MARINE CORPS HOUSING AUTOMATED SYSTEM,
MCHAS User Guide

MCHAS Version 2.5a
February 2001

This product was developed for the HQMC Housing Office through the Naval Facilities Engineering Service Center in Port Hueneme, CA.

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Section 1 - MCHAS Overview

Getting Started

Locate the **MCHAS** icon on your Desktop (Fig. 1.1).

Fig. 1.1 - MCHAS desktop icon

1. Double-click the icon.
2. The **MCHAS** Logon Dialog Box will appear (Fig. 1.2).
3. The **MCHAS** login screen contains three required fields:

   Username

   Password

   Database

   Your system administrator provides this information. Please check with your system administrator for the correct login information.
4. Enter your **MCHAS** Username.
5. Press tab to proceed to the next field.
6. Enter your **MCHAS** password.

   Note: For each character typed, an asterisk (*) will appear.
7. Press tab to proceed to the next field.
8. Enter the database name.
9. Click on the **Connect** button or the **Cancel** button to exit.

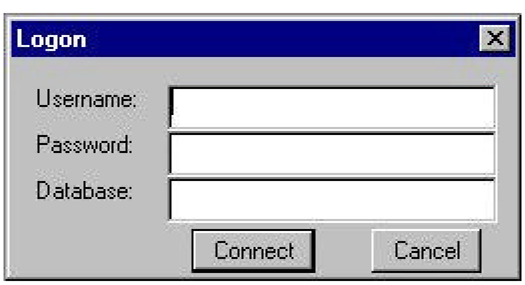


Fig. 1.2 - MCHAS Logon Dialog Box

To change your password, see section “Changing Your Password”, or your system administrator.

Changing Your Password

1. Click on the center of the Marine Corps globe emblem located in the upper left corner of the Main Menu (Fig. 1.3).
2. The Password Change dialog box will appear (Fig. 1.4).
3. Enter the new password.

Fig. 1.3 - Marine Corps logo

4. Press tab to proceed to the next field.
5. Enter the new password again to confirm your selection.
6. Press the **Save** button to accept the new password or press the **Cancel** button to exit without changing the password.

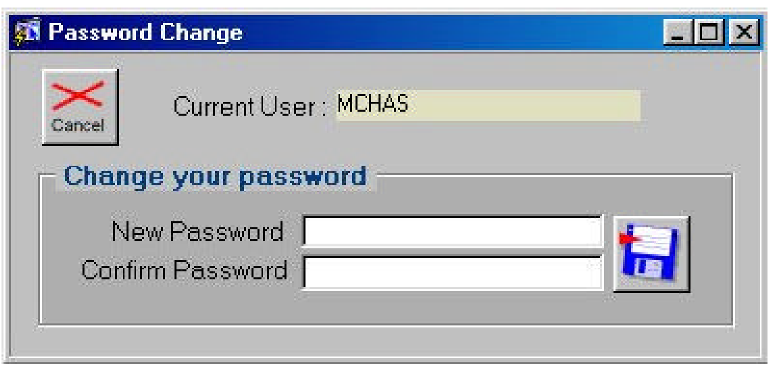


Fig. 1.4 - Password Change dialog

Your new password will take affect the next time you open MCHAS. Since permission is granted to individual screens and components based upon your username and password, it's a good idea to exit the application completely and open again after changing your password.

MCHAS Modules

Opening a Module

7. Locate the cursor on the Module icon you want to open and click on it. (Fig. 1.5).
8. The Module, or application's menu listing will be displayed. Find the application you wish to use and click OK.

Exiting a Module

9. Click on the **Save** button to save any changes.

10. Click on the **Close** button located on the toolbar.

REMINDER: Save your data before exiting. Your data can be lost if the application is closed without saving.

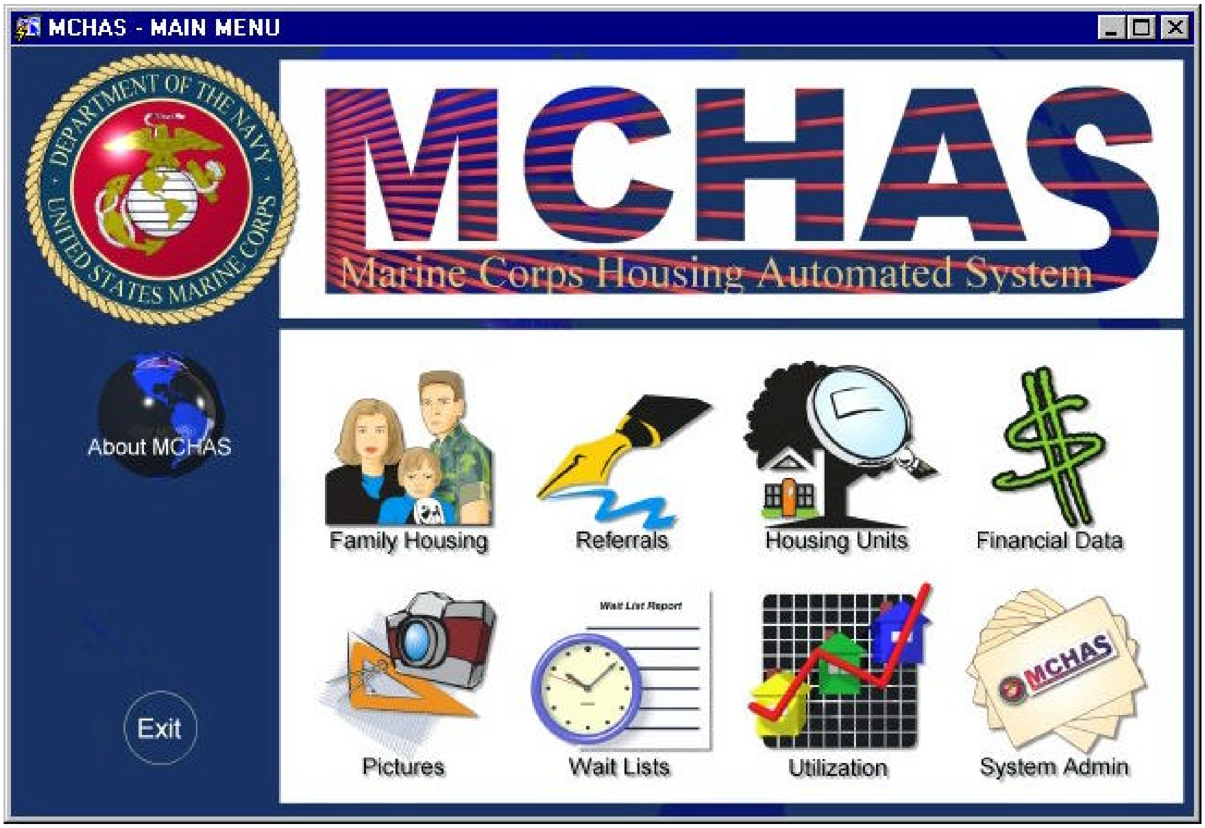


Fig. 1.5 - MCHAS Main Menu Screen

MCHAS Conventions and Definitions

Conventions of the Program

Date Formats are set for DD MON YYYY (11 OCT 1999).

Enter all numbers (phone, etc.) without spaces, dashes or parenthesis, etc.

Convention of the Users Guide

Information important to an instruction is contained in a Note: and will be highlighted in blue.

Note: This is a note

Tips, or shortcuts, will be highlighted in blue and contain a bullet.

- This is a tip.

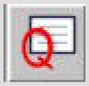
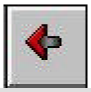
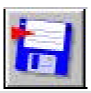
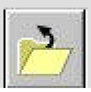
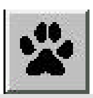
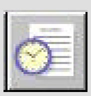
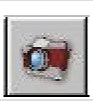
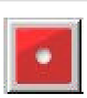
Screen Definitions

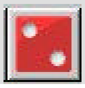
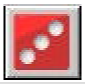
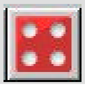
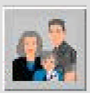
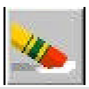
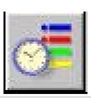
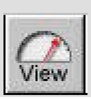
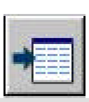
- The title bar displays the name of the application screen.
- Beneath the title bar is the main menu bar. The main menu bar displays other menu options.
- Just below the main menu bar is the tool bar. The tool bar icons allow you to use MCHAS functions with just a click of your mouse (See Button Definitions later in this manual for more detail). The button tool tips are helpful in understanding the function a button will handle.
- The application screen contains fields that you can use to input data, query, or simply display **MCHAS** database information.
- At the bottom of your document you can find the status bar (Fig. 1.6). The status bar contains instructions, number of records, mode field and when appropriate, displays messages.
- The mode field located in the status bar displays what mode you are in, i.e. ENTER-QUERY.
- The Windows control minimize box displayed on the top right of your application window, allows you to reduce your application to an icon with a click of your left mouse button, only after you have already entered a query. Reducing or "minimizing" your application enables you to open another application without closing the original one.
- If the Windows control shows two overlapped screens, this is the restore box. The overlapped screens appear only when your screen is maximized. Click on the restore box to minimize your screen. Once your screen is minimized, only one screen will appear. Click on the screen to restore your screen or "maximize" it.
- Text color. Black field labels are standard input fields. Black field labels with a red asterisk indicate **"Required"** fields. Red field labels indicate queryable fields.
- Field color. Light blue fields are fields that contain value lists. Double-click in any of these fields to view the list of values. Value lists are also indicated on the window status bar as <List>. (Fig. 1.6). Light gray fields will pull up a new screen or dialog box. Light yellow fields indicate a highlighted field or row.

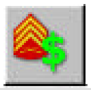
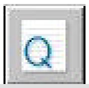
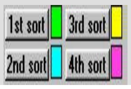
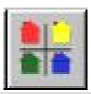
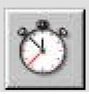
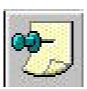
Fig. 1.6 – Window Status bar

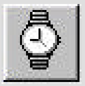
Button Definitions

Table 1.1 - Button Definitions

Button	**Description of Action**
	QUERY – Sets an application screen to the Enter-Query Mode ready for user input to perform a search. By Clicking again after search criteria has been entered, the query is executed. If the application is in the Enter-Query Mode, this button will execute the query.
	LEFT/BACK –Allows display of the previous record in the current result set.
	RIGHT/FORWARD – Allows the next record to be displayed in the current result set.
	SAVE – Saves the data on the screen. This information may be new or updated information.
	CLOSE – Closes the uppermost application screen.
	MILITARY SPOUSE – Opens an application screen for input of data if the sponsor's spouse is also in the military.
	FAMILY MEMBERS – Opens an application screen for input of family member information.
	PETS – Opens an application screen for input of pet information.
	WAIT LIST – Opens the Wait List application screen to view the sponsor's current Wait List. In the Wait List application screen this button will allow you to edit the table of Wait List Names.
	HOUSE LOOKUP - Displays available houses during the Offer and Assignment Process.
	HOUSING UNIT – 1) Opens the Maintain Housing Quarters Activity application screen to view information about the housing assignment. 2) In the Wait List application screen this button will allow you to edit the Housing Unit Grade table. 3) In the Maintain Housing Quarters Activity application screen this button will allow you to edit the Housing Unit Grade table.
	PICTURE – Opens the Image Viewer Form to view images associated with the assigned house (e.g.- photo of property).
	PRINT SQR REPORTS– Launches an outside program with custom reports.
	REMARK 1 – Allows adding of remarks.

Button	Description of Action
	REMARK 2 – Allows adding of remarks.
	REMARK 3 – Allows adding of remarks.
	REMARK 4 – Allows adding of remarks.
	REMARKS SEARCH – Allows searching remarks in the text.
	FAMILY HOUSING – Accesses the Add and Edit Military Family application screen.
	DELETE – Deletes a record from the database.
	CLEAR – Clears all fields in the current application.
	WAIT LIST REPORT – Prints a multiple wait list report.
	RE-SEQUENCE WAIT LIST POSITION – Performs a manual re-sequencing of the Wait List.
	WAIT LIST DESCRIPTION – Allows editing of the wait list description table.
	MAXIMO – Calls up Maximo information.
	ADD METER – Adds a new meter to a housing unit.
	VIEW METER –Allows viewing of meter information for a housing unit.
	INSERT – Allows insertion of a new record.
	COPY REFERRAL – Copies one referral unit information into a new record.
	ADD –Allows a new Owner to be added.
	DETAIL – Displays the unit details for the current referral listing.

Button	**Description of Action**
	SET ASIDE – Allows viewing, editing or entering Set Aside Details (a complex code is required). NEW
	CANCEL – Cancels and closes the application screen.
	GENERATE REFERRALS – Generates a printed referral listing based upon criteria entered by the user.
	SORT – Allows sorting on selected fields in 1st, 2nd, 3rd, and 4th order before executing a query and generating a report.
	PHONE NUMBER – Allows editing of a referral contact phone number.
	ADD HOUSE – Allows addition of new housing units.
	PROJECT CODES – Allows Project Codes to be edited.
	SECURITY SET UP – Allows quick set up of components.
	POST – Performs the posting of Meters (Entry of Meter Transactions) or Posts monthly scheduled charges (Charge Main).
	PRO-RATE - replaces a text button NEW
	SET DEFAULT HOUSING OFFICE - replaces a text button NEW
	UTILIZATION - Go to the Utilization Main Screen.
	PROFILES - View Other Profiles.
	DEFAULT PROFILE - Get my Default Profile.
	SET PROFILE - Save the current Profile as my Default Profile.
	OVERVIEW - formerly a text button NEW
	VIEW INSPECTION CALENDAR NEW

Button	**Description of Action**	
	VIEW THE INSPECTION TIMELINE	NEW
	SET PREFERENCES	NEW

Section 2 - Family Housing Module

The Family Housing Module consists of several areas:

1 Military Family Information
   a Assigning to a Wait List
   b Assignment to Military Housing
   c Tracking Cash Customers
2 Vacating Housing Units
3 Wait Lists
4 Family Search
5 Weapons Tracking
6 Incidents
7 Assign History
8 Unaccompanied

Adding or Editing Military Family Information

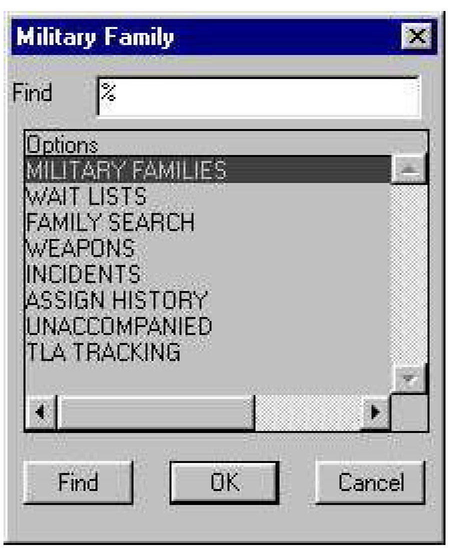
1 From the MCHAS **Main Menu** screen, click on the **Family Housing** Module.

   A Selection List will pop up (Fig. 2.1).

2 Select **MILITARY FAMILIES** and click **OK**.

Note: The application screens appear in the *query mode*. See the status bar at the bottom of the document.

Left Mouse Click Selection List



Right Mouse Click Selection List

Fig. 2.1 - Military Family pop up

3 To Query a Record, input the sponsor's social security number. If the sponsor does not exist, a message will appear (Fig. 2.2 -).

Fig. 2.2 - Add Sponsor Dialog

4 Click the Yes button to add the new sponsor.

5 Input the sponsor information.

6 Click on the **Save** button to save changes.

Note: To enter dependents, pets, or military spouse information, see the following "How to" sections.

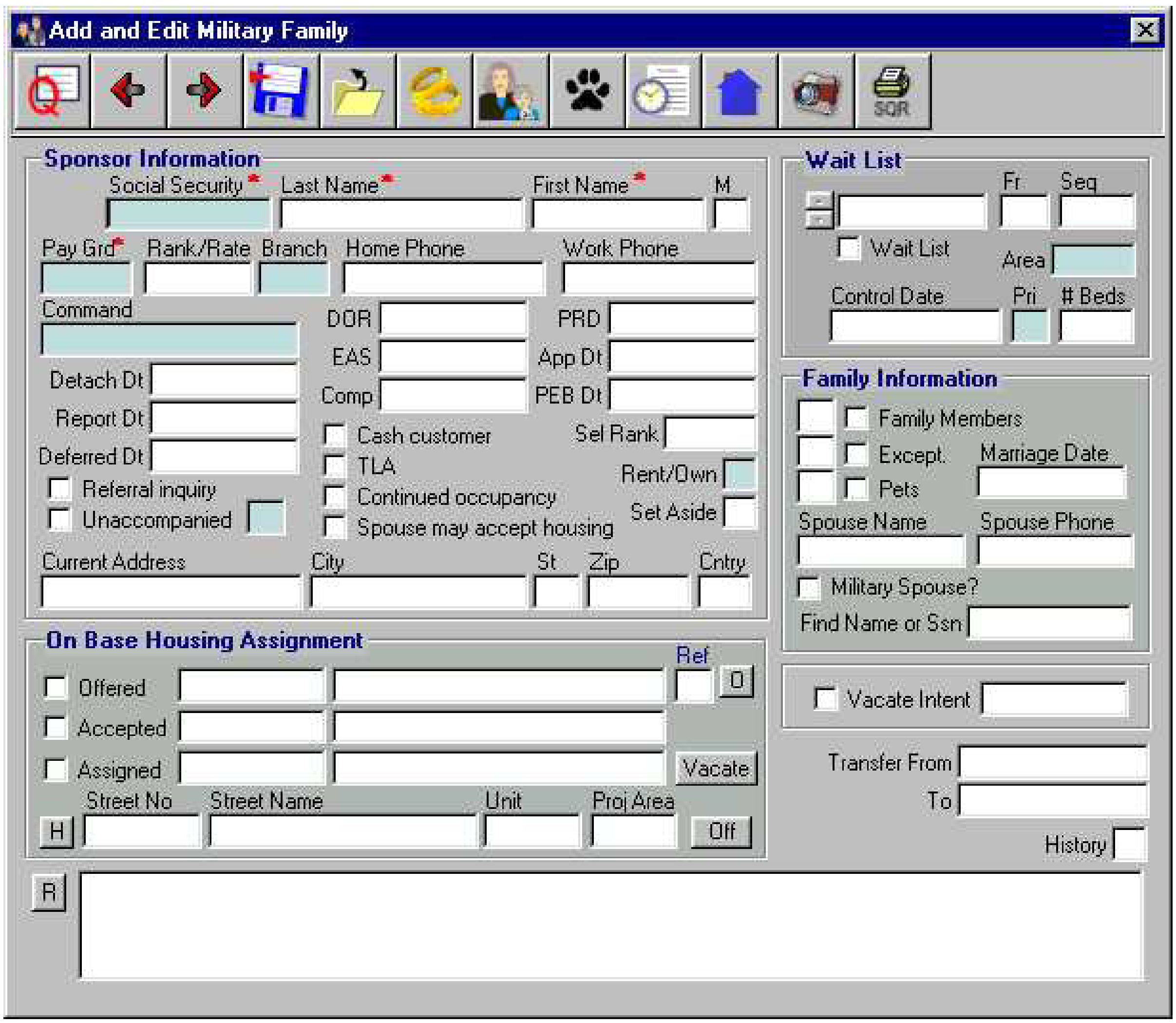


Fig. 2.3 - Add and Edit Military Family Application Screen

The following table describes each field of the Add and Edit Military Family Application Screen. Descriptions in bold or indicated with a red asterisk on the screen are required fields.

Table 2.1 - Sponsor Information

Input Field *	Description	Method of Entry
Social Security	Sponsor's Social Security Number	Enter – enter numbers only
Last Name	Sponsor's Last Name	Key In
First Name	Sponsor's First Name	Key In
M	Sponsor's Middle Initial	Key In
Py Grd	Sponsor's Pay Grade	Key In OR Popup List
Rank/Rate	Sponsor's Rank	Key In
Branch	Branch of Service sponsor is in	Key In OR Popup List
Home Phone	Sponsor's home telephone number	Key In – enter numbers only
Work Phone	Sponsor's work telephone number	Key In – enter numbers only
Command	Command sponsor is assigned to	Key In OR Popup List
DOR	Date of Rank	Key In
PRD	Projected Rotate Date of sponsor	Key In
Detach dt	Detachment Date	Key In
EAS	End of Active Service Date	Key In
App dt	Application Date	Key In
Report dt	Date reported	Key In
Comp	Computation Date of Sponsor	Key In
PEB dt	Pay Entry Base Date	Key In
Deferred dt	Deferred Date	Key In
Cash customer	Should this sponsor be on a monthly schedule?	Mouse Selection
Sel Rank	Has been Selected for a New Rank	Key In
Referral inquiry	Is person inquiring about referrals?	Mouse Selection
Spouse may accept housing	Spouse may accept housing	Mouse Selection
Unaccompanied	Where is Sponsor?	Key In OR Popup List
Continued occupancy	Is Family continuing occupancy?	Mouse Selection
Rent/Own	If sponsor is living off base – is the sponsor renting a unit or does the sponsor own the unit	Key In OR Popup List
Set Aside	If sponsor is living off base – is the sponsor in the set aside program – if Yes, tracks set aside information	Key In
Current Address	Current address	Key In
City	Current City of residence	Key In
St	Current State of residence	Key In
Zip	Current Zip code	Key In
Cntry	Current Country of residence	Key In
Remarks	Remarks about Military Family	Key In

* Input Fields in BOLD are required fields.

Table 2.2 - Wait List Information

Input Field	Description	Method of Entry
Wait List	Name of Wait List	Display Only – Entered automatically upon adding to waitlist
Wait List	Check box to indicate if Sponsor is on a wait list.	Mouse Selection
Fr	Indicates if sponsor is the top 10% of the Wait List displayed.	Display Only – Entered automatically upon assignment to a wait list
Seq	Position of the sponsor of the displayed Wait List	Display Only – Entered automatically upon assignment to a wait list
Area	Wait List area	Key In OR Popup List (required to add sponsor to Wait List)
Control Date	Date sponsor is processed for Wait List	Key In
Pri	Priority of sponsor	Key In OR Popup List
#Beds	Number of bedrooms sponsor qualified for	Key In (required to add to Wait List)

Table 2.3 - On Base Housing Assignment

Input Field	Description	Method of Entry
Offered	Date the family was offered a unit	Entered automatically upon assignment to a housing unit OR Key In
Ref	The number of housing offers that have been refused by the family	Entered automatically upon refusal of offered housing unit
O	Displays refusal history	Entered automatically upon refusal of offered housing unit
Accepted	Date the family accepted the unit	Entered automatically upon assignment to a housing unit OR Key In
Assigned	Date the unit was assigned to the family	Entered automatically upon assignment to a housing unit OR Key In
Vacated	Vacate a sponsor	Button – Key In (required to vacate sponsor)
H	Displays Assignment History, assignment and vacate dates, as well as wait list information	Button – Entered automatically upon assignment or vacate OR Key In
Street No	Street Number of the housing unit this family is assigned to	Display Only – Entered automatically upon assignment
Street Name	Street Name of the housing unit this family is assigned to	Display Only – Entered automatically upon assignment
Unit No	Number of the Unit this family is assigned to, (if Applicable)	Display Only – Entered automatically upon assignment
Proj Area	Project Area housing unit is located in	Display Only – Entered automatically upon assignment

Input Field	Description	Method of Entry
Off	Tracks off base housing for overseas activities	Button - Key In

Table 2.4 - Family Information

Input Field	Description	Method of Entry
Family Members	Check box indicating whether sponsor has family members	Display Only – Entered automatically upon inputting family member information
Exception	Check box indicating whether sponsor has any exceptional (handicapped) family members	Display Only – Entered automatically upon inputting exceptional type and member level
Pets	Check box indicating whether sponsor has pets	Display Only – Entered automatically upon inputting pet information
Marriage date	Date of marriage	Key In
Spouse Name	Name of sponsor's spouse	Display Only – Entered automatically upon inputting family member information
Spouse Phone	Telephone Number of sponsor's spouse	Key In
Military Spouse?	Check box indicating if spouse is also Military	Mouse Selection
Find Name or Ssn	Query on name, SSN or ALL	Key In
Vacate Intent	Check Box to indicate the intended date Military Family will vacate	Mouse Selection
Transfer From	Transferring from?	Key In
Transfer To	Transferring to?	Key In
History	Place a record in history – used for querying purposes only, does not archive record	Key in or double click

Entering Family Member Information

1 Click on the **Family Members** button.

The Sponsor's Family Members Application Screen appears (Fig. 2.4).

2 Add new information or update the sponsor's family members. Click on the **Save** button to save any changes.

Certain reports depend on the birthday of family members, i.e. Family members by Age in Housing. It is important to complete this information when entering family members into the system.

Also, spouses in the military DO NOT belong in the family members information. Use the **Military Spouse** screen to enter data on dual military members.

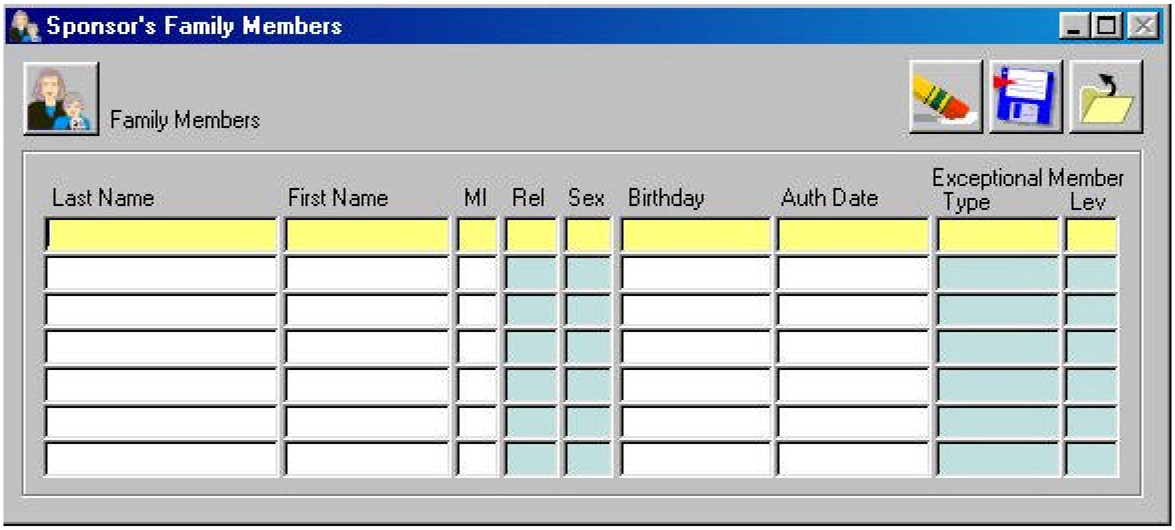


Fig. 2.4 - Input screen for Family Members

Entering Pet Information

1 Click on the **Pets** button.

The Sponsor Pet Information Application Screen appears (Fig. 2.5).

2 Enter new or update information. Click on the **Save** button to save changes.

3 Click on the **Delete a Record** button to remove information.

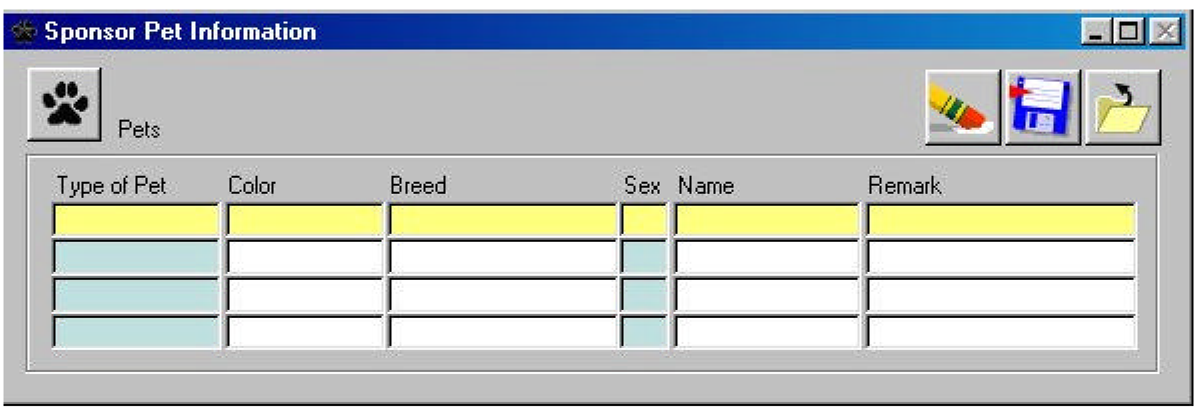


Fig. 2.5 - Sponsor Pet Information Application Screen

Entering Military Spouse Information

1 Click on the **Military Spouse** button.

The Military Spouse Information Application Screen appears (Fig. 2.6).

2 Enter new or update information on the Military Spouse Information Application Screen.

3 To remove, click on the **Delete a Record** button to delete the military spouse record.

4 Click on the **Save** button to save any changes.

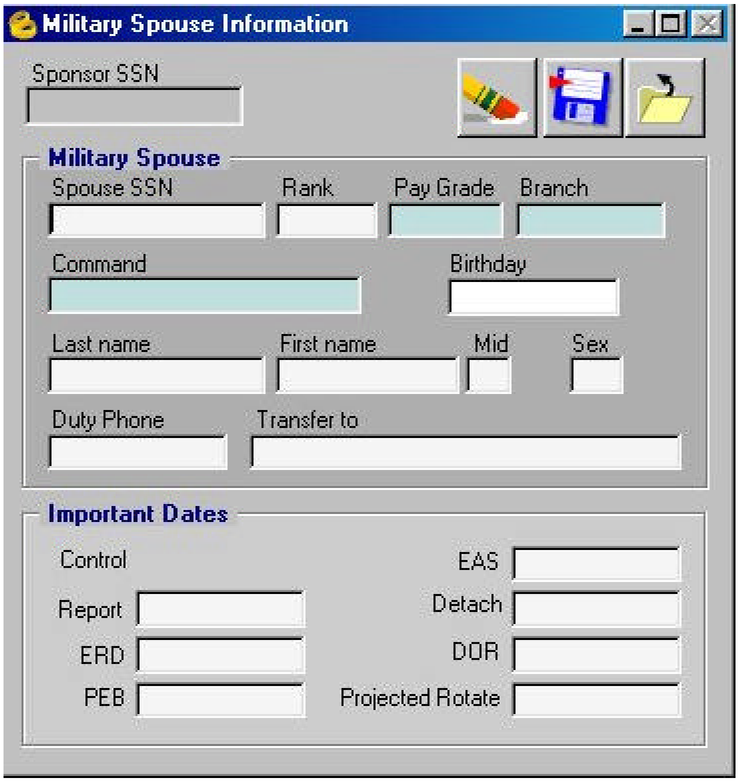


Fig. 2.6 - Military Spouse Information Application Screen

The Assignment/Vacate Process

Offers and Acceptances of Quarters

1 Click on the **Offered** box on the **Add and Edit Military Family Application Screen**.

The Offer a House Application Screen appears (Fig. 2.7).

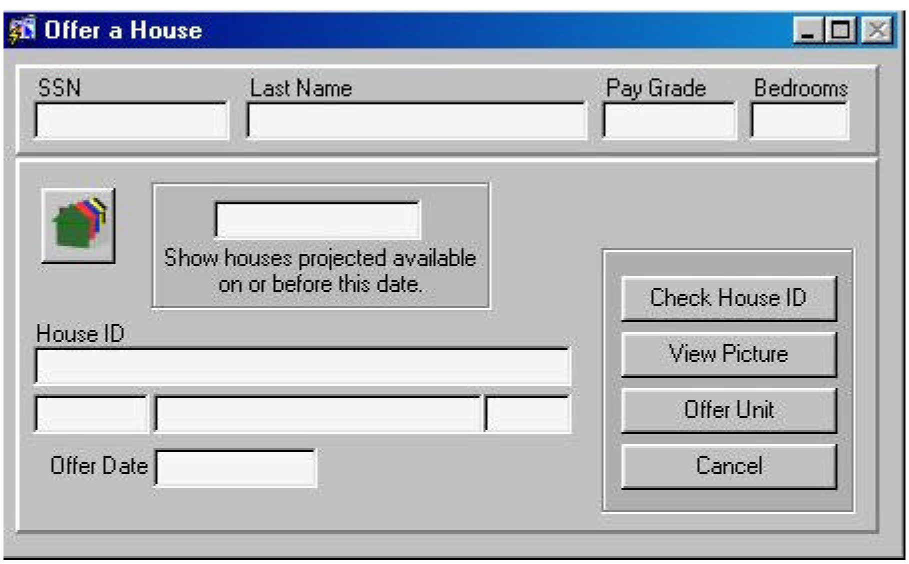


Fig. 2.7 - Offer a House Application Screen

2 Click on the **House Lookup** button and select the desired housing unit from the pop up list or enter the House ID if it is known.

The Offer date defaults to the system date but the date may be changed.

NOTE: It is a good practice to click the **Check House ID** button to fill in the actual address of the quarters being offered.

3 Click on the **Offer Unit** button.

The housing unit is now offered to the sponsor.

When an offer is made, this information is stored with the Housing Unit and appears on the Housing Unit screen. If the house is offered to another sponsor, the user will be notified that an offer is outstanding. This will not prevent them from continuing with the offer, it will only notify. Therefore it is important that offers are removed if they are no longer valid.

4 Click on the **Accepted** checkbox when the sponsor accepts the offer.

5 If the sponsor refuses the offer, click on the **Offered** checkbox. When asked if the sponsor refused housing, click yes. To view refusals, click the **O** button to the right of the Offered information. The field **Ref** will contain the number of refusals.

Assigning a Military Family to a Housing Unit

1 Click on the **Assigned** box in the Add and Edit Military Family Application Screen.

The Assign a House Application Screen appears (Fig. 2.8).

If the sponsor has been “offered” a unit, the House ID and address information will AutoFill. If the sponsor has not been offered a unit or is being assigned to a different unit than the one offered, click on the **House Lookup** button and select the desired housing unit from the pop up list.

The Assign Date will default to the system date, change this date if necessary.

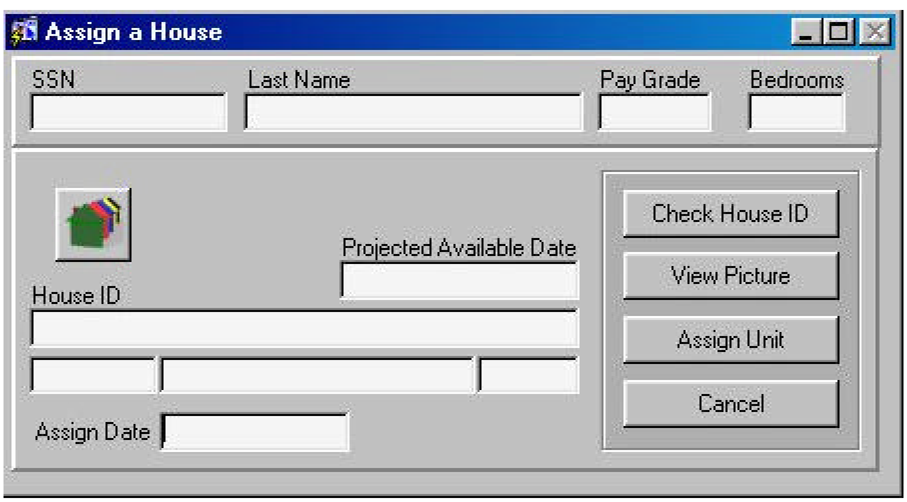


Fig. 2.8 - Assign a House Application Screen

2 Click on the **Assign Unit** button.

Housing Unit Activity screen appears (Fig. 2.9).

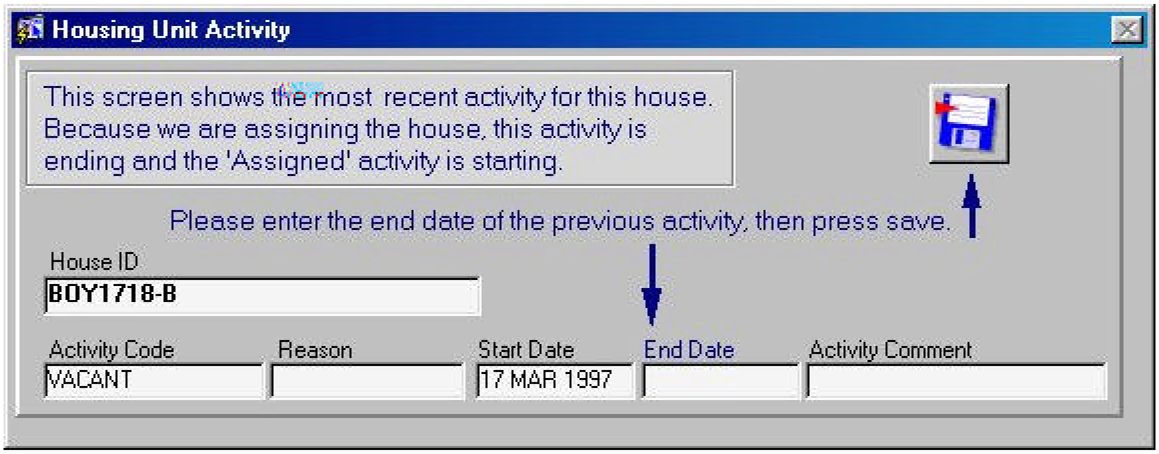


Fig. 2.9 - Housing Unit Activity Application Screen

3 Enter the end date for the displayed unit activity code. Click the **Save** button to save the data.

The Maintain Housing Quarters Activity Application Screen appears, displaying the current housing unit's information (Fig. 2.11).

4 Click on the **Close** button to return to the Add and Edit Military Family Application Screen.

NOTE: For more information about unit activities, start dates and end dates, refer to the documentation for Housing Units (**Error! Reference source not found.**).

How to Vacate a Military Family from a Housing Unit

1. From the **Main Menu**, click on **Family Housing**.
2. Select **MILITARY FAMILIES** and click **OK**.
3. Enter the Social Security Number of the sponsor that you wish to vacate and click on the **Query** button.
4. From the On Base Housing Assignment section of the screen, click on the  button.
5. **Double-click** in the Reason box to view the List of Values (Fig. 2.10).
6. Select a reason for the vacate and click **OK.**
7. Enter the Vacate Date and click on the **Save** button.
8. As with version 2.0 and earlier, select the next activity status for the housing unit. The housing unit activity screen will pop up for review (Fig. 2.11).

   Note: The new column for Reason. The Unit Activity is no longer M&R but VACANT with a reason of M&R.
9. Click on the **Close** button on the Maintain Housing Quarters Activity screen.

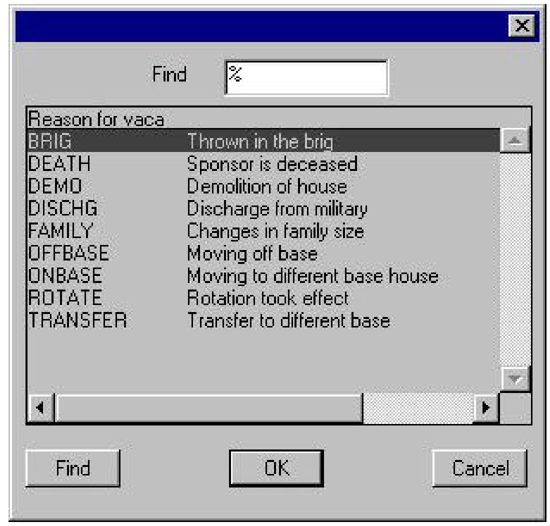


Fig. 2.10 - The Vacate Process

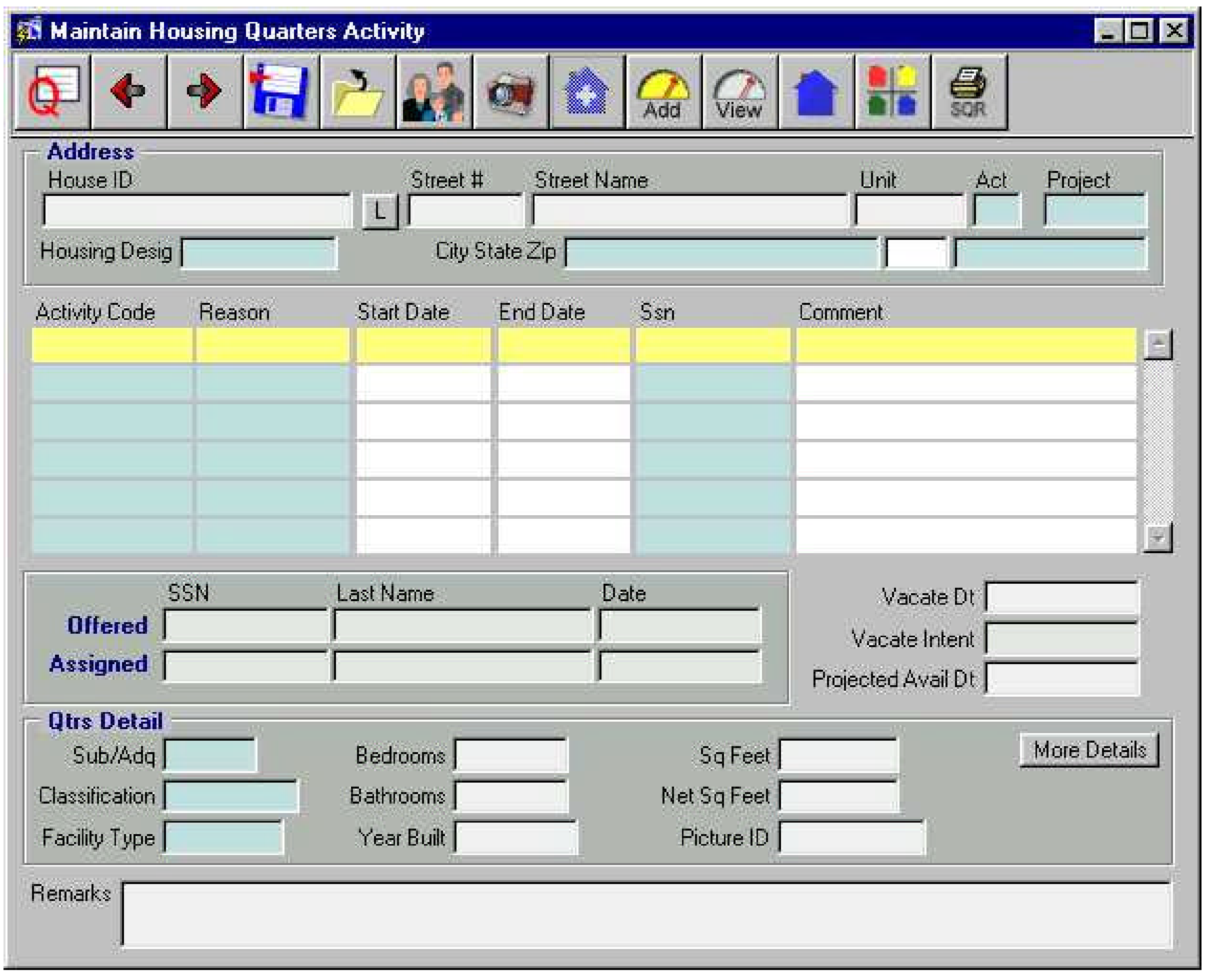


Fig. 2.11 - Maintain Housing Quarters Activity

Entering Remarks

1. From the Military Family screen, click on the button.

   Note: There are 4 remarks screens available for entering remarks (Fig. 2.12).

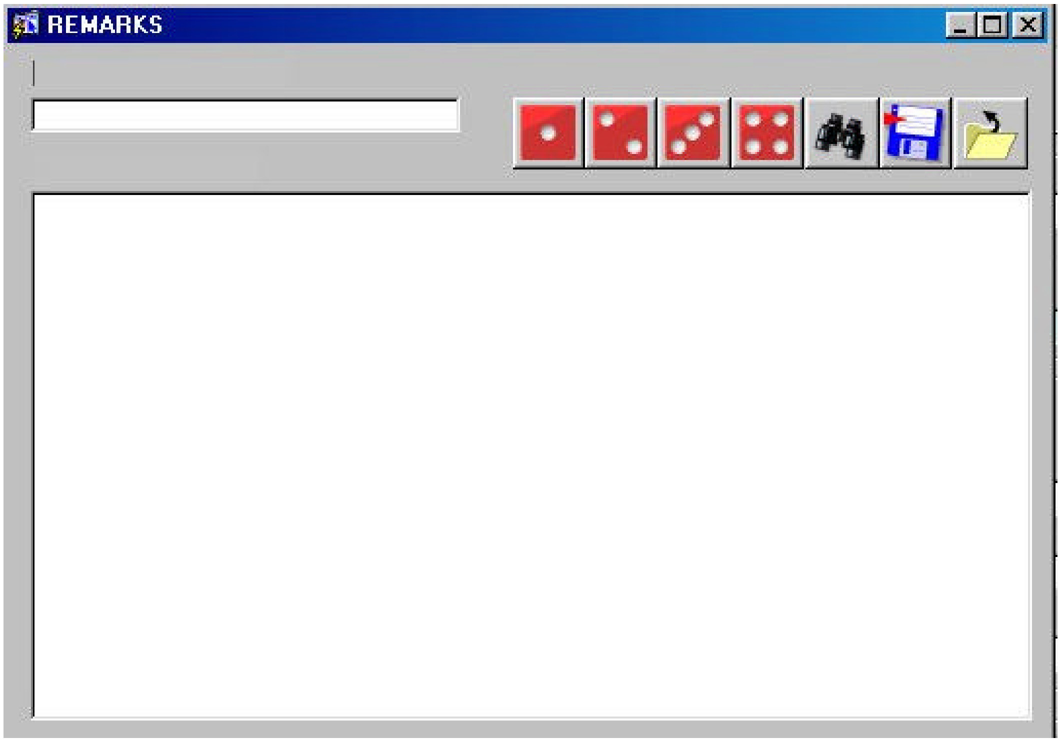


Fig. 2.12 - Remarks Application Screen

2. Click on one of the **Remark** buttons.
3. Click inside the text entry section and begin typing your remarks.
4. Click on the **Save** button to save.
5. Click on the **Close** button to exit.

Viewing Remarks

1. Click on the button.
2. Click on one of the **Remark** buttons to view all the remarks associated with this sponsor.
3. If searching for text click on the **Remarks Search** button, enter the text (Fig. 2.13).
4. Click on the **Find** button to start search.
5. If text is found, a check mark will appear to identify where the text is found.
6. Click on the **check mark** to retrieve remarks.
7. Click on the **Close** button to exit.

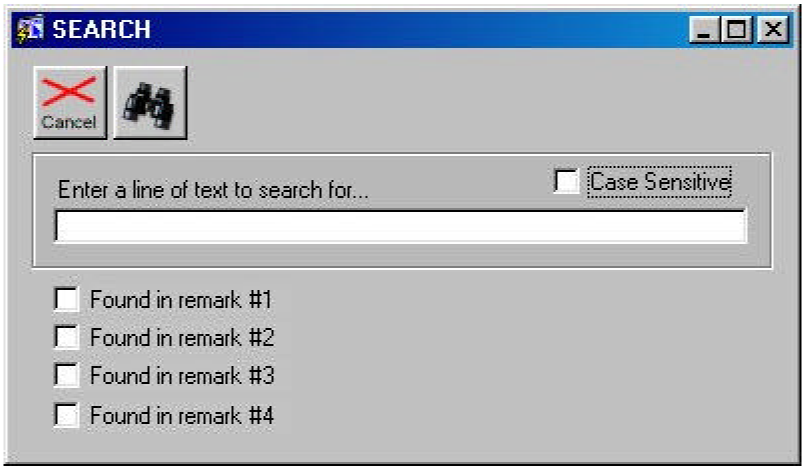


Fig. 2.13 - Remarks Search

Unaccompanied Families

How to Add Unaccompanied Information

Driven by the new Utilization Module, more information is being tracked in version 2.5 for unaccompanied families. A new screen is being used to track this information (Fig. 2.14).

Accessing Unaccompanied Families directly from the Main Menu allows you to view information on all families that are currently identified as unaccompanied.

To change the status of a military family to unaccompanied proceed as follows

1. From the **Main Menu**, Click on **Family Housing**
2. Select **MILITARY FAMILIES** and click **OK**.
3. Click on the **Unaccompanied** check box.
4. Click on the **Query** button once to enter *Query-Mode*. Enter the social security number and press the **Query** button again. If there is no unaccompanied data on file, you will receive the message “SSN not found, OK to add?”
5. Click **Yes**.
6. When presented with the social security number, verify and press the **Save** button.

   The Unaccompanied Data screen will appear again with the social security number, first name, middle initial and last name of the sponsor.
7. Enter the data for the pay grade, branch of service, status of the activity and the start date for the activity. Also enter the House ID for the unit the sponsor is currently assigned to.
8. Press the **Save** button again to save all the data.

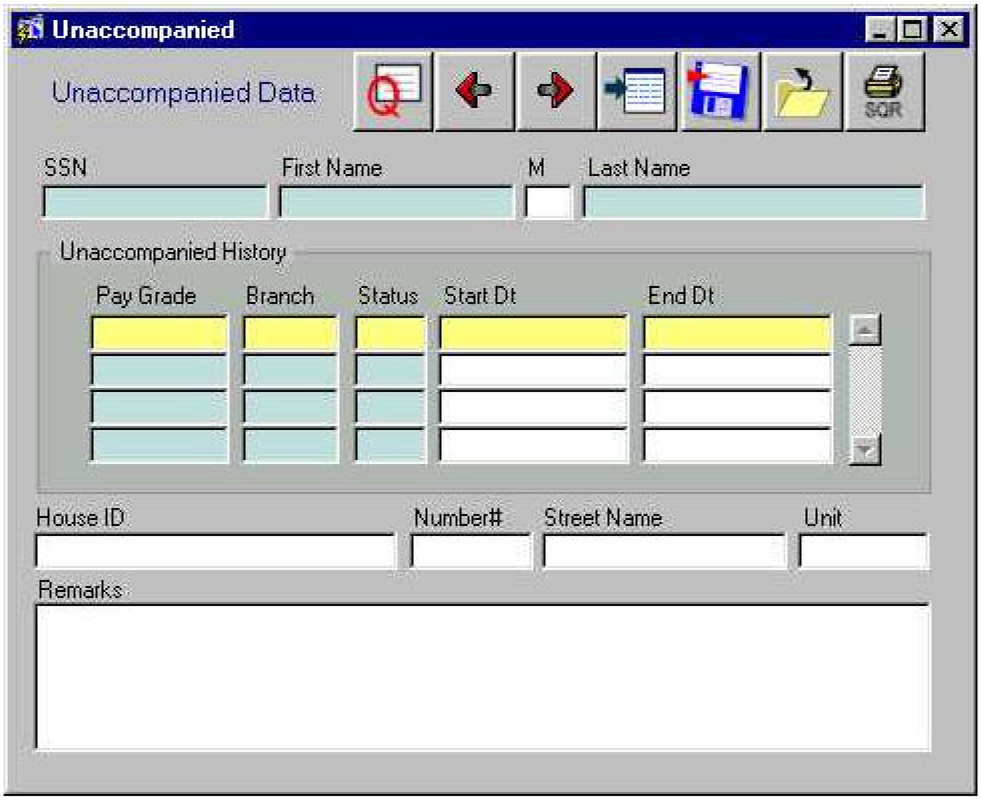


Fig. 2.14 - Unaccompanied Family Tracking

How to Add an Additional Unaccompanied Record

1. From the **Military Family** screen, click on the **Unaccompanied** check box.
2. The Unaccompanied Data screen will appear with the previous unaccompanied data.
3. Place your cursor in the Unaccompanied History section of the screen and click on the **Insert a Record** button, you are ready to insert the new information.
4. After completing this section, enter remarks pertaining to the current activity and click the **Save** button.

How to View General Unaccompanied Family Information

1. From the **Main Menu**, Click on **Family Housing.**
2. Select **UNACCOMPANIED** and click **OK**.
3. Press the **Query** button once to enter Query-Mode.
4. Enter the Social Security Number and press **Query** again.

   If you have more than one unaccompanied activity, click on the record in the Unaccompanied History section of the screen. As you move between records, the housing information and remarks will change to reflect what was entered when the activity started.

Assignment History

How to View the Assignment History

Assignment History has been expanded to include the reason for vacating quarters. It also includes wait list information not viewed by the user previously (Fig. 2.15).

Information in the Assignment History screen is automatically inserted through the MCHAS application. When the sponsor is placed on a Wait list, assigned to quarters and then vacated, this information is kept and viewable here. Changes can be made to the data if necessary and information inserted if it does not currently exist.

1. From the **Main Menu**, Click on **Family Housing**.
2. Select **MILITARY FAMILIES** and click **OK**.
3. Next to the current quarter's assignment information in the On Base Housing Assignment section of the screen, click on the **H** button.

   The Assignment History screen will appear with the current assignment information and Waitlist information if the sponsor was placed on a wait list through MCHAS.

   Note: If some of this information is blank, the person may have been assigned to quarters prior to MCHAS. If this is the case, you may fill in the pertinent information now and click on the **Save** button

Or

1. From the **Main Menu**, Click on **Family Housing**.
2. Select **ASSIGN HISTORY** and click **OK**.
3. If the screen is not already in QUERY MODE, press the **Query** button. Enter the information on the person you wish to view assignment history for and press the **Query** button again.

   Note: To view Assignment History in general, just press the **Query** button a second time and all Assignment History records are available.

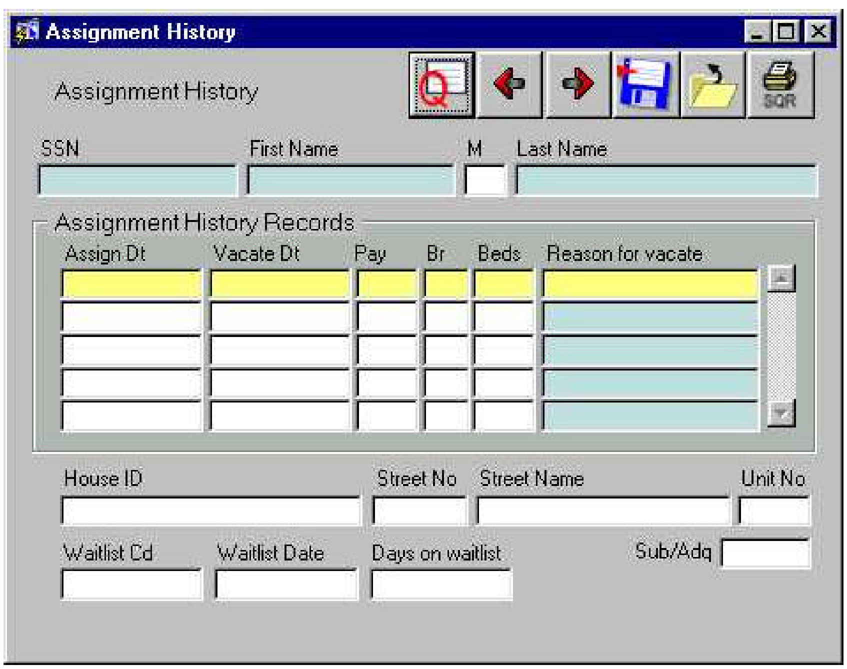


Fig. 2.15 - Assignment History

Cash Customers

Adding a Sponsor to the Charge Schedule - Making a Cash Customer

1. Click on the **Cash Customer** box in the Add and Edit Military Family Application Screen. The Charge Schedule Application Screen appears (Fig. 2.16).
2. **Double-click** on the Code field and select the charge type from the pop up menu.
3. **Double–click** on the Calc Method field and select the calculation method from the pop up menu.
4. Type in any remarks.
5. Change Active to **Y**.
6. Click on the **Save** button to save changes.

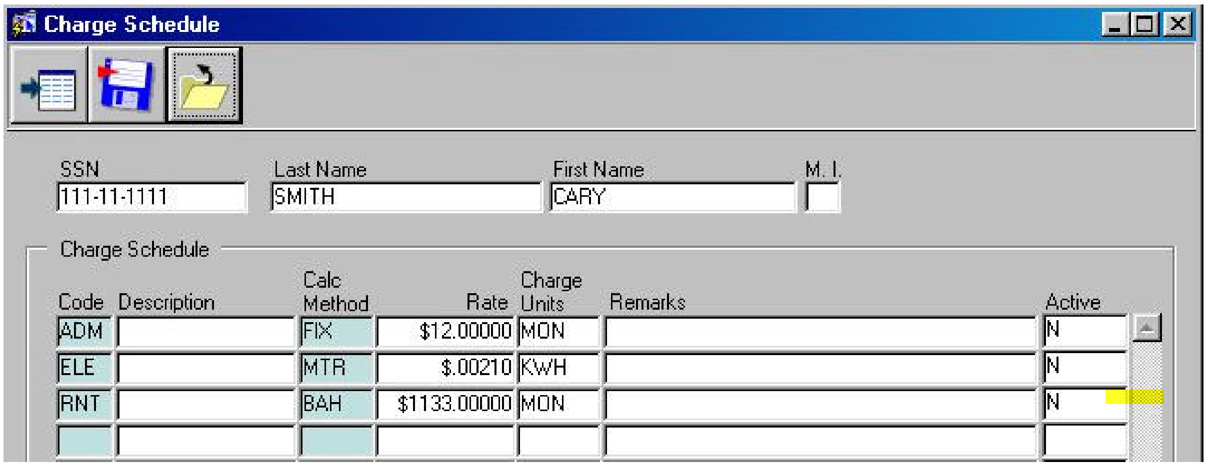


Fig. 2.16 - Charge Schedule Application Screen

Note: The rate will fill in from the Charge Schedule that is set up from the Financial Data Module. You must set up the Default Charge Schedule prior to making a sponsor a Cash Customer.

Other Features

Viewing Pictures of A Housing Unit

1. Click on the **Pictures** button from the **Add and Edit Military Family Application** Screen.
2. If the assigned house has a picture attached to it, the Picture Application Screen will appear (Fig. 2.17). If no picture is available, the button will be inactive.

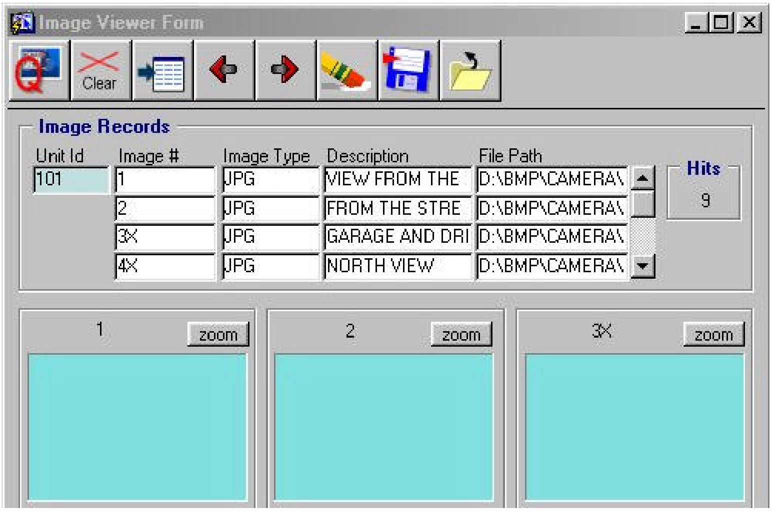


Fig. 2.17 - Housing Picture Viewer

Printing Reports

1. Click on the **SQR Reports** button.
2. The SQR Reports Application Screen will appear (Fig. 2.18).
3. Click in the Report Name field to select a report.

   NOTE: the report selected will be highlighted in yellow.

4. Click on the **SQR Reports** button to generate the selected report.
5. A dialog box will appear with "Report is running." (Fig. 2.19).

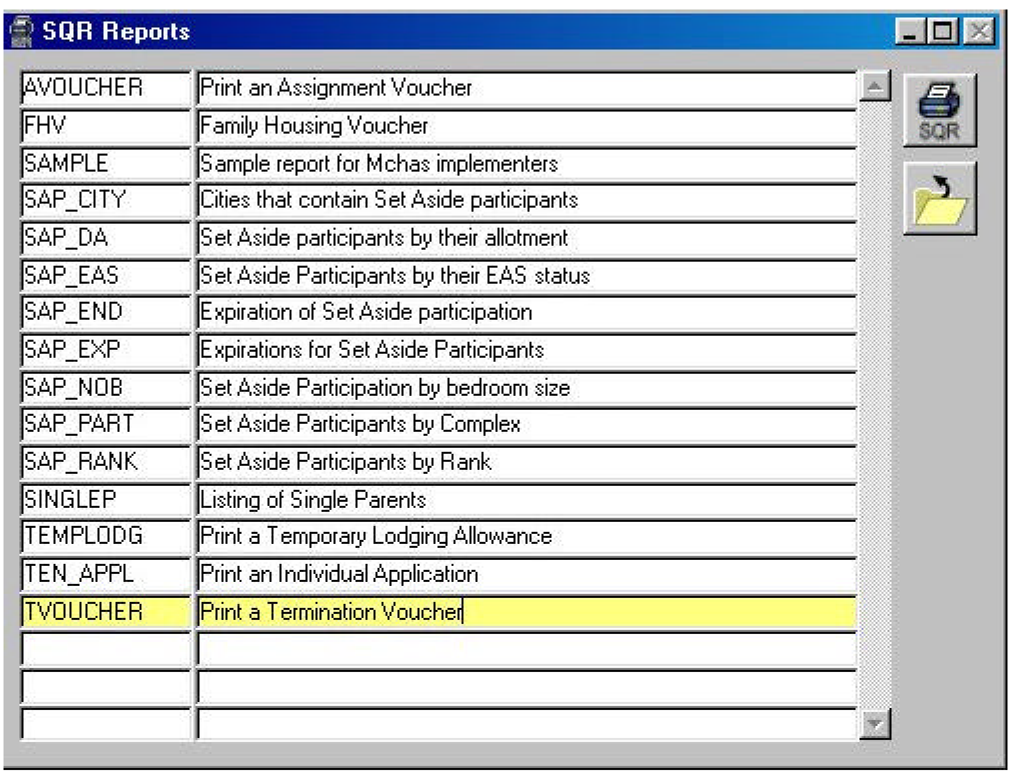


Fig. 2.18 - SQR Reports

Fig. 2.19 - Report is Running Notification

6. Click on the **Cancel (X)** button to abort the selected report.
7. After the report appears on the screen, click on the **print** button, circled on Fig. 2.20 **-**, to print the report.

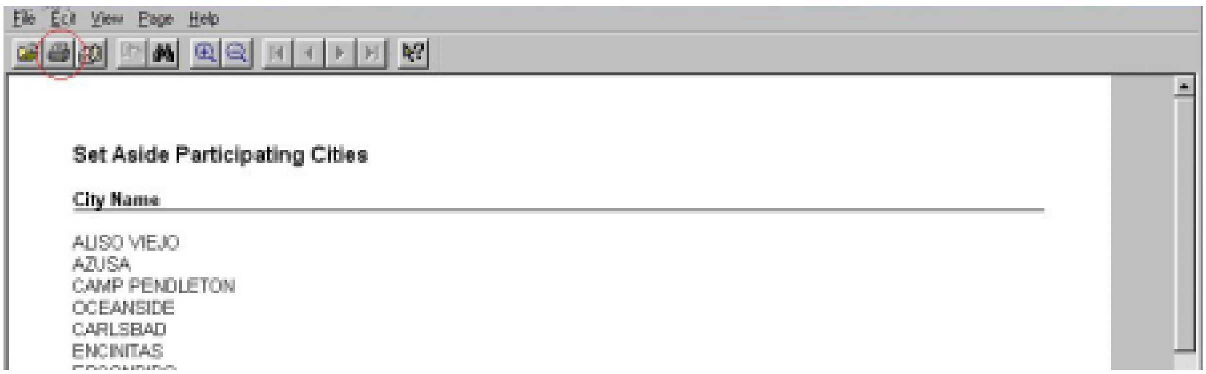


Fig. 2.20 - Report in the SQR Viewer

Search Facilities for Dependents and Pets

MCHAS allows for searching the database by family information or pet information. This can be useful if you have a limited amount of information and need to find a parent or pet owner.

1. From the **Main Menu**, click on the **Family Housing Module**.
2. When the selection list appears, choose **Family Search** and click **OK**.
3. The following Search for a Family Member or Pet Application Screen will appear (Fig. 2.21 -).

Fig. 2.21 - Search for a Family Member or Pet Application Screen

4. If you are searching on a family member, click on the **Family Members** button.

4. If you are searching on a family member, click on the **Family Members** button.

The Search Family Members Application Screen will appear (Fig. 2.22).

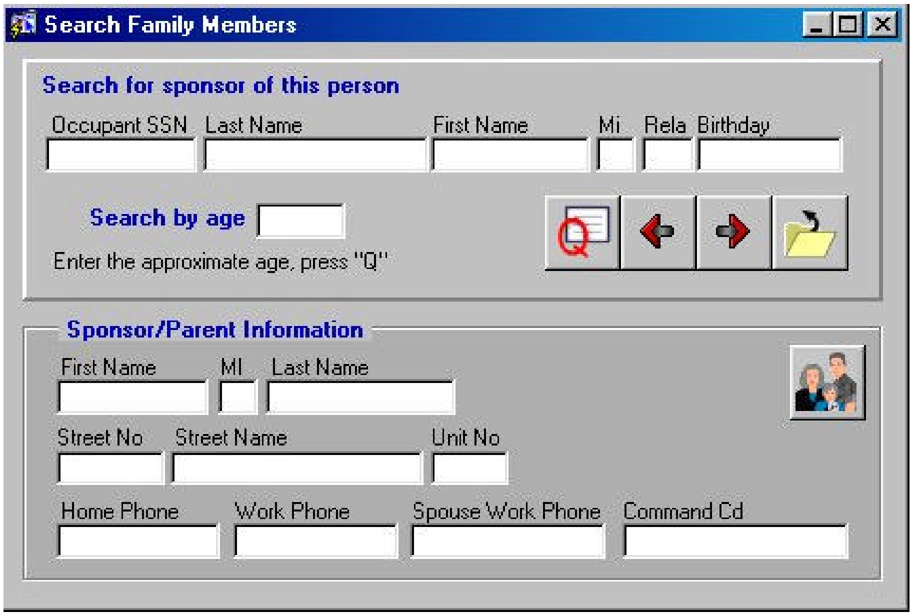


Fig. 2.22 - Search Family Members Application Screen

5. Key in the information you have on the dependent and click on the **Query** button to execute the query.

The parent/sponsor information will fill in the bottom of the application screen.

6. To view more information about the Sponsor, click the **Family Members** button and the Add/Edit Military Families screen will open with the sponsor's record.

Follow the same procedures for finding the owner of a pet (Fig. 2.23).

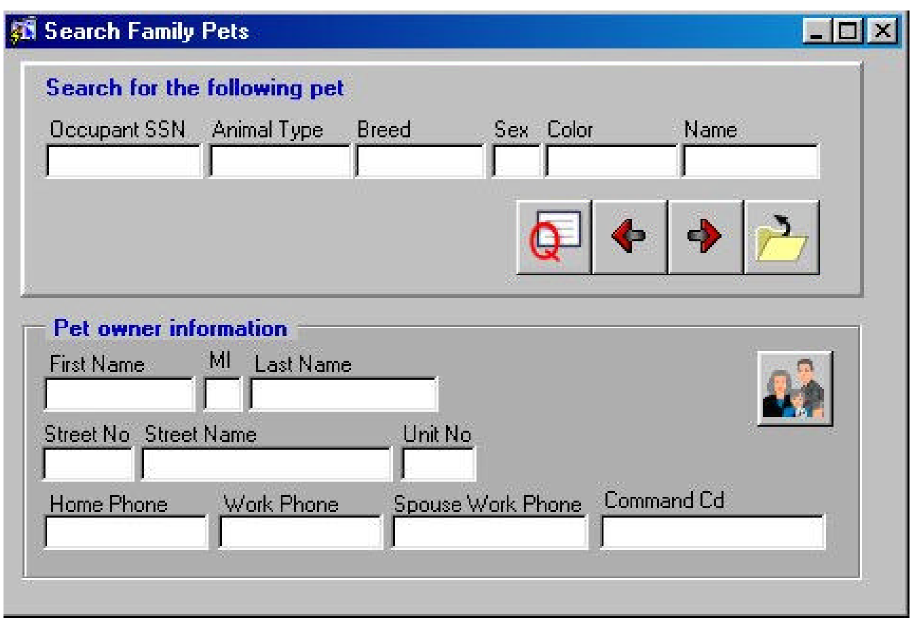


Fig. 2.23 - Search Family Pets Application Screen

Weapons Tracking - Adding a New Record

1. From the **Main Menu**, click on **Family Housing**.
2. From the selection list, click **WEAPONS** and **OK**.

   The Weapons Tracking Application screen (Fig. 2.25) will appear.
3. Key in the criteria and click on the **Query** button to execute the query.
4. If the SSN was not found, you will be asked if you wish to Add a record, click **Yes**.

   The Add New Record screen will appear (Fig. 2.24).

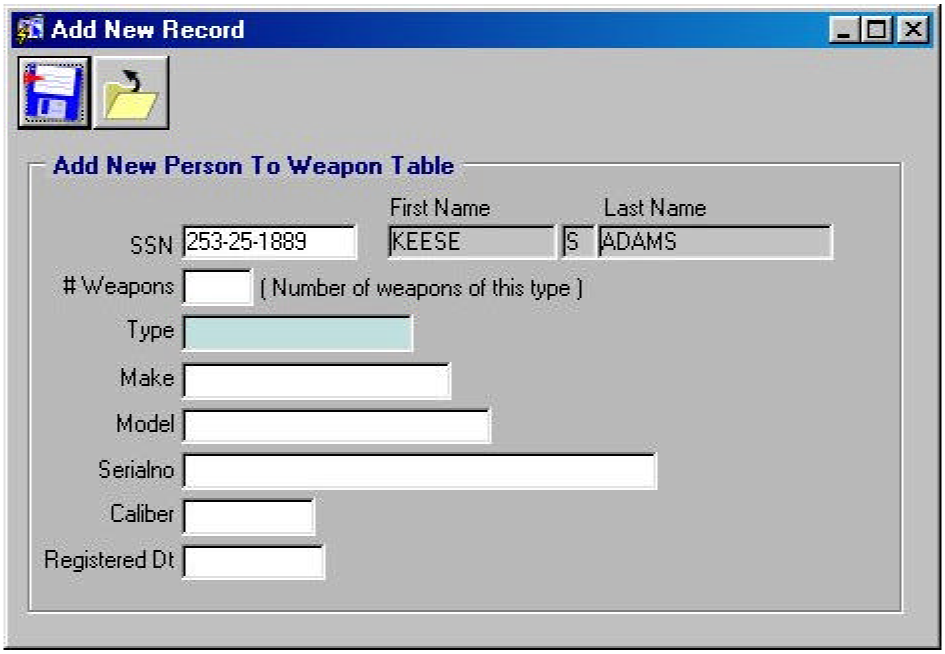


Fig. 2.24 - Add a New Weapons Record

5. Complete the form, when finished, click on the **Save** button.

Adding an Additional Weapon

1. From the **Main Menu**, click on **Family Housing**.
2. From the selection list, click **WEAPONS** and **OK**.
3. The Weapons Tracking Application screen (Fig. 2.25) will appear.
4. Key in the SSN for the sponsor you wish to add another weapon for and click on the **Query** button to execute the query.
5. Insert the cursor in the "Weapons in Sponsor's Household" section and click on the **Insert a Record** button. The cursor will move to the next available row, enter the information for the new weapon. Click on the **Save** button.

Viewing Weapons

1. From the **Main Menu**, click on **Family Housing**.
2. From the selection list, click **WEAPONS** and **OK**.
3. The Weapons Tracking Application screen (Fig. 2.25) will appear.

4. Click the **Query** button.

5. Use the **Forward** and **Back** buttons to scroll through the records.

6. Place the cursor in the "Weapons in Sponsor's Household" section, as you select each weapon, the information about the weapon will change.

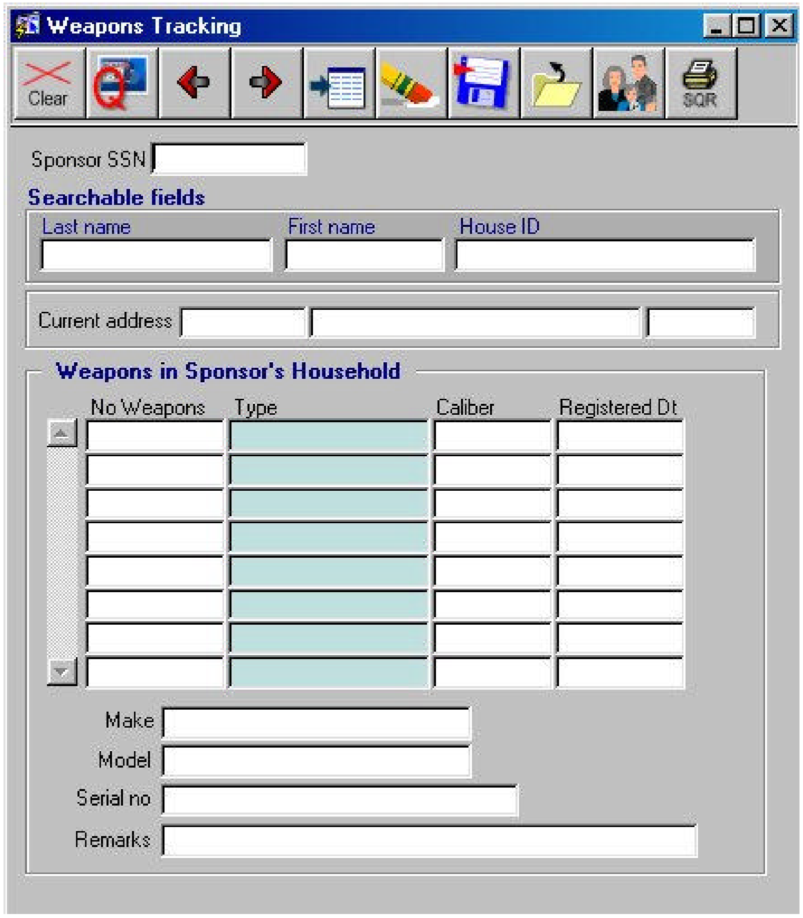


Fig. 2.25 - Weapons Tracking Application Screen

TLA Tracking

1. From the **Main Screen** click on **Family Housing**.

2. Select **TLA Tracking** from the **selection list**.

3. The Temporary Lodging Allowance screen will appear (Fig. 2.3) in Query Mode.

4. Enter the SSN for the Sponsor, click **Query**.

5. When prompted with the dialog "SSN not found, OK to add?", click Yes.

6. The Adding a TLA Record screen will appear (Fig. 2.26) with the name of the Sponsor as well as the SSN from Step 4.

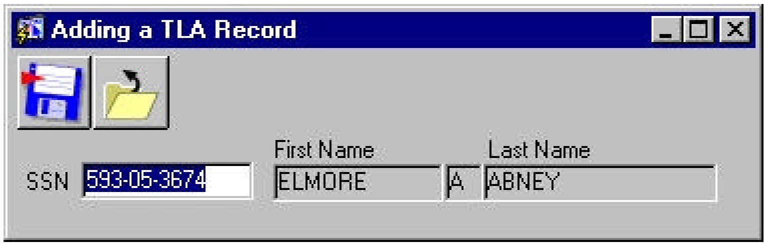


Fig. 2.26 - TLA Confirmation

7. If the information is correct, click the **Save** button.

8. When the Temporary Lodging Allowance form returns, complete the information, enter any remarks and click the **Save** button.

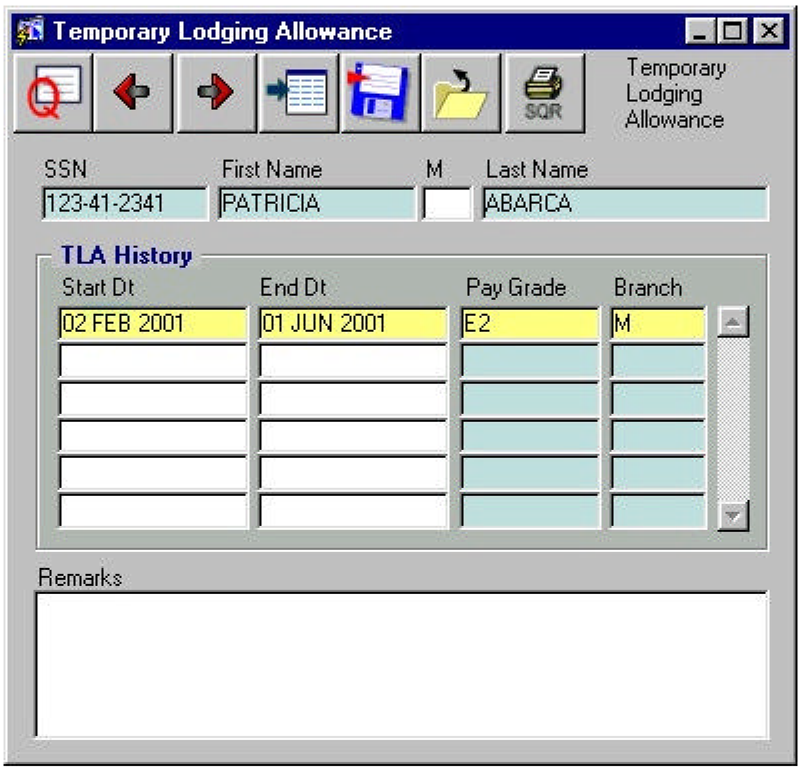


Fig. 2.27 - Temporary Lodging Allowance

Viewing TLA for a Sponsor

9. From the **Main Screen** click on **Family Housing**.

10. Select **Military Families** from the **Selection List**.

11. Enter the SSN and click the **Query** button.

12. Click the **TLA checkbox**.

13. You may edit this information or add additional TLA periods by clicking the **Insert a Record** button.

14. **Save** any changes and click the **Close** button.

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Section 3 - Wait List Management

Wait Lists

Adding a Military Sponsor to a Wait List

1 From the **Main Menu**, select **Family Housing**.

2 Select **MILITARY FAMILIES** and click **OK**.

3 Enter the SSN for the sponsor you wish to place on a Wait List, press the **Query** button.

4 Click in the **Wait List** check box on the Add and Edit Military Family Application Screen or click inside the Wait List Name field.

A dialog box will pop up (Fig. 3.1).

Fig. 3.1 - Wait List Add dialog

5 Click **OK**.

The sponsor is placed on the appropriate wait list.

Note: The *control date, number of bedrooms, pay grade* and *area* fields in the Wait List section of the Add and Edit Military Family application screen (Fig. 3.1**) must be completed prior to adding a sponsor to a wait list.**

How to Delete a Military Sponsor from a Wait List

1 Click in the **Wait List** Name field in the Add and Edit Military Family application screen.

If the Sponsor is on more than one Wait List, use the scroll arrows to make the Wait List you wish to delete from the current Wait List.

A dialog box will appear (Fig. 3.2).

2 Click on the **Delete** button.

3 The sponsor is deleted from the wait list.

Fig. 3.2 - Add to another Wait List or Delete Sponsor from a Wait List

How to Add a Military Sponsor to an Additional Wait List

Military sponsors may be added to an additional wait list by clicking either on the Add to Wait List checkbox or inside the Wait List Name field on the Add and Edit Military Family Application Screen.

1 Click inside the **Wait List** name field in the Add and Edit Military Family application screen.

A dialog box will appear (Fig. 3.2).

2 Click on the **Add** button.

The following screen appears (Fig. 3.3).

Fig. 3.3 - Add to another Wait List Application Screen

Clicking on the Wait List Name checkbox on the Add and Edit Military Family Application Screen (shown below in cutout) will also access the above screen.

3 Enter a proper pay grade, bedroom code and area. Click the **Save** button.

The sponsor is added to an additional wait list.

NOTE: These fields have a value list attached. Double-click to access the value lists. To see the additional wait list(s) a sponsor is on, click on the scroll bar arrows next to the Wait List Name field circled in Fig. 3.4.

Fig. 3.4 - Close Up View of Wait List area of screen

Viewing Wait Lists

1 From the **Add and Edit Military Family Application Screen**, click on the **Wait List** button,

OR

2 From the **Main Menu**, click on the **Wait List Module**.

The Wait List Position Application Screen appears. If the application screen was called from the Add and Edit Military Family Application Screen in Step 1 and the current sponsor is on a wait list, *that* wait list will be displayed in the Wait List Position Application Screen.

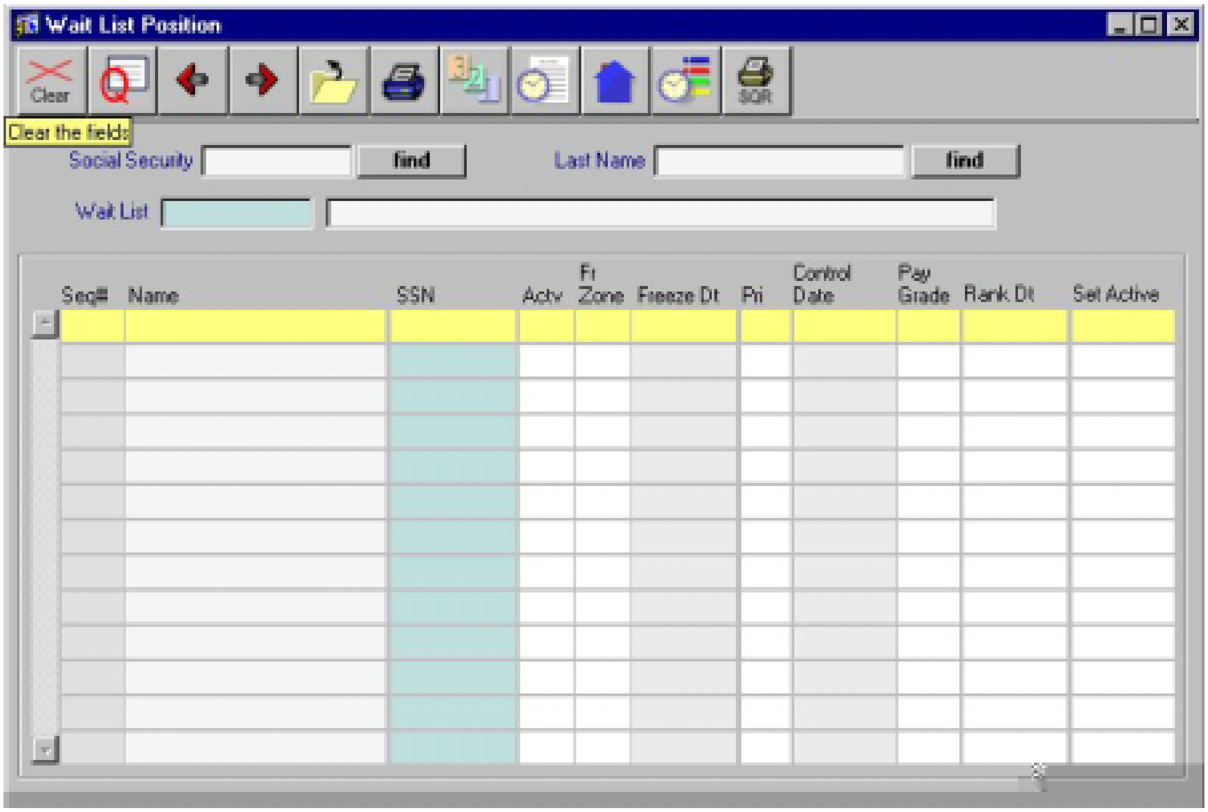


Fig. 3.5 - Wait List Position Application Screen

3 If the Wait List Position form is opened from the **Main Menu**, enter the desired Wait List in the Wait List field, or to see all wait lists, leave the application screen blank then click on the **Query** button to execute the query and view all Wait Lists.

Reminder: Double-clicking can access the value list in the Wait List field. The selected wait list(s) will be displayed.

Table 3.1 - Fields from the Wait List

Input Field	Description	**Method of Entry**
Wait List	Wait List Code	Query Only
Description	Long Description of Wait List	Display Only when Wait List Code selected
Seq #	Position on the Wait List	Automatic Calculation. See Changing a Military Sponsor's Wait List Position
Name	Name of Sponsor	Automatic

SSN	Sponsor SSN	Automatic
Actv	Is the Sponsor Active Y=Yes	See How to Set a Sponsor Active/Inactive
Fr. Zone	Is the Sponsor in the Freeze Zone Y=Yes	Automatic
Freeze Dt.	Date the Sponsor entered the Freese Zone	Automatic
Priority	The Sponsor's priority (1 - 9)	Automatic
Control Date	The Sponsor's Control Date	Automatic
Pay Grade	The Sponsor's Pay Grade	Automatic
Rank Dt.	The Sponsor's Date of Rank	Automatic
Set Active	If Inactive, date to set active again	See How to Set a Sponsor Active/Inactive

Finding a Military Sponsor on a Wait List

1 Make sure the correct wait list is displayed (see ‘Viewing Wait Lists’), then enter the social security number or name of the sponsor desired in the search field.

2 Click the **find** button. The cursor will be on the desired sponsor’s record.

Changing a Military Sponsor’s Wait List Position

1 Go to the desired sponsor on the Wait List Position Application Screen. (See ‘Finding a Military Sponsor on a Wait List’).

2 Click the mouse on the **Sequence Number** (Seq#) field.

The Adjust Wait List Order screen will appear (Fig. 3.6).

3 Change the active, freeze zone, freeze date, and/or control date fields of the sponsor, then

4 Click on the **Save** button to save changes.

This changes the sponsor’s wait list position immediately. To change the sponsor active status, see the section below "How to Set a Sponsor Active/Inactive".

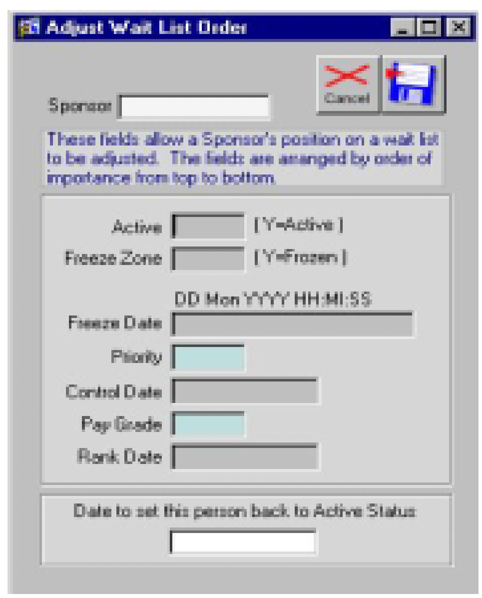


Fig. 3.6 - Adjust Wait List Order Screen

How to Set a Sponsor Active/Inactive

5. Click in the **Seq#** field. The Adjust Wait List Order screen will appear (Fig. 3.6).
6. Remove the “Y” from the Active field.
7. At the bottom of the screen, the date field has been added to input the date that the person is to be placed back on active status on the Wait List. Enter the date now.
8. Click the **Save** button to save changes.

Managing Wait Lists

When a sponsor is placed on or removed from a Wait List (through assignment), the Wait List is automatically recalculated and everyone's position # is modified. If you manage your Wait List directly from the Wait List screen these calculations are not automatic and you must re-sequence the list manually.

1 From the **Main Menu** select **Wait List**.

2 **Double-click** in the Wait List Code field to select the Wait List you wish to manage.

3 Press the **Query** button to bring up that Wait List.

4 Click in the **Seq #** field for the sponsor you wish to adjust.

5 When the **Adjust Wait List Order** screen appears (Fig. 3.6), make the changes you wish to make to this sponsor's Wait List information that will alter his position on the Wait List.

6 Click the **Save** button.

7 When the **Wait List Position** screen appears again (Fig. 3.5), press the **Calculate Wait List** button. All the position numbers will be modified.

Printing Wait Lists

Printing only Some Wait Lists

1 From the **Main Menu** select **Wait List.**

2 Press the **Query** button to bring up all Wait Lists.

3 Click on the **Wait List Report** button on the toolbar.

4 The Wait List Reports selection screen will appear (Fig. 3.1). Click the checkbox next to the Wait List(s) you wish to print.

5 Press the **Print SQR Report** button.

Fig. 3.7 - Wait List Selection for printing

Printing a single Wait List

1 From the **Main Menu** select **Wait List.**

2 **Double-click** in the Wait List Code field to select the Wait List you wish to print.

3 Click on the **Print SQR Report** button on the toolbar.

4 Choose WAIT_POS to print a single Wait List.

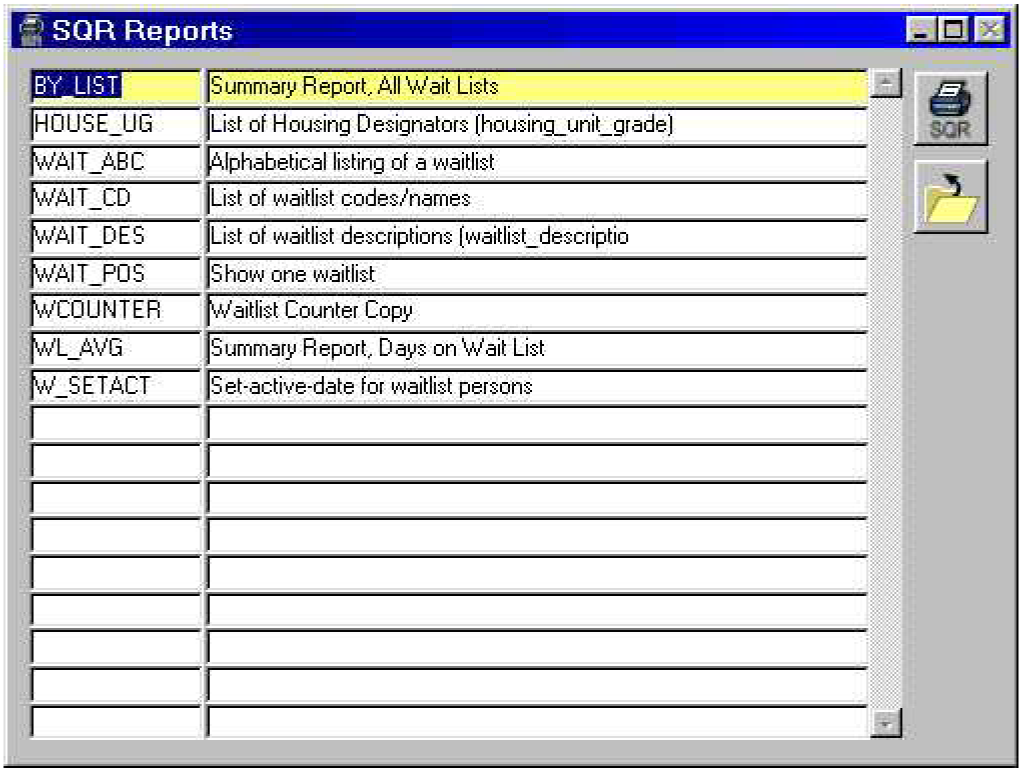


Fig. 3.8 - Wait List Reports

Printing an Alphabetical Wait List and Counter copies

1 From the **Main Menu** select **Wait List.**

2 **Double-click** in the Wait List Code field to select any Wait List or press the **Query** button to call up all Wait Lists.

3 Click on the **Print SQR Report** button on the toolbar.

4 Choose WAIT_ABC to print a single Alphabetical Wait List.

5 Choose WCOUNTER to print your Counter copies of the Wait Lists.

Other Wait List Reports

There are several reports that deal with the Wait Lists and are there to help you manage your Wait Lists. Follow the instructions for printing the Wait List Reports and choose any of the reports available.

Section 4 - Managing Off Base Referrals

Adding Off-Base Referral Housing Information

Entering Referral Listings

1. From the **Main Menu**, click on the **Referrals Module**.

   A Selection List will pop up (Fig. 4.1).

Fig. 4.1 - Referral Units pop up

2. Select **REFERRAL UNITS** and click **OK**.

   The Add/Edit Referral screen appears (Fig. 4.2).

3. To add a new Referral Unit, click the **Insert a Record** button to execute.
4. Double-click in the **Owner ID field** for a list of the owners currently on file. Select from the list and tab to complete the Contact/Owner Information fields.
5. If the owner's name does not appear, click the **Insert a New Owner** button (See the Section Entering Referral Property Owner Information).
6. Complete all information for the referral unit. When finished, click the **Save** button.

   In the Rental Details section, the Contact Date, Inactive Date and Delete Date are calculated for you. Enter the Available Date and press the “D” key next to the Available Date.

7. Complete the listing by entering Unit Details and when applicable, Set Aside Details.

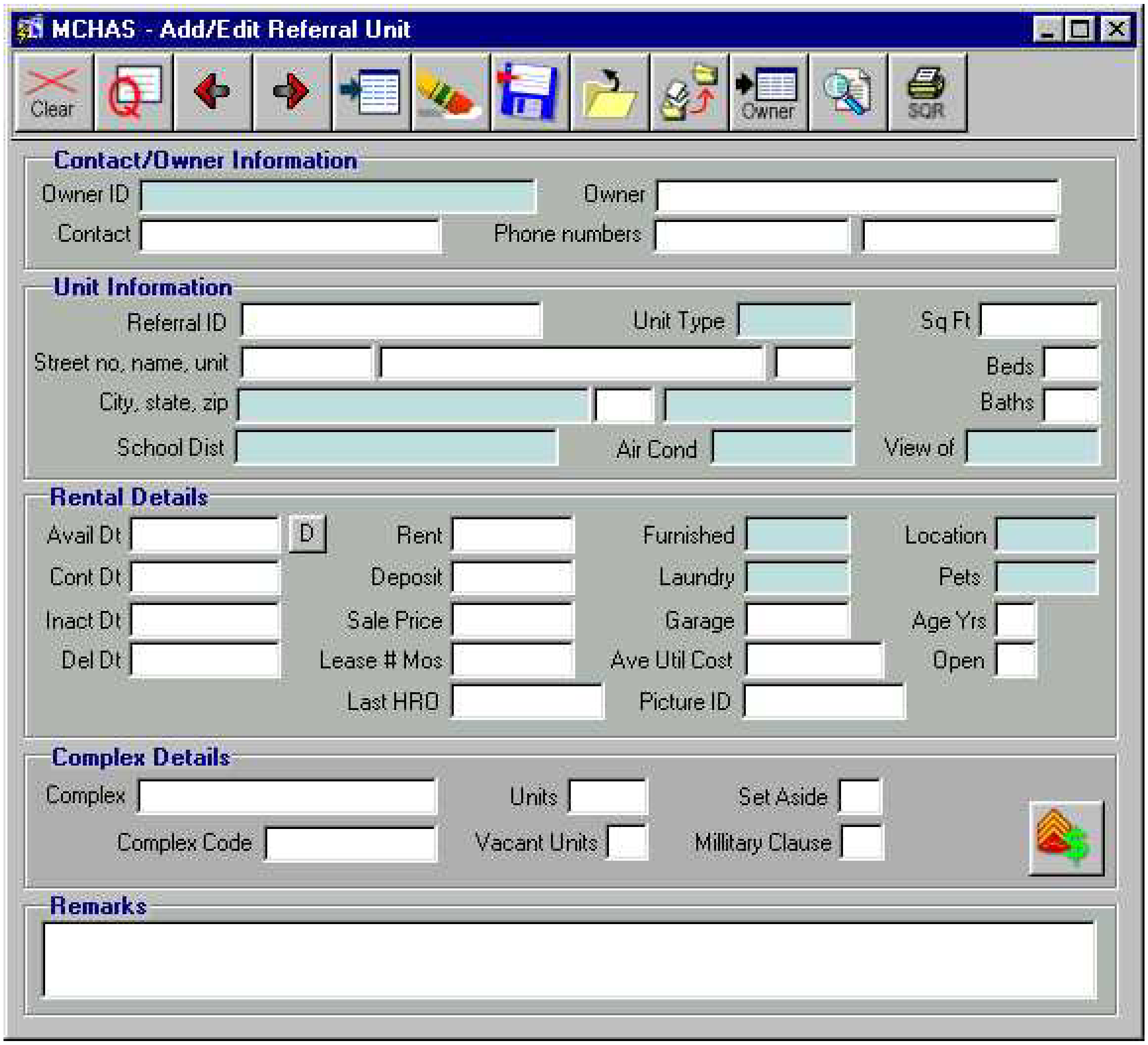


Fig. 4.2 - Add/Edit Referral Unit

Table 4.1 – Input Values – Referral Units

Input Field	Description	Method of Entry
Owner-ID	Unique identifier for a property owner	Automatic when a new owner record is inserted
Owner	Owner/Manger Name-Company	Display Only - Entered automatically upon selection of Owner Phone.
Contact	Contact Person for listing	Display Only - Entered automatically upon selection of Owner Phone.
Phone Numbers	Telephone numbers of owner/manager of the listing	Key in numbers only or List of Values
Referral-ID	Unique identifier for a referral property	Automatic when a new record is inserted
Street	Street Number and Street Name. First field is Street Number. Second field is Street Name.	Key in
Unit	Unit Number of the listing	Key in

Input Field	Description	Method of Entry
City	City of the listing	Key in or List of Values
State	State of the listing	Key in
Zip	Zip Code of the listing	Key in or List of Values
Type	Type of the listing, e.g. Apartment, Condo, House, …	Key in or List of Values
Beds	Number of bedrooms of the listing	Key in
Baths	Number of bathrooms of the listing	Key in
SqFt	Number of Square Feet of the listing	Key in
Picture ID	ID Number assigned to the pictures for this referral	Key in
Avail Dt	Date listing is available	Key in
Cont Dt	Date of Contact	Key in or Entered automatically upon entering Avail Dt and clicking Calendar Button
Inact Dt	Date listing becomes inactive (1 month)	Key in or Entered automatically upon entering Avail Dt and clicking Calendar Button
Del Dt	Date listing will be deleted from database (36 months)	Key in or Entered automatically upon entering Avail Dt and clicking Calendar Button
Rent	Rent amount of the listing	Key in
Deposit	Deposit amount of the listing	Key in
Sale Price	Sale Price of the listing	Key in
Lease # Mos	Minimum Number of Months in Lease	Key in
Furnished	Furnished Code of the listing	Key in or List of Values
Laundry	Laundry Code of the listing	Key in or List of Values
Pets	Pet allowance of the listing	Key in or List of Values
Garage	Garage Code of the listing for # cars	Key in or List of Values
Location	Map Code for Listing	Key in
Age Yrs	Age of unit	Key in
Open	Available	Key in
School Dist	District property is in	Key in
Complex	Name of Complex	Key in
Units	Number of Units complex has	Key in
Vcnt	Number of vacant units in complex with same number of bedrooms and baths	Key in
Military Clause	Indicator of the listing having a Military Clause	Key in
Complex Code	Unique identifier for Set Aside Referrals. The Mac Code given to qualified property owners.	Key in (8 number field)
Set Aside	Indicator if listing is a Set Aside	Key in
Remarks	Comments or remarks about listing	Key in

Entering Unit Details

1 To view unit details click on the **Unit Details** button.

The Unit Details application screen appears (Fig. 4.3).

2 Click on the check box next to the detail feature you wish to include.

3 Click on the **Save** button to save changes.

4 Click on the **Close** button to return to the Add/Edit Referral Units screen.

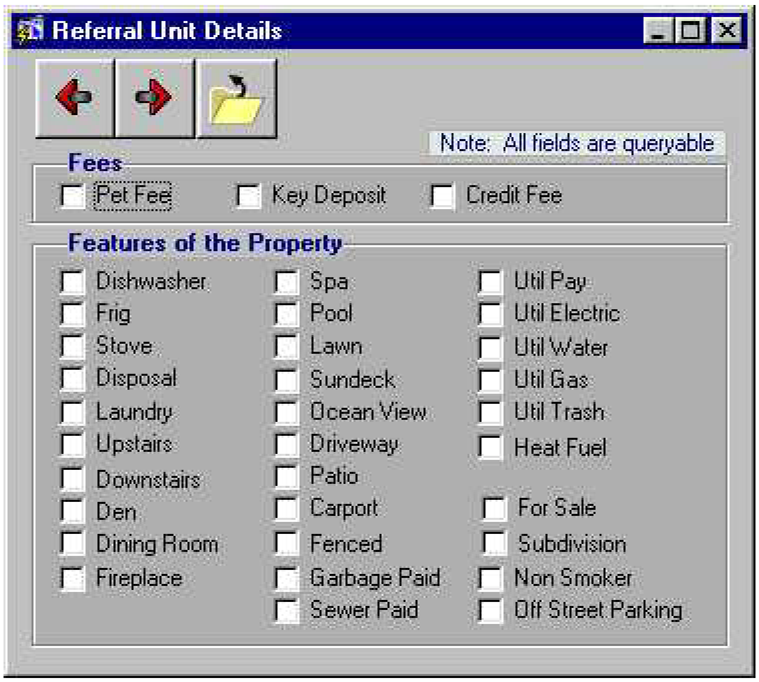


Fig. 4.3 - Unit Details

Adding Set Aside Details

1 If the property listed has been approved for Set Aside. Complete the **Complex Code** field, set **Set Aside** to "Y" and click the **Set Aside button** located in the Complex section of the Add/Edit Referral Unit screen.

2 The Set Aside Details application screen will appear (Fig. 4.4)

Tab through each field to continue keying data.

3 Click on the **Save** button to save changes. Click on the **Close** button to return to Add/Edit Referral Unit application screen.

Note: The Total fields in the Set Aside Complex Statistics will automatically calculate totals when units are added or dropped from Set Aside.

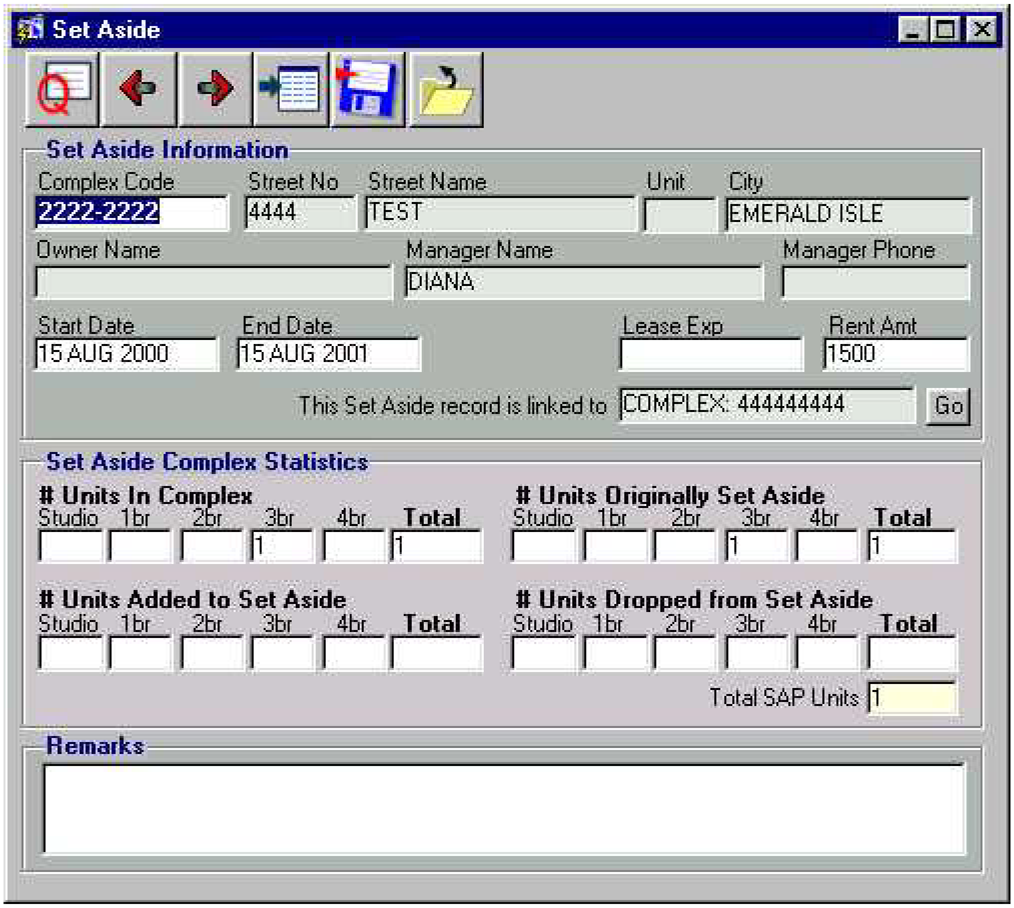


Fig. 4.4 - Set Aside Details

Entering Referral Property Owner Information

1 From the **Main Menu**, click on the **Referrals Module**.

2 From the pop-up screen select **PROPERTY OWNERS** and click **OK**.

The Referral Property Owners application screen will appear. This application screen allows a user to search the database for a particular owner or all listed owners.

3 To search for an owner, input owner the owner criteria, and click on the **Query** button to execute the query.

If the owner is in the database, the owner information will appear.

4 Click on the **Insert a New Owner** button if the owner is not found in the database. Tab through each field to continue data entry.

5 Click on the on the **Save** button to save changes.

6 To view all owners in the database click on the **Query** button to execute the query.

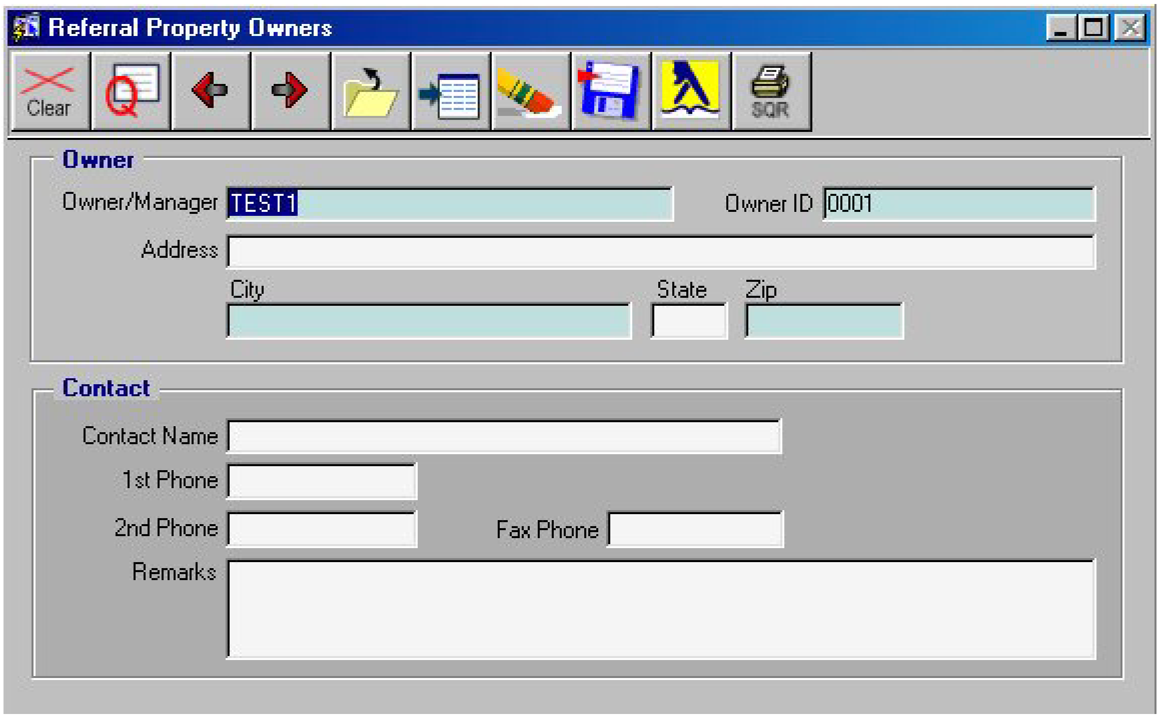


Fig. 4.5 - Property Owners

7 All of the owners in the database will appear one at a time, in the Add/Edit Referral Owner application screen. To toggle through records click on the **Forward** button to view the next record or click on the **Back** button to see the previous record.

8 Click on the **Close** button to close the application screen.

Table 4.2 – Input Values – Referral Property Owner

Input Field	Description	Method of Entry
Owner/Manager	Name of Company or individual that owns/manages the referral listings	Key in or List of Values
Owner ID	Unique identifier for the Owner	Automatic when you use the Insert a Record button
Address	Mailing Street Number, Name and Unit # of Referral Owner	Key in
City	Mailing City of Referral Owner	Key in
State	State of Referral Owner	Key in
Zip	Zip Code of Referral Owner	Key in
Contact Name	Name of Person to Contact about referral listing	Key in
1st Phone	Primary telephone number of Referral Owner.(MUST BE UNIQUE)	Key in numbers only
2nd Phone	Second telephone number of Referral Owner	Key in numbers only
Fax Phone	Telephone Number of the facsimile of the Referral Owner	Key in
Remarks	Remarks regarding Referral Owner	Key in

Generating a Referral Listing Report

1 From the **Main Menu**, click on the **Referrals Module**.

2 From the Selection List (Fig. 4.1) choose **GENERATE LISTINGS** and click **OK**.

3 From the pop-up menu (Fig. 4.6) select upon which listings you want the report generated.

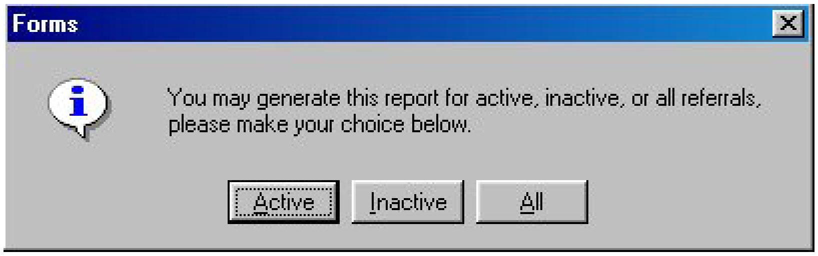


Fig. 4.6 - Generate Report - Referral Listings Options

a Pressing the **Active** button will generate Active Referrals listing screen (Fig. 4.9).

b Pressing the **Inactive** button will generate an Inactive Referrals Screen (Fig. 4.10).

c Pressing the **All** button will generate a screen for all referrals (Fig. 4.11).

All three of the Generate Referrals screens are the same, except that they query on different records depending on the dates available. They are also very similar to the Add/Edit Referral Units application screen, but allow for greater query capabilities in that you enter "ranges" for amenities such as number of bedrooms, bathrooms, rent, deposit, etc. and can query on a range of dates for the Available Date, Contact Date, Inactive Date and Delete Date.

4 Enter data for the listing, entering ranges where applicable, and press the **Query** button.

The query will return those listings that meet your criteria.

5 To print the listing, press the **SQR Report** button.

6 Choose the listing report you wish to print by double clicking the report name, or select the report and press the **Print SQR Report** button.

Query on Referral Details

1. From the **Main Screen** select **Referrals**.
2. Choose **REFERRAL UNITS or GENERATE LISTINGS** from the **Selection List**.
3. Click on the **Referral Details** button.
4. The **Referrals Details** screen will appear (Fig. 4.7). Select the checkbox next to the detail(s) you wish to query on. Click the **Query** button on the main referrals screen.

NOTE: If the Referral Unit Details screen obscures the **Query** button. Place your mouse on the title bar, click and hold down the mouse key to move the screen over. After you click on **Query**, the detail screen may move behind the Referrals screen, click on it to bring it back to the front to see what details are in the units returned by the query.

Fig. 4.7 - Referral Unit Details

Query on Multiple Values

1. Follow steps 1-3 above.

   When you begin entering data for the search, fields that have a valuelist attached allow for selecting more than one value for the search.

2. **Double-click** inside a valuelist field and choose a value.

   The chosen value will appear on the status bar.

3. **Double-click** again and select a different value.

   The second value appears with the first on the status bar (Fig. 4.8). Continue until all the values you want are selected.

4. Press **Query** to retrieve the listings.

   The referrals returned will match the multiple values selected.

5. Press the **Print SQR Report** button to print your listings.

Fig. 4.8 - Status Bar with multiple cities selected for a Query

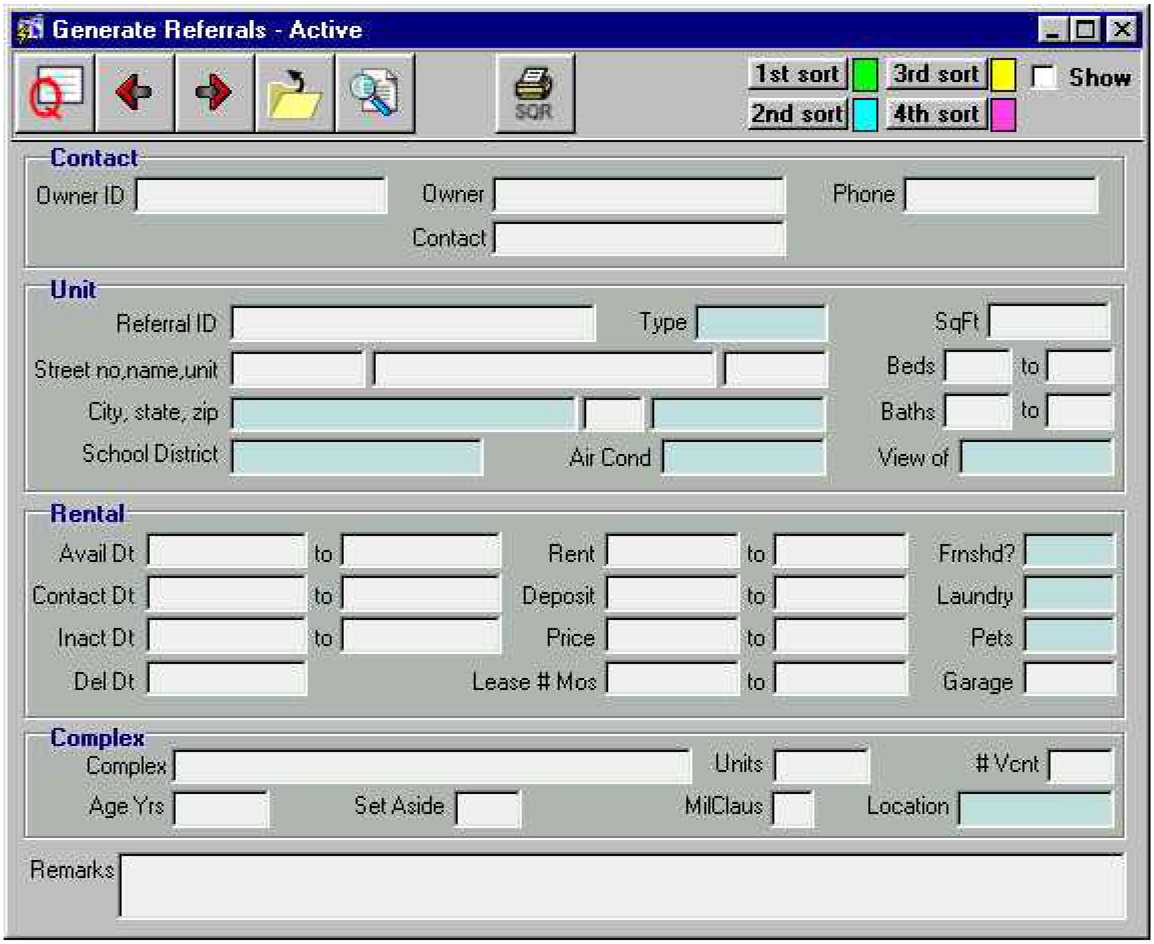


Fig. 4.9 – Active Referrals Screen

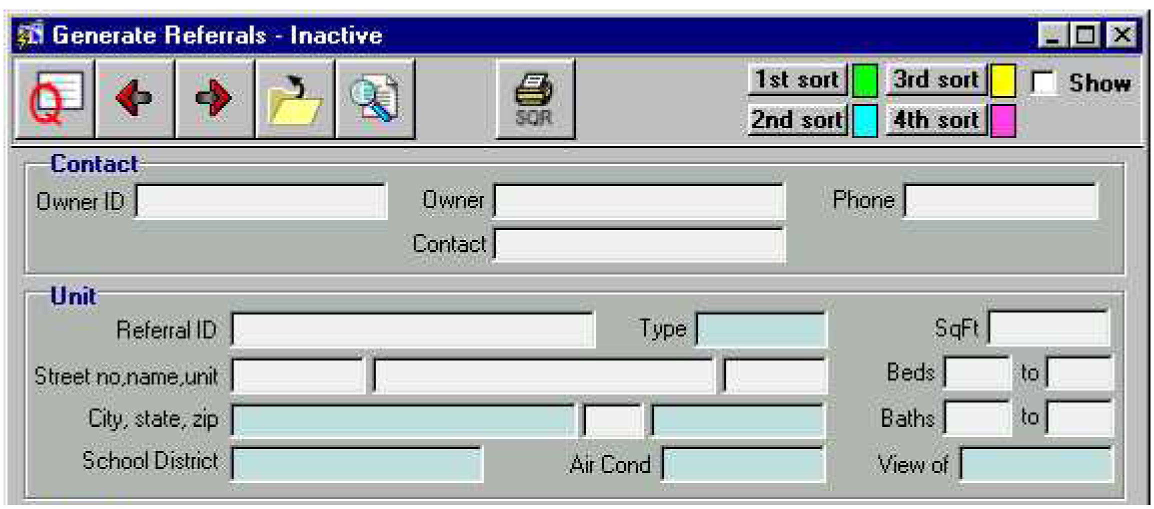


Fig. 4.10 – Inactive Referrals Screen

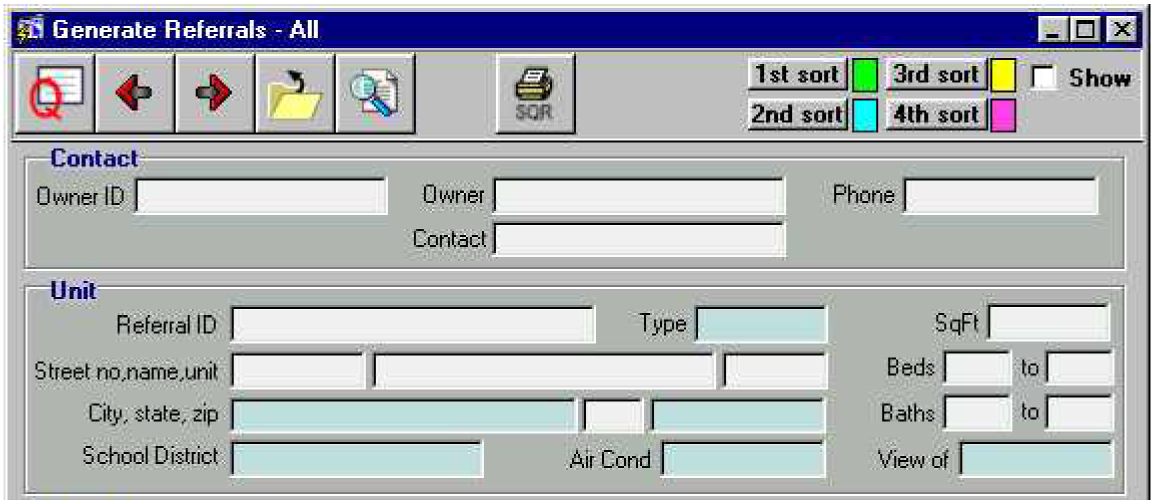


Fig. 4.11 – All Referrals Screen

Using Sort Criteria

An additional feature of the **Generate Referrals** screen is the ability to define sort criteria for the printed report.

1 To access the Primary Sort Value List, click the **1st** sort button.

  The Primary Sort Value List will pop up (Fig. 4.12).

2 Click on the item you want to sort on and click **OK**. The field in the Generate Referrals screen associated with that item will turn green.

3 Enter the criteria in this field you want to query.

4 Continue the sort criteria by using the **2nd**, **3rd**, and **4th** sort options.

  When selected, the 2nd sort criteria field will be highlighted in blue, the 3rd sort criteria will highlight in yellow, and the 4th sort criteria will highlight in magenta. See the following figures for the list of fields used in the sort, Fig. 4.13, Fig. 4.14, and Fig. 4.15

5 If you are ready to run the query, click on the **Query** button to execute the query.

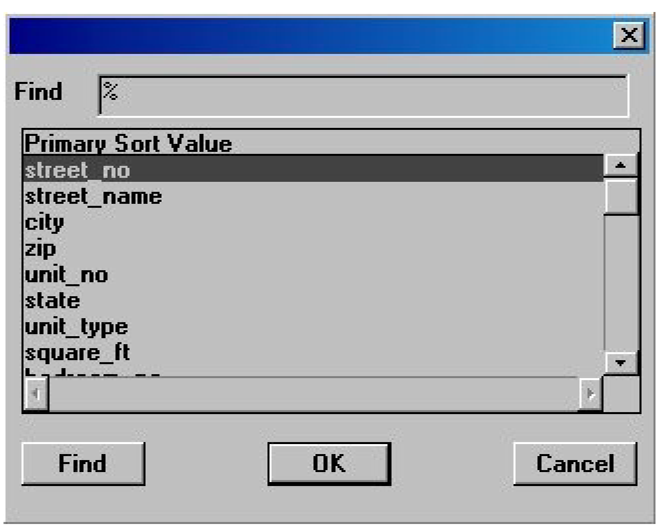


Fig. 4.12 - Primary Sort Value List

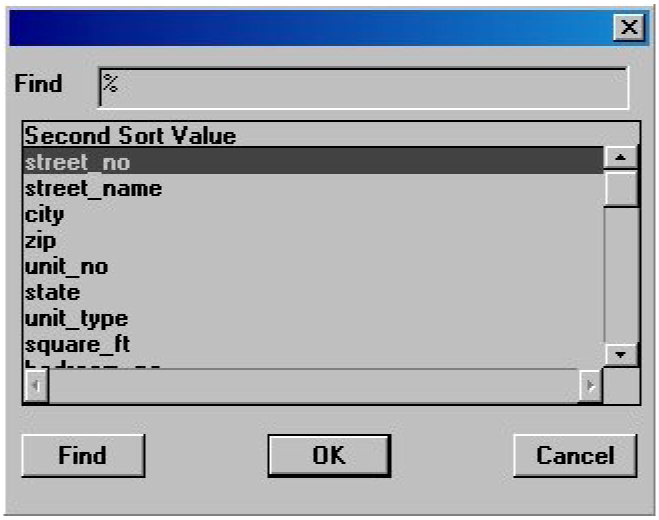


Fig. 4.13 – Second Sort Value List

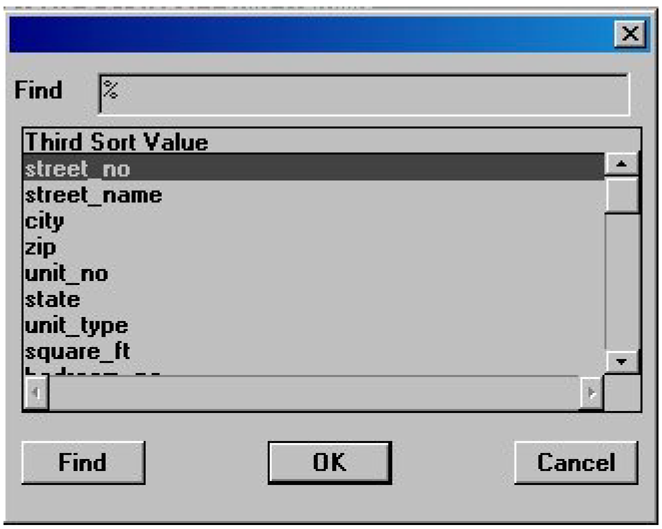


Fig. 4.14 – Third Sort Value List

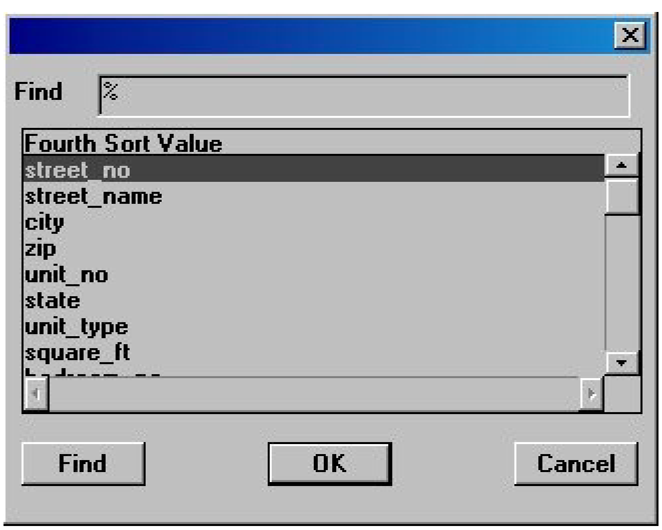


Fig. 4.15 – Fourth Sort Value List

Printing Referral Listing Reports

1 From the **Main Menu**, click the **Referrals Module**.

2 From the Selection list, choose **GENERATE LISTINGS** and click **OK**.

The Referral screen will appear.

3 Enter the data you wish to query on and click the **Query** button.

4 Click on the **Print SQR Report** button.

The SQR Reports screen will appear (Fig. 4.16).

5 Click on the desired report. Your choice will be highlighted in yellow. Press the **SQR** button.

6 After your report has run and printed, click the **Close** button to return to the Add/Edit Referral screen.

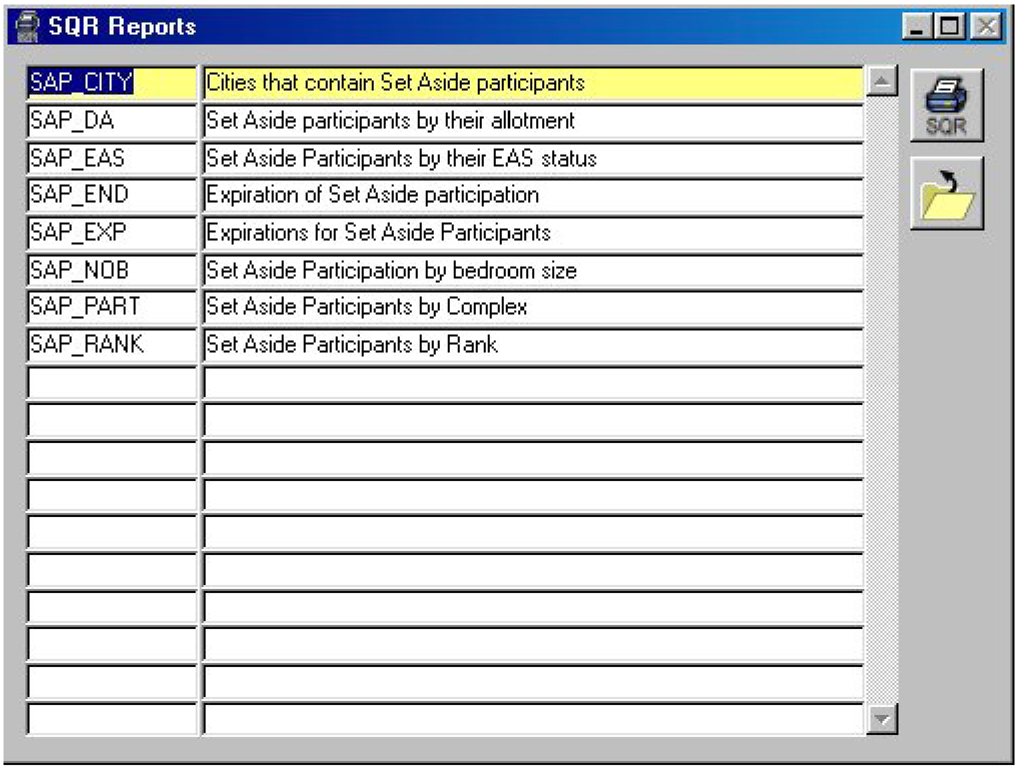


Fig. 4.16 – SQR Reports

Section 5 - Referral Complex Management

Referral Complex Management is similar to other Referrals in the Module in that you can add units, edit units, produce listings for your customer and view and print a variety of reports. The big difference is the ability to list a full apartment complex, with multiple bedroom numbers with different rents for each size.

Adding/Editing and Managing Complex Listings

Viewing Complex Listings

1 From the **Main Menu** choose **Referrals**.

When the popup appears (Fig. 5.1), choose **COMPLEX LISTINGS** and click **OK**.

Fig. 5.1 - Selection popup

2 The Referral Complex screen will appear (Fig. 5.2).

3 Enter the information you want to retrieve, Street #, Street Name or City, etc. and press the **Query** button.

4 The results of the query will be displayed, use the **Forward** or **Back** buttons to view multiple listings.

5 Make any changes, if needed and press the **Save** button. When finished viewing the listings, press the **Close** button.

Adding a Complex Listings

When the screen opens, it will be in ENTER QUERY mode. ENTER QUERY mode allows the user to enter criteria, to view and modify listings or generate listings for units that are already in the database.

Note: Pressing Ctrl+q (control and q keys simultaneously) will cancel the query.

1 To change the window status to add a new record, click the **Insert a Record** button. The application screen is now in INSERT mode.

2 Enter all information for the Complex, tabbing between fields.

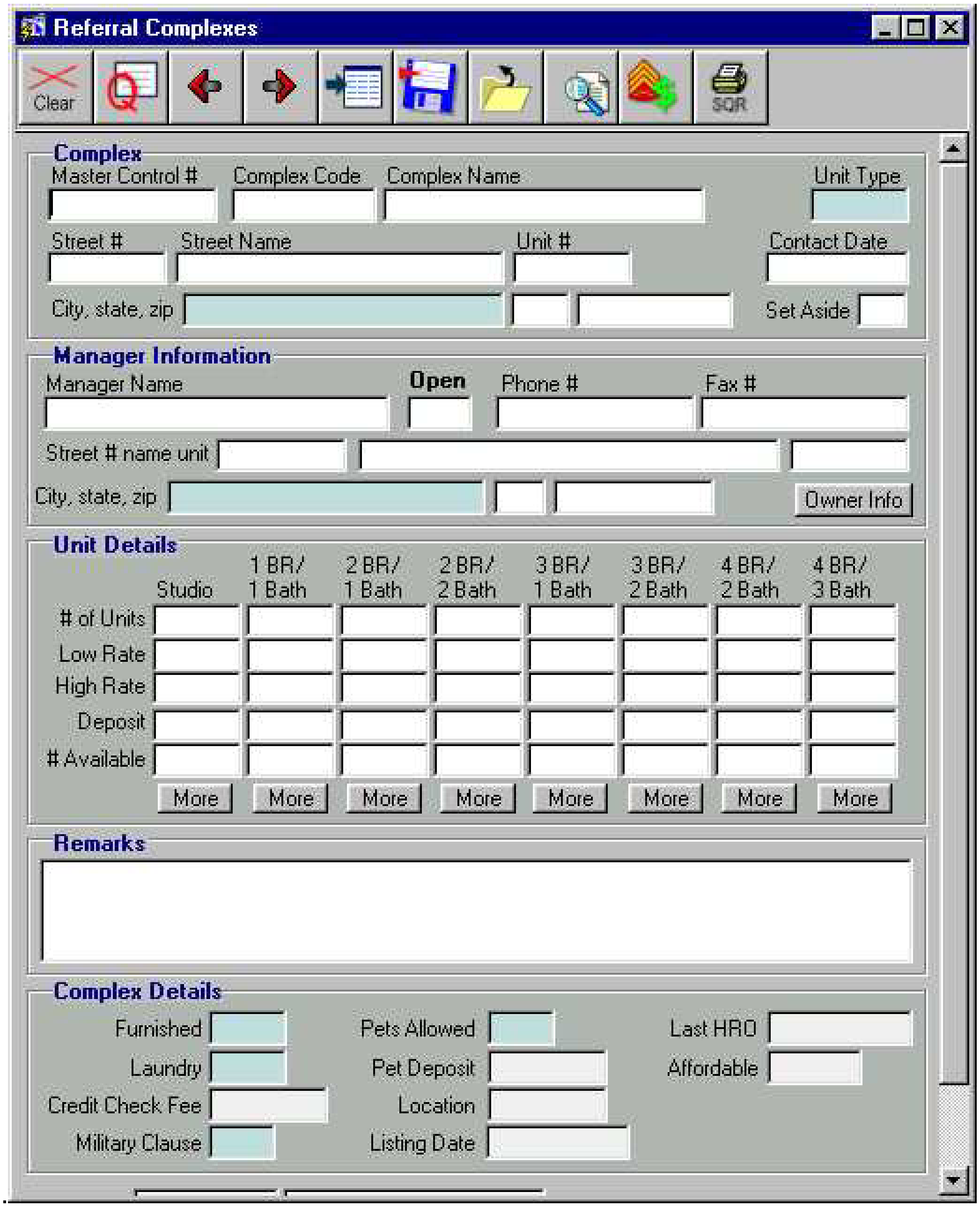
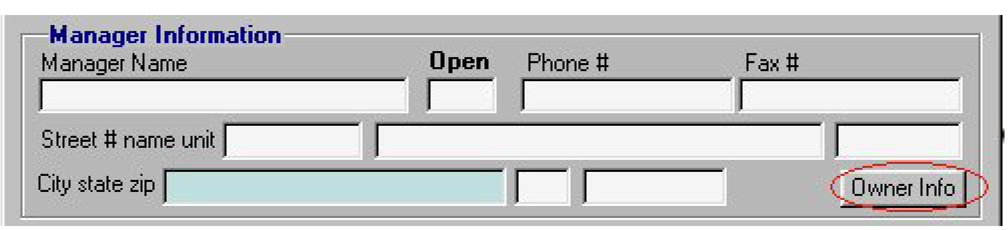


Fig. 5.2 – Referral Complex

3 In the Owner/Manager Information section (Fig. 5.3), press the **Owner Info** button to enter information about the owner of the complex. The owner screen will pop up over the manager information details.



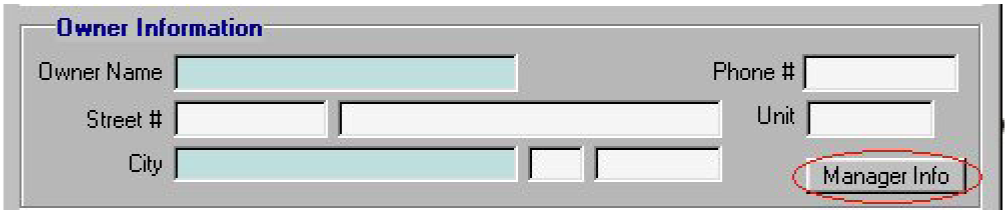


Fig. 5.3 - Complex Manager and Owner Information

4 Complete all information for the owner. Click on the **Manager Info** button to return to the Manager Information screen. When all information is complete, click on the **Save** button.

Additional Unit Type Information

Each bedroom type in the complex can have remarks or additional information stored. Click the **More** button at the bottom of a bedroom column. The following screen will appear (Fig. 5.4).

Fig. 5.4 - Unit Type Additional Information

Complex Amenities (details)

1 To add amenities (details), click on the **Details** button. The Complex Details screen will pop up (Fig. 5.5).

2 Check all boxes that apply and click the **Close Details** button.

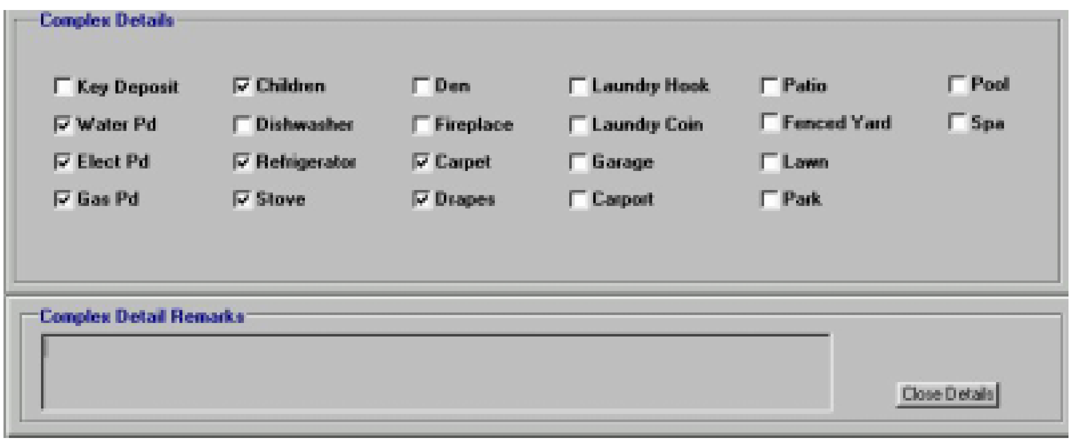


Fig. 5.5 - Complex Details

Adding Set Aside Details

1 If the Complex is Set Aside, enter the Complex Code and click the **Set Aside** button. The following screen will appear (Fig. 5.6).

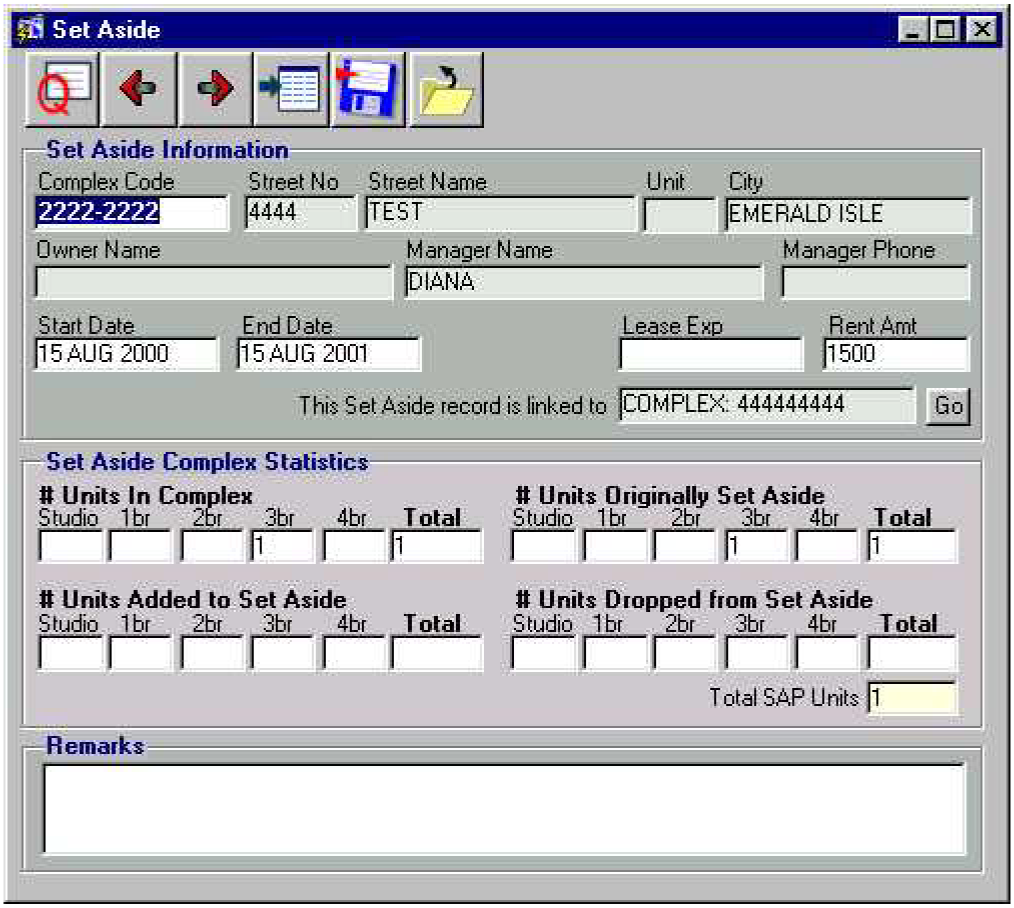


Fig. 5.6 - Set Aside Information

2 The address and owner information will appear from the previous screen. Fill in the dates and number of units information and any remarks.

NOTE: When entering unit information, the totals will be calculated for you.

3 Complete the information and click the button **Save Changes**. After the information has been saved, click **Close Details**.

4 Click on the **Save** button to save any changes.

5 Click on the **Close** button to close the application screen.

Participating property owners in the Set Aside Program are assigned a unique code, their Mac Creditor Code. This code is used as the Complex Code for identification that the property is being utilized for the Set Aside Program. You cannot set up the Set Aside Details without a Complex Code.

Field Definitions

Table 5.1– Input Values – Add/Edit Complex Unit

Input Field	Description	Method of Entry
Master Control #	Control Number assigned by housing	Key in
Complex Code	Code assigned by housing authority (required for Set Asides)	Key in
Contact Date	Date of contact with owner/manager	Key in DD MON YYYY
Complex Name	Name of Apartment Complex or Community	Key in
Unit Type	Condominium, apartments	Key in or List of Values
Set Aside	Yes or No field	Key in Y or N
Street #	Street address of Complex	Key in
Street Name	Street name of Complex	Key in
City	City of Complex	Key in or List of Values
State	State	Key in CA, etc.
Zip Code	Zip Code of Complex	Key in

Table 5.2 - Manager and Owner Information

Input Field	Description	Method of Entry
Manager Name	Name of Complex Manager to contact	Key in
Street #	Manager’s address	Key in
Street Name	Manager’s street name	Key in
Unit #	Unit Number to reach Manager	Key in
City	City	Key in or List of Values
State	State	Key in CA, etc.
Zip Code	Zip Code of Manager	Key in
Phone	Manager’s phone number	Key in numbers only
Fax	Manager’s fax number	Key in numbers only
Owner Name	Name of Complex Owner	Key in
Street #	Owner’s address	Key in
Street Name	Owner’s street name	Key in
Unit #	Unit Number of Owner	Key in
City	City of Owner residence	Key in or List of Values
State	State of Owner residence	Key in CA, AZ, etc.
Zip Code	Zip code	Key in
Phone	Owner’s phone number	Key in numbers only

Table 5.3 - Unit Details

Input Field	Description	Method of Entry
Number of Units	Number of Units for Type	Key in
Low Rate	Low rent if multiple rents available for Type	Key in numbers, no cents
High Rate	High rent if multiple rents available for Type	Key in numbers, no cents
Deposit	Deposit amount for Type	Key in numbers, no cents
Number Available	Number of Type available	Key in

Input Field	Description	Method of Entry
Additional	Remarks, notes on Type of unit	Key in

Table 5.4 - Complex Details

Input Field	Description	Method of Entry
Furnished	Is the unit furnished	Key in or List of Values
Pets Allowed	Yes, No or NEGotiable	Key in or List of Values
Laundry	Type of Laundry facilities available	Key in or List of Values
Pet Deposit	Deposit required for pets	Key in
Credit Check Fee	If a Credit Check fee is required	Key in
Location	Location of Complex based upon a grid system designated by housing	Key in
Military Clause	Is there a Military Clause in the rental agreement	Key in Y or N
Listing Date	Date Listing is Available	Key in DD MON YYYY

Table 5.5 - Modified By Information

Input Field	Description	Method of Entry
Entered Date	Date Complex entered into system	Automatic
Entered By	User Name of Person entering information	Automatic
Date Changed	Date any changes made to the listing	Automatic
Changed By	User Name of Person making changes	Automatic

Table 5.6 - Amenities Detail

Input Field	Description	Method of Entry
Check Box Fields	Yes or No values for each amenity listed	Mouse click
Complex Detail Remarks	User remarks regarding the amenities of the complex.	Key in

Generating Reports or Listings

1 For listings, enter the criteria and press the **Query** button.

2 Click on the **Print SQR Report** button.

3 From the list, choose the listing report you wish to use, and click on the **SQR** button.

4 For other reports, repeat steps 1-3 and choose the report, click on the **SQR** button again.

Section 6 - Financial Data Module

The Financial Data Module consists of 5 major areas:

- Charges - Recurring monthly charges and single charges
- Receipts - Collecting funds from tenants or pay-checkage
- Default Charges - Establish recurring monthly charges, a Cash Customer
- BAH Rates - Maintain rates for recurring charges based on the BAH
- Receipt Approval - Used by Fiscal Department to verify funds received are deposited

Charges

Creating Charges

1 From the **Main Menu**, click on the **Financial Data Module.**

A selection list will pop up (Fig. 6.1).

2 Select **CHARGES** from the pop-up menu and click **OK**.

Fig. 6.1 - Financial Data selection list

3 The Charge Main Application Screen will appear (Fig. 6.2).

4 Input the sponsor's social security number, the last name and/or the first name in the corresponding fields, or double-click in the field to select a value from the value list.

5 Click on the **Query** button to execute the query.

6 Click on the **Insert a Record** button to insert a new charge number (by clicking on the insert button, *MCHAS* will automatically assign a charge number).

The cursor will be in the newly created Charge Number field.

7 Tab through each field to continue inputting data.

Note: the Item Number is a required entry on the Charge_Main Screen. Each charge number may have one or more items. Each separately posted charge is a unique item.

8 Click on the **Save** button to save changes, and then click the **Close** button to return to the main menu.

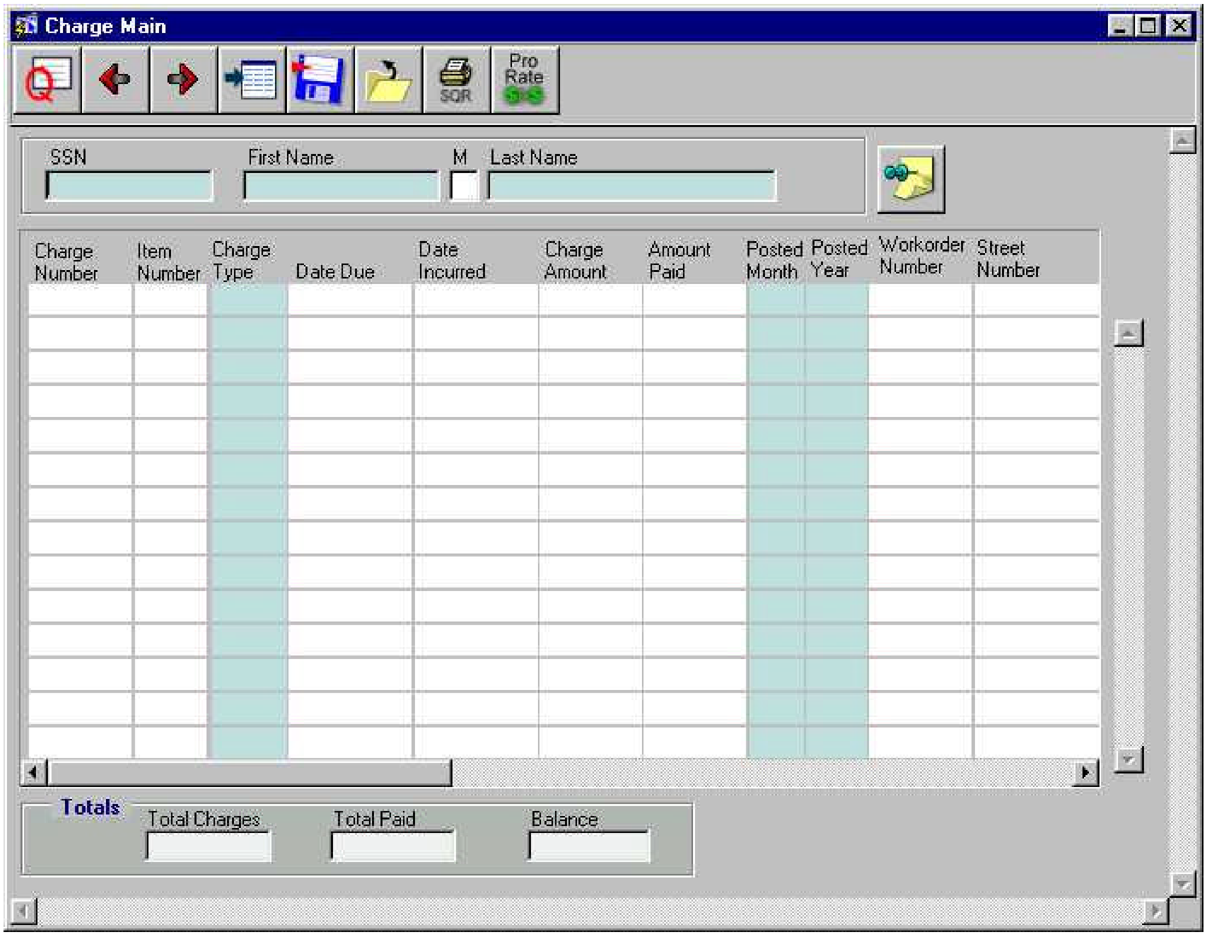


Fig. 6.2 – Charge_ Main Application Screen

Charge Field Definitions

Table 6.1 - The Charge Screen

Input Field	Description	Method of Entry
Sponsor SSN	Social Security Number	Key In or Value List
First Name	First Name of customer	Key in for non-residents
M	Middle initial of customer	Key in for non-residents
Last Name	Last Name of customer	Key in for non-residents
Charge Number	Unique, automatically assigned	Automatically generated
Item Number	Unique, automatic for customers on a charge schedule with multiple line items	Key in
Charge Type	The type of charge, ie rent, damages, etc	Key In or Value List

Input Field	Description	Method of Entry
Date Due	When the amount is due	Key in
Date Incurred	The date the charge was incurred	Key in
Charge Amount	Dollar amount of the Charge	Key in
Amount Paid	Amount paid against the charge	DO NOT KEY IN - This amount is automatically updated when a payment is made
Posted Month	Month the charge was posted	Key In or Value List
Posted Year	Year the charge was posted	Key In or Value List
Workorder Number	Maximo Workorder number for charges from other departments	Key in
Street Number	Address, if living on base	Key in for first time charges, automatic for residents in housing
Installments	Are installments allowed	Key in Y or N
Beginning Meter	Beginning Meter reading for metered charges, ie: electrical or gas	Automatic for charges posted from a Charge Schedule, Key in for Check Outs
Ending Meter	Ending Meter reading for metered charges, ie: electrical or gas	Automatic for charges posted from a Charge Schedule, Key in for Check Outs
Rate	The rate used to calculate metered charges	Automatic for charges posted from a Charge Schedule, Key in for Check Outs
Remarks	Comments regarding charge	Key in
In Dispute	Is the Charge is dispute	Key in Y or N
Bad Debt	Is this a potential bad debt?	Key in Y or N
Changed By	Person who changed the record	Automatic
Date Changed	Date a record was changed	Automatic
Entered By	Person who created the record	Automatic
Entered Date	Date a record was created	Automatic
Total Charges	Total of All charges for a customer	Automatic
Total Paid	Total of All payments by a customer	Automatic
Balance	Balance owing	Automatic

First Time Charges

1 From the **Main Menu**, click on the **Financial Data Module**.

2 Select **CHARGES** and click **OK**.

The Charge_Master Application Screen will appear (Fig. 6.2).

3 Input the sponsor's social security number in the corresponding field, or double-click in the field to select a value from the value list. Click on the **Query** button to execute the query.

4 If this is the first time a charge is being entered, a dialog will appear "SSN Not Found. Ok to Add?". Click **OK** and proceed with steps 6 through 9 in the section Creating Charges.

Prorating an Existing Charge

1 From the **Main Menu**, choose **Financial Date**.

2 From the selection list, choose **CHARGE**.

3 Enter the SSN, or other criteria for the person with the charge you wish to Prorate and click the **Query** button.

4 Click on the **Pro-Rate** button.

5 The Prorate an Existing Charge screen will appear (Fig. 6.3).

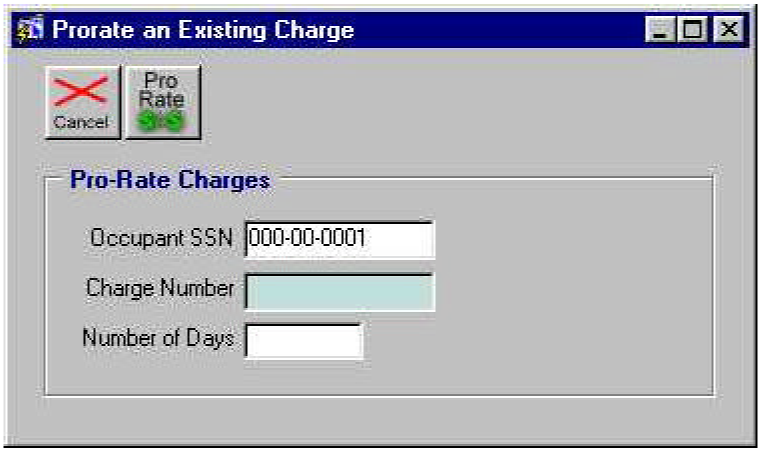


Fig. 6.3 - Prorate an Existing Charge

6 Enter the Charge Number to be prorated or double-click in the field to select from this customers charges.

7 Enter the Number of Days that is to be prorated and click the **Pro-Rate** button.

When you are prorating a charge for check-out, whether the charge has been paid and you are calculating a refund, or adjusting the amount that is to be paid, the number of days to calculate will be the number of days that sponsor was in housing. Prorating will post credits to the charge.

8 Re-Query to see the credits posted against the charge by pressing the **Query** button, entering the Social Security Number, and pressing the **Query** button again.

For faster re-query, use Ctrl+C to copy the Social Security Number to the clipboard. After you have pressed the **Query** button, use Ctrl+V to paste the number back into the SSN field before you press **Query** again.

Receipts

Applying Payments Received

1 From the **Main Menu**, click on the **Financial Data Module**.

2 Select **RECEIPTS** and click **OK**.

The Receipt_Master Application Screen will appear (Fig. 6.4).

3 Input the sponsor's social security number in the corresponding field, or double-click in the field to select a value from the value list. Click on the **Query** button to execute the query.

Inputting a first name in the First Name field, or double clicking in the field to select a value from the value list can also retrieve a sponsor's record.

4 Click on the **Insert a Record** button to insert a new receipt number (by clicking on the insert button, *MCHAS* will automatically assign a receipt number).

5 The cursor will be in the charge number field. **Double-click** to select the charge this payment is against.

6 Tab through each field to continue inputting data.

7 Click on the **Save** button to save the receipt, and then click the **Close** button to return to the main menu.

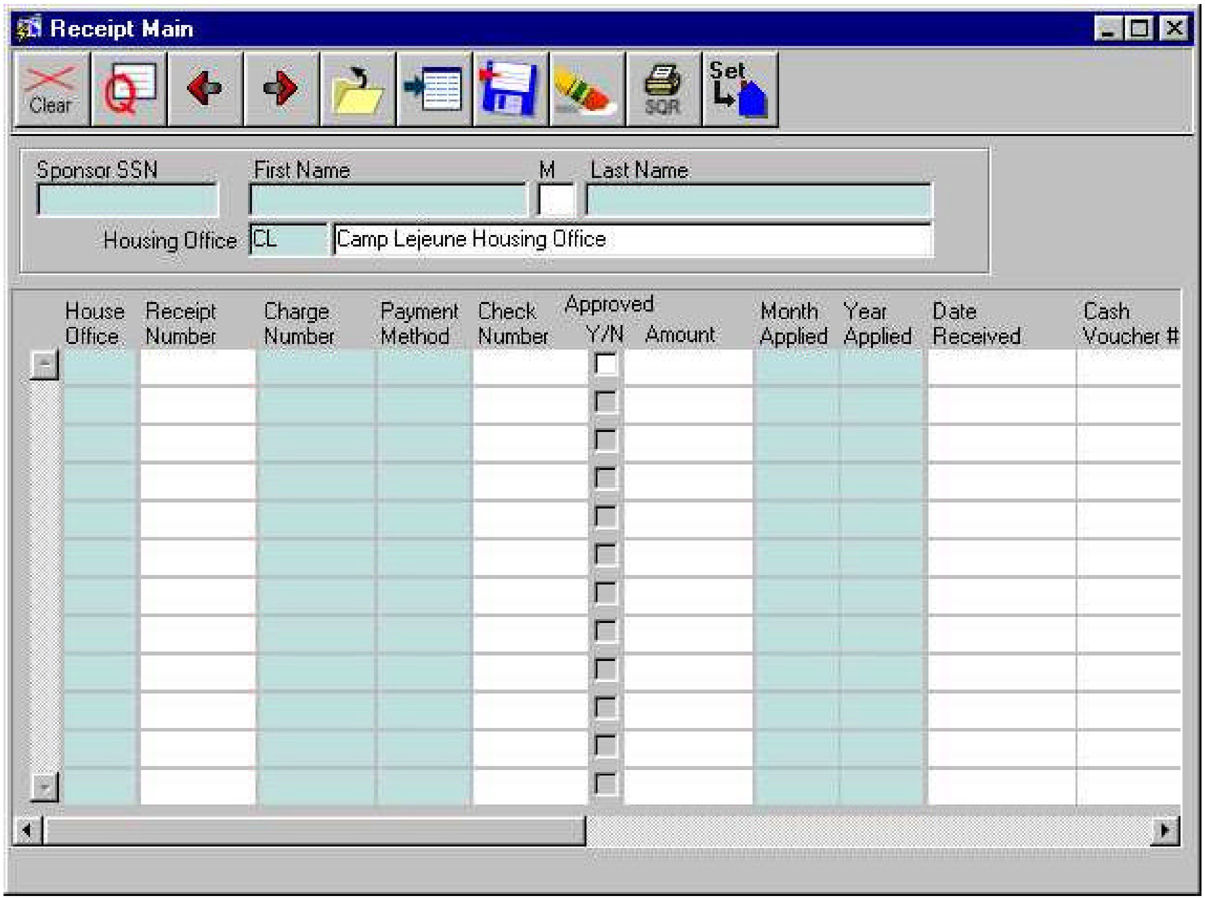


Fig. 6.4 – Receipt_Master screen

Receipt Field Definitions

Table 6.2 - The Receipt Screen

Input Field	Description	Method of Entry
Housing Office	Unique Housing Office Identifier	Key in or Value List
Occupant SSN	SSN of Customer	Key in or Value List
Last Name	Last Name of Customer	Key in or Value List
First Name	First Name of Customer	Key in or Value List
Mid	Middle initial of Customer	Key in or Value List
Receipt Number	Unique, automatically assigned	Automatic
Charge Number	Charge that is being paid	Key in or Value List
Payment Method	Method of payment, cash, check etc.	Key in or Value List

Input Field	Description	Method of Entry
Check Number	Number of the instrument used for payment	Key in
Approved Y/N	Approval indicating that the Fiscal Department received funds from other locations at facility	No Entry, Checked when receipt approved by Fiscal Department
Amount	Amount of the payment	Key in
Month Applied	Month the payment is applied to	Key in or Value List
Year Applied	Year the payment is applied to	Key in or Value List
Date Received	Date payment received	Key in
Cash Voucher #	Cash Voucher used by Fiscal Department to account for monies received	Key in by Fiscal Department
CV Date	Date of the Cash Voucher	Key in by Fiscal Department
Remarks	Remarks regarding payment	Key in
Entered By	Person who created the record	Automatic
Date Entered	Date the record was created	Automatic

First Time Receipts

1 From the **Main Menu**, click on the **Financial Data Module**.

2 Select **RECEIPTS** and click **OK**.

The Receipt_Master Application Screen will appear (Fig. 6.4).

3 Input the sponsor's social security number in the corresponding field and click on the **Query** button to execute the query.

4 If this is the first time a receipt is being entered, a dialog will appear "SSN Not Found. Ok to Add?". Click **OK** and proceed with steps 4 through 7 in the section Applying Payments Received.

Entering Partial Payments

1 Follow the procedure for Applying Payments Received.

2 Click on the **Save** button, the **Charge Balances** screen will appear (Fig. 6.5).

The Amount of Current Payment at the top of the screen reflects the amount of the receipt. The Amount of Current Disbursements and Current Amount Left to Disburse will change as the payment is applied. Enter in the far right column the amount of the payment you wish to apply to each charge item. Do this until the Amount Remaining is zero.

Note: The total of the charge example is $605 and the amount received $600.

3 Click on the **Save** button.

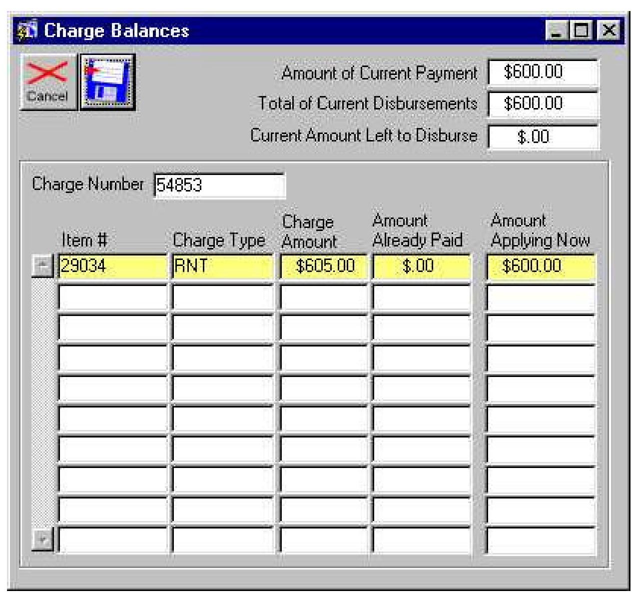


Fig. 6.5 - Charge Balances

Entering Default Charge Information

Default charges are all those charges that are used for recurring monthly charges for your Cash Customers. Each row in the Default Charges represents a line item for the charges that are posted monthly.

When you create a Cash Customer, these are the charges that are set to Active and calculated when the monthly posting is done.

1 From the **Main Menu**, click on the **Financial Data Module**.

2 Select **DEFAULT CHARGES** and click **OK**.

3 The Default Charges Application Screen will appear (Fig. 6.6).

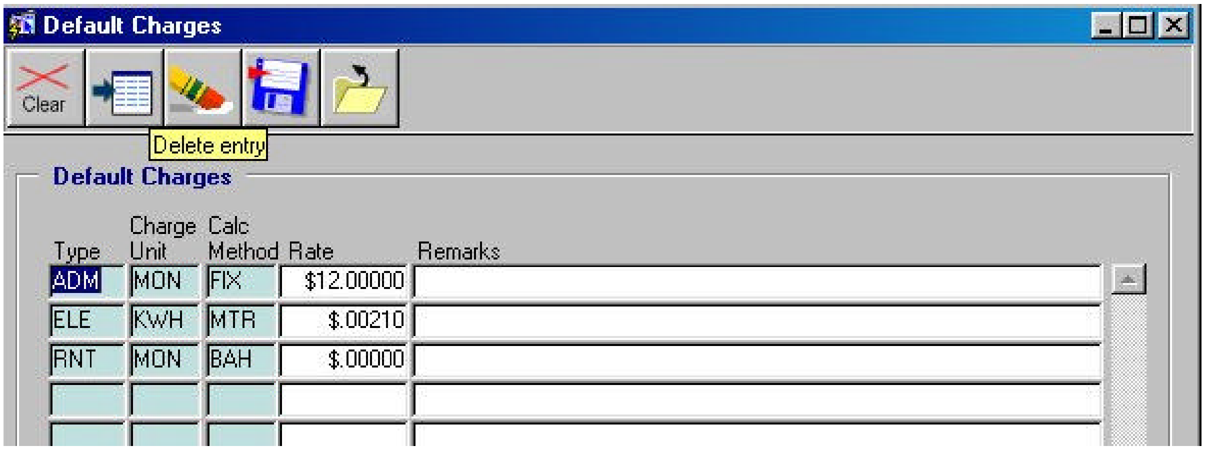


Fig. 6.6 – Default Charges Application Screen

4 Set the Type of Charge, the unit that is charged, the calculation method (Fig. 6.7) and the rate that will be used for the calculation. Enter any remarks needed.

5 To add another row click on the **Insert a Record** button.

6 To clear a field click on the **Clear** button.

7 To delete an entire row click on the **Delete a Record** button.

8 Click the **Save** button to save the any changes.

9 Click on the **Close** button to return to the main menu.

Note: Double-clicking on the light blue fields will bring up a specific value list from which selections can be made.

If STD (Standard for Unit Rent) is chosen as the Calculation Method, make sure that the rent amount is filled in on the Maintain Housing Quarters Activity screen. Likewise, if BAH is chosen, make sure that your current BAH rates are filled in (See the Section Entering/Editing BAH RATES for details).

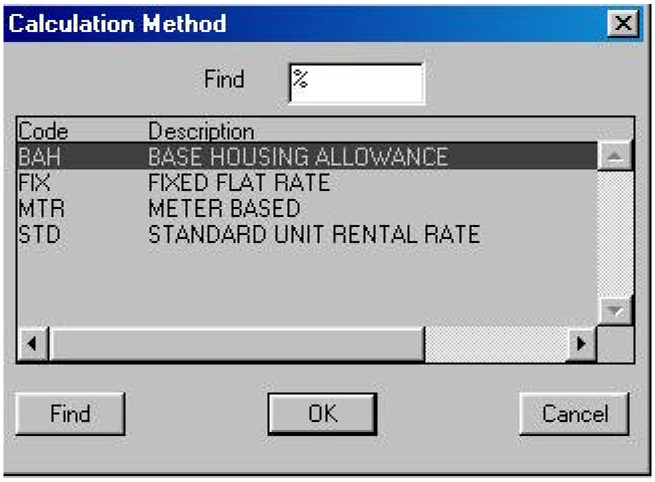


Fig. 6.7 - Calculation Methods

Entering/Editing BAH RATES

1 From the **Main Menu**, click on the **Financial Data Module**.

2 Select **BAH RATES** and click **OK**.

The BAH Application Screen will appear (Fig. 6.8).

3 Click inside the first field and enter the data for your facility.

4 Click **Save** to save the new data or changes.

5 Click **Close** to exit.

If you have any Cash Customers who pay recurring monthly charges for quarters rent based upon their BAH, this information must be kept current in order for those monthly charges to reflect the new rate.

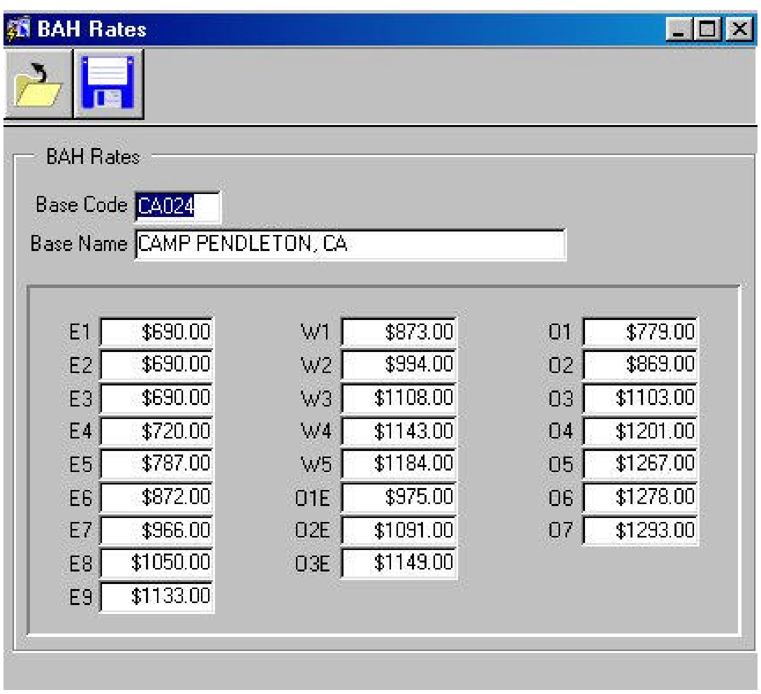


Fig. 6.8 – BAH RATES Application Screen

Printing Reports

Reports may be printed from the Charge_ Main Application screen (Fig. 6.2) or from the Receipt_Master Application screen (Fig. 6.4).

REMINDER: the Application screens will automatically default to the Enter Query mode upon access. Press Ctrl/q to cancel query mode prior to selecting the SQR button.

1 From the **Main Menu**, click on the **Financial Data Module**.

2 Chose **CHARGE** or **RECEIPT**, depending on what type of report you wish to print and click **OK**.

3 If printing a report specific to an individual, like a receipt, enter the SSN and press the **Query** button before proceeding.

4 Click on the **Print SQR Report** button.

The SQR Reports application screen will appear (Fig. 6.9).

5 **Double-click** the report to print and click on **SQR**.

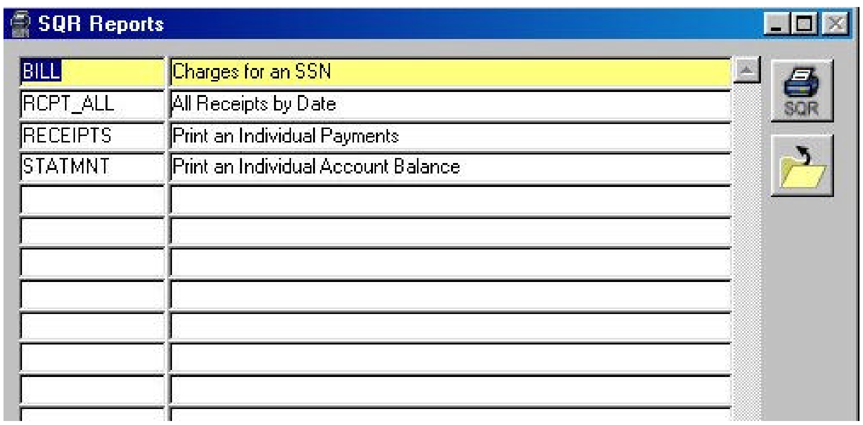


Fig. 6.9 – SQR Reports

Other Financial Data Processes

Processing Check Ins

A Check In is a Cash Customer who is moving into quarters for which he will be paying recurring monthly charges and his/her move-in is after the monthly posting of charges.

1 Assign to Quarters:

Follow the procedure for Assigning to Quarters in the Family Housing Module.

2 Create a Cash Customer:

From the Application screen, click on the Cash Customer check box. Set the Default Charges to Active.

3 Create a Charge Account:

Follow the instructions above for First Time Charges

4 Create the Monthly Charge:

Follow the instructions above for Creating Charges EXCEPT in the case of multiple items in the default charges proceed as follows:

1) When you click on **Insert a Record** to begin the Charge. Give this first charge item #1.

2) Click on **Insert a Record** again, change the Charge Number to the same number in step 1), give this line item #2, modify the charge type and proceed.

3) Continue until all default charges are entered, each with the same Charge Number but with a unique Item Number.

5 Prorate the Charge:

Follow the instructions for Prorating an Existing Charge.

6 Bill the Customer:

Click the **Print SQR Report** button to give the customer an accounting of the charges

7 Issue a Receipt:

Click the **Print SQR Report** button to issue a receipt for the customer.

Processing Check Outs

A Check Out is a Cash Customer who is moving out of quarters for which he is currently paying recurring monthly charges and his/her move-out is after the monthly posting of charges.

1 Vacate from Quarters:

Follow the instructions for Vacating from quarters in the Family Housing Module.

2 Verify Cash Customer Status:

After vacating, all the default charges will be set to N, not active.

3 Post any additional Charges:

If additional charges are to be collected (electrical charges by meter, late fees, damages, etc.) additional charges need to be posted for the customer.

If electrical or gas charges are metered. Meters need to be posted to bring the meter reading current for the next cash customer. See the Housing Units Module for instructions on setting up and posting meters.

4 Prorate Charges:

Whether you need to collect a reduced amount or calculate a refund to the customer. Follow the instructions in the section Prorating an Existing Charge.

5 Bill the Customer:

6 Issue a Receipt:

The check out process as described above would mean issuing a receipt for each charge that is created. This would mean a receipt for the regular monthly charge, one for the charge for additional electrical, and one for damages or late fees since MCHAS issues one receipt/one charge.

To save time in the check out process, especially for the customer described above, consider consolidating his final charges into the already created Charge for his recurring monthly bill.

Prorate the Charge - you will now have multiple item numbers for each item of the charge and the credits posted during the prorating. **Insert a Record** for the next "check-out" charge, change the charge number to the one just prorated. Give it the next Item # and **Save**. Continue until all "Check-Out" charges are added.

Open the Receipts screen, **Query** and insert one receipt for all the charges.

Section 7 - Housing Units Module

The Maintain Housing Quarters Activity application is for the maintenance of housing unit activity. To add, edit, or update information about a housing unit refer to the System Administration section.

Maintaining Housing Quarters

Viewing Quarters Information

1 From the **Main Menu**, click on the **Housing Units Module**.

2 Select **BASE HOUSES** and click **OK**.

The Maintain Housing Quarters Activity Application Screen will appear (Fig. 7.1).

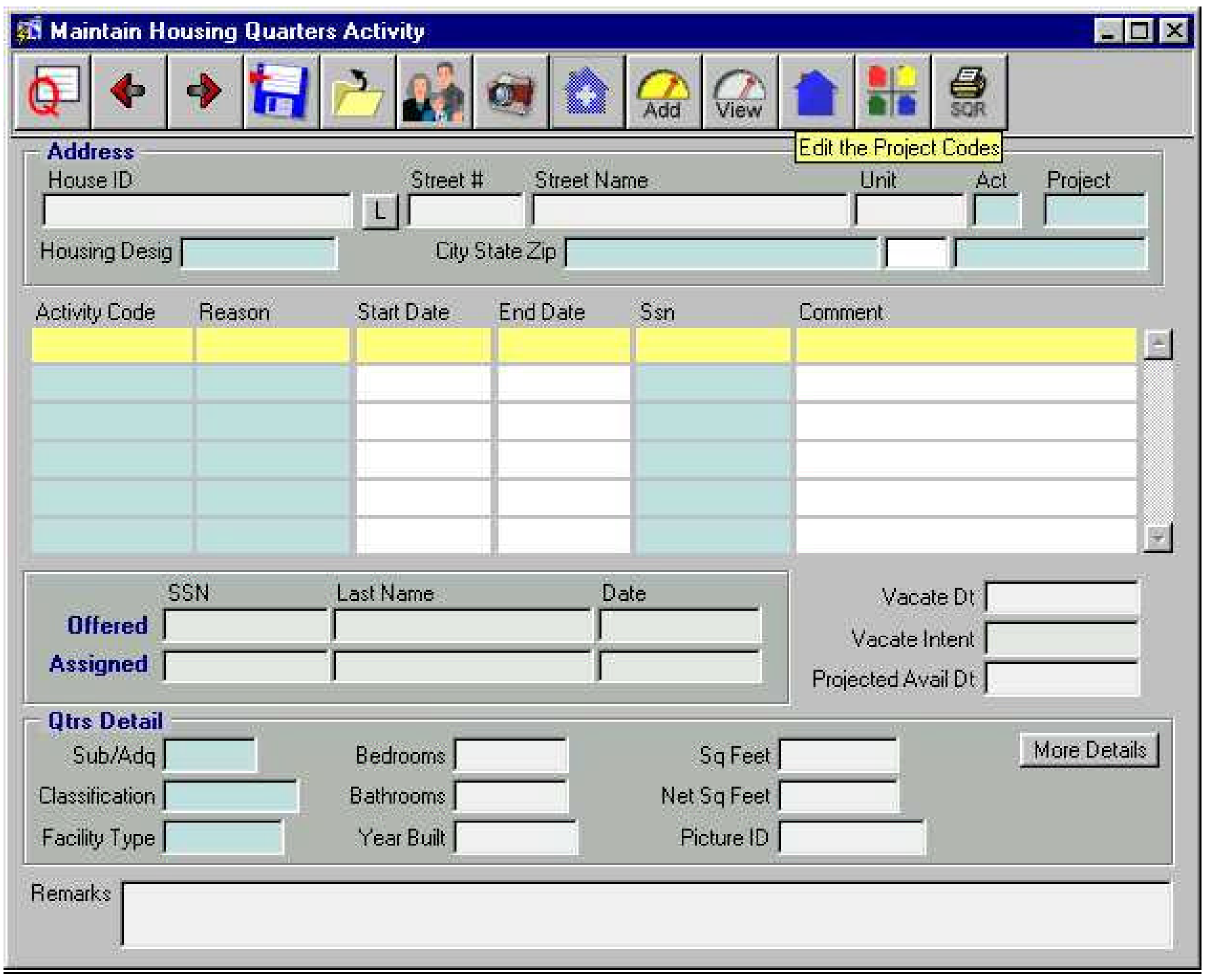


Fig. 7.1 – Maintain Housing Quarters Activity Application Screen

3 Input the your search criteria to view housing units or double click in the Project Code field to view houses within a specific project area.

4 Click on the **Query** button to execute the database search for the selected record(s).

5 Modify delete or add new activities and reasons

NOTE: The start date of an activity should be the same as the end date of the previous activity, there should be no gaps in activity as this tracks occupied and vacant days for utilization.

6 Click on the **Save** button to save changes, and click **Close** to return to the main menu.

Housing Activity Codes

Unit Activity Codes have been standardized and reasons for the activities have been added to the Valuelist. Valid Unit Activity Codes and Reasons are as follows:

Table 7.1 - Quarters Activity Codes

Activity Code	Description	Reason	**Description**
ADDED	Date unit was acquired	**CONV**	Conversion
		GENERAL	General Inventory Data
		NEW_ACQ	New Acquire
		OTHER	Other
		SUB_TO_ADQ	Substandard to Adequate
ASSIGNED	Dates unit assigned		
INACTIVE	Dates unit inactive	**BRAC**	BRAC (Disposal/Caretaker Status)
		BURN_UNIT	Burn Unit
		GENERAL	General Inventory Data
		OTHER	Other
		PEND_BQ	Pending Transfer to BQ
		PEND_DEMO	Pending Demolition
		PEND_MILCON	Pending Demolition for MILCON
		WAIT_EX_TR	Awaiting Excess/Transfer
		WAIT_PPV	Awaiting PPV
LOSS	Date unit was lost	**CONV DIV**	Conversion/Permanent Diversion
		DISP_EXCES	Disposal/Excess
		GENERAL	General Inventory Data
		GOV_TO_PPV	Government Assets to PPV
		LEASE_CAN	Lease Cancellation
		OTHER	Other-BRAC-Nat'l Clauses-etc.
		TRANS_REASS	Transfer/Reassignment
VACANT	Dates unit was vacant	**AVAILABLE**	Unit is available for occupancy
		M&R	Dates of maintenance and repair
		MAJOR REHAB	Dates of major rehabilitation
		PAY_N_GO	Pay and go Cleaning Service
		Others as defined by the facility	

Viewing Unit Activity

1. From the **Main Menu**, select **Housing Units Module**.
2. From the pop up menu, select **UNIT ACTIVITY** and click **OK**.

   The Unit Activity Application Screen will appear (Fig. 7.2).

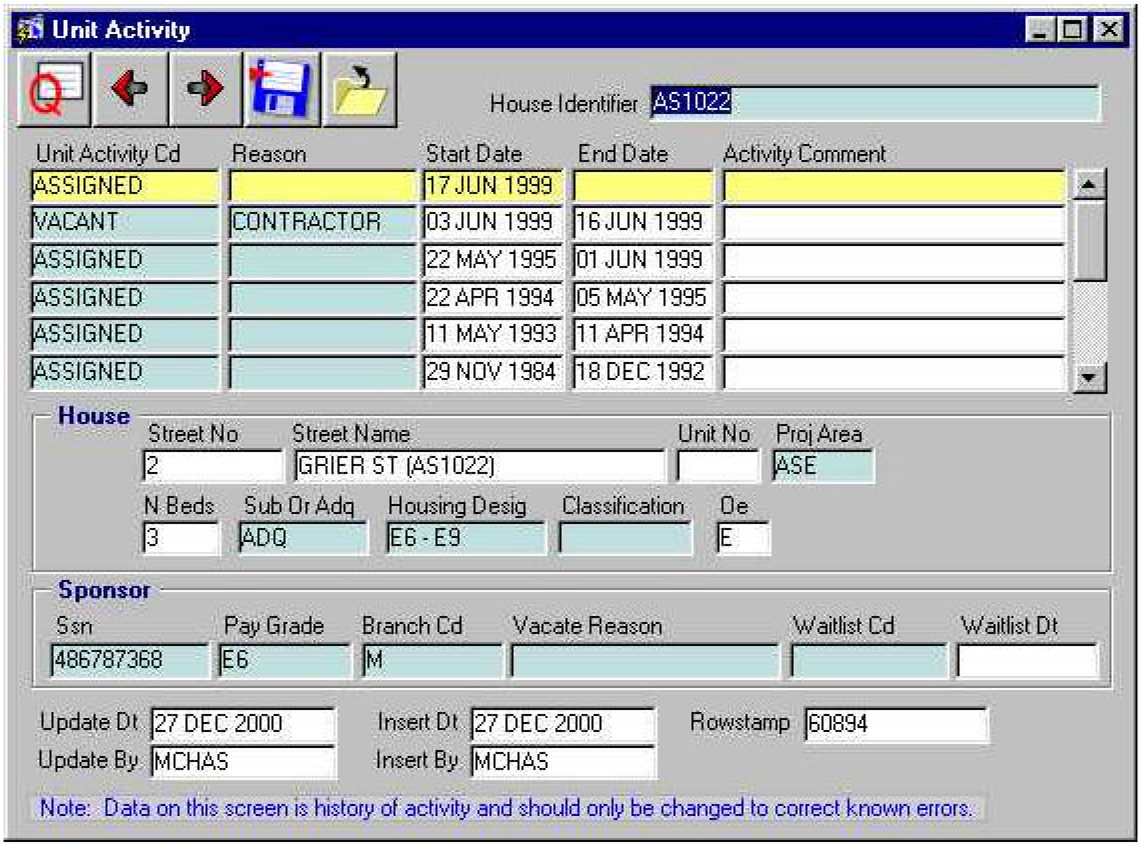


Fig. 7.2 - Unit Activity

By scrolling through the unit activity records, you can easily see information about Sponsors during ASSIGNED activities. If other information about the quarters was changed (as through a loss of quarters to PPV) you can see that information change in the Sub Or Adq field for the LOSS and ADDED activities.

NOTE: As with any screen that deals with the activity of quarters, ONLY change this information to correct known errors. Other changes may impact your utilization.

Adding a Meter to a Housing Unit

1 From the **Main Menu**, select **Housing Units Module**.

2 From the pop up menu, select **BASE HOUSES** and click **OK**.

The Maintain Housing Quarters Activity Application Screen will appear (Fig. 7.1).

3 Enter the criteria for the unit you wish to connect a meter to and click on the **Query** button.

4 Click on the **Add Meter** button.

The Housing Unit Meters screen will appear (Fig. 7.3).

5 The Project Area, Street Number and Street Name will already be filled in, type the meter number and press **Tab**.

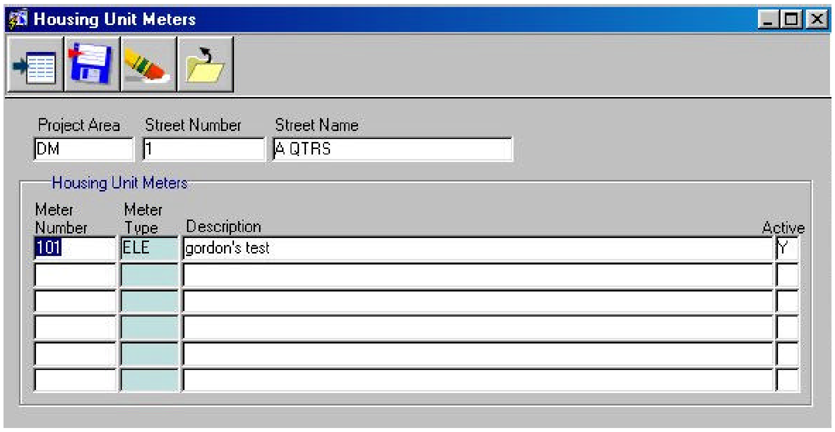


Fig. 7.3 – Housing Unit Meters

6 **Double-click** on the Meter Type box (highlighted in light blue) to obtain a pop up menu selection listing (Fig. 7.4).

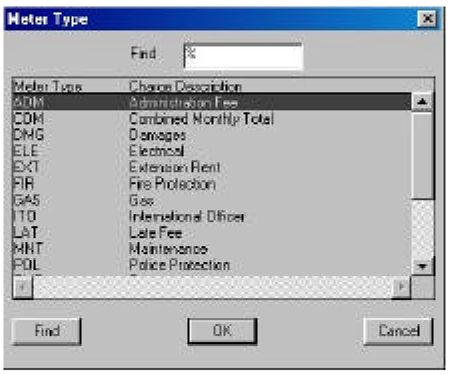


Fig. 7.4 - Meter Types

7 Highlight the desired meter type and press **OK**.

8 Type in the desired description and press **Tab**.

9 Type in the active status, Y (yes) or N (no).

10 Click on the **Save** button to save the addition.

11 Click on the **Close** button to exit.

How to View a Meter

1 From the **Main Menu**, select **Housing Units Module**.

2 From the pop up menu, select **BASE HOUSES** and click **OK**.

3 When the Maintain Housing Quarters Activity Application Screen appears, enter the criteria for a housing unit that has a meter attached and press the **Query** button.

4 Click on the **View Meters** button. The Meter Info screen will appear (Fig. 7.5) showing all the postings for that housing unit meter.

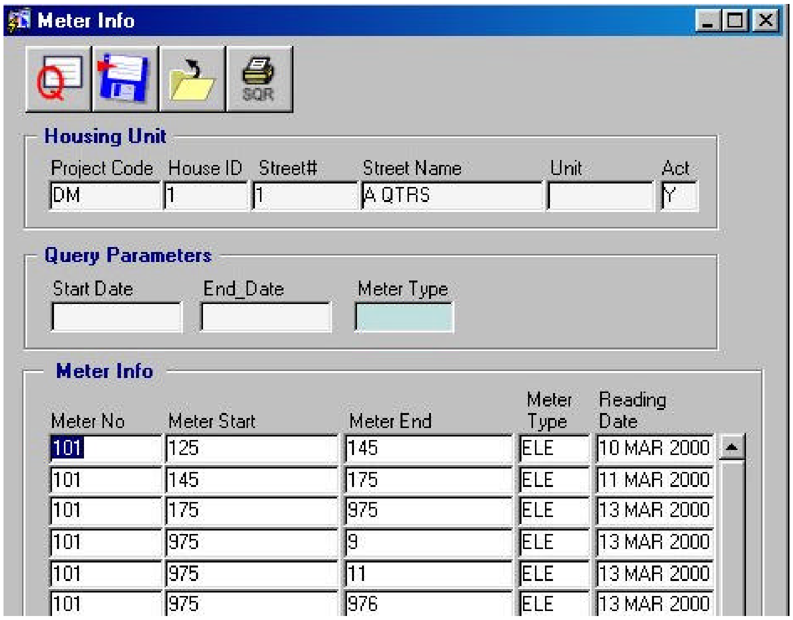


Fig. 7.5 - Meter Information

Note: The Query Parameters section allows you to enter a specific Start Date and End Date if desired. Double clicking on the Meter Type (highlighted in light blue) will access a pop-up menu from which Meter Type codes may be selected.

How to Enter Meter Readings

1 From the **Main Menu**, select **Housing Units Module**.

2 From the pop up menu select **METER READINGS** and click **OK**.

The Entry of Meter Transactions Application Screen appears (Fig. 7.6).

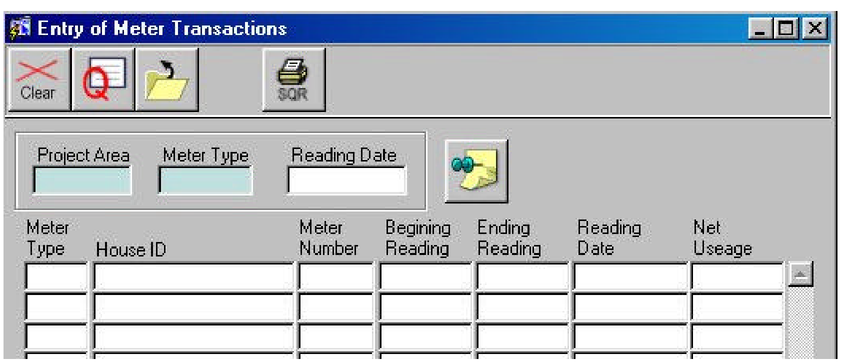


Fig. 7.6 – Entry of Meter Transactions Application Screen

3 **Double-click** in Project Area field and select project code from the pop up menu (Fig. 7.7) and click **OK**.

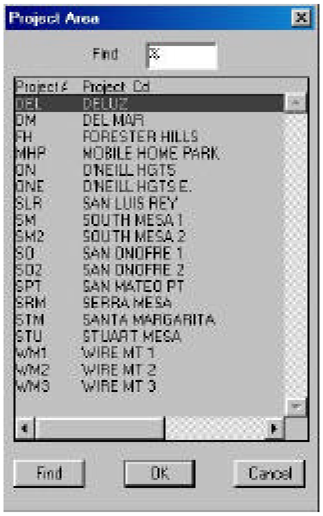


Fig. 7.7 - Meter Transactions valuelist for Project Area

4 **Double-click** in Meter Type field and select meter type from the pop up menu (Fig. 7.8) and click **OK**.

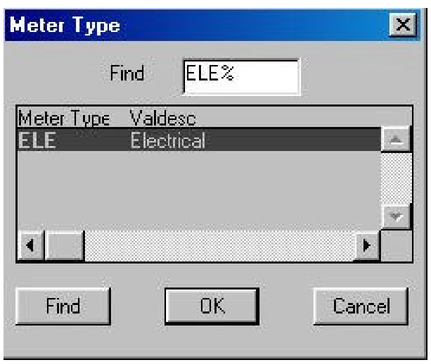


Fig. 7.8 - Meter Type valuelist

5 Click on the **Query** button.

The Entry of Meter Transactions Application Screen will fill in Meter Type, House ID, Meter Number and Beginning Reading.

6 Select House ID and enter the Ending Reading and Reading Date, **Tab**.

7 Click on the **Post Meters** button to save and post charges.

8 Click on the **Close** button to exit.

Printing Reports

1 Click on the **Print SQR Report** button.

2 The SQR Reports Application Screen will appear (Fig. 7.9).

3 Click in the Report Name field to select a report.

NOTE: the report selected will be highlighted in yellow.

4 Click on the **SQR** button to generate the selected report.

A dialog box will appear with “Report is running” (Fig. 7.10).

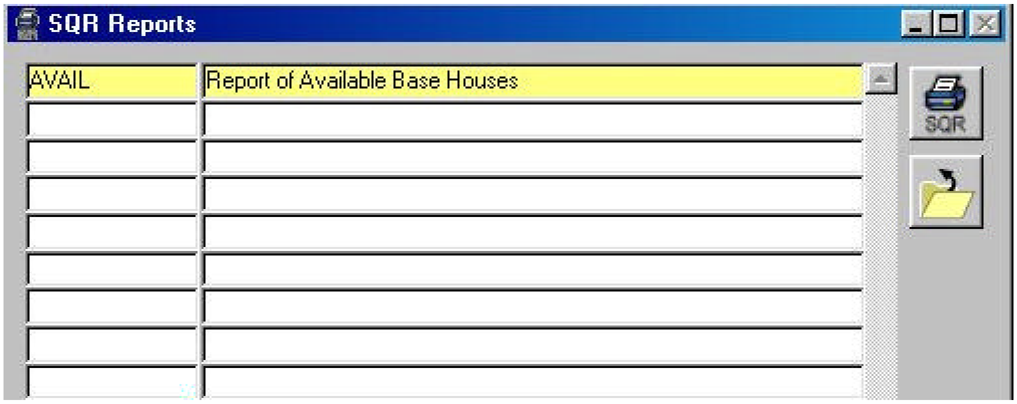


Fig. 7.9 – SQR Reports Application Screen

Fig. 7.10 - Report is Generating

5 Click on the **Cancel (X)** button to abort the selected report.

How to View Work Orders

If MAXIMO is installed at your facility, *MCHAS* can be set up to access the MAXIMO application's work order information pertaining to housing units. This is not automatic and is not available on a typical install.

1 If available, click on the **Maximo** button of the Maintain Housing Quarters Activity Application Screen.

The following screen appears (Fig. 7.11) showing the status of the MAXIMO work order.

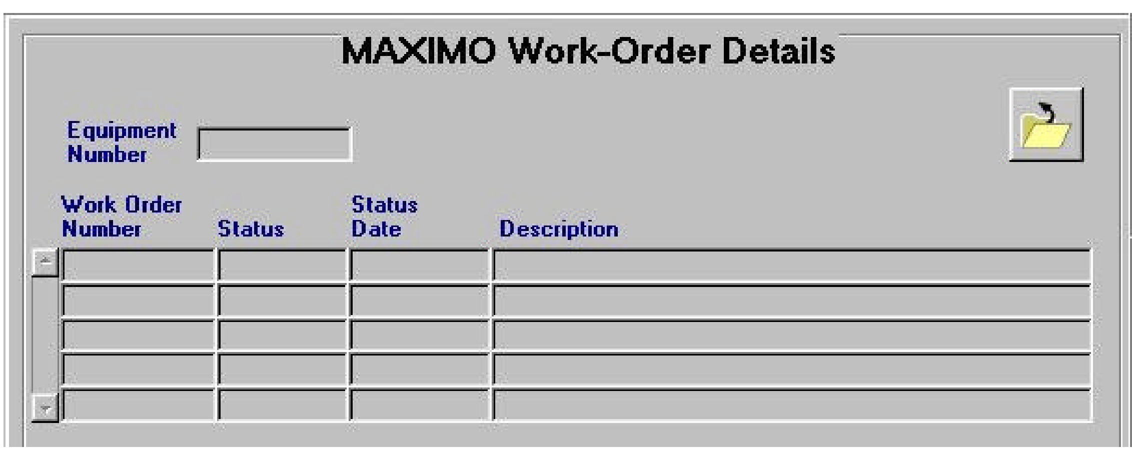


Fig. 7.11 - Maximo Work-Order Details

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Inspection Scheduling Overview

Allows for the easy creation of Inspectors for which schedules can be maintained. The types of inspections are maintained in a Valuelist for easy modification to fit your needs.

Several Reports have been created allowing Inspectors to print out their daily Inspection Schedule, or Supervisors to print out the entire schedule. Schedules can also be printed based upon Housing Area.

Schedule time-off so other staff members know when you are available for the schedule.

Inspection Scheduling

Create your Inspectors.

1. From the Main Screen click on Housing Units.
2. Select **Inspectors** from the Selection List.
1. The Inspectors screen will appear (Fig. 8.1).

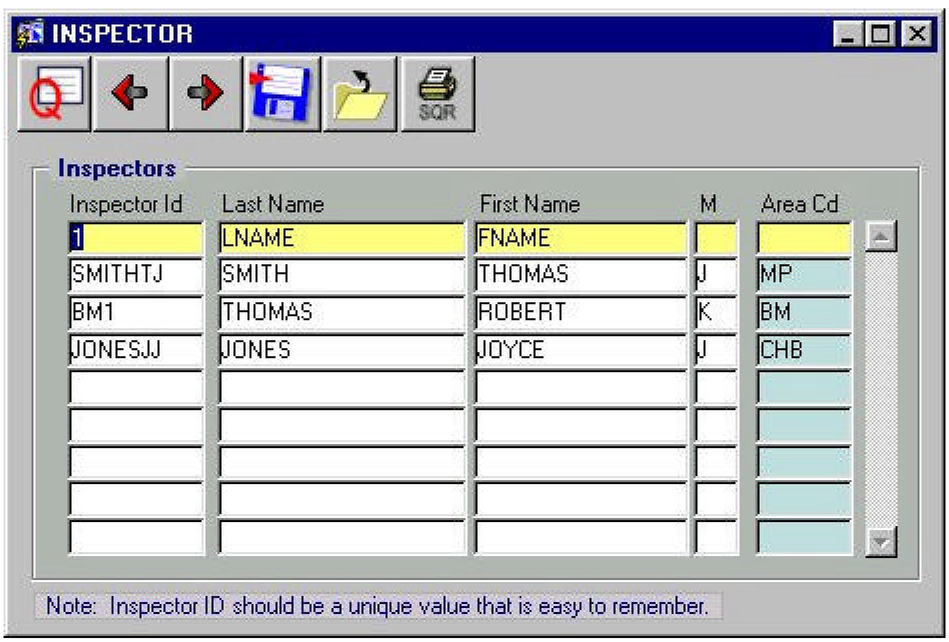


Fig. 8.1 - The Inspector List

4. Insert the cursor in the next available line. If no available lines are visible, insert the cursor in the last record and use the down arrow on the keyboard to advance to the next row.
5. Begin entering the information about the Inspector. When done, click the **Save** button.

NOTE: The Inspector ID for each inspector must be unique. They can be a series of numbers, last names or reference Project Area. They should be identifiers that are meaningful to your installation or at least easy to remember.

You are now ready to begin creating your schedule. You have two ways in which to start, from within the Inspections screen or through the Timeline. Since the Timeline can be accessed directly from the Main Screen, we will begin there.

Schedule the Appointment from the Timeline

1. From the Main Screen click on Housing Units.
2. Select Timeline from the Selection List.
3. The Inspection Time Line will appear (Fig. 8.2).

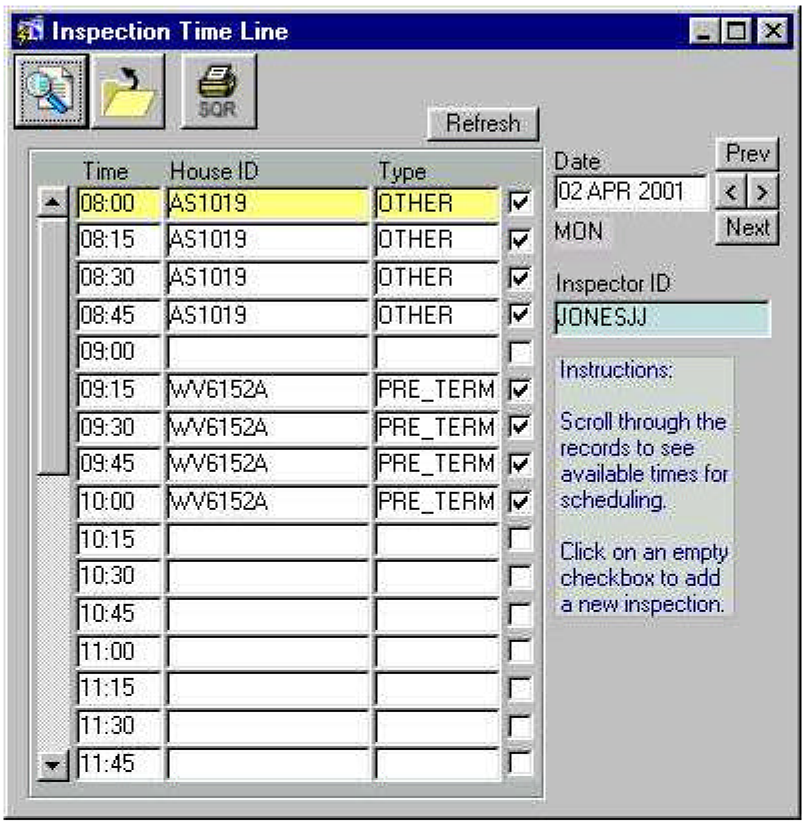


Fig. 8.2 - Inspection Timeline

4. If the Inspector you wish to schedule for does not appear in the Inspector ID field, Double-click inside the field to select the Inspector from the Valuelist.
5. Make sure the date for the inspection in visible in the Date field. To advance forward, or backward, click on the arrows to the right of the date. Click Refresh.

NOTE: When the Inspection Schedule has more dates schedules. You can use the Prev. and Next buttons to go to the next or previous day the Inspector in the Inspector ID field has anything scheduled.

6. Pick the time for the Inspection and click on the checkbox to the right of the line.
7. The Add an Inspection screen (Fig. 8.3) will appear for completion of the Inspection.

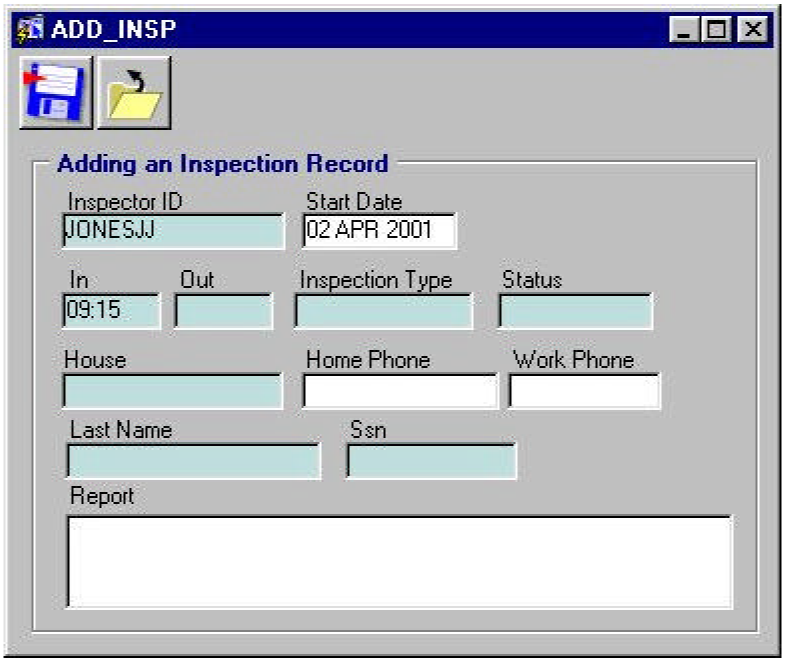


Fig. 8.3 - Add an Inspection Appointment

8. **Double-click** in the fields with a Valuelist attached to choose the value. When done, click on the **Save** button.
9. The timeline will now show the time for the inspection is checked off.
10. To view information about an inspection, select the appointment (the row will be highlighted in yellow) click on the Inspection Detail button. The Timeline Details screen will appear (Fig. 8.4).

Fig. 8.4 - Timeline Details

NOTE: Using the Timeline to schedule appointments will greatly reduce the possibility of someone scheduling two appointments for the same time.

Schedule the Appointment from the Inspections Screen

1. From the **Main Screen** click on **Housing Units**.
2. Select **Inspections** from the Selection List.
3. The Inspections screen will appear (Fig. 8.5).

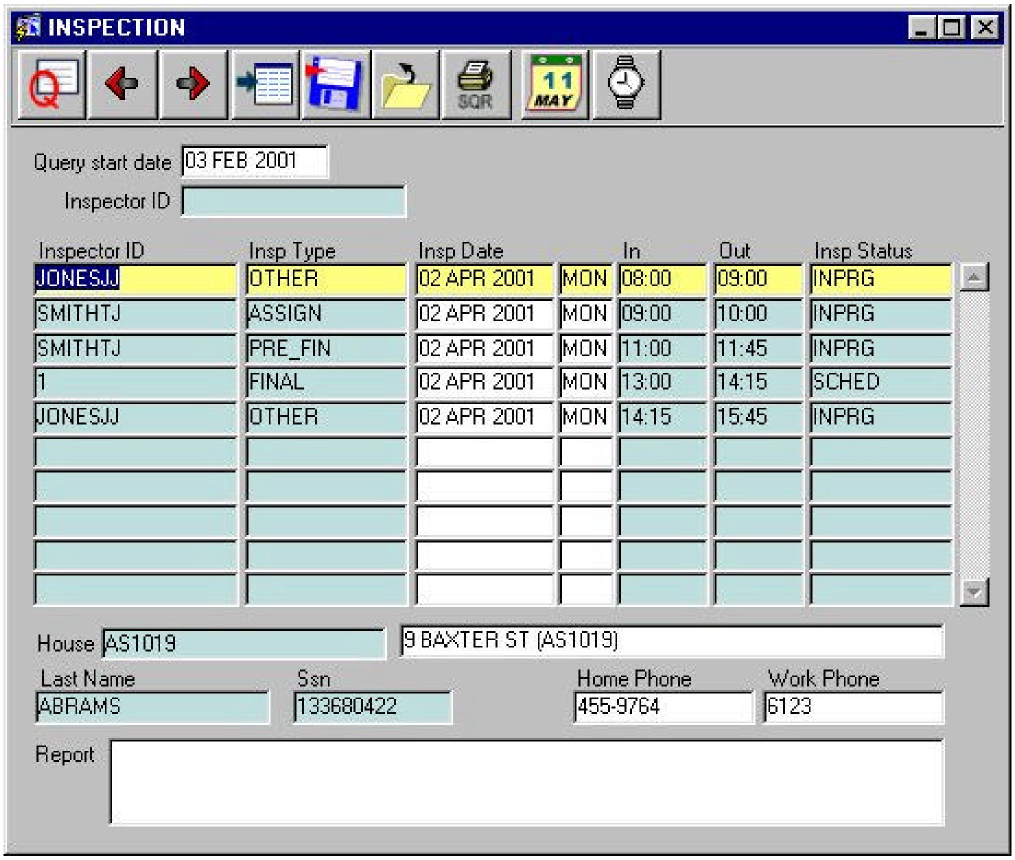


Fig. 8.5 - Inspection Main Screen

4. **Click** in the next available line and begin creating the appointment.
5. **Click** inside the House field, double-click to chose the house from the Valuelist.
6. **Click** inside the Last Name field, double-click to choose from the Valuelist.
7. When done, **click** the **Save** button.

   To schedule while looking at a single Inspectors schedule,

8. **Click** the **Query** button to enter Query mode.
9. Enter a start date for appointments in the field "Query start date". (leaving this field blank will cause ALL appointments to be returned, including those that have past).
10. Enter the Inspector ID in the field provided, click **Query**.
11. Follow the instructions 4 through 7 above to complete the appointment.

Using the Inspection Calendar

The Inspection Calendar can be used to return inspections scheduled for a specific date.

1. From the **Inspections** screen, **click** on the **Calendar** button.
2. The Calendar will appear (Fig. 8.6).
3. Use the **back** and **forward** arrows to show the month.
4. **Click** on the date for which you wish to view the schedule.
5. The Inspections screen will appear with appointments for that date.

Fig. 8.6 - Inspection calendar

Fig. 8.7 - Inspection Calendar, show option

Using the Show scheduled days option

1. From the **Inspections** screen, **click** on the **Calendar** button.
2. The Calendar will appear.
3. Use the **back** and **forward** arrows to show the month.
4. **Check** the box, Show scheduled days
5. Only days that have appointments will show, all others are grayed (Fig. 8.7).
6. **Click** on a date with appointments scheduled, the Inspection screen will appear with all appointments for that date.

By way of example, Fig. 8.8 shows the month of April with the 2nd and 6th indicating appointments. The Inspection screen shows that appointments are scheduled for those dates in April.

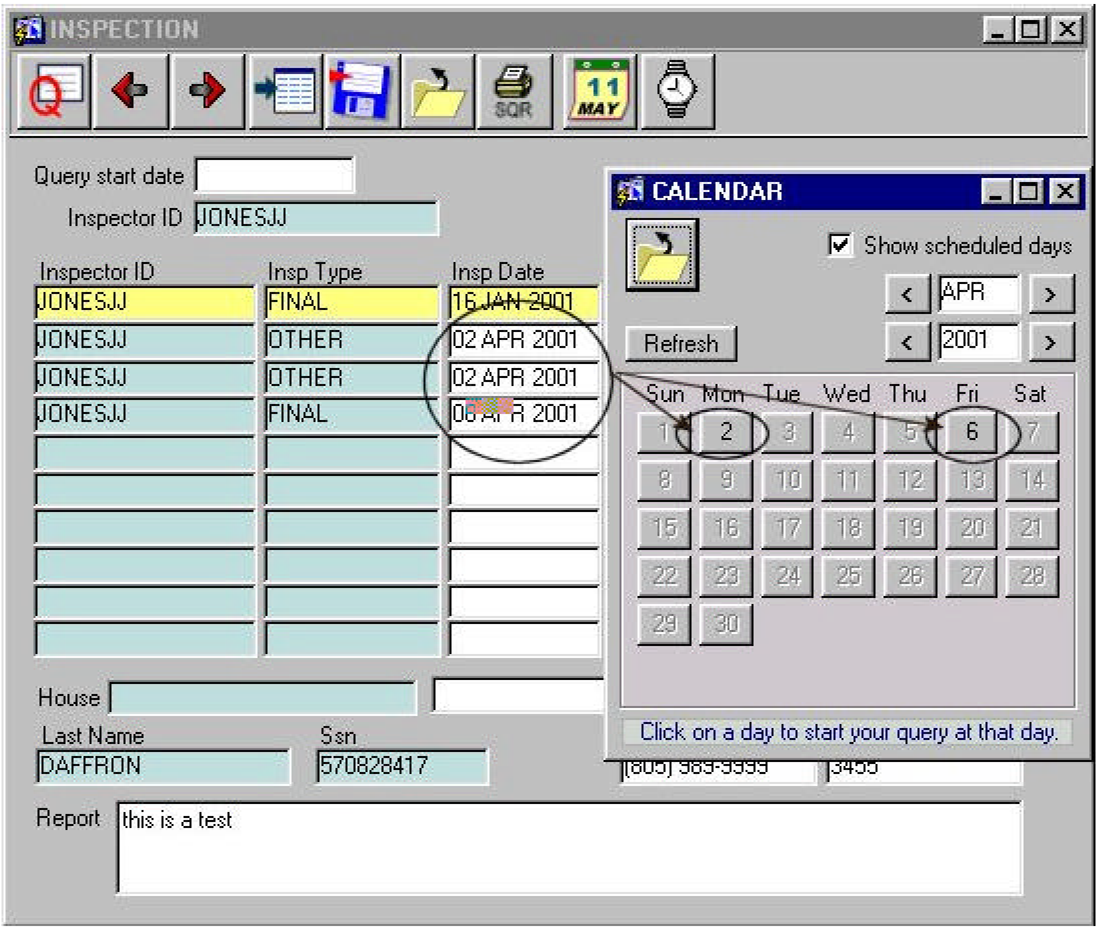


Fig. 8.8 - The Inspection Calendar, Show scheduled days

Section 9 - Administration Module

MCHAS system administration is limited to those users who are given administrative permission. Access to the administrator tables as well as other ***MCHAS*** tables are given in the Security Setup section of the System Administration Application Screen. The following sections describe how to manage the system.

How to Use the Administration Module

Maintaining *MCHAS* Tables through System Admin

1 From the **Main Menu** screen, click on the **System Admin Module**.

A Selection List will pop up.

2 Select **SYSTEM ADMIN** from the Pop-up menu and click **OK**.

MCHAS allows for several site-specific tables to be updated by the *MCHAS* Administrators. If the current user has permission, the System Administration Application Screen appears (Fig. 9.1).

Fig. 9.1 – System Administration Application Screen

3 Click on the desired *MCHAS* function button to begin editing.

The corresponding maintenance application screen will appear. (Pay Grade was selected for this example, Fig. 9.2).

Note: Application screens may be exited instantly by pressing Ctrl + q (control key and q simultaneously) on the keyboard. Pressing Ctrl + q repeatedly will ultimately return the user to the Main Menu.

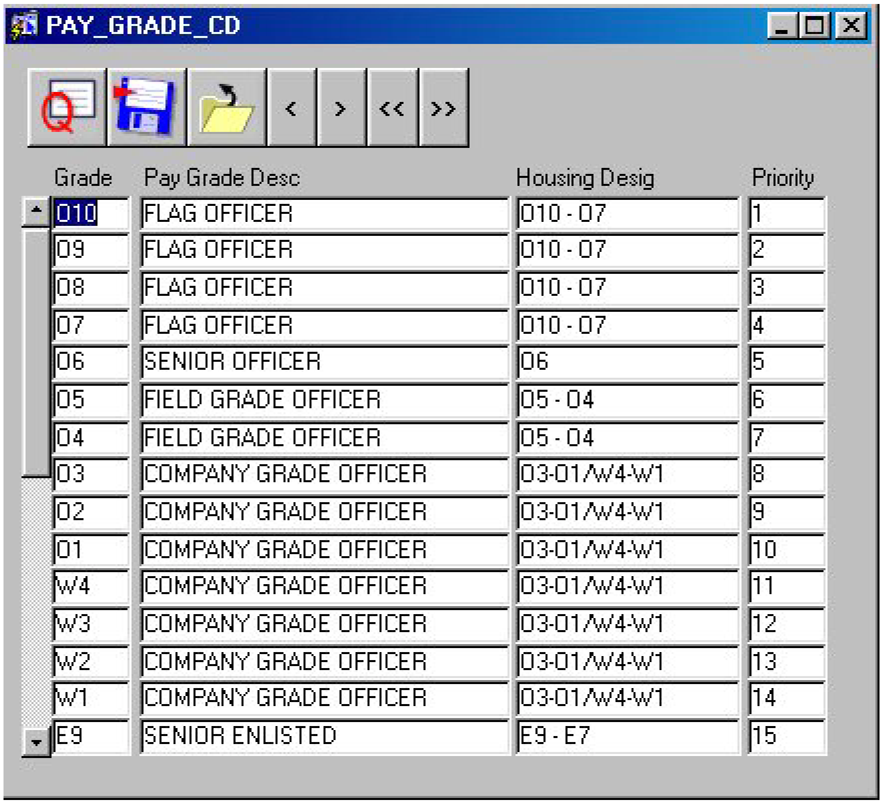


Fig. 9.2 – Pay_Grade_CD Example

4 Click in the field and make the desired modifications.

Table 9.1 - Pay Grade Codes Description

Input Field	Description
Grade	Valid Pay Grades
Pay Grade Desc.	Description for the Pay Grade
Housing Desig.	Housing Designator that tells MCHAS which houses this Pay Grade can occupy
Priority	The Priority to which the Pay Grade is given on the Wait List

To add a new record,

1 Using the scroll bar, scroll down and place the cursor in the last record of the list then press the down arrow.

The cursor will appear on an empty row.

2 Input the new record.

3 Click on the **Save** button to save changes.

4 Click on the **Close** button to close the application screen.

Housing Unit Maintenance

Housing unit information is maintained in the System Administration section of *MCHAS*. The information kept on housing units is key to correct utilization reporting. The utilization categories, designations, and number of bedrooms for each and every housing unit must be accurate to achieve correct information on each utilization report.

How to Update Housing Unit Information

1 From the **System Administration** Application Screen, click on the **Quarters Maintenance** button.

The Maintain Housing Quarters Activity Application Screen appears (Fig. 9.3).

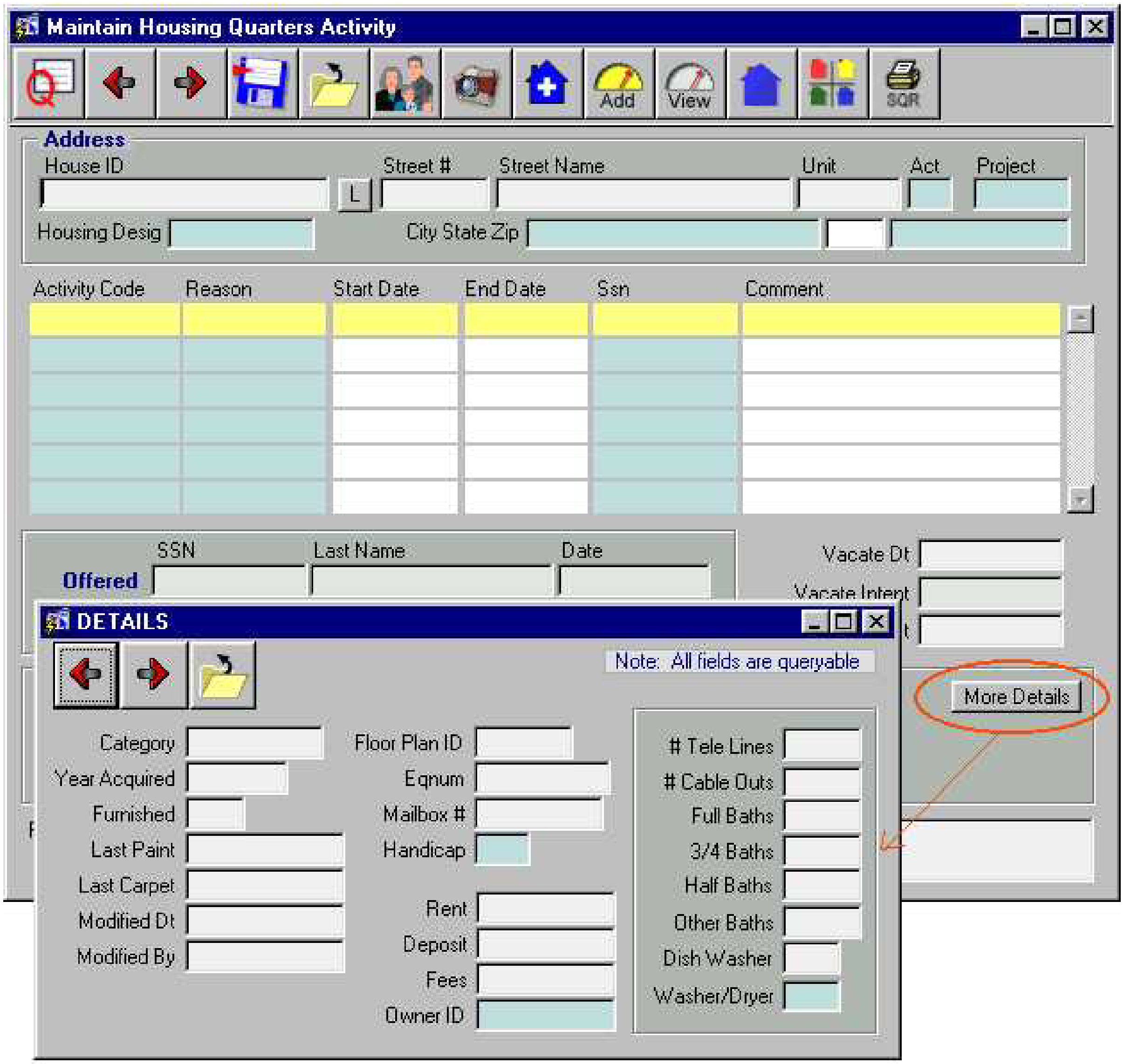


Fig. 9.3 – Maintain Housing Quarters Activity Application Screen

Note: If "Enter-Query" does not appear at the bottom of the Application Screen, click on the Query button. This will set the Application Screen to Query Mode.

2 Enter the Housing Unit desired, or leave the application screen blank to see all housing units, then click on the **Query** button to execute the query.

The selected Housing Unit(s) will be displayed.

3 Add or change information in the application screen.

4 Click on the **Save** button to save changes.

Adding a Housing Unit to Inventory

1 From the **Maintain Housing Quarters Activity** Application Screen, click on the **Add House** button.

Enter all the information for the new housing unit, making sure to enter a unit activity, beginning with ADDED, then make the unit VACANT/Available. Be sure to choose the proper reason for the ADD record. See **Error! Reference source not found.** for the proper codes and reasons.

2 Click on the **Save** button to save changes.

If all required information is entered correctly, the changes are saved to the database. If the information is *not* entered correctly the status bar will indicate the reason for errors.

How to Remove a Housing Unit from Inventory

1 Input the House ID, and/or Street#, and/or Street Name for the housing unit selected for removal, then click on the **Query** button to execute the query.

The selected Housing Unit will be displayed.

2 From the **Maintain Housing Quarters Activity** application screen, input the type of removal in the unit activity field with a start date for the loss and enter any comments, then click on the **Save** button to save changes.

Note: Make sure that all unit activities for the housing unit are accurate **BEFORE** removal. These activities will be included in the fiscal year end report and cannot be changed after the unit has been removed.

3 Click on the **Housing Unit** button to edit a housing unit grade table.

The Housing Unit Grades Application Screen will appear (Fig. 9.4). Click on the House ID you wish to delete.

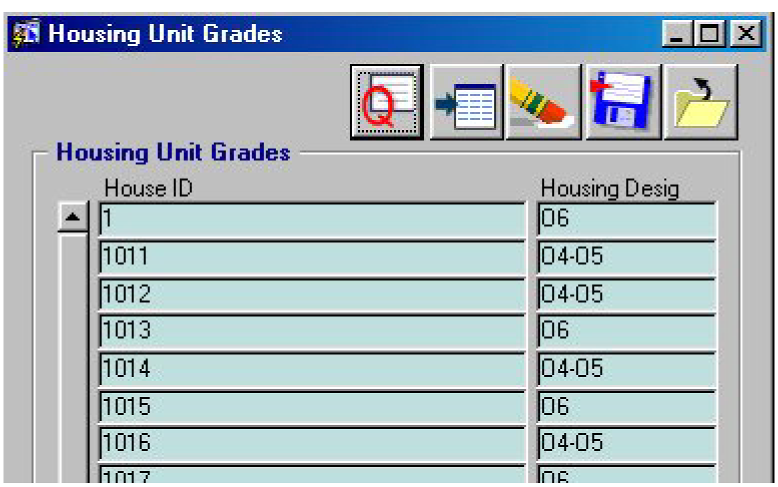


Fig. 9.4 - Housing Unit Grades Application Screen

4 Click on the **Delete a Record** button to delete the housing unit.

A prompt will appear to verify removing this housing unit from inventory.

5 Click **OK** if the correct unit was selected for removal from inventory (counted as an inventory loss in the fiscal year-end utilization reports).

All of the information for this housing unit is removed from the database, thereby removing it from inventory. This unit activity for the removed housing unit is included in the utilization report DD1410 and is saved until the fiscal year end reports have been run.

How to Add a Meter through System Admin

1 From the **Main Menu**, click on the **System Admin** Module.

The System Administration Application Screen will appear (Fig. 9.1).

2 Click on the **Quarters Maintenance** button.

The Maintain Housing Quarters Activity Application Screen appears (Fig. 9.3).

3 Enter the House ID or street number, street name to retrieve the housing unit you wish to attach a meter to.

4 Click on the **Query** button.

5 Click on the **Add a Meter** button.

The Housing Unit Meters Application Screen appears (Fig. 9.5).

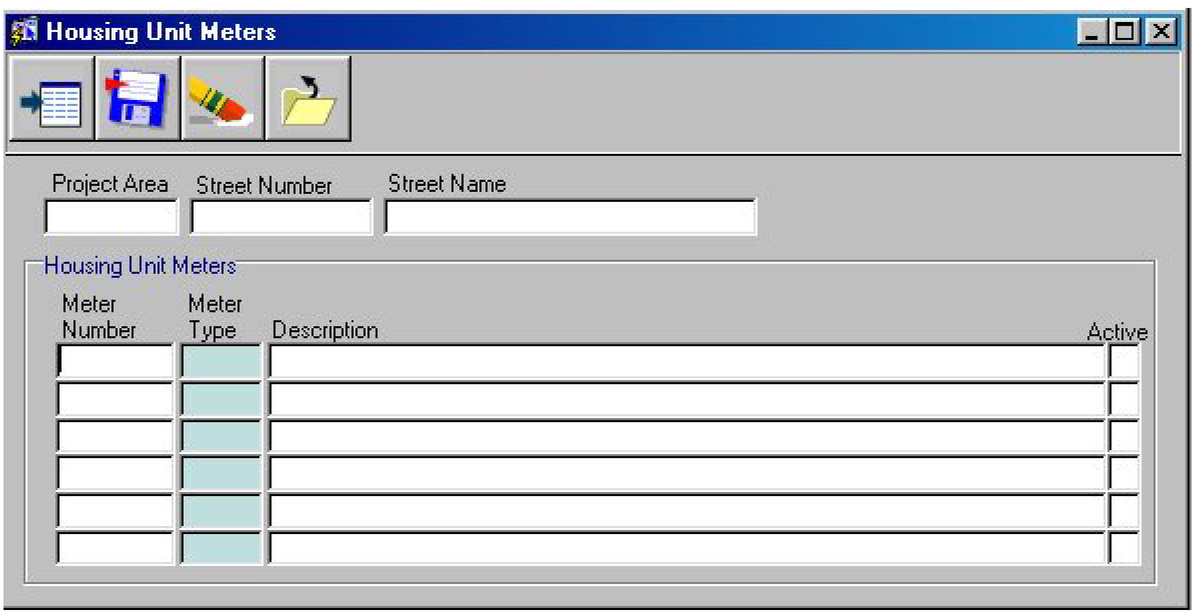


Fig. 9.5 - Housing Unit Meters Application Screen

6 The Project Area, Street Number and Street Name will already be filled in. Type in the Meter Number and press **Tab**.

7 Type in **Meter Type** OR **double-click** on Meter Type field and make a selection from the pop up menu and click **OK**.

8 Type in a description if applicable.

9 Click on the **Save** button to save.

10 Click on the **Close** button to exit the application.

Maintaining Installation Information

MCHAS stores information about the military installation where it is installed. This information is to be used in utilization reports, to establish defaults in certain fields in the reports and application screens, to identify the installation, and to tell in which directory ***MCHAS*** is installed.

How to Update Installation Information

1 From the **System Administration** Application Screen, click on the **Installation Info** button.

The Installation Information Application Screen appears (Fig. 9.6).

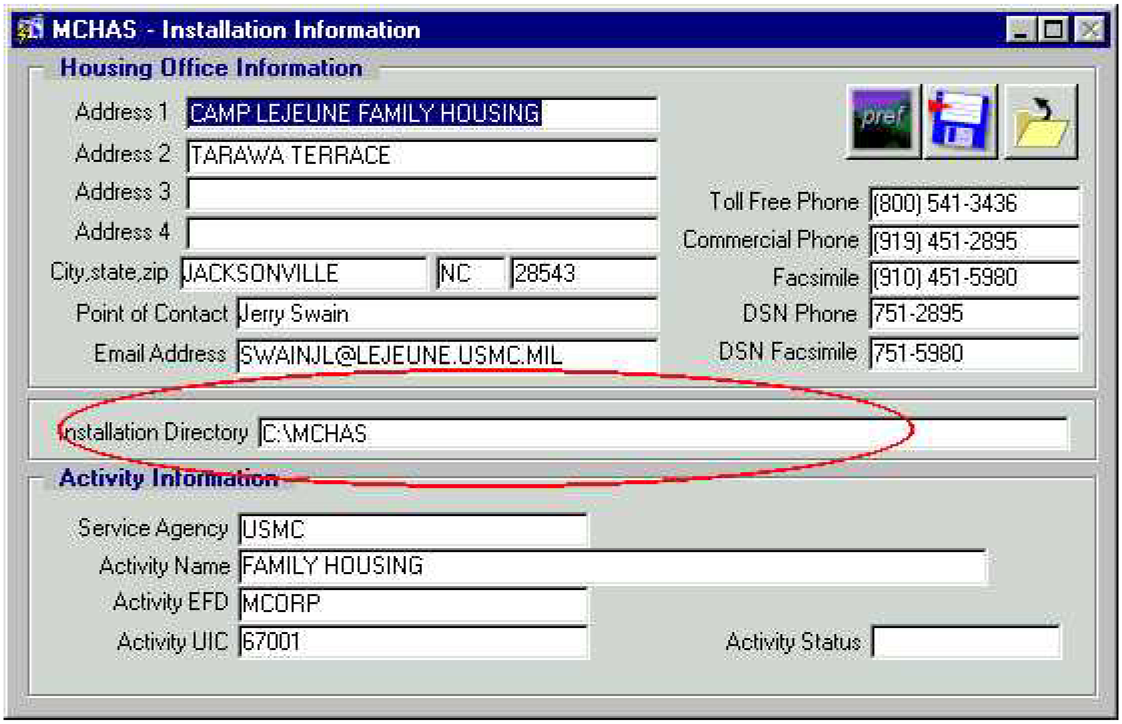


Fig. 9.6 – *MCHAS* Installation Information Application Screen

2 Click in the fields where changes or additions need to take place.

Note: The Installation Directory must be kept current as this information is used throughout the *MCHAS* system. DO NOT change unless your Network or System Administrator instructs you to do so because of a change in your MCHAS installation.

3 Click on the **Save** button to save changes.

4 Click on the **Close** button to close the application screen.

Setting Preferences

You must have Administrative Privileges to set Preferences.

1. From the Main Screen click on System Admin.
2. Click on the **Installation Info** button.
3. Click on the **Preferences** button.
4. The Preferences screen will appear (Fig. 9.7).
5. Fill in the default values for your installation. Set your Inspection Scheduling defaults and click the **Apply** button. (You will be asked to confirm changing the Timeline Interval, answer Yes).

6. If you want to confirm removing Sponsors from the Waitlist upon assignment to quarters, select the checkbox.
7. Click the **Close** button.

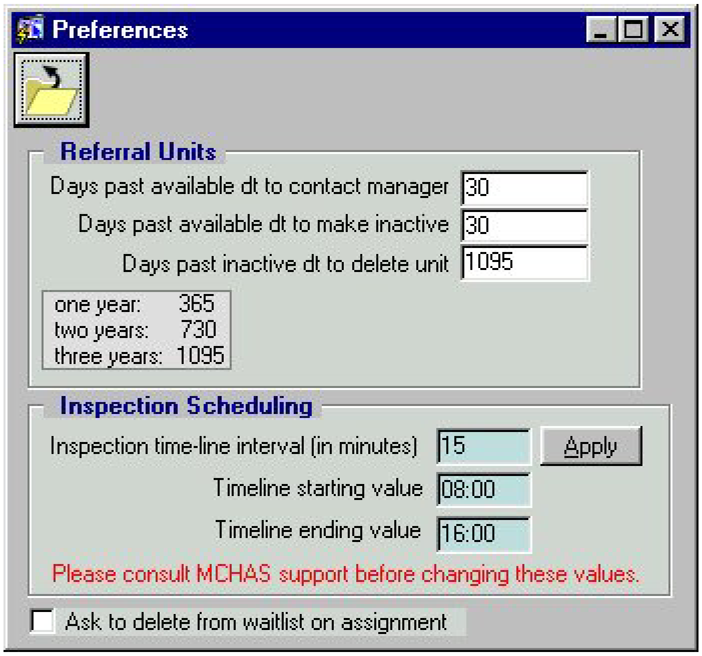


Fig. 9.7 - Application Preferences

Setting Referral Units Dates sets the defaults for Contact Date, Inactive Date and Delete Date for Referral Units. When you enter the Available Date for a Referral and press the button for date calculations, those calculations are based upon the numbers here.

Inspection scheduling numbers affect the Inspection Timeline appearance. If your inspection day is from 07:00 to 14:00 and those numbers are entered here, the timeline will start at 7am and end at 2pm. Intervals (15, 30 & 60) are the number of minutes for each increment within the hours of the inspection day as shown on the Timeline.

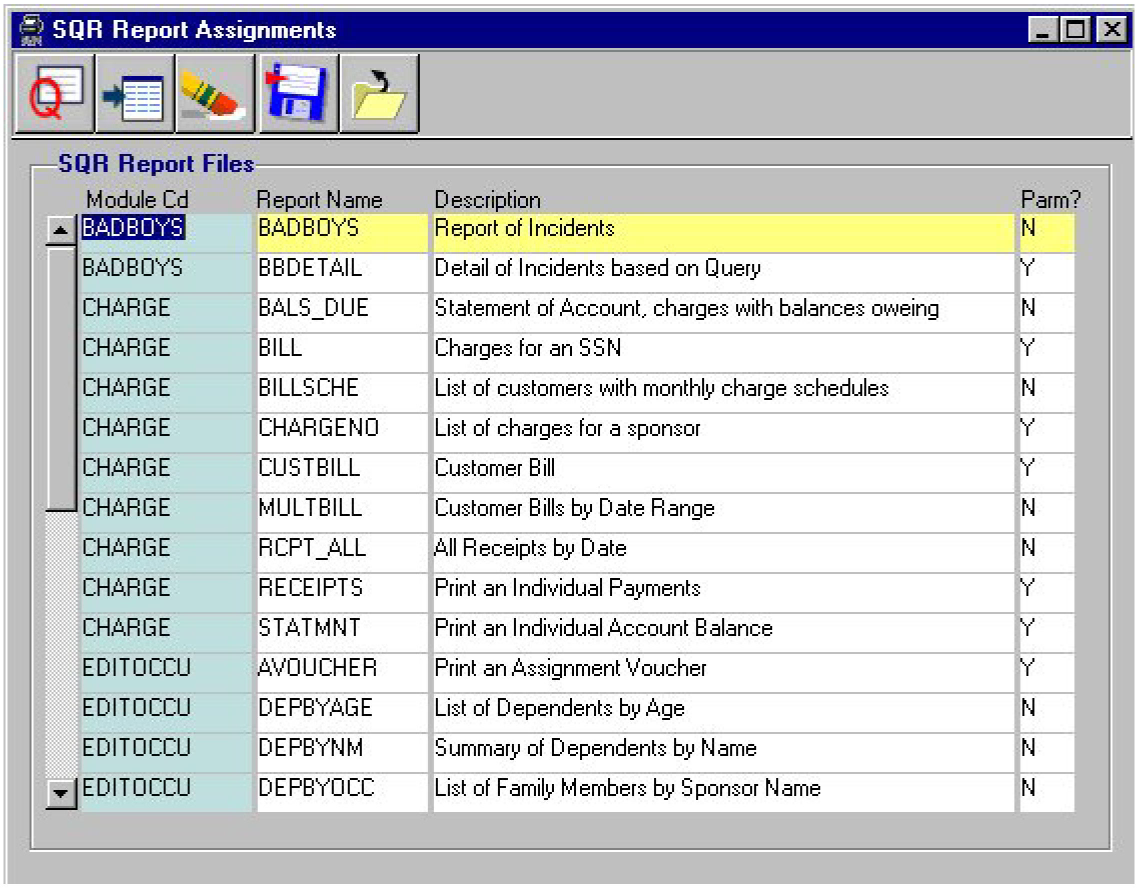
Adding SQR Reports

1. From the **System Administration Application Screen**, click on **Add SQR Reports**.
2. The SQR Report Assignments Application Screen appears (Fig. 9.8)
3. Input the desired module or double-click in the Module Name field and make a selection from the value list.
4. Click on the **Query** button to execute the query.
5. Click on the **Insert a Record** button to insert a new row.
6. Input the report name.
7. Tab to the Description field and input the Description of the new report.
8. Tab to the Parm? Field, input a Y for Yes or N for No.
9. Click on the **Save** button to save changes.
10. Click on the **Close** button to close the application screen.

Note: Once the insert button is activated, information must be entered in order to exit the screen. The record can then be removed by clicking the **Delete a Record**.

Table 9.2 - SQR Reports Field Definitions

Input Field	Description
Module Cd	8 character name for the Module the report is to be attached to
Report Name	Report names utilize the 8.3 naming convention. When adding your own custom reports, make sure the report name does not exceed the 8 character limit
Description	Brief but meaningful description of the report
Parm?	Parameter - Does the report require a parameter from MCHAS to run.



Module Cd	Report Name	Description	Parm?
BADBOYS	BADBOYS	Report of Incidents	N
BADBOYS	BBDETAIL	Detail of Incidents based on Query	Y
CHARGE	BALS_DUE	Statement of Account, charges with balances oweing	N
CHARGE	BILL	Charges for an SSN	Y
CHARGE	BILLSCHE	List of customers with monthly charge schedules	N
CHARGE	CHARGENO	List of charges for a sponsor	Y
CHARGE	CUSTBILL	Customer Bill	Y
CHARGE	MULTBILL	Customer Bills by Date Range	N
CHARGE	RCPT_ALL	All Receipts by Date	N
CHARGE	RECEIPTS	Print an Individual Payments	Y
CHARGE	STATMNT	Print an Individual Account Balance	Y
EDITOCCU	AVOUCHER	Print an Assignment Voucher	Y
EDITOCCU	DEPBYAGE	List of Dependents by Age	N
EDITOCCU	DEPBYNM	Summary of Dependents by Name	N
EDITOCCU	DEPBYOCC	List of Family Members by Sponsor Name	N

Fig. 9.8 – *MCHAS* SQR Assignments Application Screen

Set User Passwords

8. If you need to reset the password for a User, click the Set User Passwords button.
9. Enter the User Login ID.
10. Enter the new Password, confirm the password by entering it again
11. Click the **Save** button.

Data Cleanup

1. From the **System Administration Application Screen**, click on the **Data Cleanup** button.
2. The Data Cleanup Screen appears (Fig. 9.9).

Fig. 9.9 – Data Cleanup Application Screen

3. Click on the button for the Cleanup procedure to start the Record Integrity.

   Note: This process can take a long time. Once begun, it should not be interrupted.

4. Click on the **Close** button to close the application screen.

Incidents

Incidents are tracked through the Administration Module for security purposes.

Viewing Incidents

1. Click on the **Incident Reporting** button.
2. In the Residents Incident Report screen (Fig. 9.10), input the occupant's social security number and click on the **Query** button to execute the query

   OR

3. **Double-click** in the Occupant SSN field and select from the pop up menu

   OR

4. Click the **Overview** button and select from the Overview/Troubled Residents Application Screen (Fig. 9.11) by double-clicking on the Occupant SSN.
5. Records for that occupant are now viewable and editable.

How to Enter a New Record

1. Press **Ctrl + q** to exit query mode.
2. Input the occupant's social security number in the Occupant SSN field. Press the tab key and information for the sponsor and his housing assignment will automatically be filled in.
3. **Tab** through each field to continue inputting data.
4. Click on the **Save** button to save changes.
5. Click on the **Close** button to exit.

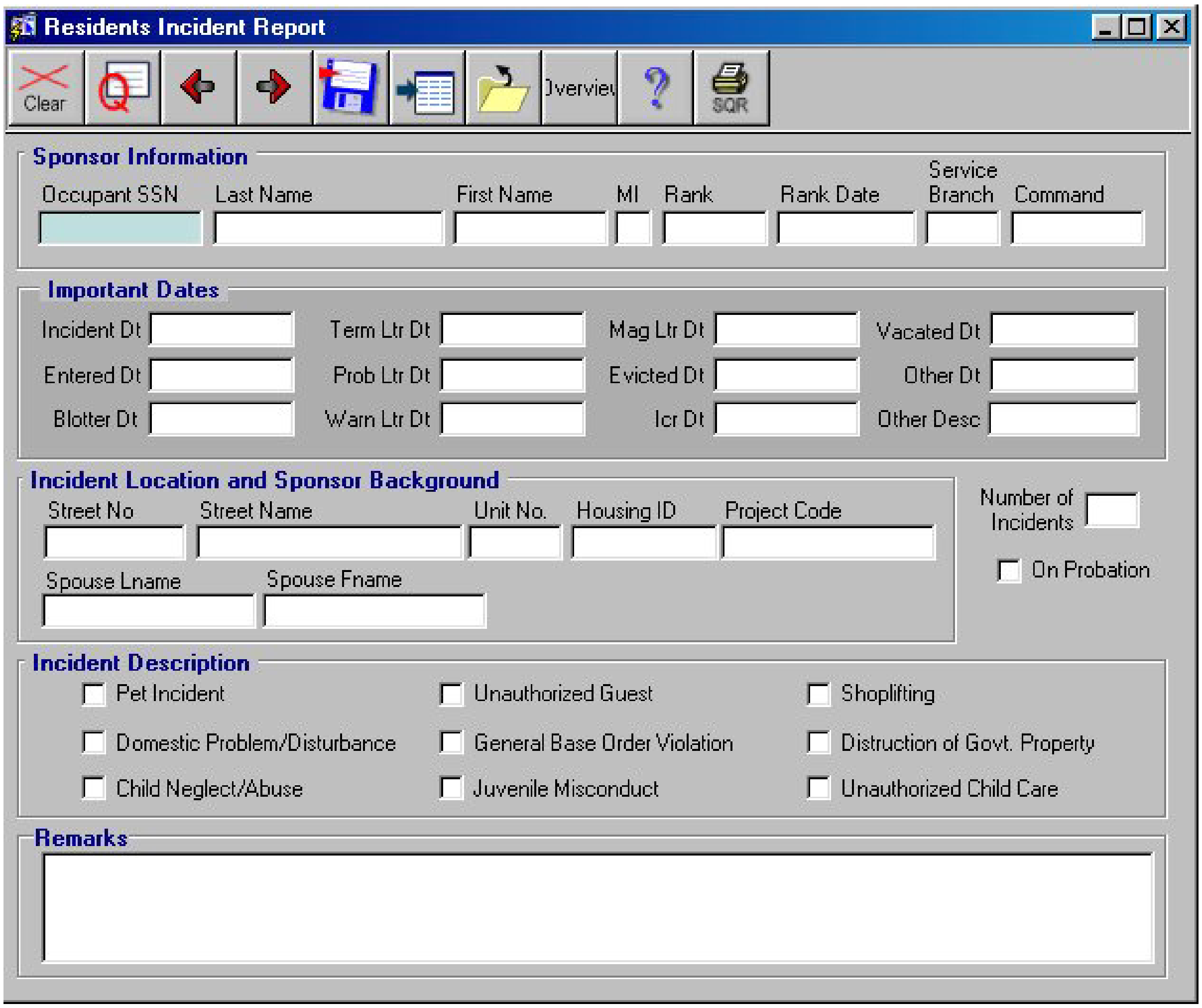


Fig. 9.10 – Residents Incident Report Application Screen

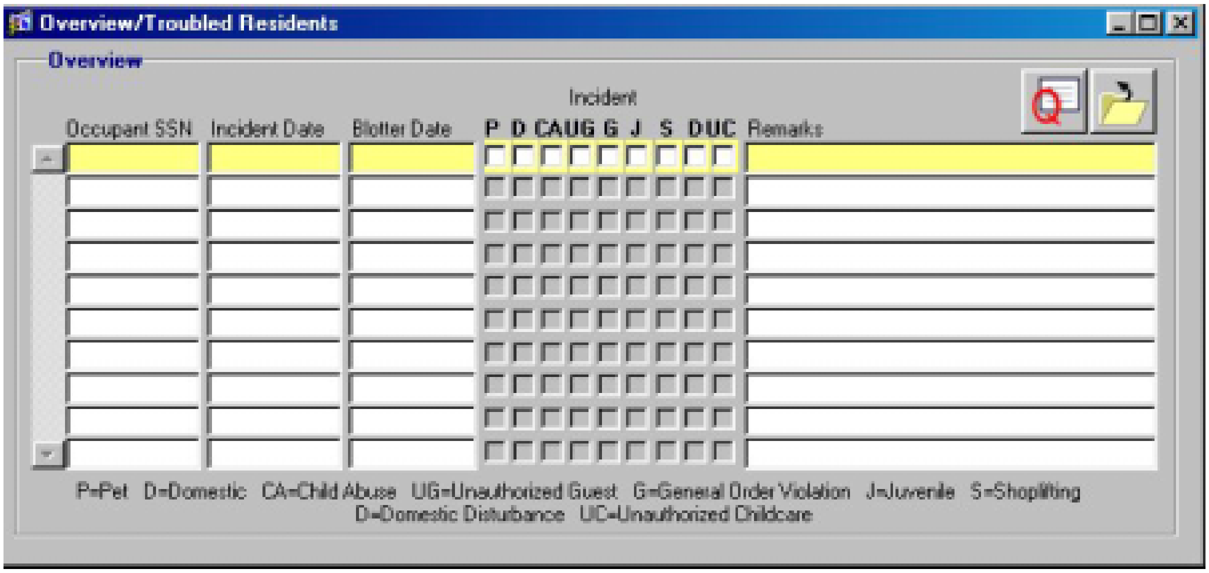


Fig. 9.11 – Overview/Troubled Residents Application Screen

Updating Values to a Value List

1. From the **System Administration Application Screen**, click on the **Value List** button.

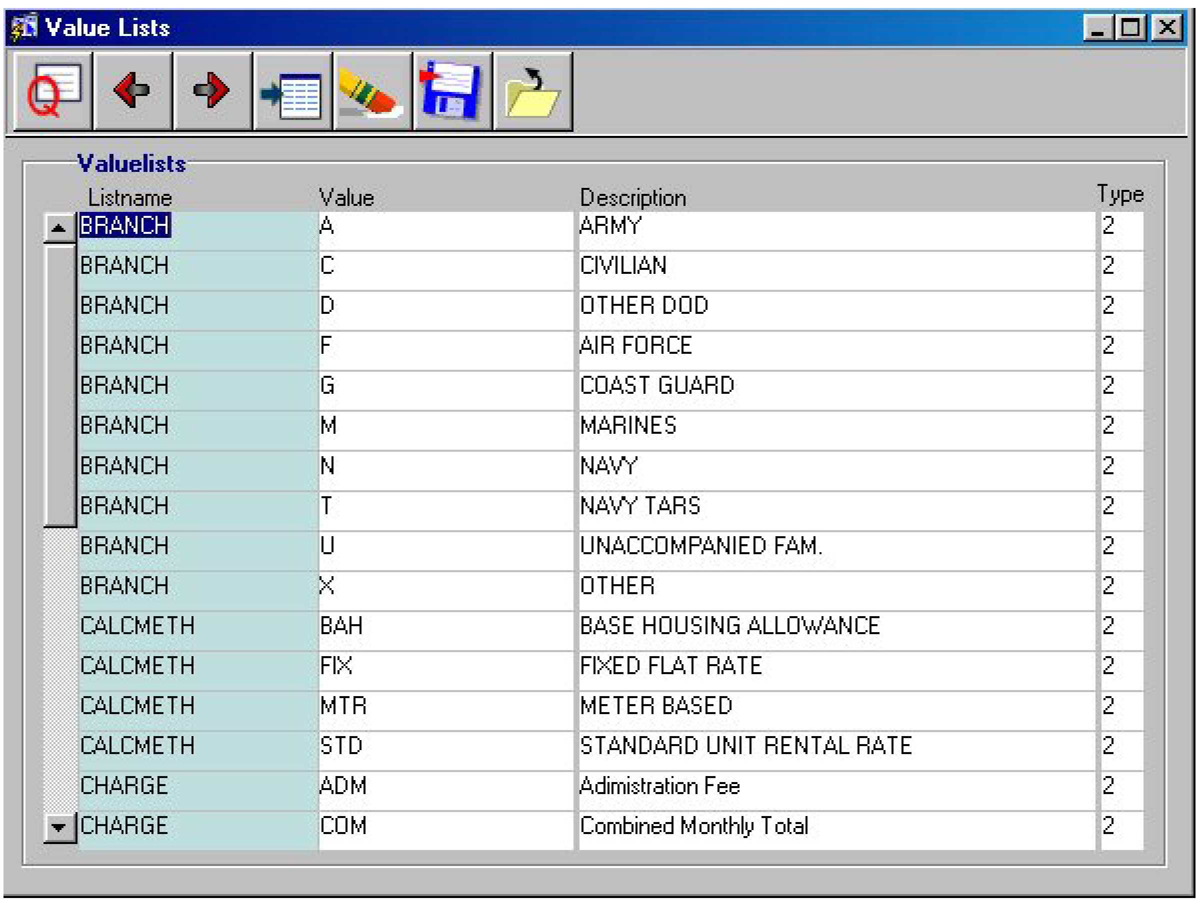


Fig. 9.12 – Value Lists

2. The value list application screen opens (Fig. 9.12) showing all lists.
3. To view only one list, press the **Query** button and input the desired value list or **double-click** in the Listname field and make a selection from the value list.
4. Click on the **Query** button *again* to execute the query.
5. Click in the field you would like to update. Make your changes.
6. Click on the **Save** button to save the changes.
7. To add a new record to the value list, place the cursor in a field.
8. Click on the **Insert a Record** button.

   MCHAS has inserted a blank row to accept the new row.
9. Input the desired data, repeating the Listname exactly.
10. Click on the **Save** button to save changes.
11. Click on the **Close** button to close the application screen.

    Note: In the Type field, input a 2 (for values with descriptions) and 1 (for values that do not have a description).

Table 9.3 - Value List Definitions

Input Field	Description
Listname	The Name given to the Valuelist
Value	The Value that MCHAS will use
Description	A Description for the Value
Type	1 = No Description 2 = Description

SSN Maintenance

How to Correct a Sponsor's SSN

1. From the **Main Menu**, click on **System Admin**.
2. From the Selection List, choose **SSN MAINTENANCE** and click **OK**.
3. Click on the **Correct an SSN** button (Fig. 9.13).

   The Change SSN screen will appear (Fig. 9.14).
4. Input the SSN you want corrected in the Current SSN field.
5. Input the correct SSN in the New SSN field.
6. Click on the **Save** button to save changes.
7. Click on the **Close** button.

Because of all the relationships to the SSN that need to be changed when an error is made, always correct with this method, DO NOT attempt to change from the Military Families screen.

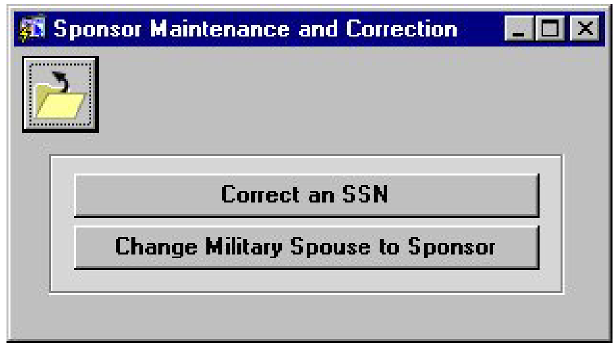


Fig. 9.13 - Sponsor Maintenance and Correction

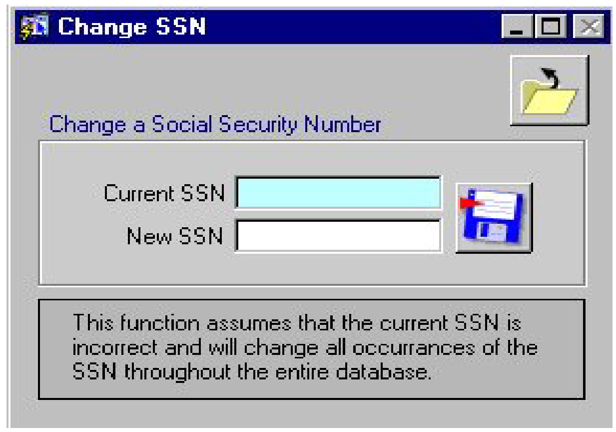


Fig. 9.14 - Changing an SSN

How to Switch Sponsorship to a Military Spouse

1. From the **Main Menu**, click on **System Admin**.
2. From the Selection List, choose **SSN MAINTENANCE** and click **OK**.
3. Click on the **Change Military Spouse to Sponsor** button.
4. When the Sponsorize a Military Spouse screen appears (Fig. 9.15), enter the social security number for the Military Spouse that will be taking sponsorship of quarters or **double-click** on the Military Spouse SSN field to select from a list of SSNs.
5. Click on the **Save** button to save the change.
6. Click on the **Close** button to close the application screen.

Note: It is important that Military Spouse information be kept current in the event that a switch between dual military is necessary. The former sponsor will be added to the Family Member screen.

Fig. 9.15 - Switch Sponsorship of Housing to Military Spouse

How to View the CRLOG

1. From the **Main Menu**, click on **System Admin.**
2. From the Selection List, choose **CRLOG** and click **OK**.
3. The CR Log screen opens showing inserts and deletes from the Charge and Receipt screens.

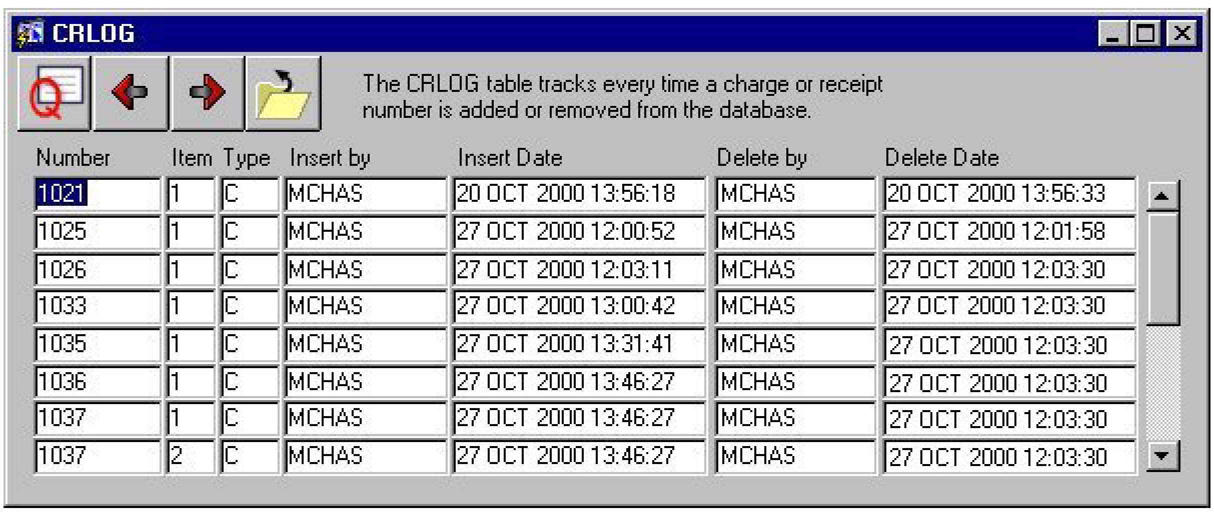


Fig. 9.16 - Charge/Receipt Log

You may Query the CR Log by Charge/Receipt Number, Item Number, Type (C=Charge, R=Receipt), Insert by or Delete by.

4. To Query the CRLOG, press the **Query** button, enter the information you want to query on and press the **Query** button again. Those records meeting the query criteria are returned.
5. Click on the **Close** button to close the application screen.

Security Setup

MCHAS Security consists of four major areas:

- ✓ Application
- ✓ Groups
- ✓ Users
- ✓ Components

The Application

Contains the installation information for MCHAS (Fig. 9.17).

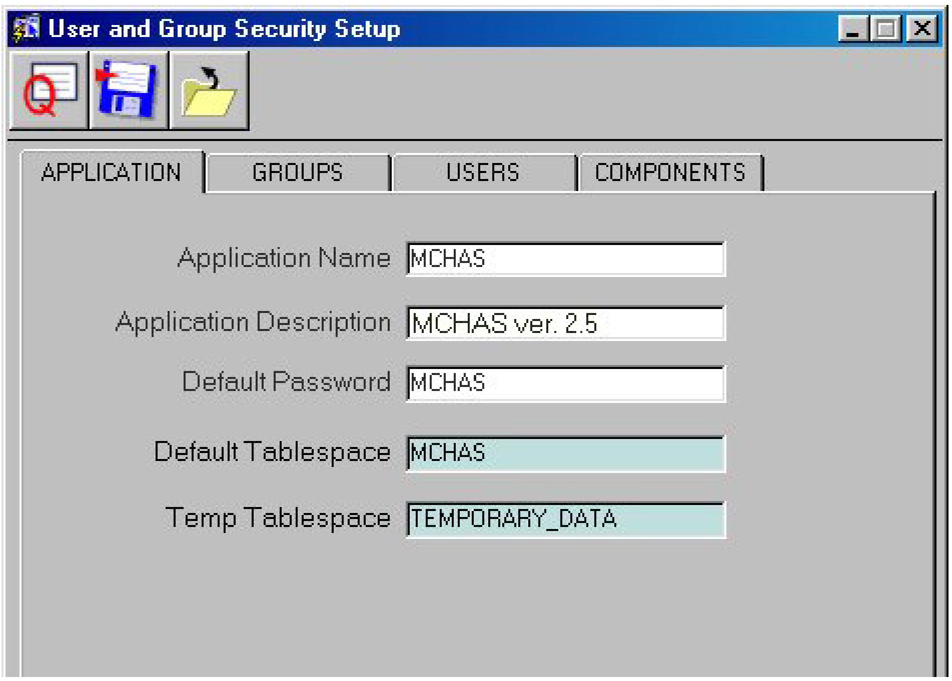


Fig. 9.17 - Security Setup/Application Tab

Groups - Modifying and Creating

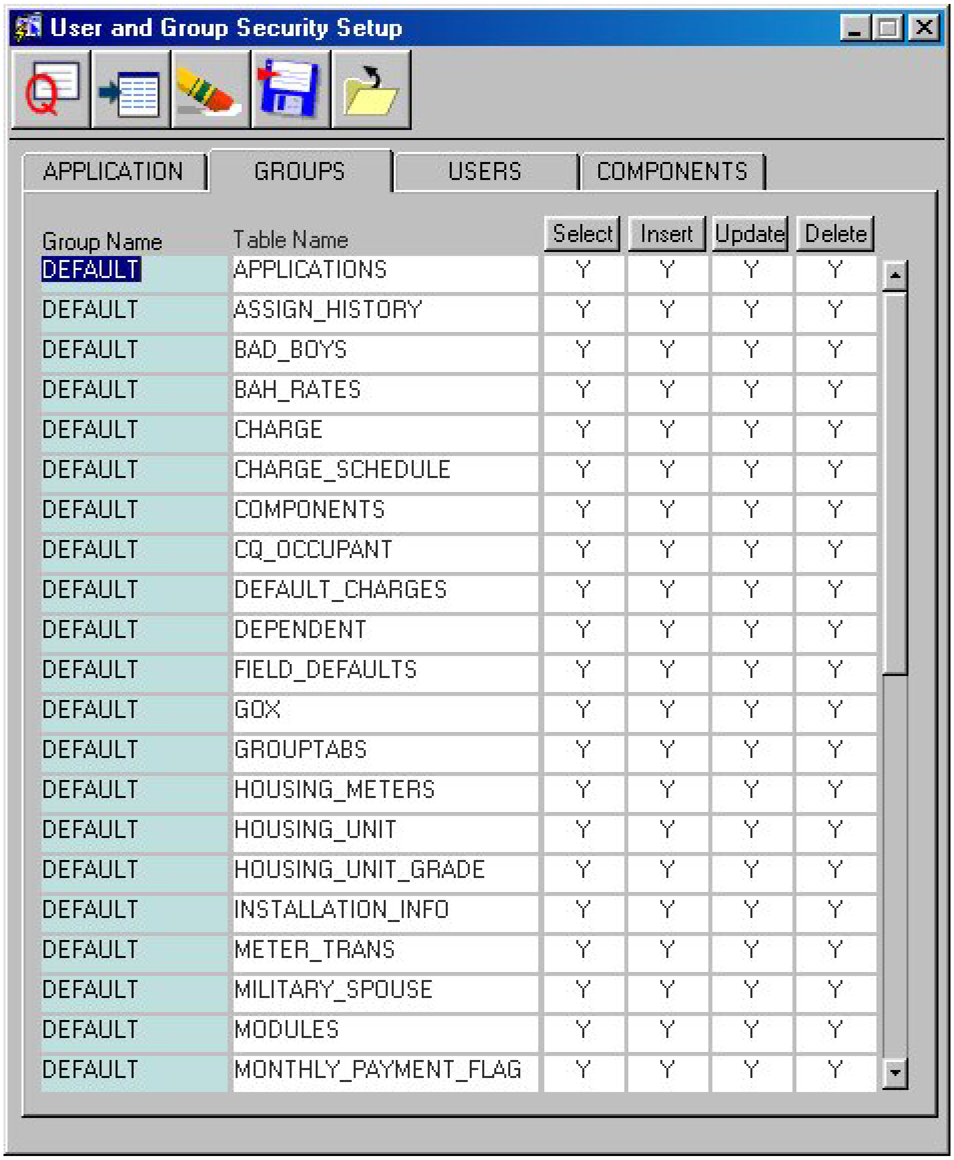
Groups are MCHAS' way of controlling access to the Oracle database tables and the permissions for each. Groups are created first, the table settings are made and then Users are placed into the Groups.

1. From the **User and Group Security Setup** screen, click on the **GROUPS** tab.
2. **Double-click** in the Group Name field to select a specific group and click **OK.**
3. Press the **Query** button to execute the query.

   You will see the Group Name, each of the tables in MCHAS and the permissions that group has for each of the tables (Fig. 9.18).

Fig. 9.18 - Create a New Group

4. To create a new Group, click the **Insert a Record** button.
5. A popup appears asking for a name for the new Group, 8-character maximum (Fig. 9.18). Enter the new Group name and press the **Save** button.
6. **Double-click** in the Group Name field, select the newly created Group name and click **OK**.
7. Press the **Query** button to execute the query.
8. You can see the newly created group and its permissions. Modify if necessary.



Group Name	Table Name	Select	Insert	Update	Delete
DEFAULT	APPLICATIONS	Y	Y	Y	Y
DEFAULT	ASSIGN_HISTORY	Y	Y	Y	Y
DEFAULT	BAD_BOYS	Y	Y	Y	Y
DEFAULT	BAH_RATES	Y	Y	Y	Y
DEFAULT	CHARGE	Y	Y	Y	Y
DEFAULT	CHARGE_SCHEDULE	Y	Y	Y	Y
DEFAULT	COMPONENTS	Y	Y	Y	Y
DEFAULT	CQ_OCCUPANT	Y	Y	Y	Y
DEFAULT	DEFAULT_CHARGES	Y	Y	Y	Y
DEFAULT	DEPENDENT	Y	Y	Y	Y
DEFAULT	FIELD_DEFAULTS	Y	Y	Y	Y
DEFAULT	GOX	Y	Y	Y	Y
DEFAULT	GROUPTABS	Y	Y	Y	Y
DEFAULT	HOUSING_METERS	Y	Y	Y	Y
DEFAULT	HOUSING_UNIT	Y	Y	Y	Y
DEFAULT	HOUSING_UNIT_GRADE	Y	Y	Y	Y
DEFAULT	INSTALLATION_INFO	Y	Y	Y	Y
DEFAULT	METER_TRANS	Y	Y	Y	Y
DEFAULT	MILITARY_SPOUSE	Y	Y	Y	Y
DEFAULT	MODULES	Y	Y	Y	Y
DEFAULT	MONTHLY_PAYMENT_FLAG	Y	Y	Y	Y

Fig. 9.19 - Security Setup/Groups Tab

Consult your DBA or System Administrator before changing any of these settings if you are unsure of what permissions should be granted.

Users - Viewing and Creating

This is the section of Security in which the Users for the application MCHAS are set up.

1. From the **User and Group Security Setup** screen, click on the **USERS** tab.
2. Press the **Query** button to view all Users.

   You will see the User ID, Group Name, and the complete Name of your Users (Fig. 9.21).
3. To create a new User, click the **Insert a Record** button.
4. The Create New User input screen appears (Fig. 9.20).
5. **Double-click** in the Group Name field to access the Groups already created. Select from the list and click **OK**.
6. Click on the **Save** button.

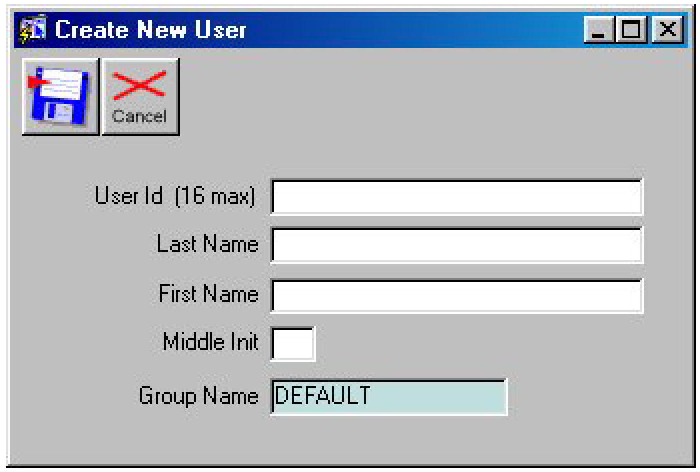


Fig. 9.20 - Create a New User

7. You will receive a message when the User has been created, click **OK** (Fig. 9.22).

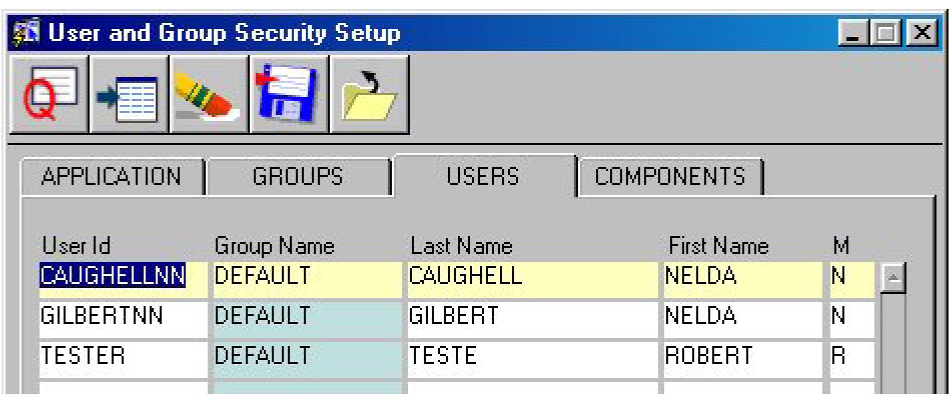


Fig. 9.21 - Security Setup/Users Tab

Fig. 9.22 - User Created

Modifying Users

If you find that an error was made during the creation of a user, **DO NOT** modify the Users information on the **Users** tab. Since users are created at the database, they must be DROPPED and recreated.

12. From the **User and Group Security Setup** screen, click on the **USERS** tab.
13. Press the **Query** button to view all Users or enter the User ID, Last Name or First Name for the User you wish to drop and press the **Query** button.
14. With the User selected (the row will be yellow) click the **Delete Current User** button.
15. You will receive two prompts to confirm the delete (Fig. 9.23 and Fig. 9.24). If you wish to continue, click **Yes** for both prompts.

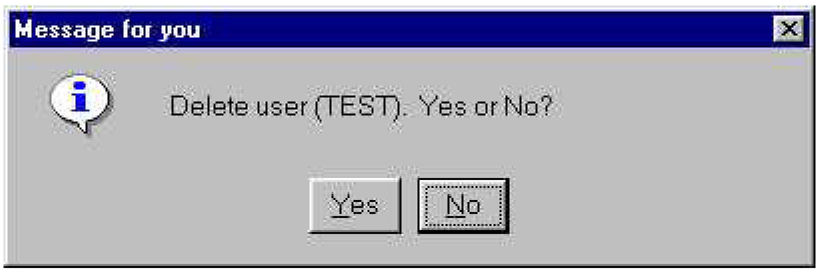


Fig. 9.23 - Delete user prompt 1

Fig. 9.24 - Delete user prompt 2

When the user has been dropped from the database, you will receive the confirmation on the status bar (Fig. 9.25).

Fig. 9.25 - Status bar confirmation for deleted user

16. Repeat the steps for creating a user above (Users - Viewing and Creating) to re-create this User.

About Components

The Components tab of the Security Setup is where User access to the individual screens, buttons and functions within MCHAS are granted to the User. Since access to certain Modules is restricted, like the System Admin. Module and the Financial Module, access is granted to the User at the component level.

1. From the **User and Group Security Setup** screen, click on the **COMPONENTS** tab.

   Pressing the **Query** button will show all Users and the components that have been granted to them (Fig. 9.27).

2. **Double-click** in the User ID field to access the list of Users created, select one from the list and click **OK**.
3. Press the **Query** button to view only *that* user's components.
4. To grant components to a new User or modify for an existing user, click the Click the **Quick Setup** button.
5. **Double-click** in the User ID field (Fig. 9.26) and choose the User from the list and click **OK**.

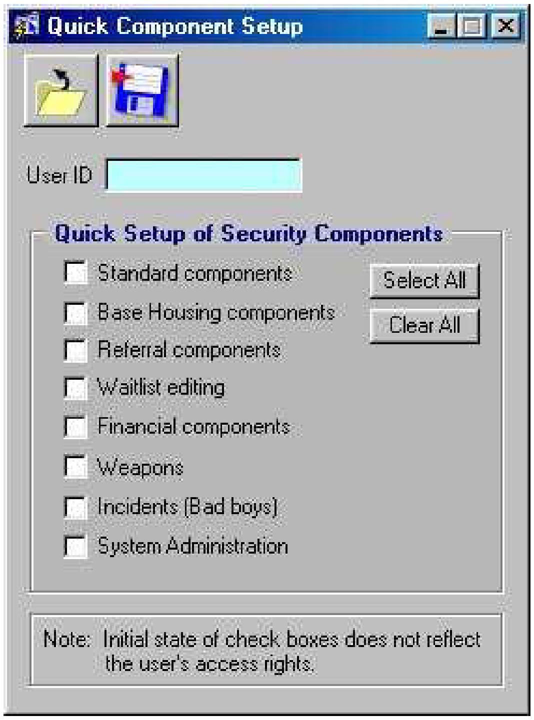


Fig. 9.26 - Quick Component Setup

6. For Starters, select the checkbox for **Standard components**.
7. Select any other components that the User will need to perform their job.
8. Click the **Save** button, then **Close**.

Components have been divided into the Modules of MCHAS. By clicking the Referral components checkbox, the User will receive access to all components in the Referral Module. By using this type of grouping, the System Administrator does not need to remember which components are for the Referral Module the User receives them all.

If you need to modify someone's components, remember when you use the Quick Component Setup it is like starting from scratch each time. If a User previously had only Standard components and you wish to add Base Housing components, when you set up the components, you **must** select Standard components again as well as the new Base Housing components.

Standard Components for the General User are: Standard, Base Housing and Wait List.

Refer to your DBA or System Administrator for a complete list or components and modules to guide you through setting up user components.

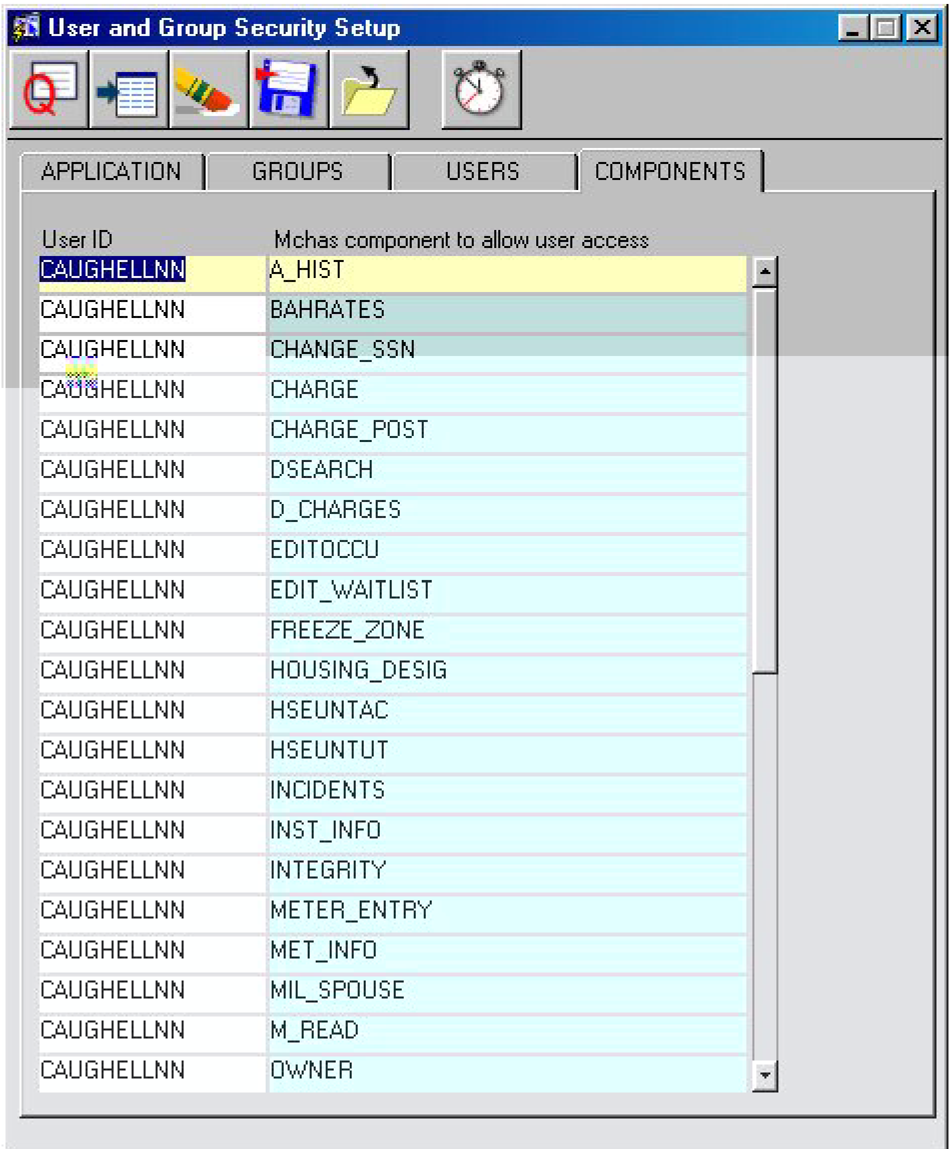


Fig. 9.27 - Security Setup/Components Tab

Section 10 - Utilization Module

This module, while designed to meet the requirements for fiscal yearend reporting to Marine Corps Headquarters, it has been broadened to provide a tool by which housing offices can view occupancy/vacancy trends and occupancy dynamics over a specific period of time. Trends can also be viewed for specific neighborhoods within the base housing community.

Modeled to be compatible with the Inventory & Utilization Assistant program, the Utilization Module screens pull data counts from the Oracle database based upon categories set up in MCHAS 2.5.

The Components of the Utilization Module

MCHAS Utilization Categories

1 Government Owned

  a Adequate

  b Substandard

2 Leased

3 801

4 Domestic

5 Foreign

6 PPV

7 Mobile Home Spaces

Opening MCHAS Utilization Screens

1. From the **Main Menu**, click on **Utilization**.
2. From the selection list, click on the **Utilization** Screen you wish to view.

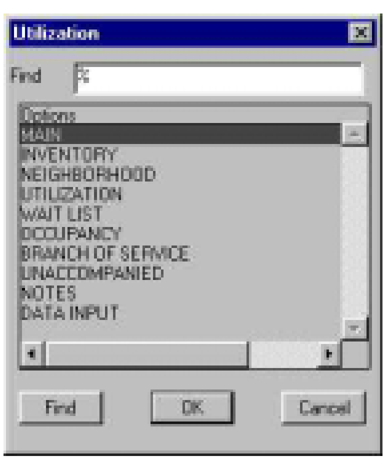


Fig. 10.1 - Left and Right click Selection Lists

Utilization Screens

1. Inventory – Starting inventory, adds, losses, inactive units, temporary diversions and officer/enlisted designations for housing.

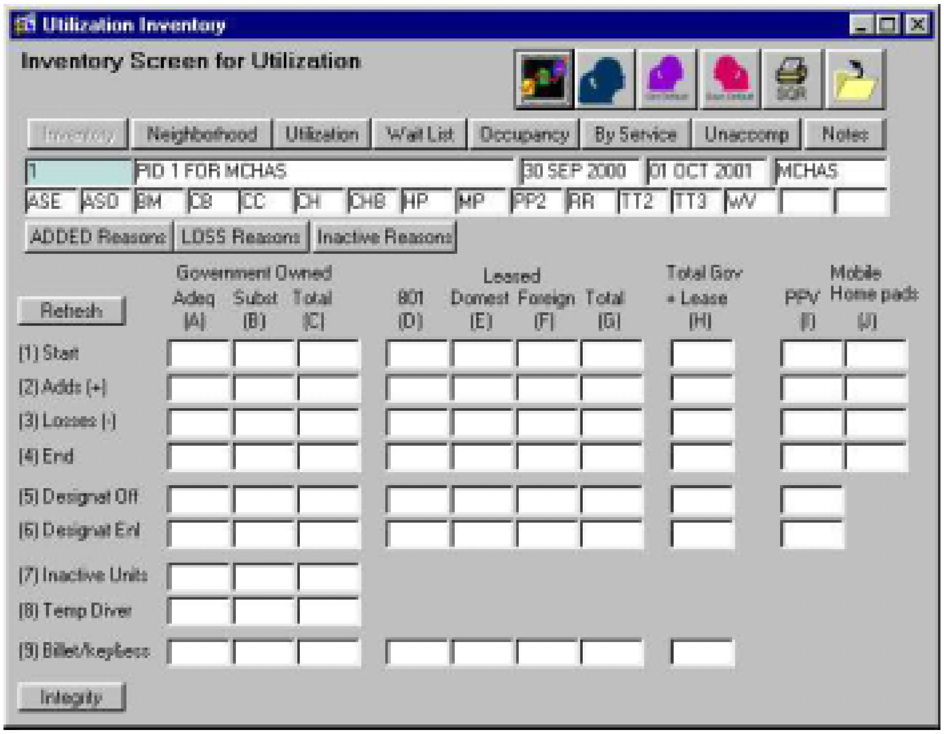


Fig. 10.2 - Utilization Inventory

2. Neighborhoods - # of units in each neighborhood including square footage.

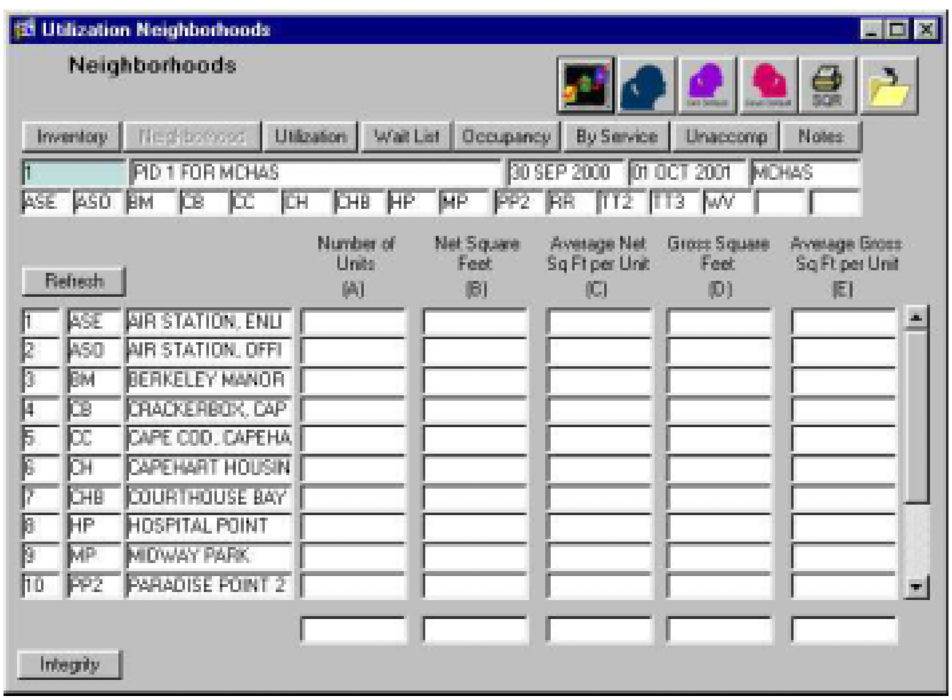


Fig. 10.3 - Utilization Neighborhoods

3. Utilization – Occupied and Vacant day calculations for the categories.

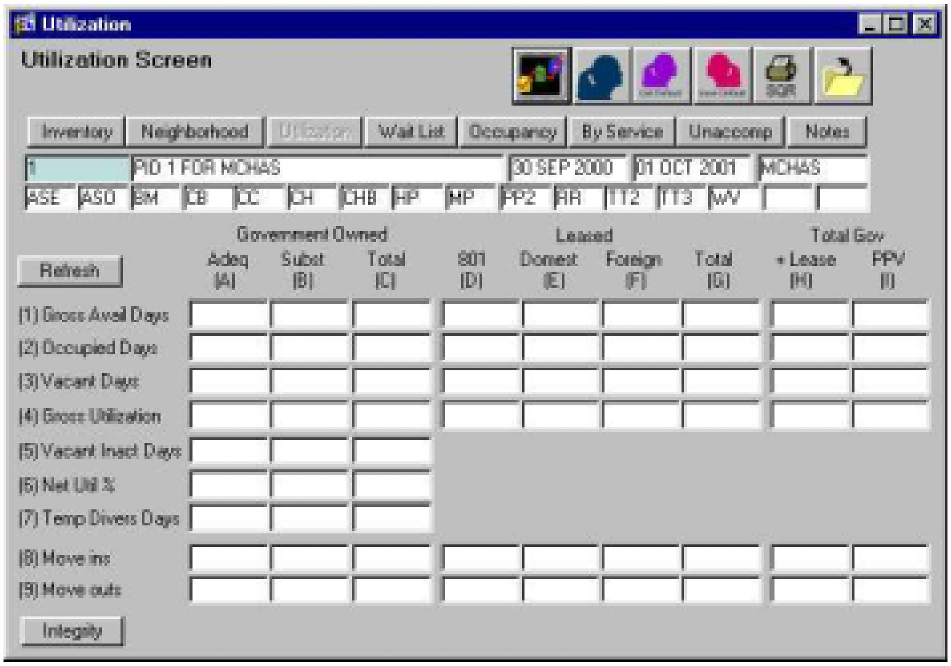


Fig. 10.4 - Utilization

4. Wait Lists – How many families by rank and number of bedrooms are on the Waitlist.

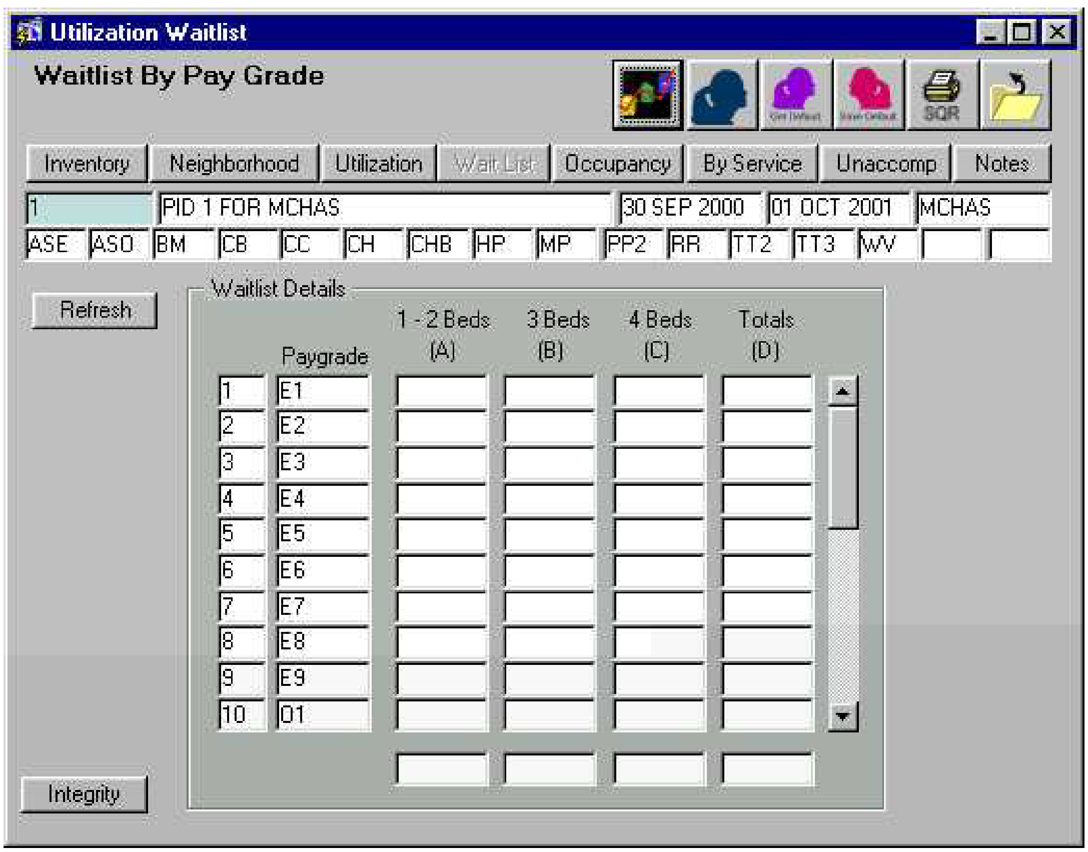


Fig. 10.5 - Utilization Waitlists

5. Occupancy – Number of families living in each bedroom size by rank.

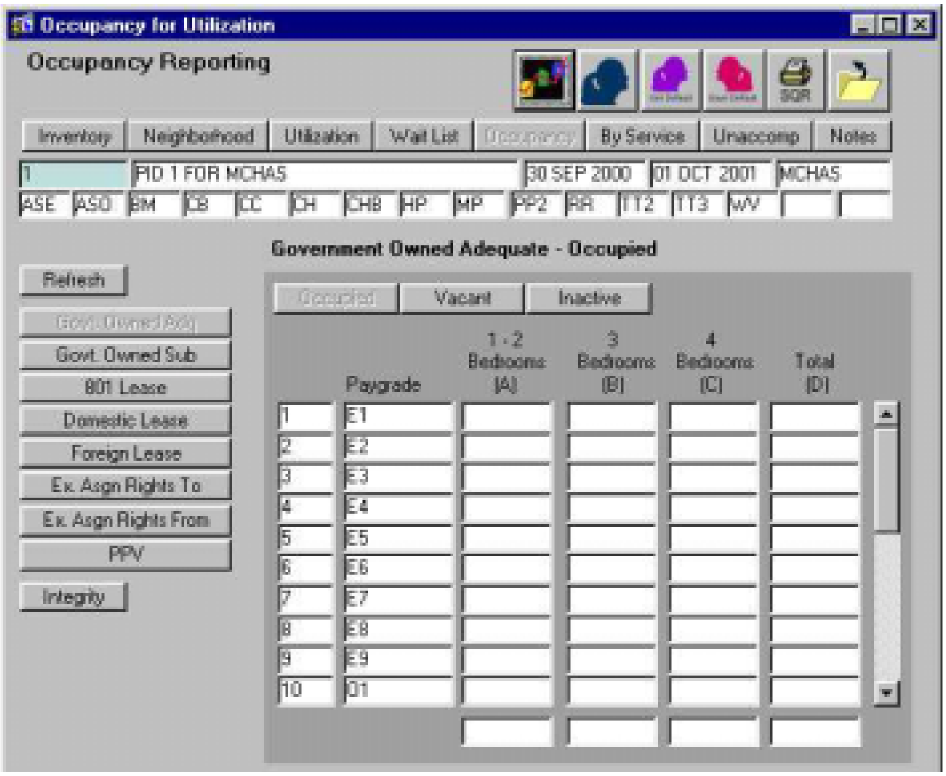


Fig. 10.6 - Utilization Occupancy

6. Occupancy by Branch of Service – Number of Enlisted and Officer families by the Sponsor's Branch of Service.

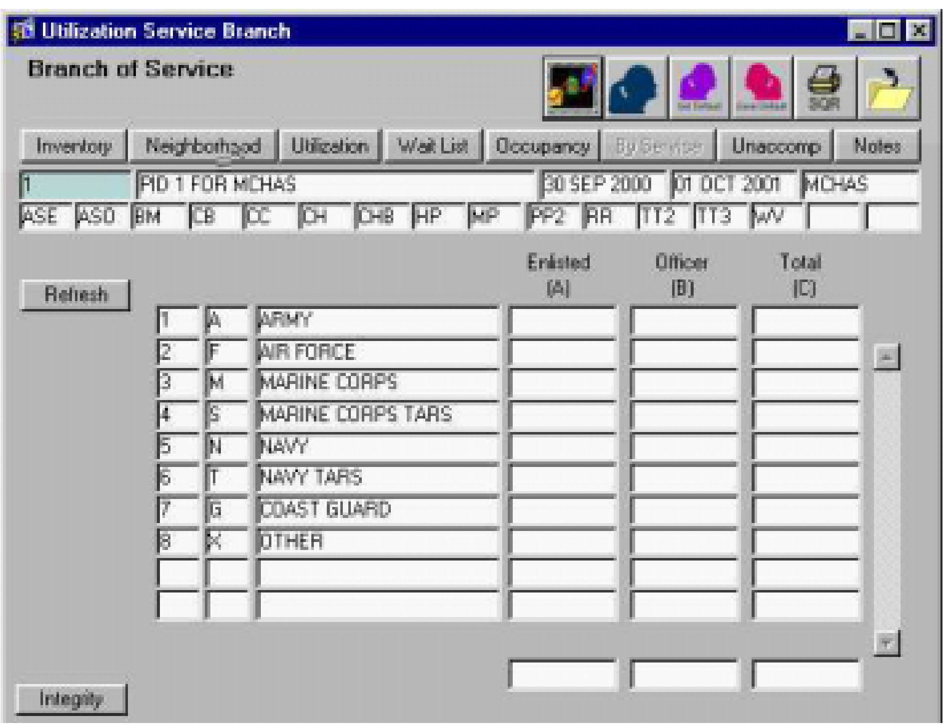


Fig. 10.7 - Utilization Occupancy by Branch of Service

7. Occupancy by Unaccompanied Families and Civilians – Number of Unaccompanied families and Civilian families living in housing by paygrade or equivalent.

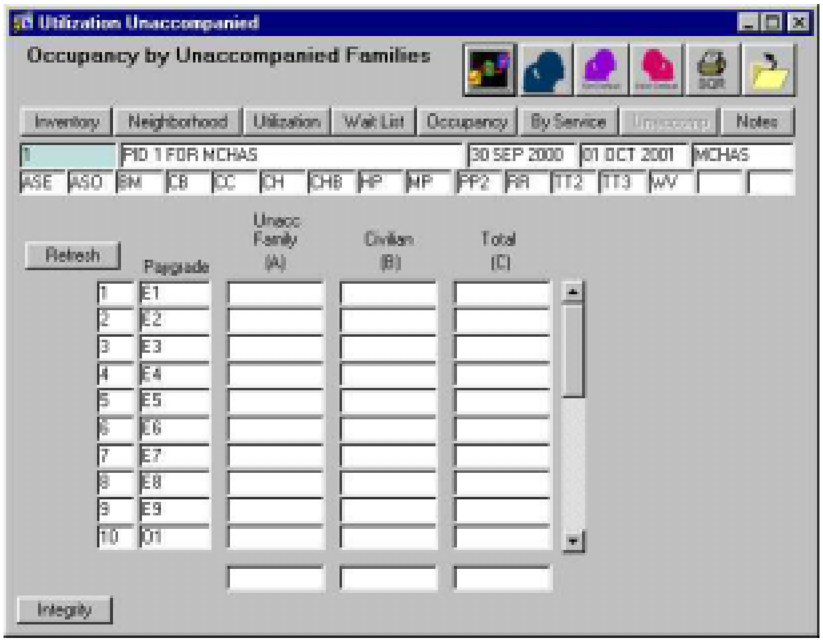


Fig. 10.8 - Occupancy by Unaccompanied Families

8. Notes – Comments by personnel by way of explanation of totals.

Fig. 10.9 - Utilization Notes

9. Main –Access Reports directly and run Integrity report.

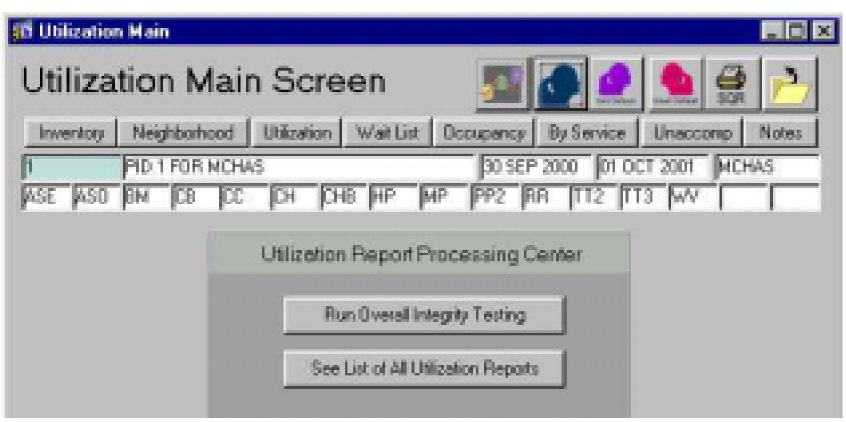


Fig. 10.10 - Main Screen

10. Data Input for Exclusive Assignment to/from the Navy.

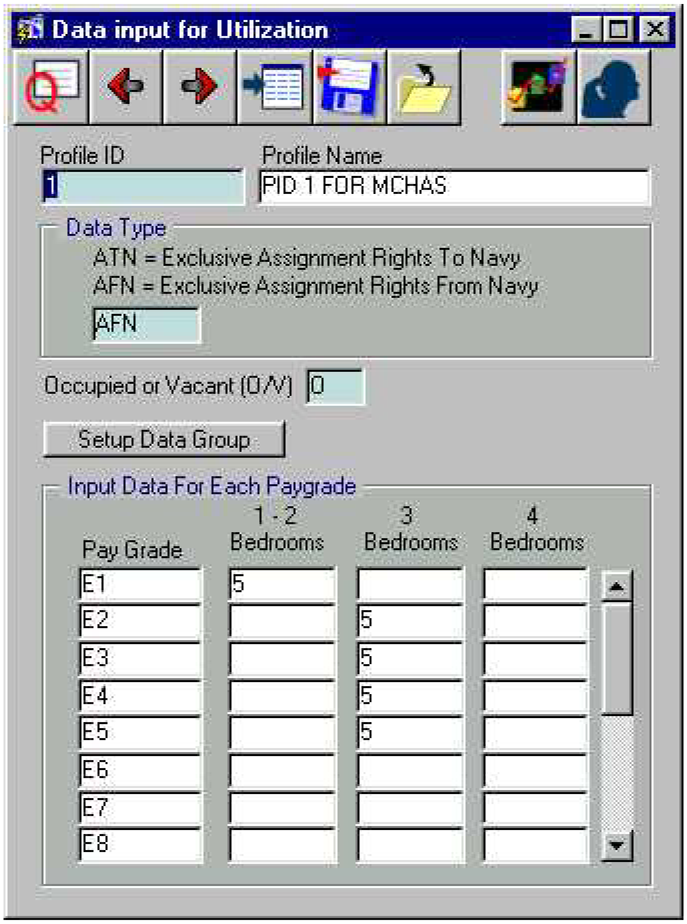


Fig. 10.11 - Data Input

The Profile:

By using the profile approach, each management level of housing can view housing statistics from their own unique prospective. For those activities that have multiple family housing managers for multiple neighborhoods, each manager can track his/her own neighborhood.

Each user can set up a Profile. Each profile is based upon two criteria, neighborhood(s) and a date range within which to view activities. By choosing only those neighborhoods to be viewed and setting up a date range, the information returned on screen and in the reports will meet only those criteria.

When the user sets up a profile, this then becomes their "Default" profile. Each session for that user will begin with their default profile. However, for this module to be a truly useful tool, the default profile can also be changed as the user's needs change or new Profiles can be created. Profiles can be shared within the office, but can only be changed by the person who created the Profile.

How to Create a Profile

1 From the **Main Menu**, click on the **Utilization Module**.

2 Select **MAIN** from the selection list.

The Utilization Main screen will appear (Fig. 10.10).

3 Click on the **Profiles** button (view other profiles).

The Profiles Management screen will appear (Fig. 10.12).

4 Click in the **Current Profile** field and delete the number.

5 Click in the Date Range **From** field and input the start date.

6 Click in the Date Range **To** field and input the end date.

7 Select the **Neighborhoods** you would like to include.

8 Click on the **Save** button to save changes.

You new profile id will appear in the current profile field.

9 Click on the **Close** button to close the application screen.

10 Your profile id will appear on the application screen as the selected profile. To make this your default profile, click on the **Save Default Profile** button.

How to Modify a Profile

1 From the **Main Menu**, click on the **Utilization Module**.

2 Select **MAIN** from the selection list.

The Utilization Main screen will appear (Fig. 10.10).

3 Click on the **Profiles** button (view other profiles).

4 Click in the fields that you would like to change and make the modifications.

5 Click on the **Save** button to save changes.

6 Click on the **Close** button to close the application screen.

Note: Remember, if you want to make changes to an existing Profile and that profile was not created by you, you will need to create a new profile. You cannot change a Profile that was not created by you.

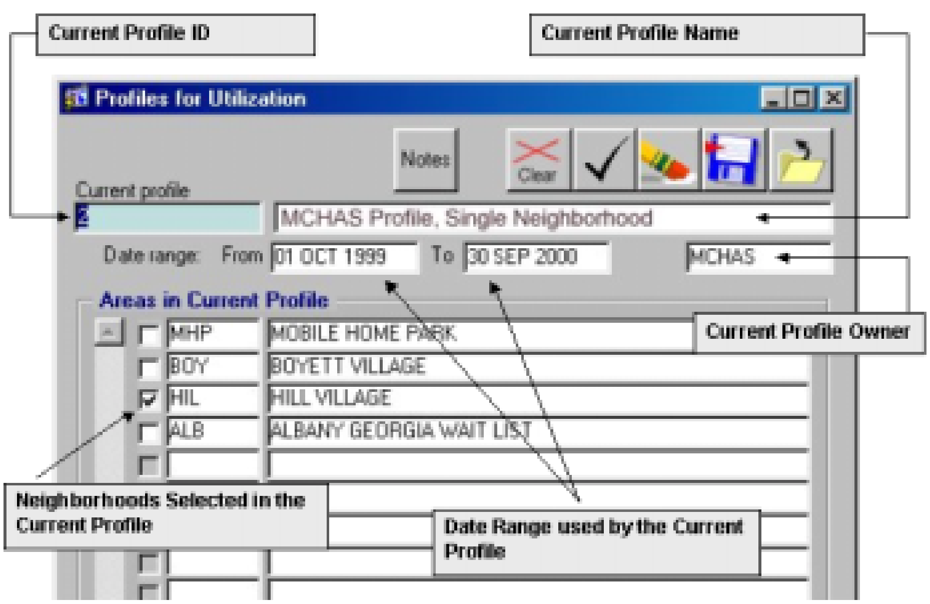


Fig. 10.12 – Profile Management Screen

Viewing Utilization Data

How to View Utilization Data

1 From the **Main Menu** Click on the **Utilization Module.**

2 Make a selection from the selection list.

3 The application screen will open with the user's default profile.

Note: If this is your first time using the Utilization Module, the requested screen will open with another profile (a profile set up by your system administrator as the default). To create a new profile and set it as you default, see How to Create a Profile. Refer to Fig. 10.12 for definitions of fields.

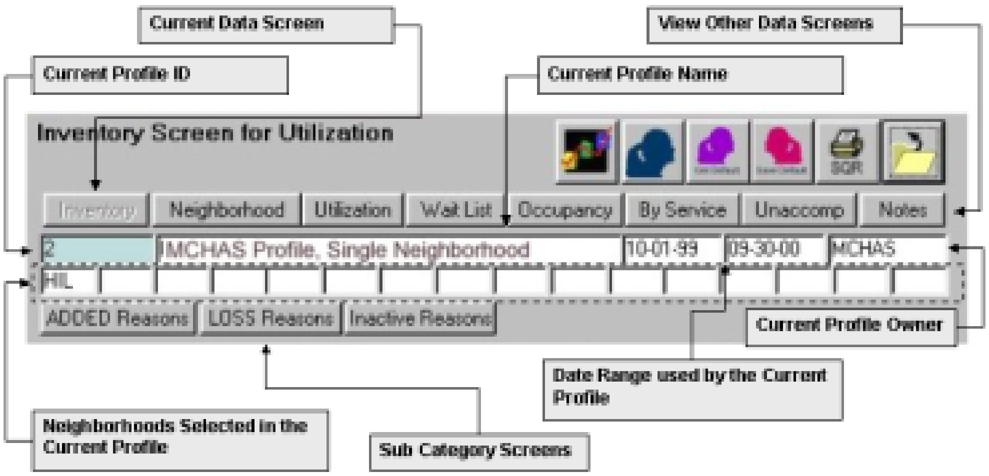


Fig. 10.13 – Utilization Screen with Heading Fields Identified

4 To view other data screens, click on one of the buttons located above the profile information.

5 The application screen will appear (Fig. 10.14), click on the Refresh button to retrieve the counts.

6 When finished viewing the information, click the **Close** button to exit.

7 To print the information, click the **Print SQR Report** button.

Note: While every effort has been made to optimize the time it takes to calculate the counts, in some instances this process may take some time depending on how many neighborhoods are selected and the date range to be viewed.

Fig. 10.14 – Inventory Screen sample

Data Input - Exclusive Assignment Rights to/from Navy

3. From the **Main Menu** Click on the **Utilization** Module.
4. From the selection list, click on **Data Input**.
5. The application screen will open (Fig. 10.11).

NOTE: A default record group will already be set up for data input for four categories.

Exclusive Assignment Rights to Navy - Occupied
Exclusive Assignment Rights to Navy - Vacant
Exclusive Assignment Rights from Navy - Occupied
Exclusive Assignment Rights from Navy - Vacant

6. To add a pay grade to the list, use the Back and Forward arrows to advance through the records, when the category you wish to add to is the current record, click on the **Insert a Record** button.
7. Click inside the row created and enter the new pay grade.
8. Repeat to add more pay grades, when done, click the **Save** button.

Creating a New Record Group for Data Input

9. From the **Data Input** screen, click on the **Setup Data Group** button.
10. **The Data Input for Utilization** screen will appear (Fig. 10.15).

Fig. 10.15 - Setup Data Group for Input

11. Enter the Profile ID for the new Data Group, click the Save button.
12. You can now begin entering the data for the new group. When done, click the **Save** button.

Printing the Report for Data Input

13. From the **Data Input** screen, click on the **Utilization Main Screen** button.
14. Click on the **See List of all Utilization Reports** button
15. Select the Report for the data type you just entered and click the **Print SQR Report** button.

Reports and Integrity Testing

Printing Reports

Each screen has a **Print SQR Report** button. Click on the **Print SQR Report** button to print the single report. The report will be generated based upon the current Profile.

NOTE: You do not need to refresh the screen prior to printing a report.

Printing Reports Independently

From the **Utilization Main Screen**, reports can be printed without opening the individual screens. This will allow the user to print the reports without viewing the calculations first.

1 From the **Main Menu**, click on **Utilization Module**.

2 Select **MAIN** from the selection list.

3 From the Utilization Main Screen (Fig. 10.16), Double-click in the **Profile ID** field to view and/or select another Profile. Check the Profile name, date range and neighborhoods selected.

4 Click on the 

button to run utilization reports.

5 Select the report you would like to run and click the **Print SQR Report** button.

Integrity Testing

1 From the **Utilization Main Screen**, integrity reports can be printed without opening the individual screens. This will allow the user to print the reports without viewing the calculations first.

2 From the **Main Menu**, click on **Utilization Module**.

3 Select **MAIN** from the selection list.

4 From the Utilization Main Screen (Fig. 10.16), Double-click in the **Profile ID** field to view and/or select another Profile. Check the Profile name, date range and neighborhoods selected.

5 Click on the 

button to run integrity testing.

NOTE: Integrity testing performs several compares in the database. These compares return information that may need to be corrected in order for the Occupancy, Waitlist or other reports and screen to return true and accurate information. Therefore, the Overall Integrity Testing report may take some time to run.

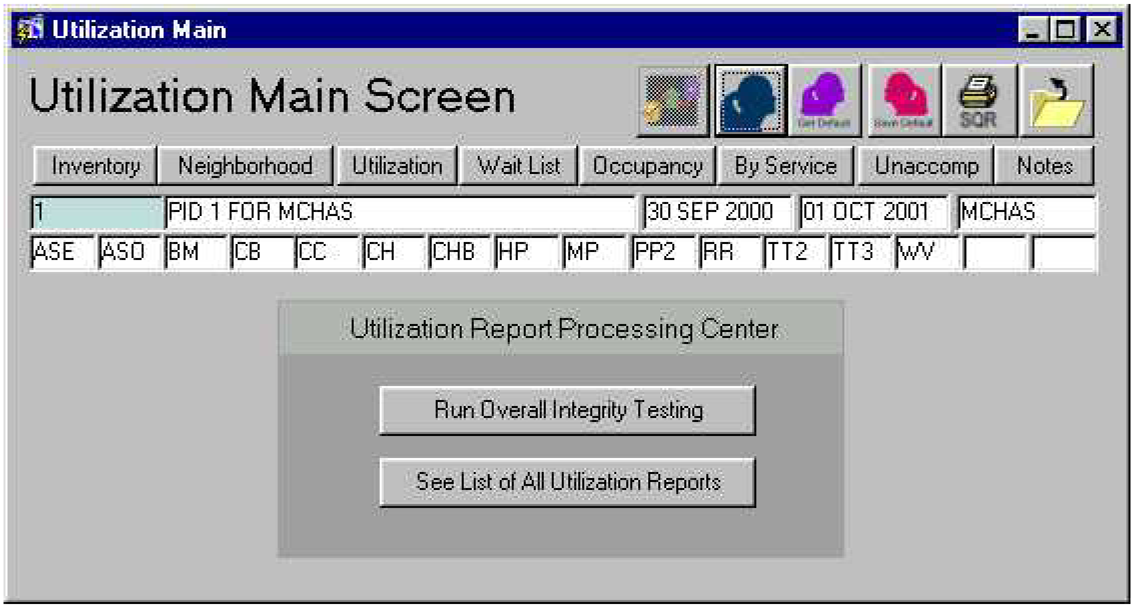


Fig. 10.16 – Utilization Main Screen

How to Run an Integrity Check on an individual screen

Each screen has an Integrity button which will run a report to find any discrepancies in your database that pertain to the screen that is currently open.

1 From the **Main Menu**, click on the **Utilization Module.**

2 Select a Utilization screen from the selection list.

3 Click on the Integrity button.

If discrepancies were found, have your system administrator make the necessary corrections to the database and run your integrity reports again.

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Appendix A - **Index to Figures & Tables**

List of Figures

Index to Figures & Tables

List of Tables

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Appendix B - About the Documentation

The documentation has been optimized for double sided copying with odd and even headers and footers that identify each section of the document. Page numbering has been modified to include the section number along with the page number.

MCHAS Documentation

The Module Documents

The MCHAS 2.5a documentation consists of 16 Microsoft Word Documents, 1 Master document and 15 sub-documents. Each document name identifies the Section # in the documentation.

The document hierarchy is as follows:

1. 25a_master.doc
    1. 0-25 Cover.doc
    2. 0-25 TOC.doc
    3. 1-25 Overview.doc
    4. 2-25 Family Housing Module.doc
    5. 3-25 WaitLists.doc
    6. 4-25 Referrals.doc
    7. 5-25 Referral Complex.doc
    8. 6-25 Financial.doc
    9. 7-25 Housing Quarters.doc
    10. 8-25 Inspections.doc
    11. 9-25 System Admin.doc
    12. 10-25 Utilization.doc
    13. 25 AppendixA.doc
    14. 25 AppendixB.doc
    15. 25 AppendixC.doc

Printing the Document

1. Open Microsoft Word
2. Open the master document, 25a_master.doc, in OUTLINE VIEW.
3. EXPAND the subdocuments.

4. Switch to PRINT LAYOUT VIEW. This is very important, if you print from the Outline View, the document will not paginate correctly and margins are off set for an outline.

5. Print the document.

Each document may be printed independently, however, in order for the Table of Contents, the Index to the Figures and Tables and certain cross document cross-references to print, they must be printed from the Master Document.

Contents of The CD

The CD contains all the documentation files for the MCHAS 2.5a User's Guide.

The folder > **MCHAS 25a Documentation** contains all of the Microsoft Word documents.

The folder > **MCHAS HTML** contains the documentation is HTML format for viewing with a web browser. To use, in Windows Explorer or my Computer, double-click to open the folder. Double-click on the start.html file. Navigate with the tree style frame on the left, view the documents on the right.

The folder > **MCHAS Adobe Acrobat** contains the documentation in Adobe Acrobat format.

Notes:

Appendix C - Change History

Overview of Changes to MCHAS 2.5

New Module – Utilization

The utilization module was added to MCHAS 2.5. This Module tracks housing activities and occupancy during the year for the fiscal year end utilization report due to Marine Corps headquarters each October. See the documentation specific to the Utilization Module for viewing these activities and occupancy data through this new Module.

2.5 Changes to Existing Modules

Main Menu

Reports have been replaced with the Utilization Module. Reports and screens previously accessible from the Main Menu have been moved to the Module Selection List that they pertain to.

Military Families

The screen has changed adding new fields and buttons. Other alterations were made to consolidate space. NEW screens in version 2.5 accessible from the Military Family screen:

1. Unaccompanied Families

When a housing sponsor will be leaving his family in housing, additional information is now being requested. In version 2.0, the screen only indicated that the family was unaccompanied and that the sponsor was either Overseas or in Training. In version 2.5 another screen opens and includes more information on the unaccompanied status of the family.

2. Assignment History

Assignment history has been expanded to provide more information about assignments to housing, including pay grade, number of bedrooms, and a reason for vacating.

3. Off Base Assignment Information

Utilized primarily at overseas facilities.

4. The Vacate Process

This process has changed to allow a Reason for vacating quarters to be added.

Wait Lists

Field added to include the date, for a sponsor that is currently inactive on the wait list, that the sponsor intends to become active again.

Housing Activity

Activity Codes consolidated and a field added for “Reason” for the Activity. Instead of an Activity for M&R, the housing activity is now VACANT and the reason for the vacancy is M&R.

System Administration

A log file has been added to track inserts and deletes from Charges and Receipts.

Changing a sponsor SSN and changing the occupancy to a military spouse have been split out and are accessed through a selection list.

Quarters Maintenance

Additional fields have been added and/or reclassified to aid in Utilization tracking.

Database Changes

Several new tables have been added to the database to accommodate the Utilization Module. Others have been added and/or modified to meet the requirements as defined by the users. These new tables are `PROFILES, PROFILE_DET, UNACCOMP, UTILINFO` and `CRLOG`. The modified tables are `ASSIGN_HISTORY, REMARKS`, and `INSTALLATION_INFO`.

The `HOUSING_UNIT` table has also been modified to include `NET_SQ_FT`, which along with `SQ_FT`, is used in the Utilization Module to calculate Gross and Net square feet by Neighborhood.

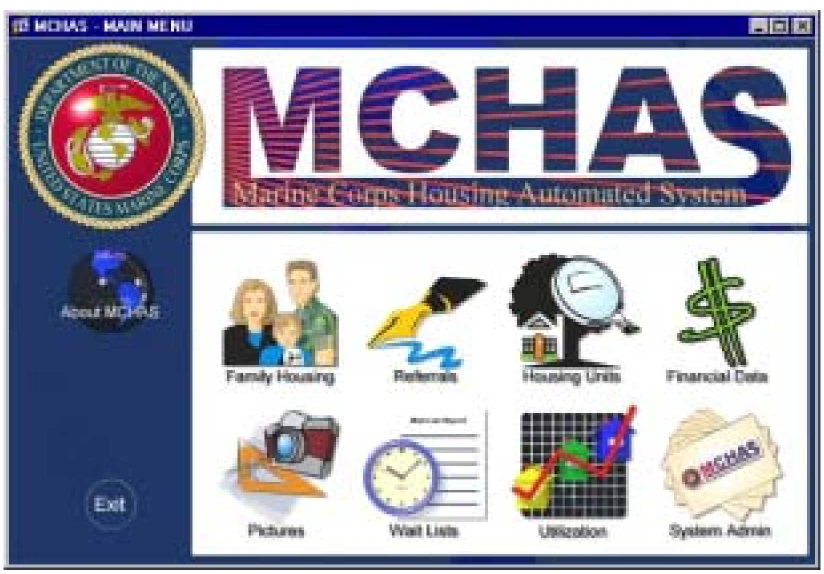
Users Guide

This supplement to the previously issued Users Guide has been formatted to support double sided copying and binding. Future releases will be formatted accordingly to save paper and space.

Screen Changes in MCHAS 2.5

Main Menu

The Main Menu has changed to include direct access to the Utilization Module. To view the Utilization screens, click on the Utilization image. See the documentation for this new MCHAS Module for detailed instructions for viewing Utilization data.



Military Family

Left Mouse Click Selection List

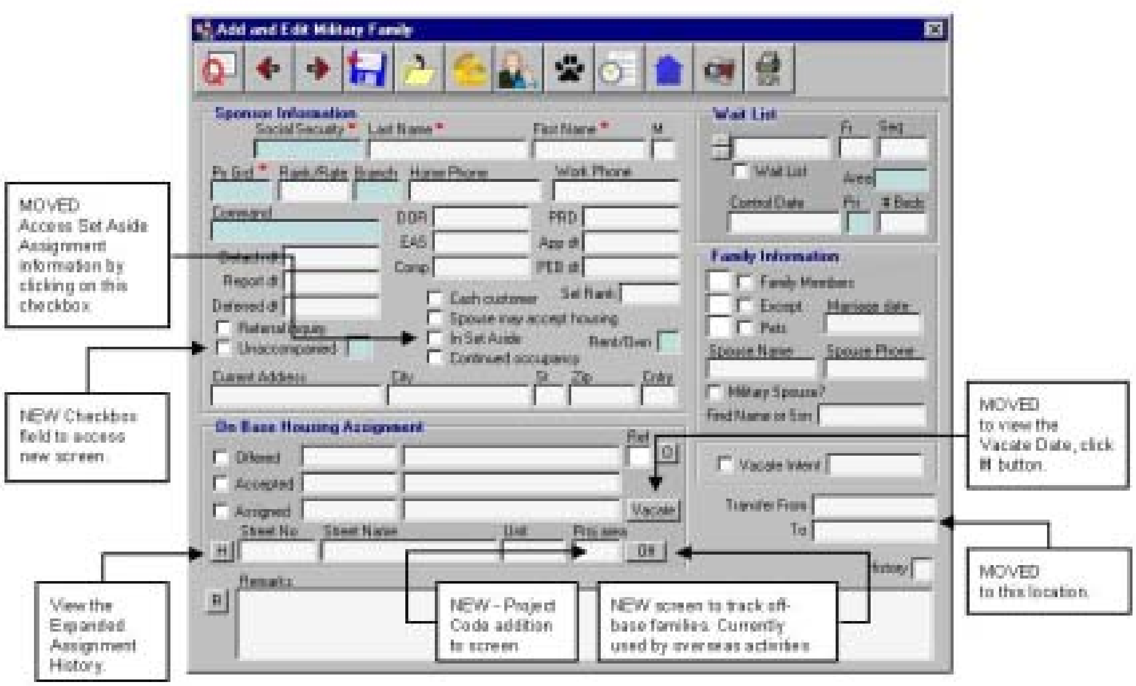
Right Mouse Click Selection List

The selection list has been modified to include direct access to Assignment History and Unaccompanied Families screens.

The Military Family Screen

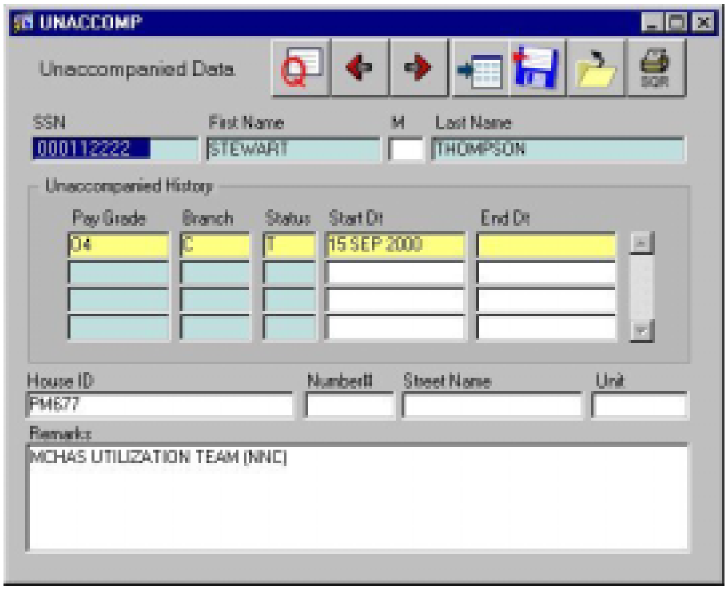
Fields have been moved and added.

Changes to the Military Family Screen



Unaccompanied Families

Driven by the new Utilization Module, more information is being tracked in version 2.5 for unaccompanied families as shown below.

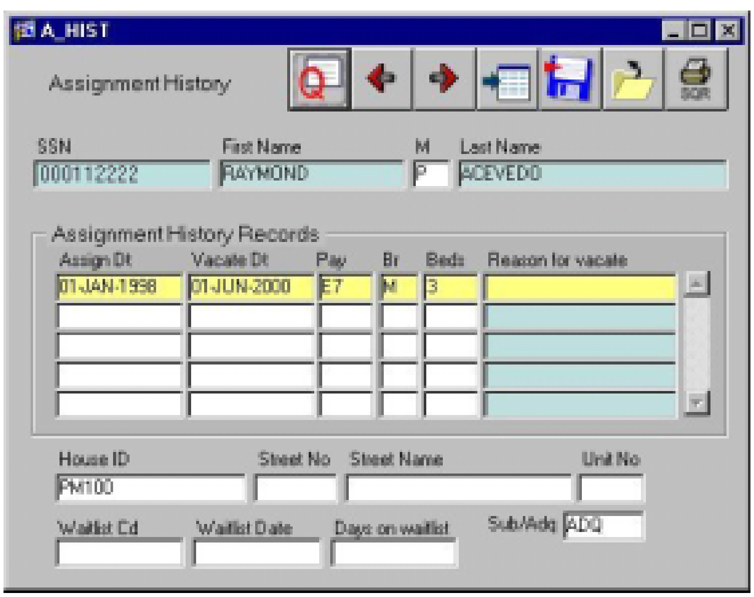


Accessing Unaccompanied Families directly from the Main Menu allows you to view information on all families that are currently identified as unaccompanied.

Assignment History

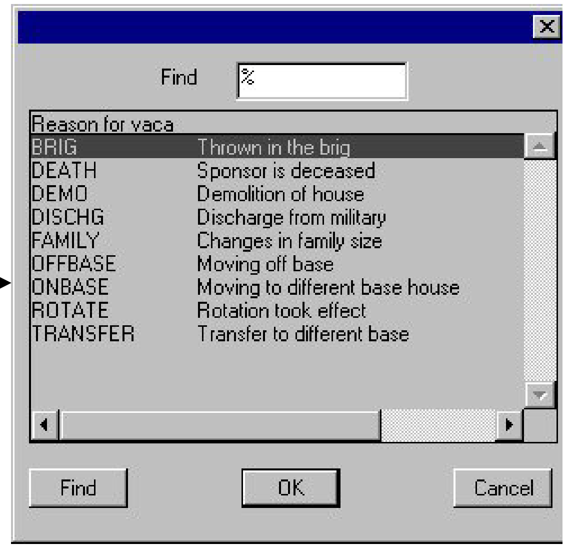
Assignment History has been expanded to include the reason for vacating quarters. It also includes wait list information not viewed by the user previously.

Information in the Assignment History screen is automatically inserted through the MCHAS application. When the sponsor is placed on a Wait list, assigned to quarters and then vacated, this information in kept and viewable here. Changes can be made to the data if necessary and information inserted if it does not currently exist.

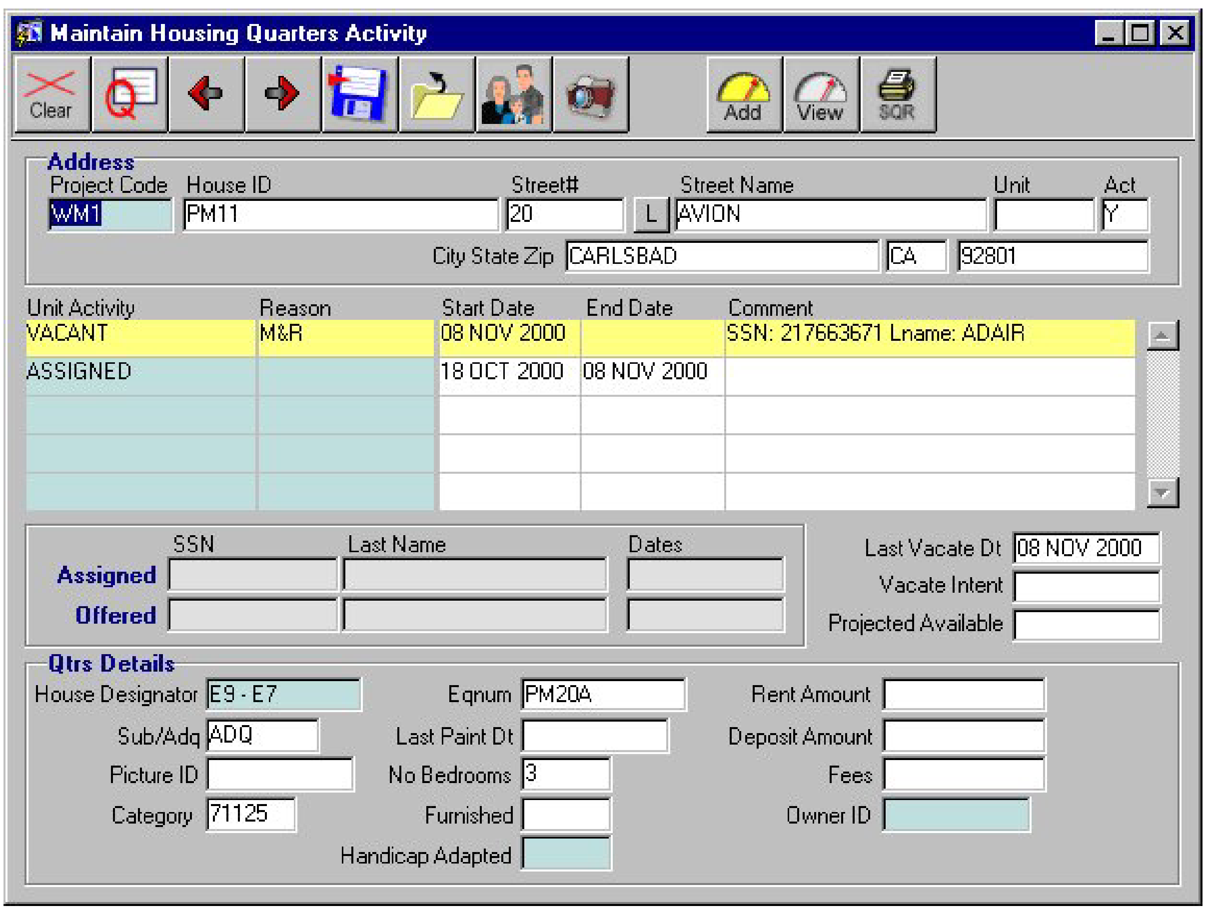


The Vacate Process

Vacating a family from quarters now includes a reason.



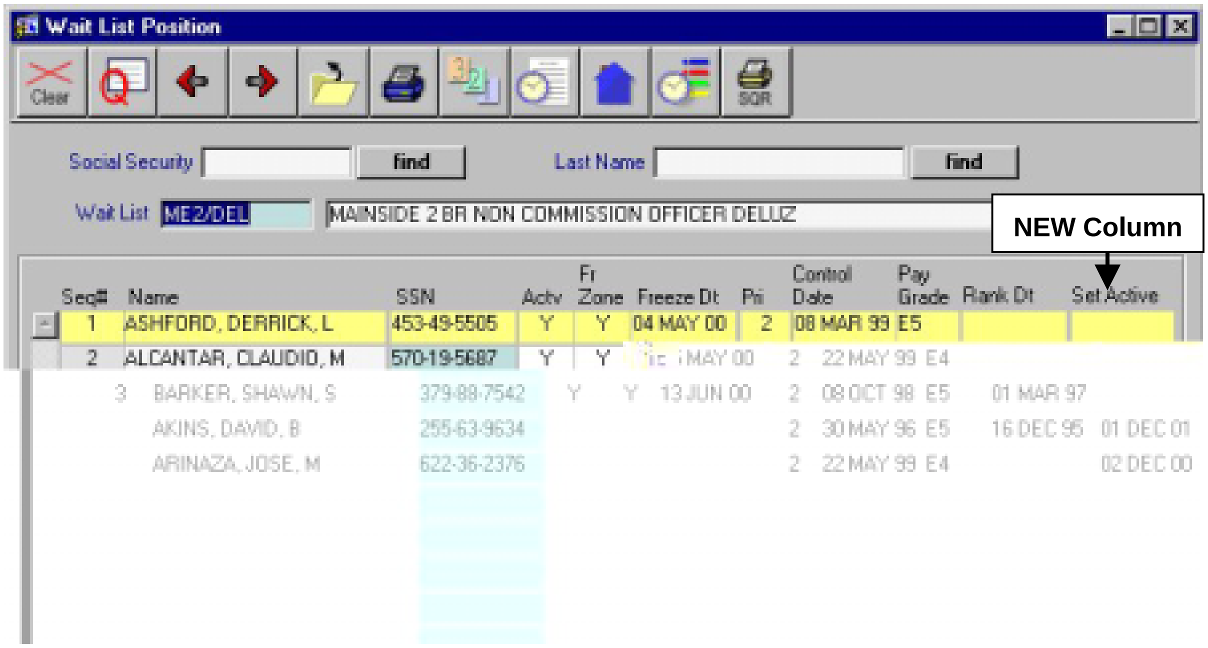
The Vacate process..

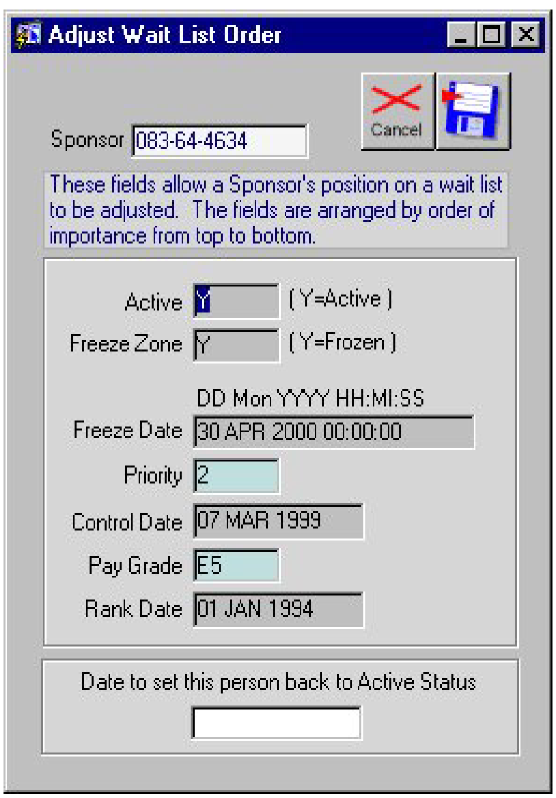


Note the new column for Reason. The Unit Activity is no longer M&R but VACANT with a reason of M&R.

Wait Lists

The Wait List screen has been modified to include the addition of a Set Active Date. This field is used to identify the date that a sponsor who has been placed "Inactive" on the wait list will become active again.





Housing Activity

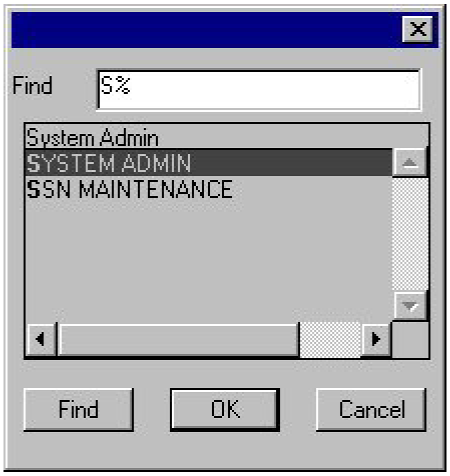
Unit Activity Codes have been standardized and reasons for the activities have been added to the Valuelist.

Valid Unit Activity Codes and Reasons are as follows:

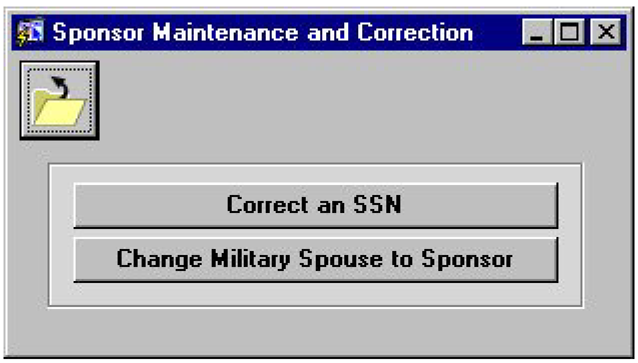
Activity Code	Description	Reason	**Description**
ADDED	Date unit was acquired	CONV	Conversion
		GENERAL	General Inventory Data
		NEW_ACQ	New Acquire
		OTHER	Other
		SUB_TO_ADQ	Substandard to Adequate
ASSIGNED	Dates unit assigned to a customer		
DIVERSION	Dates unit was diverted		
INACTIVE	Dates unit inactive	BRAC	BRAC (Disposal/Caretaker Status)
		BURN_UNIT	Burn Unit
		GENERAL	General Inventory Data
		OTHER	Other
		PEND_BQ	Pending Transfer to BQ
		PEND_DEMO	Pending Demolition
		PEND_MILCON	Pending Demolition for MILCON
		WAIT_EX_TR	Awaiting Excess/Transfer
		WAIT_PPV	Awaiting PPV
LOSS	Date unit was lost	CONV DIV	Conversion/Permanent Diversion
		DISP_EXCES	Disposal/Excess
		GENERAL	General Inventory Data
		GOV_TO_PPV	Government Assets to PPV
		LEASE_CAN	Lease Cancellation
		OTHER	Other-BRAC-Nat'l Clauses-etc.
		TRANS_REASS	Transfer/Reassignment
VACANT	Dates unit was vacant	AVAILABLE	Unit is available for occupancy
		M&R	Dates of maintenance and repair
		MAJOR REHAB	Dates of major rehabilitation
		PAY_N_GO	Pay and go Cleaning Service
		Others as defined by the facility	

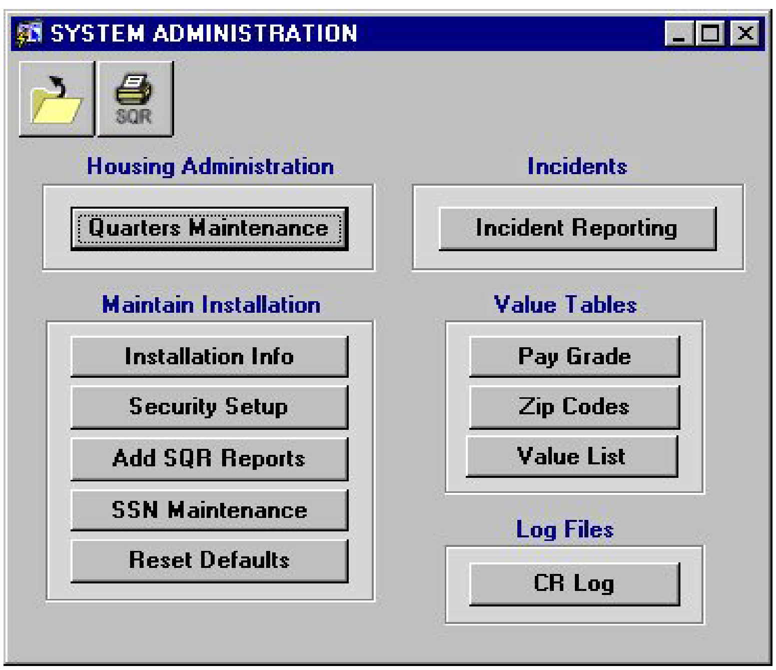
System Administration

When you click on the System Admin image from the Main Menu, you will now see a Selection List with two choices.



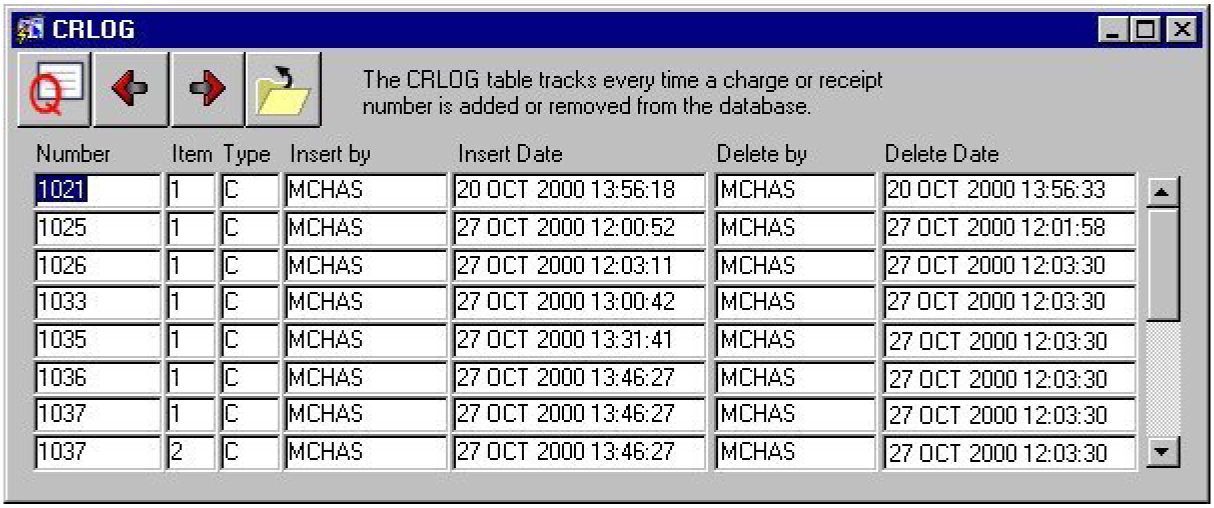
Correcting a Sponsor SSN or switching a housing assignment to a military Spouse are now done through SSN MAINTENANCE.





Select the Administrative function you wish to perform. The new Log File, CR Log, has been added to the screen. To view this file, press the **CR Log** button.

The CR Log screen opens showing inserts and deletes from the Charge and Receipt screens.

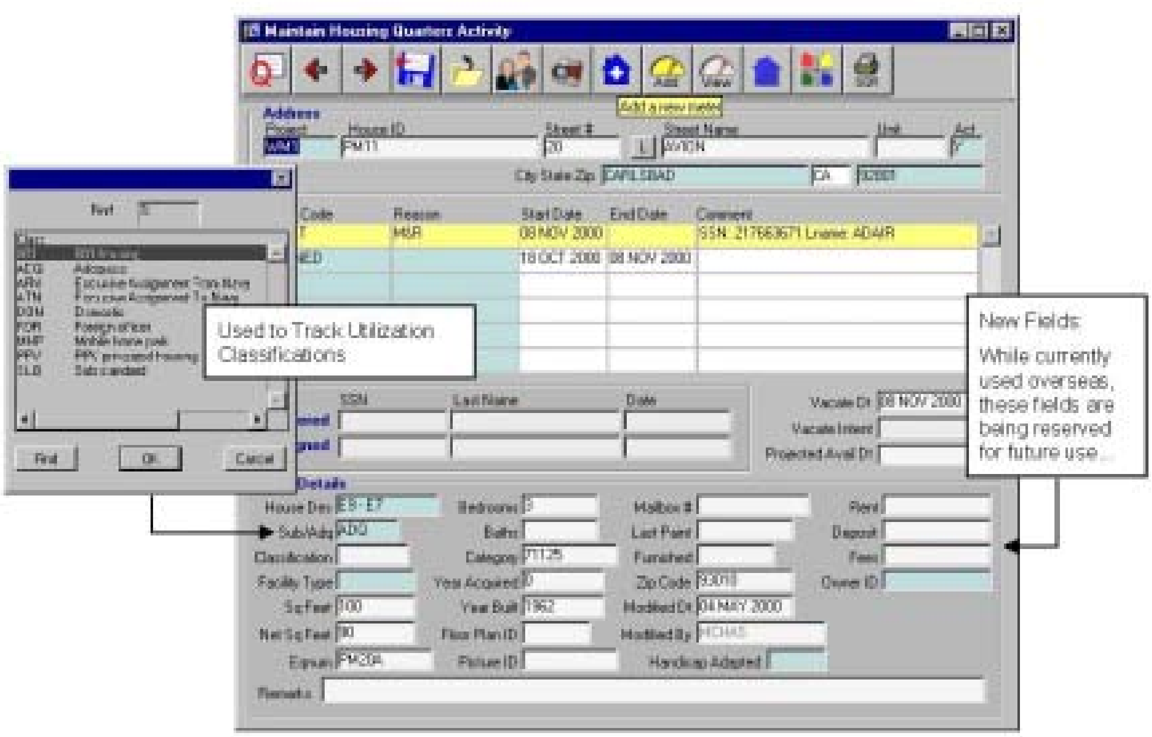


Number	Item	Type	Insert by	Insert Date	Delete by	Delete Date
1021	1	C	MCHAS	20 OCT 2000 13:56:18	MCHAS	20 OCT 2000 13:56:33
1025	1	C	MCHAS	27 OCT 2000 12:00:52	MCHAS	27 OCT 2000 12:01:58
1026	1	C	MCHAS	27 OCT 2000 12:03:11	MCHAS	27 OCT 2000 12:03:30
1033	1	C	MCHAS	27 OCT 2000 13:00:42	MCHAS	27 OCT 2000 12:03:30
1035	1	C	MCHAS	27 OCT 2000 13:31:41	MCHAS	27 OCT 2000 12:03:30
1036	1	C	MCHAS	27 OCT 2000 13:46:27	MCHAS	27 OCT 2000 12:03:30
1037	1	C	MCHAS	27 OCT 2000 13:46:27	MCHAS	27 OCT 2000 12:03:30
1037	2	C	MCHAS	27 OCT 2000 13:46:27	MCHAS	27 OCT 2000 12:03:30

Quarters Maintenance

Modifications were made to the Quarters Maintenance screen to aid in the tracking of government housing for Utilization purposes. Changes include Classifications of units and new fields to track rents, deposits, fees and Owner (other than Government owned).

Quarters Maintenance - Accessed from System Administration



Overview of Changes in MCHAS 2.5a

New Module - Inspection Scheduling

Inspection Scheduling

Allows for the easy creation of Inspectors for which schedules can be maintained. The types of inspections are maintained in a Valuelist for easy modification to fit your needs.

Several Reports have been created allowing Inspectors to print out their daily Inspection Schedule, or Supervisors to print out the entire schedule. Schedules can also be printed based upon Housing Area.

Schedule time-off so other staff members know when you are available for the schedule.

2.5a Changes to Existing Modules

Family Housing

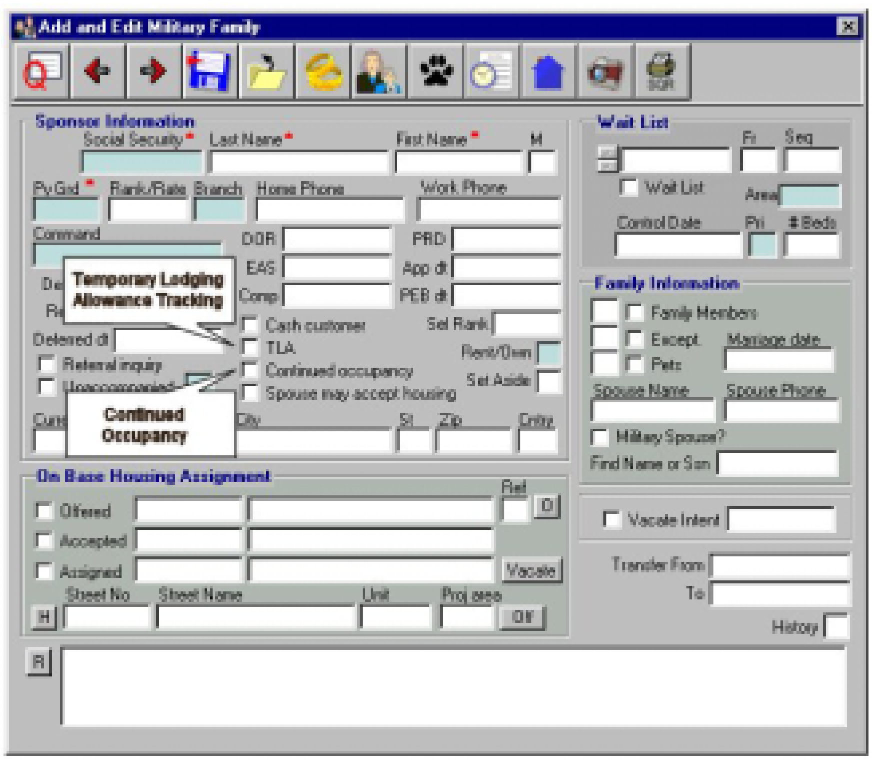
Checkbox field for Continued Occupancy.

TLA Tracking.

The Family Housing Voucher number is now saved with the Sponsor, which means if you have to re-print, the number will remain the same.

The "Current Address" field will now be the address of the assigned quarters upon assignment.

You can leave a Sponsor on a Waitlist after assignment to quarters.

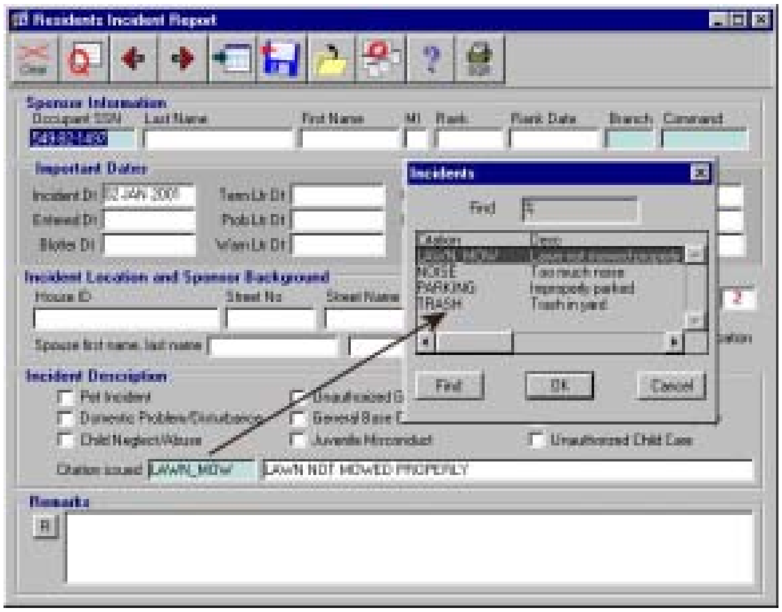


Wait List

Optimized for faster response when changes to the Wait List are made.

Incident Reporting

Fields added for Citations issued.



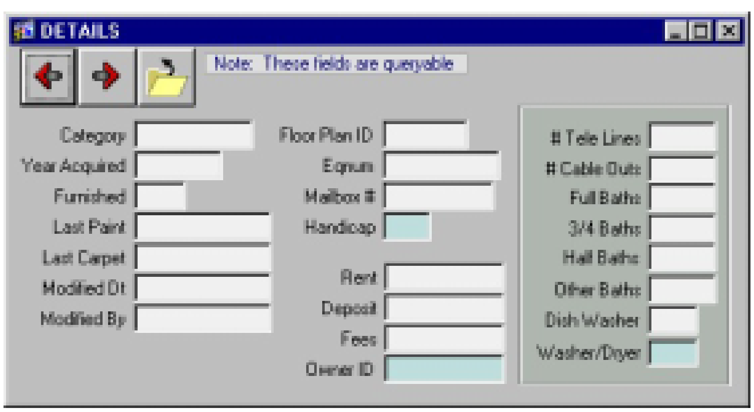
Base Housing

Additional fields added for tracking of telephone lines, cable lines, full, 3/4 and 1/2 baths, dishwasher, washer, dryer and last carpet date.

Both Housing Units screens show all information about a house. Previously, the Quarters Maintenance screen under System Administration was much more detailed.

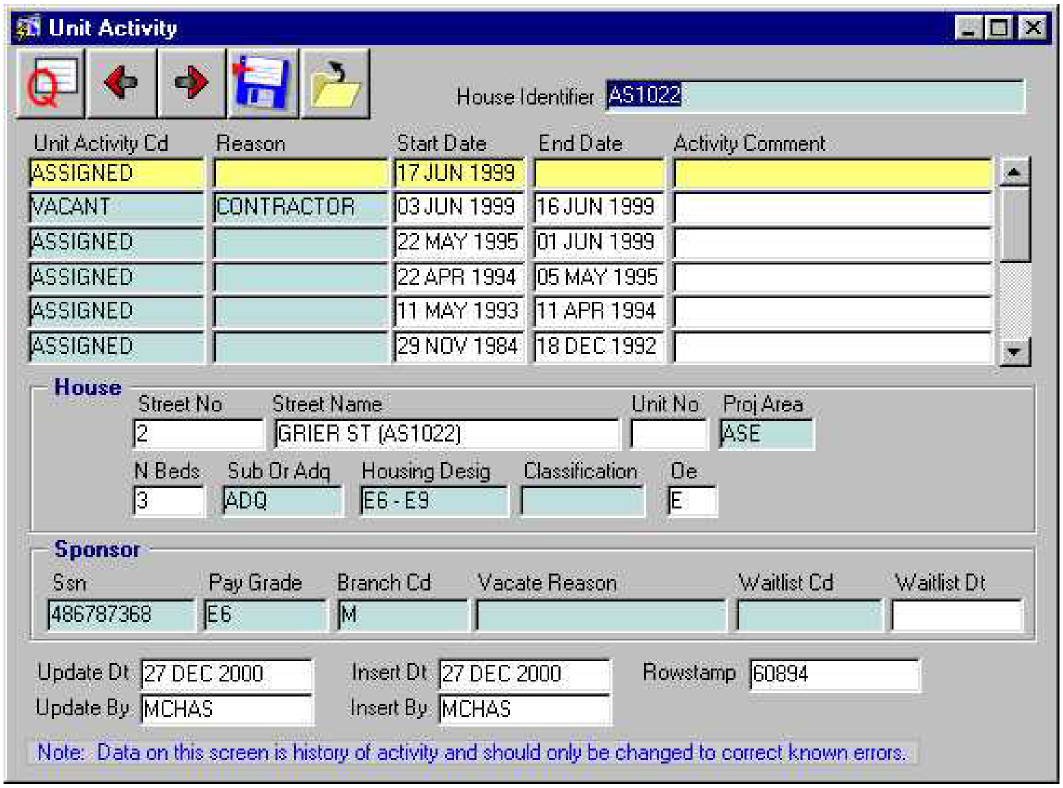
Inspection Scheduling.

Unit details are Queryable.



Unit Activity

Track and view Unit Activity on its own screen.



Referrals

Fields added for square feet, last HRO date, view (from a valuelist) and air conditioning (from a valuelist).

Complexes can be marked as "affordable".

Fields added to the detail screen for non-smoker and paid utilities.

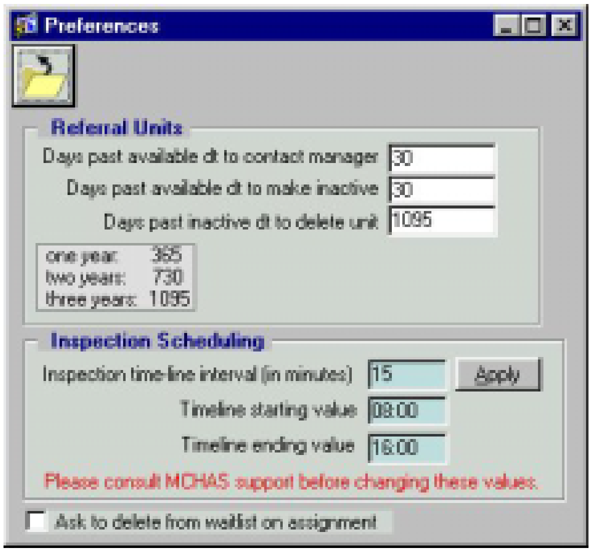
Details are now Queryable.

System Admin

Social Security Maintenance and Switching occupancy for dual military families has been moved from System Admin. These functions can now be assigned without access to full Administration privileges.

Preferences have been included for setting Inactive, Delete and Contact dates for Referral Units. You can also set the time increments and the start time and end time for the inspection day.

A checkbox has been added for confirmation to remove a Sponsor from the Wait List when assigned to quarters**.**



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