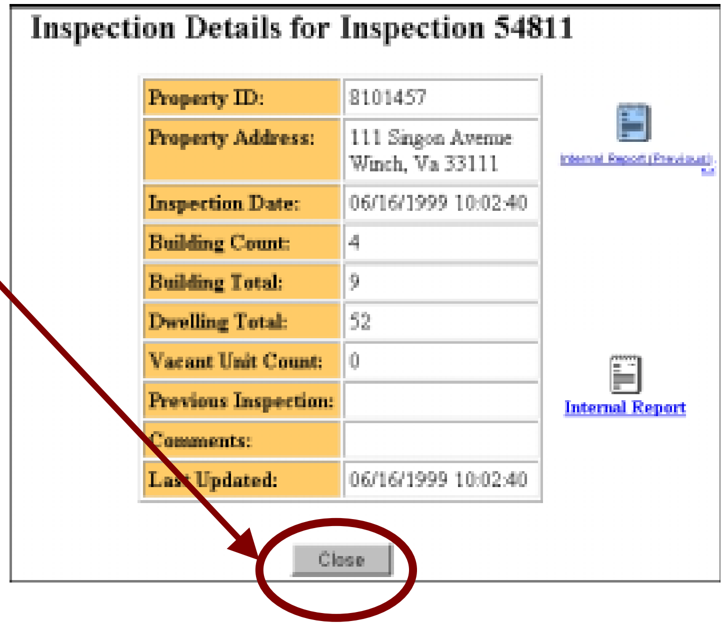
- The *Calendar* window closes when you select a day or click on the **X** button.

VIEW UPLOADS

Overview: The *Inspection Uploads* page lists all the physical inspections uploaded to CIDR, REAC's database, based on the query criteria entered. The *Inspection Uploads* page's *Status* column shows uploads as posted, accepted, rejected, new, engineer in progress, engineer complete, GTM in progress, complete, or marked for deletion.

Action	Example
1. Click on the **View Upload** radio button. **2.** Optional: Select the search criteria under the ***Area, Contract, Inspector ID, Status Date, Inspection No.*** and/or ***Status*** fields. **3.** Click on the **View Upload** button to display the *Inspections Upload* page.	The *Inspection Review Query* page: 
4. Click on an inspection number link (e.g., <u>**54811**</u>) to display the *Inspection Details* page. *Note: The* **Change Criteria** *button allows you to return to the Inspection Review Query page to enter different search criteria.*	The *Inspection Uploads* page displays:  *If the list is long, scroll to see the bottom of the list.*

Action	Example
5. Click on the **Close** button to return to the *Inspection Uploads* page.	The *Inspection Details* page:



Inspection Details for Inspection 54811

Property ID:	8101457
Property Address:	111 Singon Avenue Winch, Va 33111
Inspection Date:	06/16/1999 10:02:40
Building Count:	4
Building Total:	9
Dwelling Total:	52
Vacant Unit Count:	0
Previous Inspection:	
Comments:	
Last Updated:	06/16/1999 10:02:40

Internal Report (Previous)

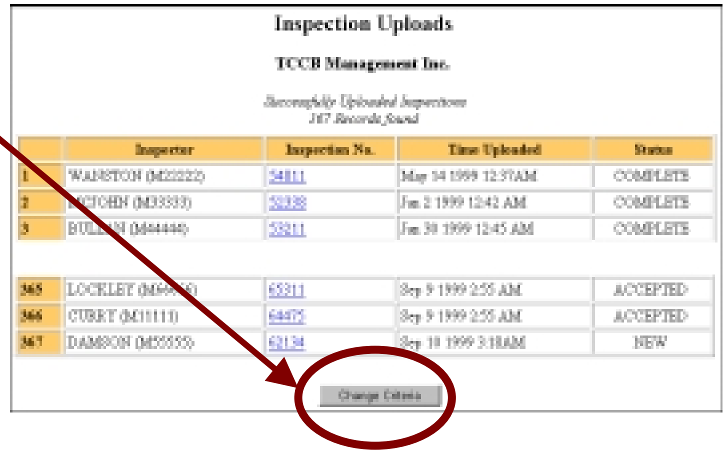
Internal Report

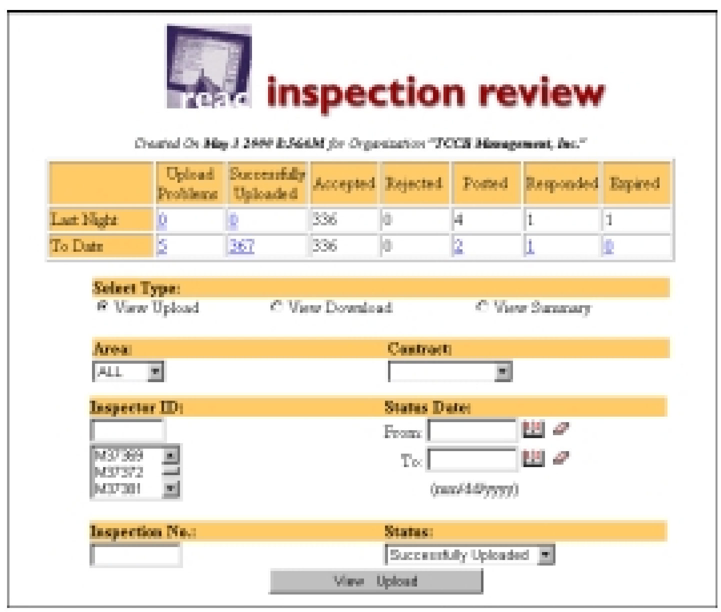
Close

*The **Internal Report (Previous)** link displays the previous year's Inspection Summary Report*.

*The **Internal Report** link displays the current Inspection Summary Report for that inspection. When the **Internal Report** link is selected a disclaimer is displayed indicating that the report is not final or available for distribution.*

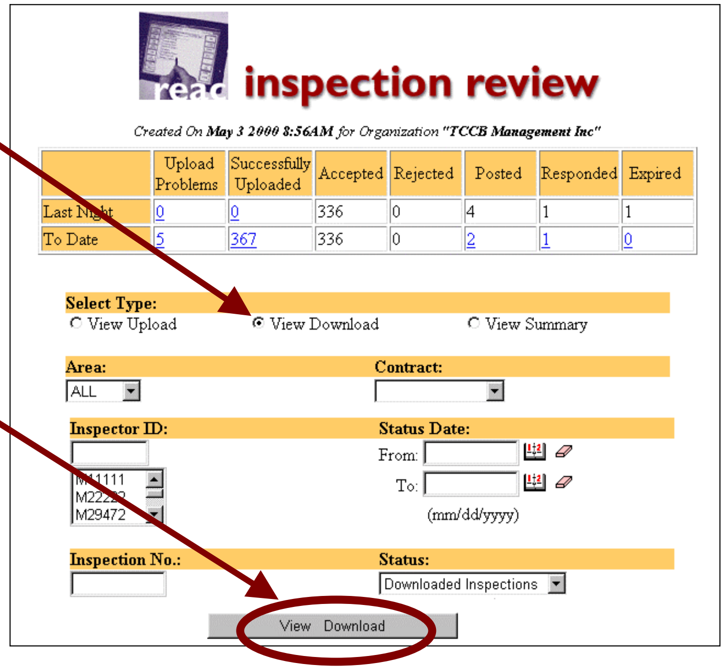
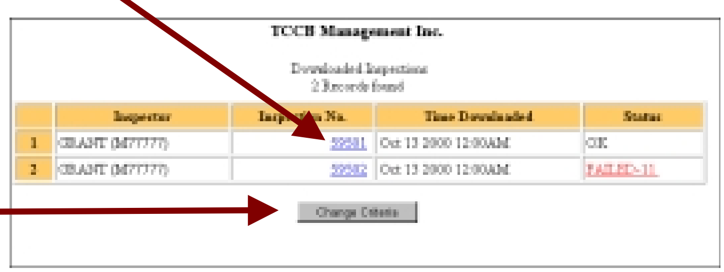
Action	Example
6. Click on the **Change Criteria** button to display the *Inspection Review Query* page again.	The *Inspection Uploads* page displays:
	The *Inspection Review Query* page displays:





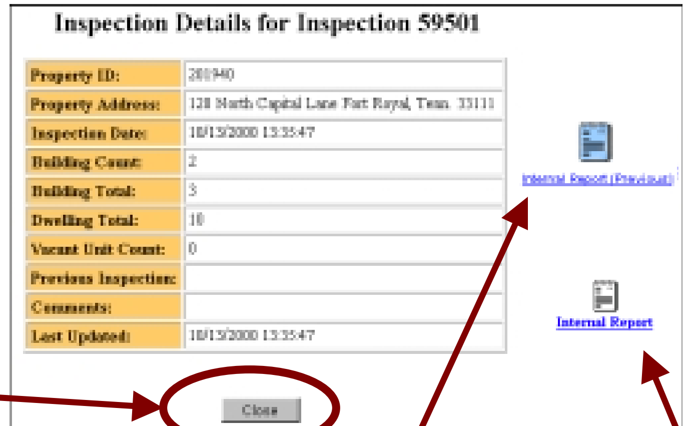
VIEW DOWNLOADS

Overview: The *Downloaded Inspections* page lists all the physical inspections downloaded for the specified query criteria.

Action	Example
1. Click on the **View Download** radio button. **2.** Optional: Select additional search criteria in the ***Area, Contract, Inspector ID, Status Date, Inspection No.*** and/or ***Status*** fields. **3.** Click on the **View Download** button to display the *Downloaded Inspections* page.	The *Inspection Review Query* page: 
4. Click on an inspection number link to view the *Inspection Details* page. (In this example, Inspection No. 59501 is selected.) *Note: The **Change Criteria** button allows you to return to the Inspection Review Query page to enter different search criteria.*	The *Downloaded Inspections* page: 

Action	Example

The *Inspection Details* page:

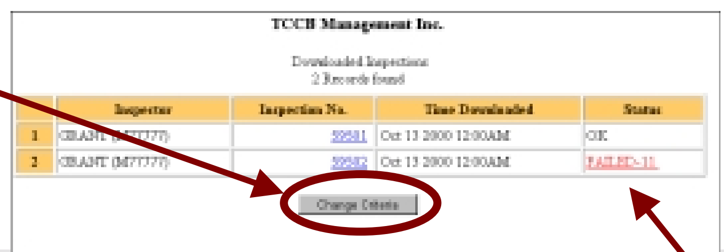


5. Click on the **Close** button to return to the *Downloaded Inspections* page.

The ***Internal Report (Previous)*** *link displays the previous year's Inspection Summary Report.*

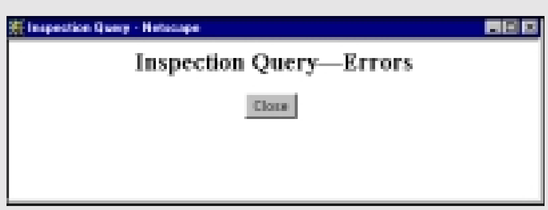
The ***Internal Report*** *link appears if the inspection has been uploaded and processed. Click on it to display the Inspection Summary Report for that inspection. When the* ***Internal Report*** *link is selected a disclaimer is displayed indicating that the report is not final or available for distribution*.

The *Downloaded Inspections* page displays:

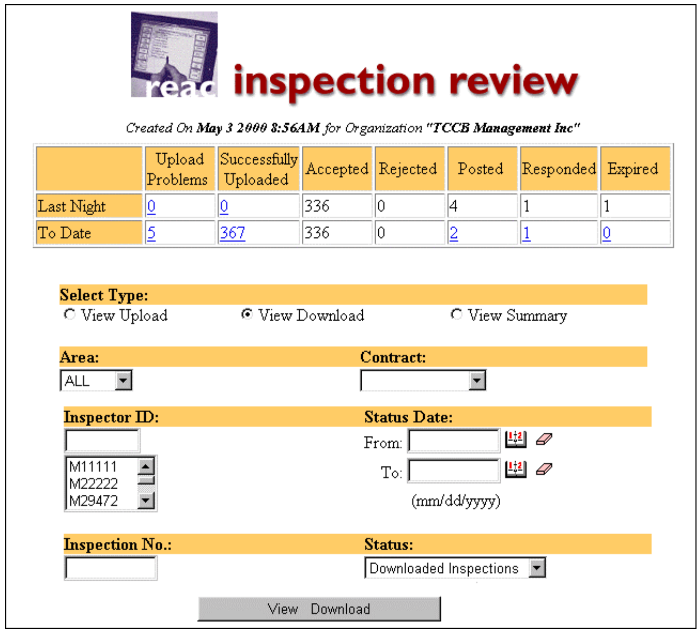


6. Click on the **Change Criteria** button to return to the *Inspection Review Query* page.

NOTE: If an error occurred during the download, the *Status* column provides a status error link. Click on the failed number link (e.g., **FAILED-11**) to display the error message.

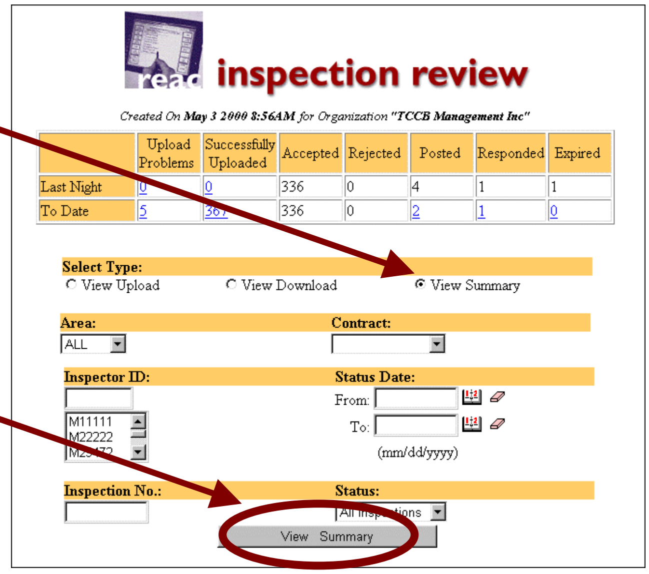
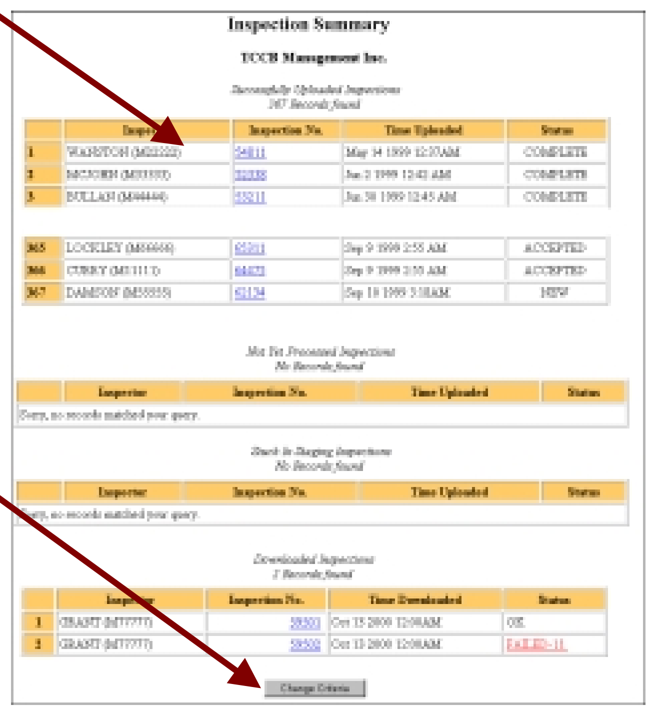


Action	Example
	The *Inspection Review Query* page:

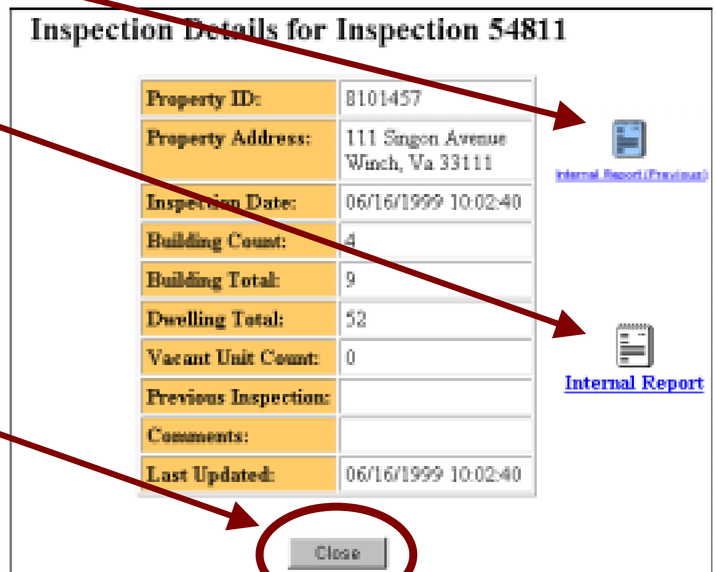


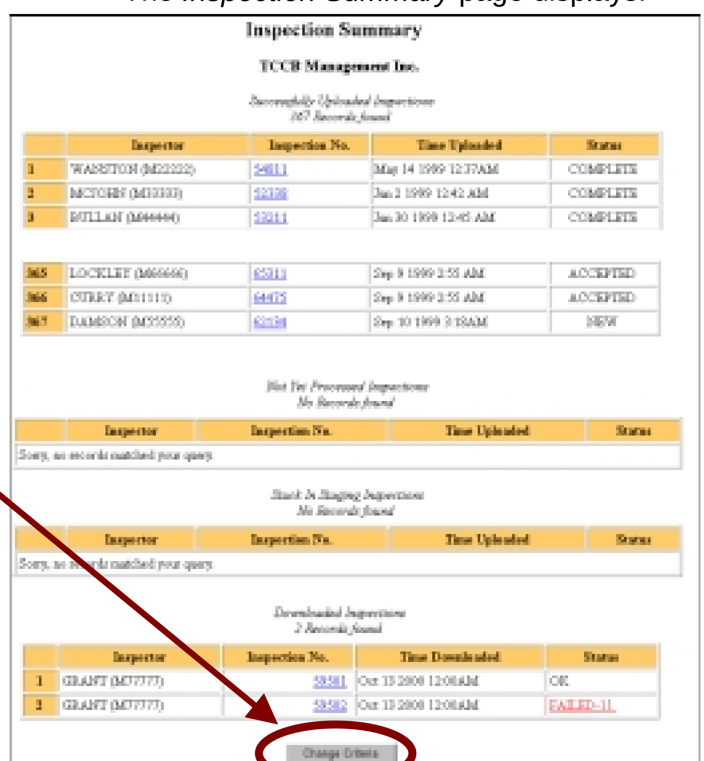
VIEW SUMMARY

Overview: The *Inspection Summary* page lists all the inspections that have been uploaded and downloaded within the query criteria.

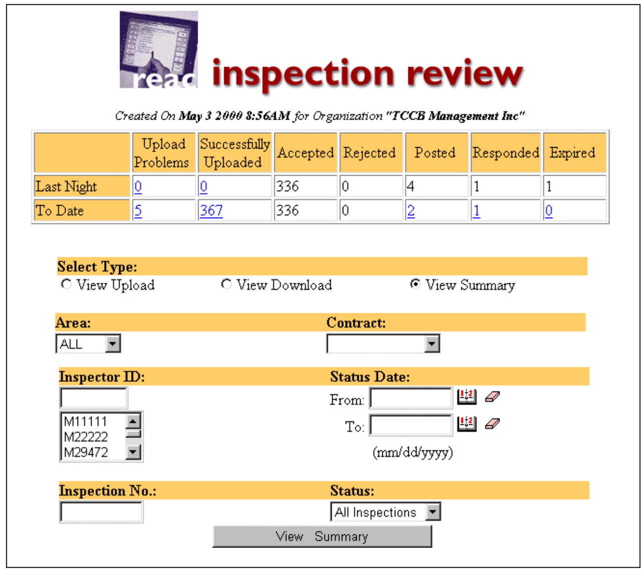
Action	Example
1. Click on the **View Summary** radio button. **2.** Optional: Select additional search criteria in the ***Area, Contract, Inspector ID, Status Date, Inspection No.*** and/or ***Status*** fields. **3.** Click on the **View Summary** button to display the *Inspection Summary* page.	The *Inspection Review Query* page: 
4. Click on an *Inspection No.* link (e.g., **<u>54811</u>**) to view the *Inspection Details* page. *Note: The* **Change Criteria** *button allows you to return to the Inspection Review Query page to enter different criteria.*	The *Inspection Summary* page displays: 

Action	Example
*The **Internal Report (Previous)** link displays the previous year's Inspection Summary Report.* *The **Internal Report** link displays the current Inspection Summary Report for that inspection. When the **Internal Report** link is selected a disclaimer is displayed indicating that the report is not final or available for distribution.* **5.** Click on the **Close** button to return to the *Inspection Summary* page.	The *Inspection Details* page displays:
6. Click on the **Change Criteria** button to return to the *Inspection Review Query* page.	The *Inspection Summary* page displays:



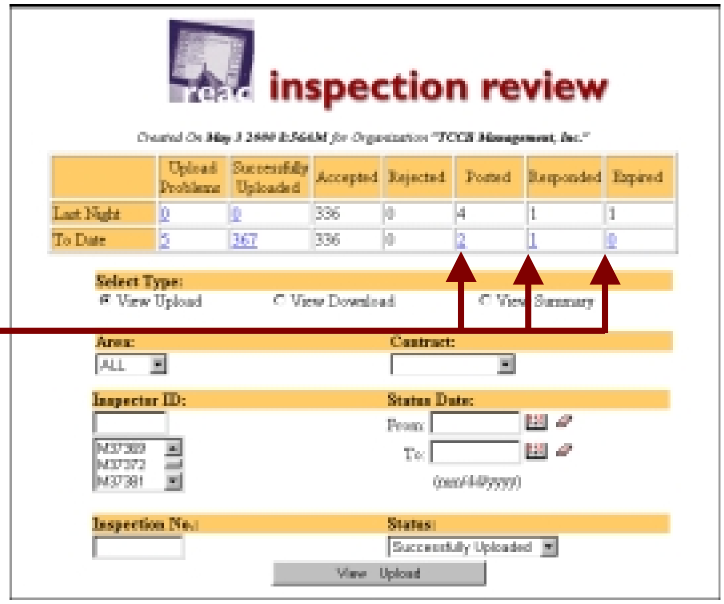
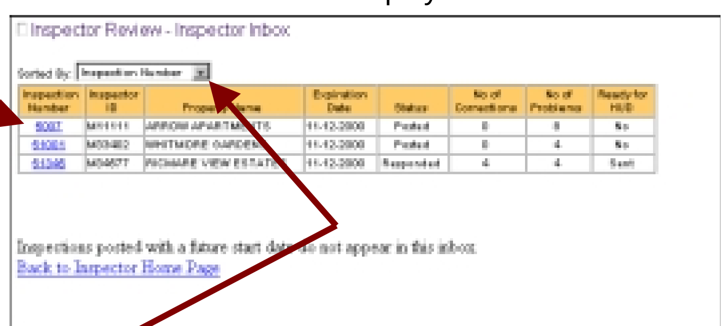


Action	Example
	The *Inspection Review Query* page displays:



ACCESS INSPECTOR REVIEW - INSPECTOR INBOX

Overview: The Contractor can make changes to the challenged inspection information and provide comments.

Action	Example
1. Click on one of the links in the *Posted, Responded,* or *Expired* columns to display the *Inspector Review – Inspector Inbox* page.	The *Inspection Review Query* page: 
2. Click on the desired *Inspection Number* link (e.g. **<u>5007</u>**) to display that inspection with the first page, *Contractor Review - Property* page.	The *Inspector Review – Inspector Inbox* page displays: 

NOTE: Click on the **Sorted By** drop-down arrow, if applicable, to select how the data in the *Inbox* should be sorted. The sort default is by **Inspection Number**.

Changes cannot be made to inspections with a status of "Expired" or "Responded."

Action	Example
ITEMS CHALLENGED:	The *Contractor Review – Property* page displays:

3. Update the necessary fields.

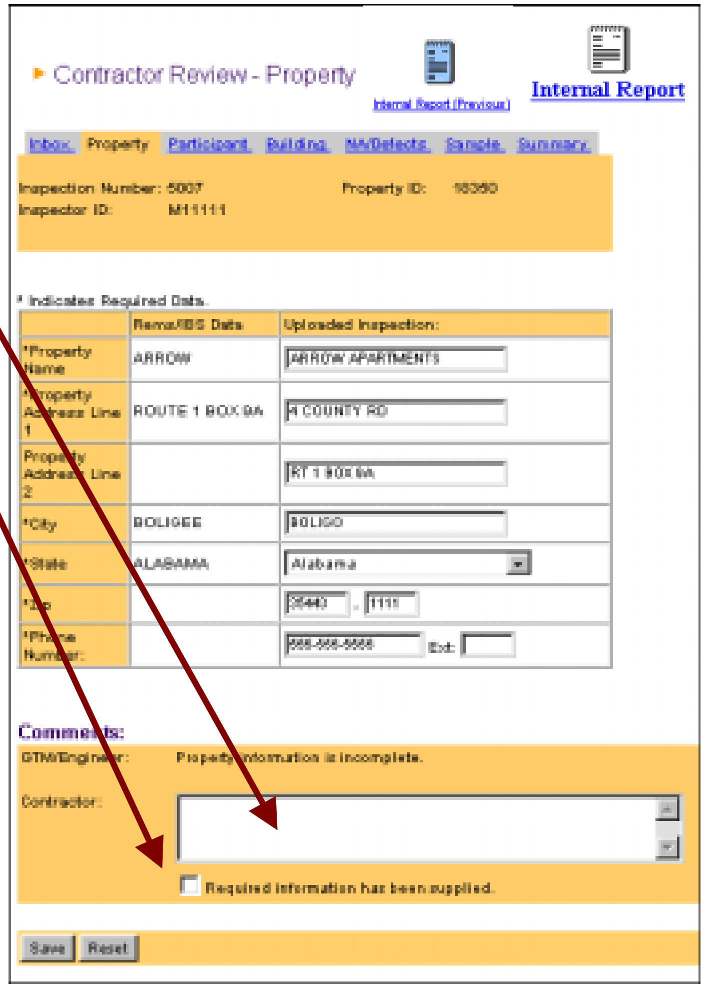
4. Enter your comments in the ***Comments*** field
OR
Click on the checkbox for **Required information has been supplied.**

*Clicking the box causes the system to insert the text "Required information has been supplied." The **Comments** field is required, so you must either check the box or enter your own comment text.*

5. Click on the **Save** button to save the updated information or on the **Reset** button to return all fields to their original values.

ITEMS NOT CHALLENGED:

This example shows challenged items. An unchallenged item would have no active fields and no **Save** or **Reset** buttons.



*The **Internal Report (Previous)** link displays the previous year's Inspection Summary Report.*

The ***Internal Report*** link displays the current Inspection Summary Report for that inspection. When the ***Internal Report*** link is selected a disclaimer is displayed indicating that the report is not final or available for distribution.

NOTE: Required fields are marked with an asterisk (*) and must be updated. Updated data will be lost if not saved before going to the next tab.

CONTRACTOR REVIEW - PARTICIPANT PAGE

Overview: The Contractor can make changes to the challenged participant information and provide comments. If the participant information is not challenged, all fields are view only and the ***Contractor Comments*** field is not visible.

Action	Example
Click on the **Participant** tab to display the *Contractor Review – Participant* page. *The **Internal Report (Previous)** link displays the previous year's inspection summary report.* *The **Internal Report** link displays the current Inspection Summary Report for that inspection. When the **Internal Report** link is selected a disclaimer is displayed indicating that the report is not final or available for distribution.* **ITEMS NOT CHALLENGED:** This example shows no challenges, so there are no active fields and no **Save** or **Reset** buttons. **ITEMS CHALLENGED:** A challenged item would include active fields and **Save** and **Reset** buttons. Update the necessary fields, then click on the **Save** button (not shown).	The *Contractor Review - Participant* page: 

NOTE: For a challenged report, all required fields must be updated. Required fields are marked with an asterisk (*). Updated data will be lost if not saved before going to the next tab.

The ***Contractor Comments*** field (not shown) **must** be updated manually or by checking the **Required information has been supplied** check box.

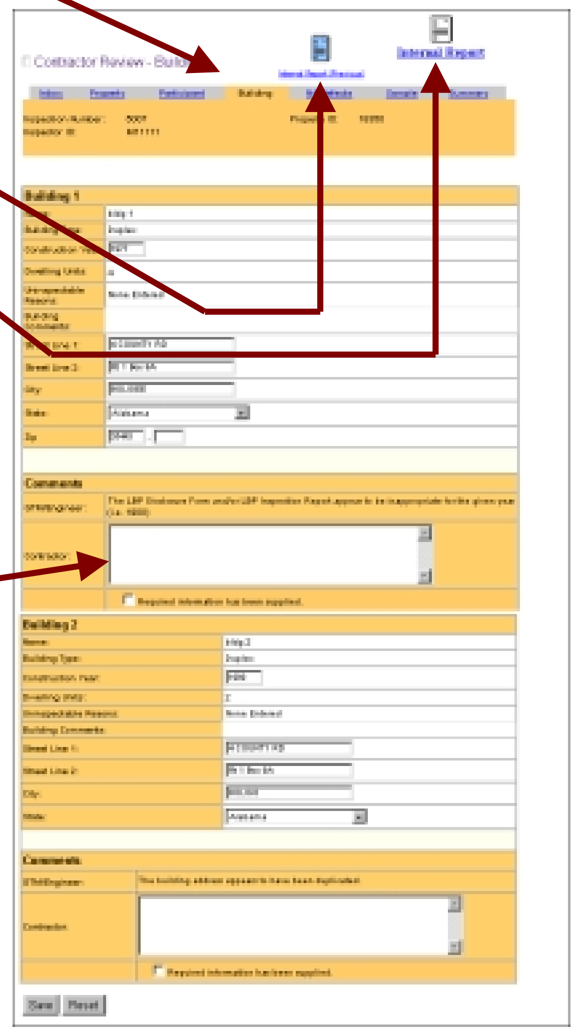
CONTRACTOR REVIEW - BUILDING PAGE

Overview: The Contractor can make changes to the challenged items and provide comments. If the Building information is not challenged, the *Building* page shows no data.

Action	Example
Click on the **Building** tab to display the *Contractor Review – Building* page.	The *Contractor Review - Building* page:

*The **Internal Report (Previous)** link displays the previous year's inspection summary report.*

*The **Internal Report** link displays the current Inspection Summary Report for that inspection. When the **Internal Report** link is selected a disclaimer is displayed indicating that the report is not final or available for distribution.*



ITEMS CHALLENGED :

1. Update the necessary fields and enter the Contractor's comments in the ***Contractor Comments*** field.

2. Click on the **Save** button to save the updated information. (To return the fields to the original values, click on the **Reset** button.)

ITEMS NOT CHALLENGED:

This example shows a challenged item. If the building information is not challenged, "no data" is displayed and there are no **Save** or **Reset** buttons.

NOTE: All required fields must be updated. Required fields are marked with an asterisk (*). Updated data will be lost if not saved before going to the next tab.

CONTRACTOR REVIEW - NA/DEFECTS PAGE

Overview: The Contractor can make changes to the challenged items and provide comments. If N/As or Defects are not challenged, the *NA/Defects* page is not visible.

Action	Example

Action

Click the **NA/Defects** tab to display the *Contractor Review – NA/Defects* page.

The ***Internal Report (Previous)*** *link displays the previous year's inspection summary report.*

The ***Internal Report*** *link displays the current Inspection Summary Report for that inspection. When the* ***Internal Report*** *link is selected a disclaimer is displayed indicating that the report is not final or available for distribution.*

Certificate *options:*

- ***Yes*** *– a valid certificate is available*
- ***No*** *– a valid certification is not available*
- ***NA*** *– a certificate is not needed*

Challenged Inspectable Item *options:*

- ***NA*** *– can be changed to NOD or remain NA*
- ***NOD*** *– can be changed to NA or remain NOD*
- ***L1, L2,*** *or* ***L3*** *– can be changed to another level or deleted*

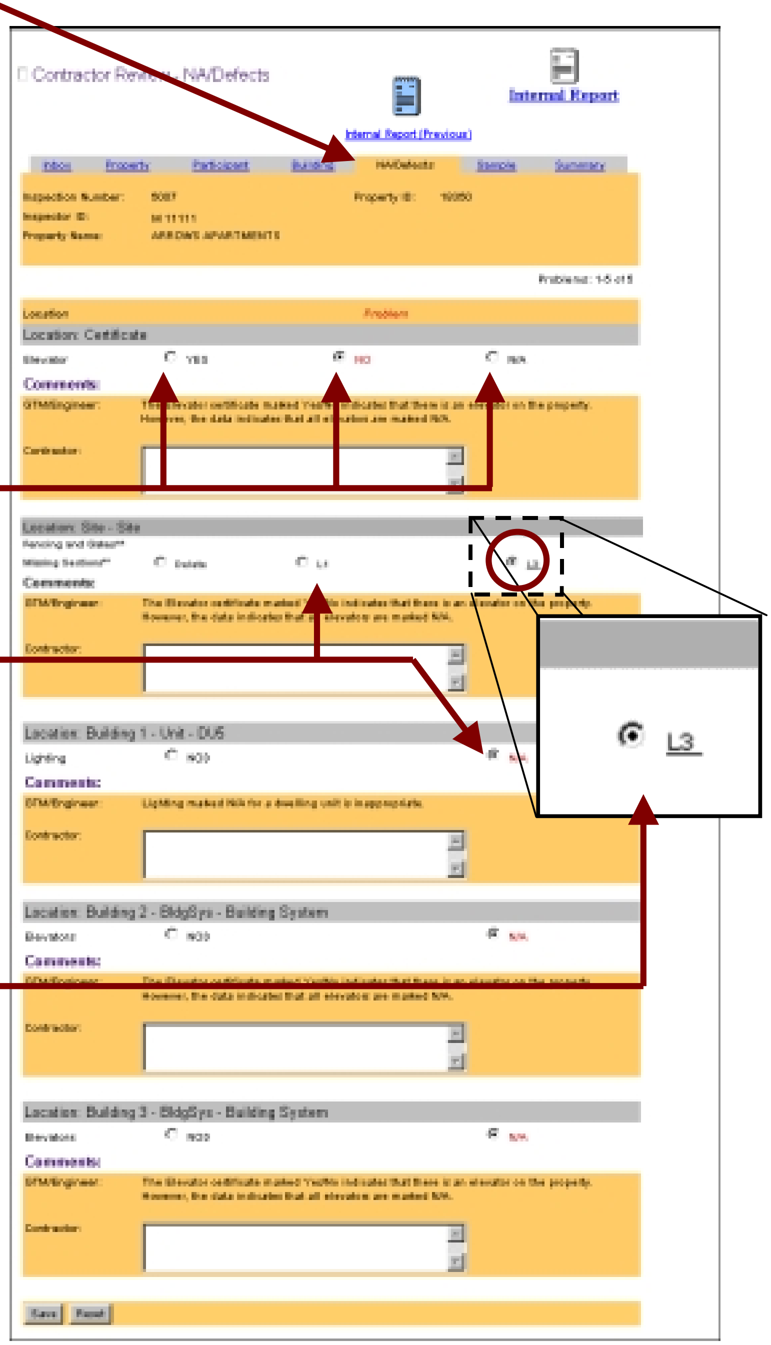
ITEMS CHALLENGED:

1. Click on the **L3** link (if the rating is L3) to display the *Item's Comments* page.

This allows the entry of a new location and comments for the L3 item.

Example

The *Contractor Review – NA/Defects* page:

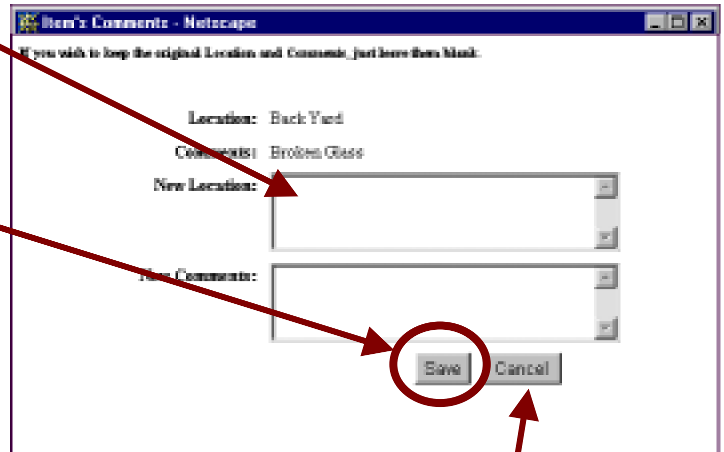


Action	Example

The *Items Comments* page displays:

2. Click in the **New Location** and **New Comments** boxes and enter the desired text.

3. Click on the **Save** button to save the updated information and to display the *NA/Defects* page again.

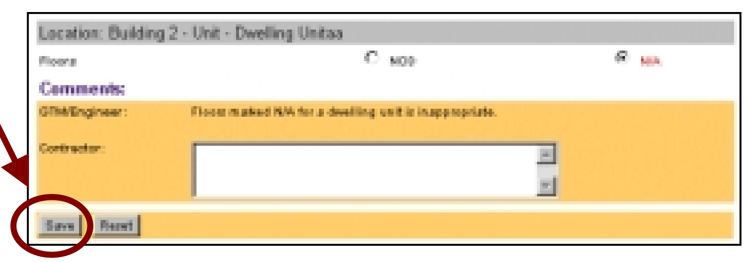


NOTE: Click on the **Cancel** button to return to the *NA/Defects* page without making any changes.

4. Update the necessary fields on the *NA/Defects* page and enter the Contractor's comments.

5. Click on the **Save** button to save the updated information. (To return the fields to the original values, click on the **Reset** button.)

The bottom of the *Contractor Review – NA/Defects* page:



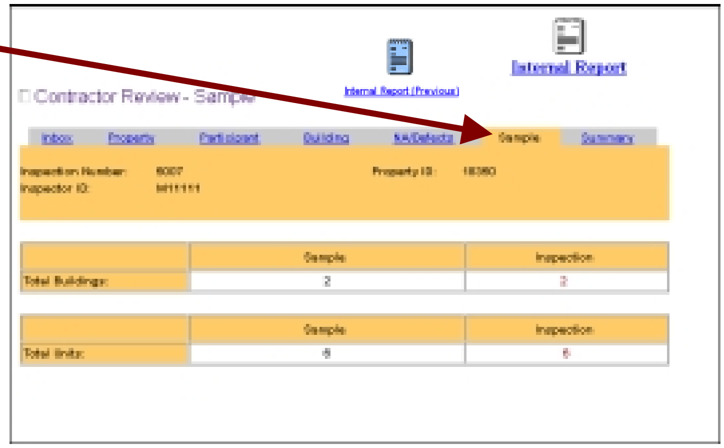
*The **Contractor Comments** field must be updated.*

ITEMS NOT CHALLENGED:

This example shows a challenged item. If the NA/Defects information is not challenged, the narrative "no data" is displayed and there are no **Save** or **Reset** buttons.

CONTRACTOR REVIEW – SAMPLE PAGE

Overview: If the sample is challenged, the Contractor can only update the ***Contractor Comments*** field. If the sample is not challenged, the ***Contractor Comments*** field is not visible.

Action	Example
Click the **Sample** tab to display the *Contractor Review – Sample* page.	The *Contractor Review – Sample* page: 
ITEMS NOT CHALLENGED: This example shows no challenges. All fields are view only and there are no **Save** or **Reset** buttons.	*The **Internal Report (Previous)** link displays the previous year's inspection summary report.*
ITEMS CHALLENGED: A challenged item would include a ***Contractor Comments*** field and **Save** and **Reset** buttons. Update the necessary fields, including the ***Contractor Comments*** field, then click on the **Save** button (not shown).	*The **Internal Report** link displays the current Inspection Summary Report for that inspection. When the **Internal Report** link is selected a disclaimer is displayed indicating that the report is not final or available for distribution.*

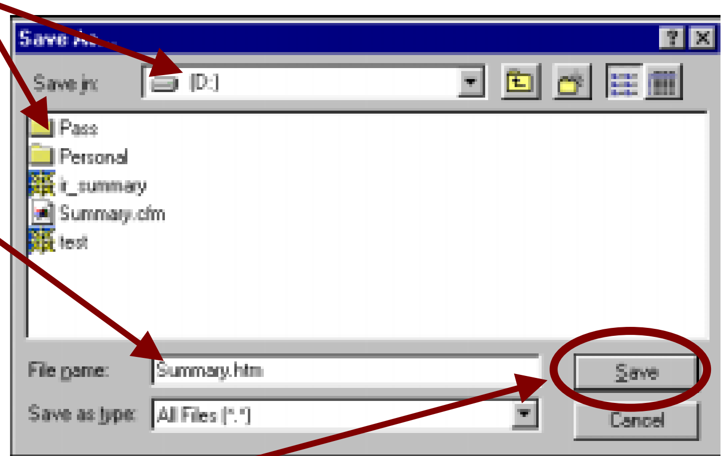
NOTE: Updated data will be lost if not saved before going to the next tab.

CONTRACTOR REVIEW – SUMMARY PAGE

Overview: This page provides the Contractor with a summary list of the inspections challenged items. This process shows how to save the challenged items list to a file, which can then be attached to an e-mail and sent to the inspector responsible for the inspection.

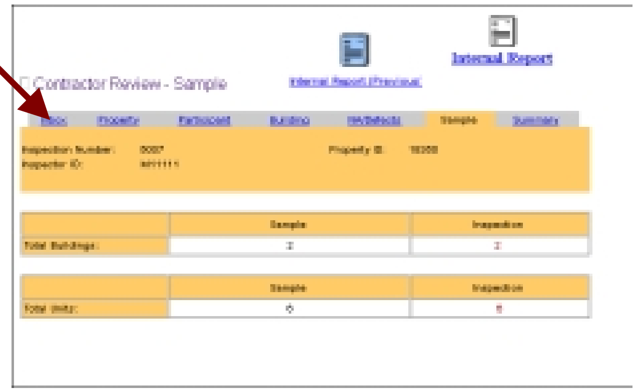
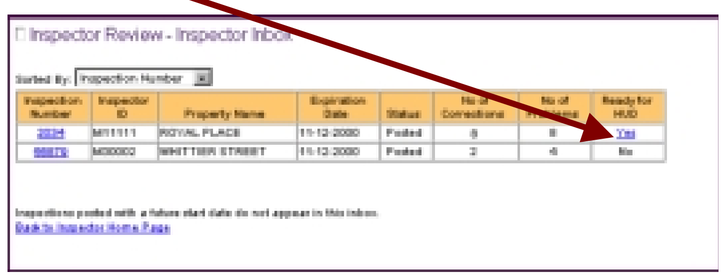
Action	Example
*The **Internal Report (Previous)** link displays the previous year's inspection summary report.* *The **Internal Report** link displays the current Inspection Summary Report for that inspection. When the **Internal Report** link is selected a disclaimer is displayed indicating that the report is not final or available for distribution.* **1.** Click on the **Summary** tab to display the *Contractor Review – Summary* page. *There are no editable fields in the Contract Review – Summary page.* **2.** Hold down the **CTRL** key on your keyboard and tap the "**S**" key to display the ***Save As*** dialogue box.	The *Contractor Review – Summary* page: 

Action	Example
3. Select the desired drive and folder where the file is to be saved.	The ***Save As*** dialogue box displays:
4. Click in the ***File Name*** field and type a file name with the extension **.htm**. *In the example shown at right the file is saved to the **D:** drive**,** the file name is **Summary,** and the file extension is **.htm**.*	
5. Click on **Save** to save the file.	

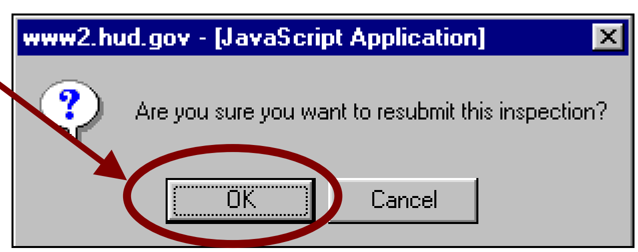


NOTE: This file can be attached to an email and sent to the inspector that conducted the inspection.

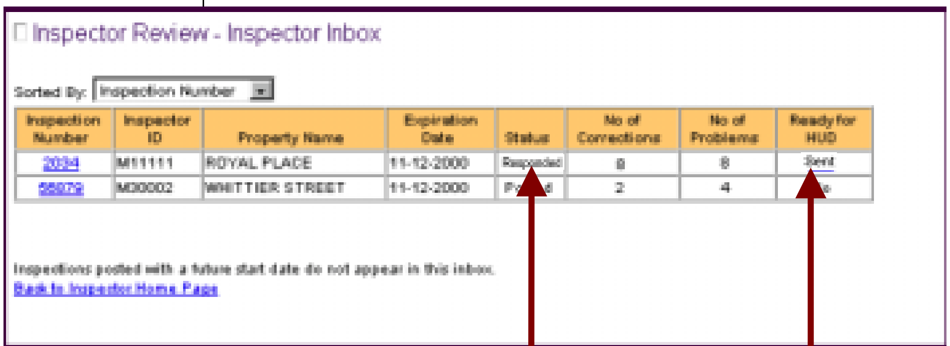
UPDATE INSPECTOR REVIEW - INSPECTOR INBOX

Action	Example
1. Click on the **Inbox** tab to display the *Inspector Review – Inspector Inbox* page.	The *Inspector Review – Sample* page: 
2. Click on the **<u>Yes</u>** link in the *Ready For HUD* column to display the *Resubmit Confirmation* window.	The ***Inspector Review – Inspector Inbox*** displays: 

NOTE: The number of corrections must equal the number of problems before the **<u>Yes</u>** link appears in the *Ready For HUD* column.

3. Click on the **OK** button to resubmit the inspection and to display the *Inspector Review – Inspector Inbox* page again.	The *Resubmit Confirmation* window: 

Action	Example
	The ***Inspector Review - Inspector Inbox*** displays:

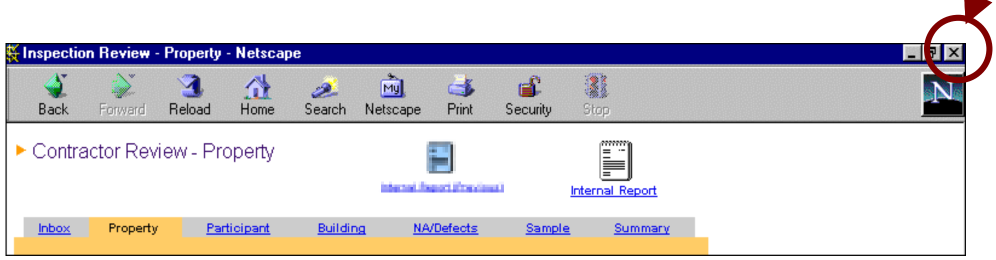


*Note that the **Status** field changes from **Posted** to **Responded** and the **<u>Yes</u>** link in the Ready for HUD column changes to **Sent**.*

The inspection remains in the Inspector Inbox until it is completed by HUD.

EXIT INSPECTION REVIEW

Remember to save any changes before exiting. To exit the system at any time, click on the button located at the top of any *Inspection Review* page.

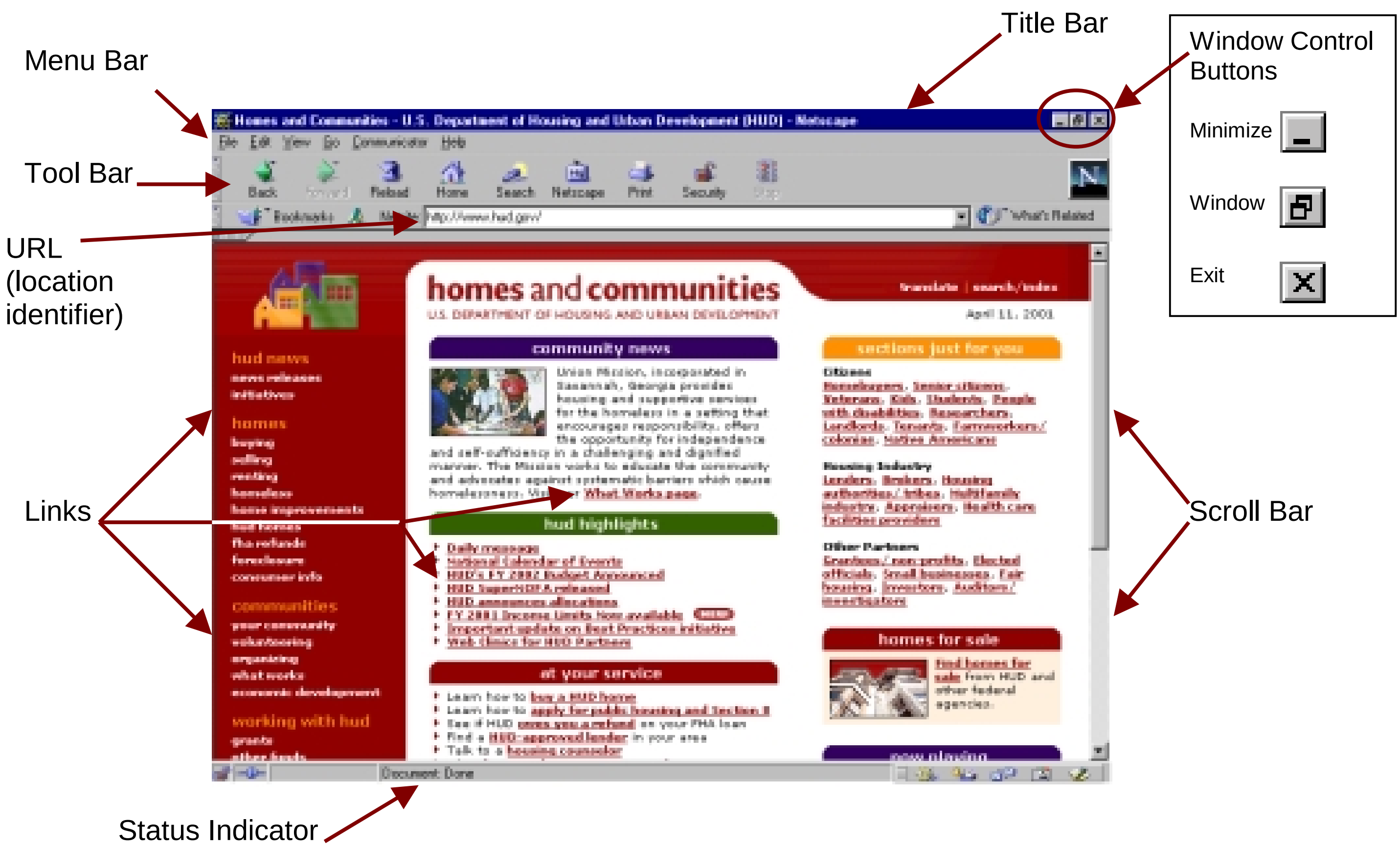


APPENDIX A: BROWSER BASICS

PASS/Inspection Review is accessible to Contractors via the Internet. This appendix provides basic instruction on the aspects and functions of an Internet browser.

A browser allows you to access **Web sites**, which are composed of one or more web pages that display in the browser window, as in the example below. A **Web page** is a document or image with a unique address or location on the Web. (A Web address is also known as a "Uniform Resource Locator" or URL. For example, the URL for the *HUD Home* page is **www.hud.gov**.)

BROWSER WINDOW ELEMENTS



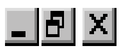
NOTE: Above is an example of a typical browser window (in this case Netscape Communicator 4.5) displaying the *HUD Home* page. Other Web browsers, such as Microsoft Internet Explorer, have similar screen layouts and equivalent functionality.

TITLE BAR

The browser's *Title* bar stretches across the very top of the window and usually displays the title of the Web page currently displayed in the window ▼.

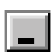
If more than one window is open in the browser, the title bar of the active window is bold (or darker), while the title bar(s) of the other open window(s) appear faded (or lighter).

BROWSER WINDOW CONTROL BUTTONS



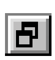
In the right corner of the *Title* bar (the top of the browser window) are three control buttons , called the **Minimize**, **Window** and **Exit** buttons, respectively.

Minimize: The **Minimize** button reduces (or minimizes) the browser window to a small block (or *Title* box) located on the Windows Desktop Toolbar. (This lets you work in another application for a while without exiting the browser.) To enlarge the window back to full size, click on the appropriate title box on your Windows Desktop *Toolbar*.



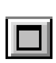
Window: The **Window** button reduces the browser window to a smaller size, and lets you drag and resize the browser window. This permits you to view any other application windows that may be open on the Windows desktop. This button's appearance changes, depending on the state of the window.

When the current window is "maximized" (takes up the whole screen), the **Window** button looks like this:



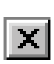
Click on it to put the browser window into a scalable window on your Windows desktop.

When the current window is not maximized (is already in a scalable window), the **Window** button looks like this:



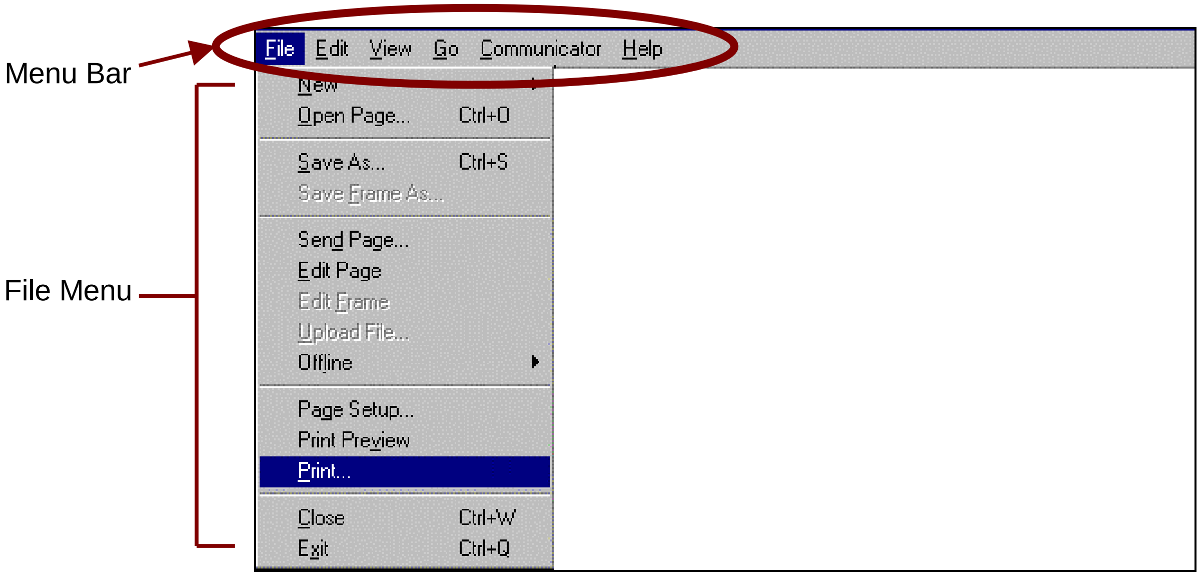
Click on it to maximize the window (cause it to fill the whole screen).

Exit: The **Exit** button (sometimes called the **Close** button) closes the browser application, logs you off the HUD Secure Web Systems Web site (if you're currently logged on), and returns you to the Windows desktop.



MENU BAR

The menu bar provides drop-down menus for browser functions. To display a drop down menu, click on the menu item. To activate a menu option, click on that option.



Depending on what you are doing in your browser at any given time, some menu options may not be available. Menu options that appear faded (such as the "Save Frame As..." and "Edit Frame" options in the example above) are not available.

TOOL BAR

The *Tool* bar consists of buttons representing browser functions.

Available functions are buttons with bold text and graphics. A *Tool* bar button appears faded if the function is not currently available.

NOTE: The **Lock** icon 

indicates whether the current Web page is secure or not. A secure Web page is one blocked from non-authorized Internet users (through logon accounts or other methods). This is useful for pages containing sensitive information, such as financial or housing data. If the lock appears closed, the page is secure. If the lock is open (as shown above), a Web page is not secure.

LOCATION IDENTIFIER

The unique address or location of the Web document or application is called the Uniform Resource Locator (URL), and is often called a Web address. The URL identifies a particular Web page among all the computers on the Internet, such as the address for the REAC Web site: **www.hud.gov/reac**.

To enter a URL (a Web Address):

1. Click in your browser's ***Location, Go To, Netsite*** or ***Address*** field to place the flashing cursor in that field. (This is the same field, however the field name shown may be any of these names).

2. If there is already text in the field (as in our example above), press the **Delete** or **Backspace** key until the text in the field is cleared.

3. Type in the desired URL (Web Address), in this case **www.hud.gov/offices/reac**.

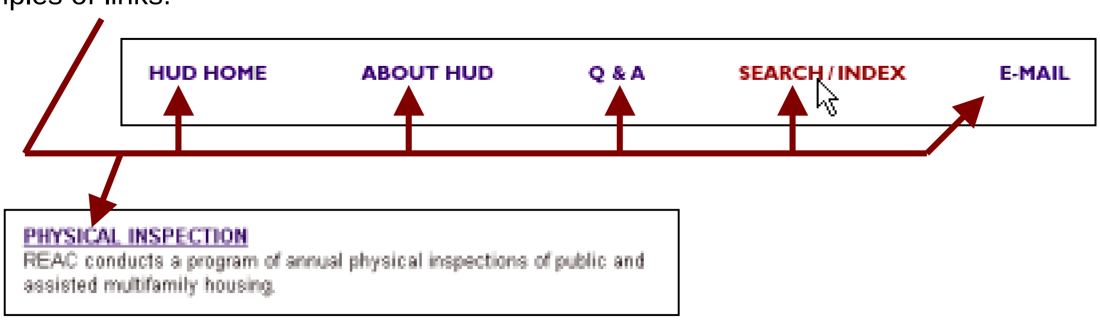
3. Press the **Enter** key.

*The browser automatically adds the **http://** to the address and connects to the Web page at that address. Depending on many factors, connection time may vary.*

LINKS

A link provides a method to move quickly from the current page to another Web page. Links are typically underlined, although they do not have to be. Click on a particular link TO move to that particular page. Once the link is accessed, it typically changes color to indicate that you have accessed it once before.

Some examples of links:



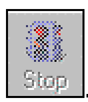
STATUS BAR

The *Status* bar indicates the status of whatever action is being performed at that time (as do some other screen elements).
If the browser is performing an action (for example, searching a database for information or attempting to display a complex graphic on the screen)**:**

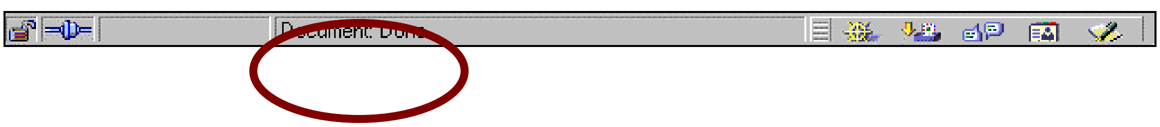
- in Netscape, the Netscape logo in the upper right corner of the window displays with comets flying across it.
- the **Stop** button on the Tool bar 

is bold and the red "stop light" is on.
- the *Status* indicator bar at the bottom of the window (near the lock icon) describes the status (See example below ▼).

When the browser has completed an action:

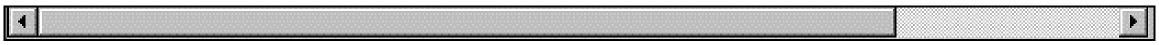
- In Netscape, the logo returns to its static state (no flying comets).
- the **Stop** button appears faded 

.
- the *Status* indicator bar reads "Document: Done," as in the example below ▼.



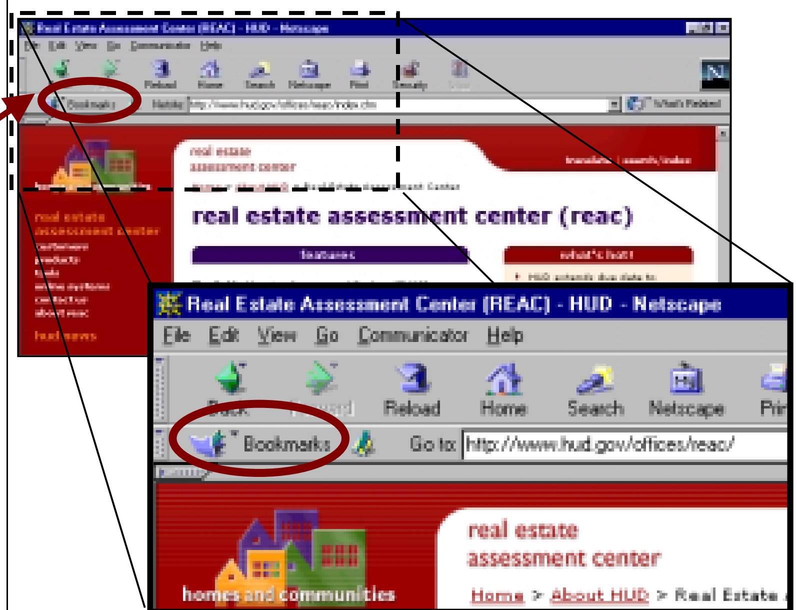
SCROLL BARS

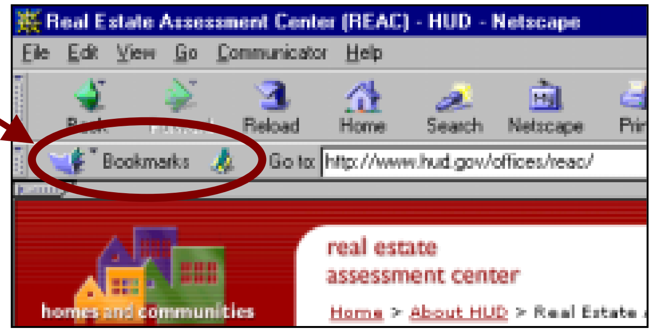
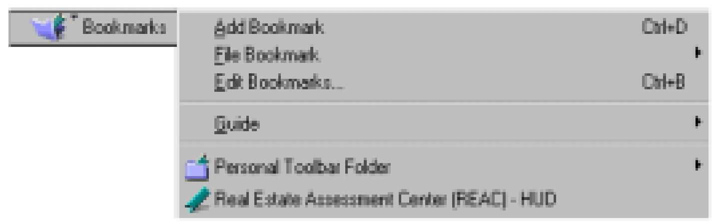
Scroll bars appear whenever there is more information to display on the screen or in the dialog box or list box than can be seen within the window. There are horizontal and vertical scroll bars. Clicking on an arrow on a horizontal scroll bar causes the display to move left or right, while clicking on an arrow on a vertical scroll bar causes the display to move up or down. This way, all the additional information on a page can be seen. Below is an example of a horizontal scroll bar ▼.



BOOKMARK A WEB PAGE

Overview: Bookmarks provide a quick way to access Web pages you visit often. By bookmarking a Web site, you don't have to remember the URL address or type it in to access it. In this example, you will add the *HUD/REAC Home* page as a bookmark.

Action	Example
1. In your browser, go to the Web page you wish to bookmark. (In this case, **www.hud.gov/offices/reac**.) **2.** Click in the **Bookmarks** button (next to the URL locator bar) to display the *Bookmarks* menu.	The browser displaying the *HUD/REAC Home* page: 
3. Click on the **Add Bookmark** option to add the current Web site page to your list of bookmarked sites.	The *Bookmarks* menu:  *After you click on the* **Add Bookmark** *option, the* Bookmarks *menu will disappear from the screen.*

Action	Example
4. Click in the **Bookmarks** button again to display the *Bookmarks* menu.	The browser with the *HUD/REAC Home* page displayed: 
*You may test if this worked by exiting out of your browser, then starting it again. Click on the **Bookmarks** button and click on the HUD/REAC bookmark option. The HUD/REAC page should display.*	The *Bookmark* menu with the new *HUD/REAC Home* page option:  *Notice that the new bookmark has been added to your list. (See “Note” below.)*

NOTE: If your Bookmark list already contains other bookmarks, the new bookmark for HUD/REAC will appear at the end of your list of available bookmarks (rather than as the first option, as shown above).