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# SECTION 8 PORTABILITY IN HDSWin

One of the features of the housing choice voucher program is the mobility of the assistance. Section 8(r) of the United States Housing Act of 1937 provides that housing choice voucher participants may choose a unit that meets program requirements anywhere in the United States, provided a PHA administering the tenant-based program has jurisdiction over the area in which the unit is located. The term “portability” refers to the process of leasing or purchasing a dwelling unit with housing voucher tenant-based assistance outside of the jurisdiction of the PHA that initially issues the family its voucher (the Initial PHA). Program regulations covering where a family may move and the responsibilities of the Initial PHA and the Receiving PHA (the PHA with jurisdiction over the area to which the family moves) are found at 24 CFR sections 982.353 through 982.355.

## Applicant Family Requests Portability

A family that has not yet leased a unit under the housing choice voucher program is eligible for portability if the head of household or spouse was a resident of the Initial PHA’s jurisdiction at the time the application for assistance was submitted. A “resident”, for determining eligibility for portability, is a person who has a legal domicile in the jurisdiction.

A non-resident family may be required to initially lease a unit with its housing choice voucher in the Initial PHA’s jurisdiction. However, the Initial PHA has the authority (but no obligation) to allow a new voucher holder that was not living in its jurisdiction at the time of application to exercise portability. The Initial PHA may decide to allow portability for a family new to its jurisdiction in certain instances, such as when the move would respond to a special family need, but not allow such moves in other instances. It is important for the Initial PHA to establish a policy and document the reasons for discretionary decisions to avoid any perception of discrimination.

### Applicant Family Requests Portability and Fails to Lease-up

#### Initial PHA

If this will be the family’s first lease under the housing choice voucher program, the Initial PHA must compare the family’s income to the applicable-income limit (typically the very low-income limit) for the community where the family wants to move and determine if the family will be able to lease up in that jurisdiction.

#### In HDSWin:

- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the ‘Applicant/Tenant’ file.
- Issue a voucher from the ‘Voucher’ option in the ‘Applicant/Tenant’ file.
- Process an Action **10-Issuance of Voucher** from the ‘Actions’ option in the ‘Applicant/Tenant’ file. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**
  - ❖ Please note that Actions **10-Issuance of Voucher** and **11-Expiration of Voucher** are not required actions by PIC. However, if an Action **10-Issuance of Voucher** is processed, you must process an Action **11-Expiration of Voucher** when the family ends participation with the voucher.

Contact the Receiving PHA to alert that agency to expect the family.

**Complete Part I of Form HUD-52665.** You may generate this form in HDSWin using the ‘Recert Forms’ option in the ‘Applicant/Tenant’ file.

Send the following via fax or mail to the Receiving PHA.

- **Form HUD-52665** with Part I completed - the Receiving PHA will complete Part II.
- A copy of the family’s voucher issued by the Initial PHA.
- Copies of any current income verifications.
- In the case of an applicant, the Initial PHA has not completed a **Form HUD-50058** but must provide the family and income information to the Receiving PHA in a format similar to **Form HUD-50058** so that the information is easily available for use by the Receiving PHA.

## Receiving PHA

The Receiving PHA must inform the Initial PHA **immediately** whether it will absorb or administer the family's housing choice voucher assistance and if it approves an extension to the voucher term or changes the unit size of the family's voucher. The Receiving PHA's payment standards are used when the portable family leases a unit. The family will need to be informed of the Receiving PHA's policies and payment standards before it begins its search.

### In **HDSWin**:

- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the 'Applicant/Tenant' file.
- Issue a voucher from the 'Voucher' option in the 'Applicant/Tenant' file to enable the family to search in the Receiving PHA's jurisdiction.

**Complete Form HUD-52665 Part II** and send it to the Initial PHA. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

## Initial PHA

### In **HDSWin**:

- After the family fails to lease a unit, the voucher expires and upon receipt of the completed **Form HUD-52665 Part II** from the Receiving PHA, the Initial PHA should process an Action **11-Expiration of Voucher** using the 'Actions' option from the 'Applicant/Tenant' file. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**
- Un-issue the voucher from the 'Voucher' option in the 'Applicant/Tenant' file so that it may be issued to another applicant.
- There is no need to process an Action **5-Portability Move-out** because the applicant never moved in.

## Applicant Family Ports Out and Is Absorbed

## Initial PHA

If this will be the family's first lease under the housing choice voucher program, the Initial PHA must compare the family's income to the applicable-income limit (typically the very low-income limit) for the community where the family wants to move and determine if the family will be able to lease up in that jurisdiction.

### In **HDSWin**:

- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the 'Applicant/Tenant' file.
- Issue a voucher from the 'Voucher' option in the 'Applicant/Tenant' file.
- Process an Action **10-Issuance of Voucher** from the 'Actions' option in the 'Applicant/Tenant' file. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**
  - ❖ Please note that Actions **10-Issuance of Voucher** and **11-Expiration of Voucher** are not required actions by PIC. However, if an Action **10-Issuance of Voucher** is processed, you must process an Action **11-Expiration of Voucher** when the family ends participation with the voucher.

Contact the Receiving PHA to alert that agency to expect the family.

**Complete Part I of Form HUD-52665.** You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

Send the following via fax or mail to the Receiving PHA.

- **Form HUD-52665** with Part I completed - the Receiving PHA will complete Part II.
- A copy of the family's voucher issued by the Initial PHA.
- Copies of any current income verifications.
- In the case of an applicant, the Initial PHA has not completed a **Form HUD-50058** but must provide the family and income information to the Receiving PHA in a format similar to **Form HUD-50058** so that the information is easily available for use by the Receiving PHA.

## Receiving PHA

The Receiving PHA must inform the Initial PHA **immediately** that it will absorb the family's housing choice voucher assistance. The Receiving PHA's payment standards are used when the portable family leases a unit. The family will need to be informed of the Receiving PHA's policies and payment standards before it begins its search.

### In **HDSWin**:

- Set up the landlord using the 'Landlord' option under the 'Section 8' menu.
- Set up the unit that the family will be leasing in the 'Units' file under the 'Applicant' menu.
- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the 'Applicant/Tenant' file.
- Issue a voucher and mark the voucher file as 'Port In' and 'Absorbed' from the 'Voucher' option in the 'Applicant/Tenant' file. This voucher will enable the family to search in the Receiving PHA's jurisdiction.
- **After a HAP Contract has been executed on behalf of the family**, process an Action **1-New Admission** from the 'Actions' option in the 'Applicant/Tenant' file. **This action will create a Form HUD-50058, which must be reported to PIC by the Receiving PHA.** Please note, **HDSWin** will automatically complete the following fields on **Form HUD-50058** based on the voucher and tenant data entered:
  - **12d Did family move into your PHA jurisdiction under portability?** This field should be marked Yes.
  - **12e Cost Billed per month.** Must equal \$0.
  - **12f PHA code billed.** Must be blank.

**Complete Form HUD-52665 Part II** and send it to the Initial PHA **within 10 working days of HAP Contract execution**. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

## Initial PHA

**After the Receiving PHA executes a HAP Contract on behalf of the family:**

### In **HDSWin**:

- Process an Action **11-Expiration of Voucher** from the 'Actions' option in the 'Applicant/Tenant' file and submit the action to PIC. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**
- Un-issue the voucher from the 'Voucher' option in the 'Applicant/Tenant' file so that it may be issued to another applicant.
- There is no need to process an Action **5-Portability Move-out** because the applicant never moved in.

## Applicant Family Ports Out and Is Not Absorbed

### Initial PHA

If this will be the family's first lease under the housing choice voucher program, the Initial PHA must compare the family's income to the applicable-income limit (typically the very low-income limit) for the community where the family wants to move and determine if the family will be able to lease up in that jurisdiction.

### In **HDSWin**:

- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the 'Applicant/Tenant' file.
- Issue a voucher from the 'Voucher' option in the 'Applicant/Tenant' file.
- Process an Action **10-Issuance of Voucher** from the 'Actions' option in the 'Applicant/Tenant' file. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**
  - ❖ Please note that Actions **10-Issuance of Voucher** and **11-Expiration of Voucher** are not required actions by PIC. However, if an Action **10-Issuance of Voucher** is processed, you must process an Action **11-Expiration of Voucher** when the family ends participation with the voucher.

Contact the Receiving PHA to alert that agency to expect the family.

**Complete Part I of Form HUD-52665.** You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

Send the following via fax or mail to the Receiving PHA.

- **Form HUD-52665** with Part I completed - the Receiving PHA will complete Part II.
- A copy of the family's voucher issued by the Initial PHA.
- Copies of any current income verifications.
- In the case of an applicant, the Initial PHA has not completed a **Form HUD-50058** but must provide the family and income information to the Receiving PHA in a format similar to **Form HUD-50058** so that the information is easily available for use by the Receiving PHA.

## Receiving PHA

The Receiving PHA must inform the Initial PHA **immediately** that it will administer the family's housing choice voucher assistance and if it approves an extension to the voucher term or changes the unit size of the family's voucher. The Receiving PHA's payment standards are used when the portable family leases a unit. The family will need to be informed of the Receiving PHA's policies and payment standards before it begins its search.

The Receiving PHA must submit the Initial billing notice no later than 10 working days following the date the HAP contract was executed and in time that it will be received no later than 60 days following the expiration date of the family's voucher issued by the Initial PHA. A Receiving PHA that failed to send the Initial billing notice within 10 working days following the date the HAP contract is executed is generally required to absorb the family into its own program unless the Initial PHA is willing to accept the late submission.

### In **HDSWin**:

- Set up the landlord using the 'Landlord' option under the 'Section 8' menu.
- Set up the unit that the family will be leasing in the 'Units' file under the 'Applicant' menu.
- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the 'Applicant/Tenant' file.
- Issue a voucher and mark the voucher file as 'Port In' from the 'Voucher' option in the 'Applicant/Tenant' file. Enter the **HA Number** to be billed and the applicable Admin Fees.
- **After a HAP Contract has been executed on behalf of the family**, process an **Action 1-New Admission** from the 'Actions' option in the 'Applicant/Tenant' file. **This action will create a Form HUD-50058, which must be reported to PIC by the Receiving PHA.** Please note, **HDSWin** will automatically complete the following fields on **Form HUD-50058** based on the voucher and tenant data entered:
  - **12d Did family move into your PHA jurisdiction under portability?** This field should be marked Yes.
  - **12e Cost billed per month.** The amount of the housing assistance payment in addition to any administrative fees. The value of this field must be greater than \$0.
  - **12f PHA code billed.** The applicable PHA code.

**Complete Form HUD-52665 Part II** and send it to the Initial PHA with a current **Form HUD-50058 within 10 working days of HAP Contract execution**. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

**The Receiving PHA is responsible for reporting all changes to PIC and must keep the Initial PHA informed of all changes affecting household subsidy.**

After each change in billing amount, the Receiving PHA must send the Initial PHA a completed **Form HUD-52665** showing the new HAP amount, copies of **Form HUD-50058** and any related income verifications. The Receiving PHA should notify the Initial PHA of any change in the billing amount as soon as possible (preferably, before the effective date to avoid retroactive adjustments) but no later than 10 working days following the effective date of the change.

The Receiving PHA must also send the Initial PHA a copy of the updated **Form HUD-50058** at each annual recertification, regardless of whether there is a change in the billing amount. The purpose of this notification is to serve as a 'reconciliation' to assist both PHAs in fulfilling their accounting and record-keeping responsibilities.

## Initial PHA

### After the Receiving PHA executes a HAP Contract on behalf of the family:

#### In HDSWin:

- From the 'Landlord' option under the 'Section 8' menu, set up the Receiving PHA as a landlord.
- Mark the voucher file as 'Port Out' from the 'Voucher' option in the 'Applicant/Tenant' file.
- From the 'Port Out Reimbursement' option under the 'Section 8' menu, add a record in order to create a HAP Payment that can be sent to the Receiving PHA.
  - Select the Receiving PHA as the landlord.
  - Select the applicable tenant.
  - Enter the HAP, URP, Admin, and Hard to House fee amounts if applicable.
  - Enter the effective date.
- From the 'HAP Processing' option under the 'Section 8' menu, generate a HAP check and send it to the Receiving PHA. This payment must be made within 30 days of receipt of Part II of Form HUD-52665 indicating the billing amount. The Initial PHA is also responsible for ensuring that subsequent billing amounts are received no later than the fifth working day of each month for which the monthly billing amount is due.
- There is no need to process an Action **5-Portability Move-out** because the applicant never moved in.

# Participating Family Requests Portability

A participant family electing to move to another jurisdiction with its voucher is eligible to do so but only when the family is able to move out of its current program unit under the terms of the family's lease. A family is not eligible for portability if the family has moved out of its assisted unit in violation of the lease.

Income limits do not affect the eligibility of a participant family exercising portability; however, the family's TTP must be less than the payment standard at the Receiving PHA for the family to lease within the Receiving PHA's jurisdiction.

## Participating Family Requests Portability and Fails to Lease-up

### Initial PHA

In **HDSWin**, place the tenant in '**Shop**' mode using the 'Actions' option from the 'Applicant/Tenant' file. Shop mode will place the family in an active but not housed status. This will allow the family to search for a unit and at the same time stop any HAP checks from being generated. It may be necessary to process an Action **9-Annual Reexamination Searching** in **HDSWin** (using the 'Actions' option under the 'Applicant/Tenant' file) if the participating family is due for an annual reexamination during the search process. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**

Contact the Receiving PHA to alert that agency to expect the family.

**Complete Part I of Form HUD-52665.** You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

Send the following via fax or mail to the Receiving PHA.

- **Form HUD-52665** with Part I completed - the Receiving PHA will complete Part II.
- A copy of the family's voucher issued by the Initial PHA.
- Copies of the current **Form HUD-50058** and supporting income verifications.

### Receiving PHA

The Receiving PHA must inform the Initial PHA **immediately** whether it will absorb or administer the family's housing choice voucher assistance and if it approves an extension to the voucher term or changes the unit size of the family's voucher. The Receiving PHA's payment standards are used when the portable family leases a unit. The family will need to be informed of the Receiving PHA's policies and payment standards before it begins its search.

In **HDSWin**:

- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the 'Applicant/Tenant' file.
- Issue a voucher from the 'Voucher' option in the 'Applicant/Tenant' file to enable the family to search in the Receiving PHA's jurisdiction.

**Complete Form HUD-52665 Part** indicating the family failed to lease-up and send it to the Initial PHA. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

### Initial PHA

After the family fails to lease a unit, the voucher expires and upon receipt of the completed **Form HUD-52665** Part II from the Receiving PHA, the Initial PHA should process an Action **6-End Participation** using the 'Actions' option from the 'Applicant/Tenant' file. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**

- ❖ The voucher status will automatically change to 'Available' after an Action **6-End Participation** is processed so that it may be issued to another applicant.
- ❖ Please remember that if an Action **10-Issuance of Voucher** was previously processed and submitted to PIC for this family, it may be necessary to process an Action **11-Expiration of Voucher** and submit the action to PIC.

## Participating Family Ports Out and Is Absorbed

### Initial PHA

- In **HDSWin**, place the tenant in ‘**Shop**’ mode using the ‘Actions’ option from the ‘Applicant/Tenant’ file. Shop mode will place the family in an active but not housed status. This will allow the family to search for a unit and at the same time stop any HAP checks from being generated. It may be necessary to process an Action **9-Annual Reexamination Searching** in **HDSWin** (using the ‘Actions’ option under the ‘Applicant/Tenant’ file) if the participating family is due for an annual reexamination during the search process. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**

Contact the Receiving PHA to alert that agency to expect the family.

**Complete Part I of Form HUD-52665.** You may generate this form in **HDSWin** using the ‘Recert Forms’ option in the ‘Applicant/Tenant’ file.

Send the following via fax or mail to the Receiving PHA.

- **Form HUD-52665** with Part I completed - the Receiving PHA will complete Part II.
- A copy of the family’s voucher issued by the Initial PHA.
- Copies of the current **Form HUD-50058** and supporting income verifications.

### Receiving PHA

The Receiving PHA must inform the Initial PHA **immediately** that it will absorb the family’s housing choice voucher assistance. The Receiving PHA’s payment standards are used when the portable family leases a unit. The family will need to be informed of the Receiving PHA’s policies and payment standards before it begins its search.

In **HDSWin**:

- Set up the landlord using the ‘Landlord’ option under the ‘Section 8’ menu.
- Set up the unit that the family will be leasing in the ‘Units’ file under the ‘Applicant’ menu.
- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the ‘Applicant/Tenant’ file.
- Issue a voucher and mark the voucher file as ‘Port In’ and ‘Absorbed’ from the ‘Voucher’ option in the ‘Applicant/Tenant’ file. This voucher will enable the family to search in the Receiving PHA’s jurisdiction.
- **After a HAP Contract has been executed on behalf of the family**, process an Action **4-Portability Move-in** from the ‘Actions’ option in the ‘Applicant/Tenant’ file. **This action will create a Form HUD-50058, which must be reported to PIC by the Receiving PHA after the Initial PHA has processed an Action 5-Portability Move-out.** Please note, **HDSWin** will automatically complete the following fields on **Form HUD-50058** based on the voucher and tenant data entered:
  - **12d Did family move into your PHA jurisdiction under portability?** This field should be marked Yes.
  - **12e Cost Billed per month.** Must equal \$0.
  - **12f PHA code billed.** Must be blank.

**Complete Form HUD-52665 Part II** and send it to the Initial PHA **within 10 working days of HAP Contract execution.** You may generate this form in **HDSWin** using the ‘Recert Forms’ option in the ‘Applicant/Tenant’ file.

### Initial PHA

**After the Receiving PHA executes a HAP Contract on behalf of the family**, process an Action **5-Portability Move-out** using the ‘Actions’ option under the ‘Applicant/Tenant’ file. Use an effective date that is earlier than the HAP Contract date. A HDS message will emerge inquiring if the Receiving PHA is absorbing the Portable Move-out. Click on ‘Yes’. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**

- ❖ The voucher status will automatically change to ‘Available’ after an Action **5-Portability Move-out** is processed so that it may be issued to another applicant.
- ❖ Please remember that if an Action **10-Issuance of Voucher** was previously processed and submitted to PIC for this family, it may be necessary to process an Action **11-Expiration of Voucher** and submit the action to PIC.

## Participating Family Ports Out and Is Not Absorbed

### Initial PHA

In **HDSWin**, place the tenant in **'Shop'** mode using the 'Actions' option from the 'Applicant/Tenant' file. Shop mode will place the family in an active but not housed status. This will allow the family to search for a unit and at the same time stop any HAP checks from being generated. It may be necessary to process an Action **9-Annual Reexamination Searching** in **HDSWin** (using the 'Actions' option under the 'Applicant/Tenant' file) if the participating family is due for an annual reexamination during the search process. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**

Contact the Receiving PHA to alert that agency to expect the family.

**Complete Part I of Form HUD-52665.** You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

Send the following via fax or mail to the Receiving PHA.

- **Form HUD-52665** with Part I completed - the Receiving PHA will complete Part II.
- A copy of the family's voucher issued by the Initial PHA.
- Copies of the current **Form HUD-50058** and supporting income verifications.

### Receiving PHA

The Receiving PHA must inform the Initial PHA **immediately** that it will administer the family's housing choice voucher assistance and if it approves an extension to the voucher term or changes the unit size of the family's voucher. The Receiving PHA's payment standards are used when the portable family leases a unit. The family will need to be informed of the Receiving PHA's policies and payment standards before it begins its search.

The Receiving PHA must submit the Initial billing notice no later than 10 working days following the date the HAP contract was executed and in time that it will be received no later than 60 days following the expiration date of the family's voucher issued by the Initial PHA. A Receiving PHA that failed to send the Initial billing notice within 10 working days following the date the HAP contract is executed is generally required to absorb the family into its own program unless the Initial PHA is willing to accept the late submission.

In **HDSWin**:

- Set up the landlord using the 'Landlord' option under the 'Section 8' menu.
- Set up the unit that the family will be leasing in the 'Units' file under the 'Applicant' menu.
- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the 'Applicant/Tenant' file.
- Issue a voucher and mark the voucher file as 'Port In' from the 'Voucher' option in the 'Applicant/Tenant' file. Enter the **HA Number** to be billed and the applicable Admin Fees.
- **After a HAP Contract has been executed on behalf of the family**, process an Action **4-Portability Move-in** from the 'Actions' option in the 'Applicant/Tenant' file. **This action will create a Form HUD-50058, which must be reported to PIC by the Receiving PHA after the Initial PHA has processed an Action 5-Portability Move-out.** Please note, **HDSWin** will automatically complete the following fields on **Form HUD-50058** based on the voucher and tenant data entered:
  - **12d Did family move into your PHA jurisdiction under portability?** This field should be marked Yes.
  - **12e Cost billed per month.** The amount of the housing assistance payment in addition to any administrative fees. The value of this field must be greater than \$0.
  - **12f PHA code billed.** The applicable PHA code.

**Complete Form HUD-52665 Part II** and send it to the Initial PHA with **Form HUD-50058 within 10 working days of HAP Contract execution.** You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

**The Receiving PHA is responsible for reporting all changes to PIC and must keep the Initial PHA informed of all changes affecting household subsidy.**

After each change in billing amount, the Receiving PHA must send the Initial PHA a completed **Form HUD-52665** showing the new HAP amount, copies of **Form HUD-50058** and any related income verifications. The Receiving PHA should notify the Initial PHA of any change in the billing amount as soon as possible (preferably, before the effective date to avoid retroactive adjustments) but no later than 10 working days following the effective date of the change.

The Receiving PHA must also send the Initial PHA a copy of the updated **Form HUD-50058** at each annual recertification, regardless of whether there is a change in the billing amount. The purpose of this notification is to serve as a 'reconciliation' to assist both PHAs in fulfilling their accounting and record-keeping responsibilities.

## Initial PHA

**After the Receiving PHA executes a HAP Contract on behalf of the family:**

In **HDSWin**:

- Process an Action **5-Portability Move-out** using the 'Actions' option under the 'Applicant/Tenant' file. Use an effective date that is earlier than the HAP Contract date. A HDS message will emerge inquiring if the Receiving PHA is absorbing the Portable Move-out. Click on No. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**
- From the 'Landlord' option under the 'Section 8' menu, set up the Receiving PHA as a landlord.
- Mark the voucher file as 'Port Out' from the 'Voucher' option in the 'Applicant/Tenant' file.
- From the 'Port Out Reimbursement' option under the 'Section 8' menu, add a record in order to create a HAP Payment that can be sent to the Receiving PHA.
  - Select the Receiving PHA as the landlord.
  - Select the applicable tenant.
  - Enter the HAP, URP, Admin, and Hard to House fee amounts if applicable.
  - Enter the effective date.
- From the 'HAP Processing' option under the 'Section 8' menu, generate a HAP check and send it to the Receiving PHA. This payment must be made within 30 days of receipt of Part II of Form HUD-52665 indicating the billing amount. The Initial PHA is also responsible for ensuring that subsequent billing amounts are received no later than the fifth working day of each month for which the monthly billing amount is due.

## Receiving PHA Absorbs the Voucher at a Later Date

The Receiving PHA may absorb the family into its own program once the HAP contract is executed on behalf of the family by the Receiving PHA, assuming it has funding available under its ACC to do so and such a decision will not result in over-leasing. HUD encourages the Receiving PHA to provide adequate advance notice to the Initial PHA to avoid having to return an overpayment. The Receiving PHA must specify the effective date of the absorption of the family.

### Receiving PHA

In **HDSWin** select 'Absorbed' from the Applicant/Tenant 'Cert/Voucher' file and process either an Action **3-Interim Reexamination** or **2-Annual Reexamination** (whichever is applicable) using the 'Actions' option under the 'Applicant/Tenant' file to report that the voucher has been absorbed. **This action will create a Form HUD-50058, which must be reported to PIC by the Receiving PHA.** Please note, **HDSWin** will automatically complete the following fields on **Form HUD-50058** based on the voucher and tenant data entered:

- **12d Did family move into your PHA jurisdiction under portability?**  
This field should be marked Yes.
- **12e Cost Billed per month.** Must equal \$0.
- **12f PHA code billed.** Must be blank.

**Complete Form HUD-52665 Part II** and send it to the Initial PHA notifying them you will be absorbing the voucher. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

### Initial PHA

In **HDSWin** from the 'Port Out Reimbursement' option under the 'Section 8' menu, process a 'Stop Bill'. This will stop future HAP checks from being generated and change the voucher status for the applicable tenant to 'Available' so that it may be issued to another applicant.

- ❖ Please remember that if an Action **10-Issuance of Voucher** was previously processed and submitted to PIC for this family, it may be necessary to process an Action **11-Expiration of Voucher** and submit the action to PIC.

## Participating Family Not Absorbed by Receiving PHA1 Ports Into Receiving PHA2's Jurisdiction and Fails to Lease-up

### Receiving PHA1

**Refer the family back to the Initial PHA.**

In **HDSWin**, place the tenant in '**Shop**' mode using the 'Actions' option from the 'Applicant/Tenant' file. Shop mode will place the family in an active but not housed status. This will allow the family to search for a unit and at the same time stop any HAP checks from being generated. It may be necessary to process an Action **9-Annual Reexamination Searching in HDSWin** (using the 'Actions' option under the 'Applicant/Tenant' file) if the participating family is due for an annual reexamination during the search process. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**

**Complete Form HUD-52665 Part II** and send it to the Initial PHA indicating the HAP Contract is being terminated. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

### Initial PHA

In **HDSWin** from the 'Port Out Reimbursement' option under the 'Section 8' menu, process a 'Stop Bill'. This will stop future HAP checks from being generated and change the voucher status for the applicable tenant to 'Available' so that it may be issued to another applicant.

Contact the Receiving PHA2 to alert that agency to expect the family.

**Complete Part I of Form HUD-52665.** You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

Send the following via fax or mail to the Receiving PHA2.

- **Form HUD-52665** with Part I completed - the Receiving PHA2 will complete Part II.
- A copy of the family's voucher issued by the Initial PHA.
- Copies of the current **Form HUD-50058** and supporting income verifications previously completed by the Receiving PHA1.

### Receiving PHA2

The Receiving PHA2 must inform the Initial PHA **immediately** whether it will absorb or administer the family's housing choice voucher assistance and if it approves an extension to the voucher term or changes the unit size of the family's voucher. The Receiving PHA2's payment standards are used when the portable family leases a unit. The family will need to be informed of the Receiving PHA2's policies and payment standards before it begins its search.

In **HDSWin**:

- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the 'Applicant/Tenant' file.
- Issue a voucher from the 'Voucher' option in the 'Applicant/Tenant' file.

**Complete Form HUD-52665 Part II** indicating the family failed to lease-up and send it to the Initial PHA. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

## Initial PHA

- After the family fails to lease a unit, the voucher expires and upon receipt of the completed **Form HUD-52665 Part II** from the Receiving PHA2, the Initial PHA should notify the Receiving PHA1 so they may process an Action **6-End of Participation** and submit the action to PIC.
  - ❖ Please remember that if an Action **10-Issuance of Voucher** was previously processed and submitted to PIC for this family, it may be necessary to process an Action **11-Expiration of Voucher** and submit the action to PIC.

## Receiving PHA1

After the family fails to lease a unit, the Receiving PHA1 should process an Action **6-End of Participation**. **This action will create a Form HUD-50058, which must be reported to PIC by the Receiving PHA1.**

- ❖ The Receiving PHA1 should keep in contact with the Initial PHA until a HAP Contract is executed or until the family fails to lease a unit. This will ensure that the appropriate action is processed and submitted to PIC.

## Participating Family Not Absorbed by Receiving PHA1 Ports Into Receiving PHA2's Jurisdiction and Is Absorbed

### Receiving PHA1

Refer the family back to the Initial PHA.

In **HDSWin**, place the tenant in '**Shop**' mode using the 'Actions' option from the 'Applicant/Tenant' file. Shop mode will place the family in an active but not housed status. This will allow the family to search for a unit and at the same time stop any HAP checks from being generated. It may be necessary to process an Action **9-Annual Reexamination Searching** in **HDSWin** (using the 'Actions' option under the 'Applicant/Tenant' file) if the participating family is due for an annual reexamination during the search process. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**

**Complete Form HUD-52665 Part II** and send it to the Initial PHA indicating the HAP Contract is being terminated. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

### Initial PHA

In **HDSWin**:

- From the 'Port Out Reimbursement' option under the 'Section 8' menu, process a 'Stop Bill'. This will stop future HAP checks from being generated and sent to Receiving PHA1. This also will change the voucher status for the applicable tenant to 'Available'.
- Re-Issue the voucher from the 'Voucher' option in the 'Applicant/Tenant' file.

Contact the Receiving PHA2 to alert that agency to expect the family.

**Complete Part I of Form HUD-52665**. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

Send the following via fax or mail to the Receiving PHA2.

- **Form HUD-52665** with Part I completed - the Receiving PHA2 will complete Part II.
- A copy of the family's voucher issued by the Initial PHA.
- Copies of the current **Form HUD-50058** and supporting income verifications previously completed by the Receiving PHA1.

### Receiving PHA2

The Receiving PHA2 must inform the Initial PHA **immediately** that it will absorb the family's housing choice voucher assistance. The Receiving PHA2's payment standards are used when the portable family leases a unit. The family will need to be informed of the Receiving PHA2's policies and payment standards before it begins its search.

In **HDSWin**:

- Set up the landlord using the 'Landlord' option under the 'Section 8' menu.
- Set up the unit that the family will be leasing in the 'Units' file under the 'Applicant' menu.
- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the 'Applicant/Tenant' file.
- Issue a voucher and mark the voucher file as 'Port In' and 'Absorbed' from the 'Voucher' option in the 'Applicant/Tenant' file.
- **After a HAP Contract has been executed on behalf of the family**, process an Action **4-Portability Move-in** from the 'Actions' option in the 'Applicant/Tenant' file. **This action will create a Form HUD-50058, which must be reported to PIC by the Receiving PHA2 after the Receiving PHA1 has processed an Action 5-Portability Move-out.** Please note, **HDSWin** will automatically complete the following fields on **Form HUD-50058** based on the voucher and tenant data entered:
  - **12d Did family move into your PHA jurisdiction under portability?** This field should be marked Yes.
  - **12e Cost Billed per month.** Must equal \$0.
  - **12f PHA code billed.** Must be blank.

**Complete Form HUD-52665 Part II** and send it to the Initial PHA **within 10 working days of HAP Contract execution.** You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

### Initial PHA

- **After the Receiving PHA2 executes a HAP Contract on behalf of the family**, the Initial PHA should notify the Receiving PHA1 so they may process an Action **5-Portability Move-out** and submit the action to PIC.
- Un-Issue the voucher from the 'Voucher' option in the 'Applicant/Tenant' file so that it may be issued to another applicant.
  - ❖ Please remember that if an Action **10-Issuance of Voucher** was previously processed and submitted to PIC for this family, it may be necessary to process an Action **11-Expiration of Voucher** and submit the action to PIC.

### Receiving PHA1

**After the Receiving PHA2 executes a HAP Contract on behalf of the family**, process an Action **5-Portability Move-out** from the 'Actions' option in the 'Applicant/Tenant' file, using an effective date earlier than the HAP Contract date. **This action will create a Form HUD-50058, which must be reported to PIC by the Receiving PHA1.**

- ❖ The Receiving PHA1 should keep in contact with the Initial PHA until a HAP Contract is executed or until the family fails to lease a unit. This will ensure that the appropriate action is processed and submitted to PIC.

## Participating Family Not Absorbed by Receiving PHA1 Ports Into Receiving PHA2's Jurisdiction and Is Not Absorbed

### Receiving PHA1

**Refer the family back to the Initial PHA.**

In **HDSWin**, place the tenant in '**Shop**' mode using the 'Actions' option from the 'Applicant/Tenant' file. Shop mode will place the family in an active but not housed status. This will allow the family to search for a unit and at the same time stop any HAP checks from being generated. It may be necessary to process an Action **9-Annual Reexamination Searching** in **HDSWin** (using the 'Actions' option under the 'Applicant/Tenant' file) if the participating family is due for an annual reexamination during the search process. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**

**Complete Form HUD-52665 Part II** and send it to the Initial PHA indicating the HAP Contract is being terminated. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

## Initial PHA

### In **HDSWin**:

- From the 'Port Out Reimbursement' option under the 'Section 8' menu, process a 'Stop Bill'. This will stop future HAP checks from being generated and sent to Receiving PHA1. This also will change the voucher status for the applicable tenant to 'Available'.
- Re-Issue the voucher from the 'Voucher' option in the 'Applicant/Tenant' file.

Contact the Receiving PHA2 to alert that agency to expect the family.

**Complete Part I of Form HUD-52665.** You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

Send the following via fax or mail to the Receiving PHA2.

- **Form HUD-52665** with Part I completed - the Receiving PHA2 will complete Part II.
- A copy of the family's voucher issued by the Initial PHA.
- Copies of the current **Form HUD-50058** and supporting income verifications previously completed by the Receiving PHA1.

## Receiving PHA2

The Receiving PHA2 must inform the Initial PHA **immediately** that it will administer the family's housing choice voucher assistance and if it approves an extension to the voucher term or changes the unit size of the family's voucher. The Receiving PHA2's payment standards are used when the portable family leases a unit. The family will need to be informed of the Receiving PHA2's policies and payment standards before it begins its search.

The Receiving PHA2 must submit the Initial billing notice no later than 10 working days following the date the HAP contract was executed and in time that it will be received no later than 60 days following the expiration date of the family's voucher issued by the Initial PHA. A Receiving PHA2 that failed to send the Initial billing notice within 10 working days following the date the HAP contract is executed is generally required to absorb the family into its own program unless the Initial PHA is willing to accept the late submission.

### In **HDSWin**:

- Set up the landlord using the 'Landlord' option under the 'Section 8' menu.
- Set up the unit that the family will be leasing in the 'Units' file under the 'Applicant' menu.
- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the 'Applicant/Tenant' file.
- Issue a voucher and mark the voucher file as 'Port In' from the 'Voucher' option in the 'Applicant/Tenant' file. Enter the **HA Number** to be billed and the applicable Admin Fees
- **After a HAP Contract has been executed on behalf of the family**, process an Action **4-Portability Move-in** from the 'Actions' option in the 'Applicant/Tenant' file. **This action will create a Form HUD-50058, which must be reported to PIC by the Receiving PHA2 after the Receiving PHA1 has processed an Action 5-Portability Move-out.** Please note, **HDSWin** will automatically complete the following fields on **Form HUD-50058** based on the voucher and tenant data entered:
  - **12d Did family move into your PHA jurisdiction under portability?** This field should be marked Yes.
  - **12e Cost billed per month.** The amount of the housing assistance payment in addition to any administrative fees. The value of this field must be greater than \$0.
  - **12f PHA code billed.** The applicable PHA code.

**Complete Form HUD-52665 Part II** and send it to the Initial PHA with a current **Form HUD-50058 within 10 working days of HAP Contract execution.** You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

**The Receiving PHA2 is responsible for reporting all changes to PIC and must keep the Initial PHA informed of all changes affecting household subsidy.**

After each change in billing amount, the Receiving PHA2 must send the Initial PHA a completed **Form HUD-52665** showing the new HAP amount, copies of **Form HUD-50058** and any related income verifications. The Receiving PHA2 should notify the Initial PHA of any change in the billing amount as soon as possible (preferably, before the effective date to avoid retroactive adjustments) but no later than 10 working days following the effective date of the change.

The Receiving PHA2 must also send the Initial PHA a copy of the updated **Form HUD-50058** at each annual recertification, regardless of whether there is a change in the billing amount. The purpose of this notification is to serve as a 'reconciliation' to assist both PHAs in fulfilling their accounting and record-keeping responsibilities.

## Initial PHA

**After the Receiving PHA2 executes a HAP Contract on behalf of the family**, the Initial PHA should notify the Receiving PHA1 so they may process an Action **5-Portability Move-out** and submit the action to PIC.

### HDSWin:

- From the 'Landlord' option under the 'Section 8' menu, set up the Receiving PHA2 as a landlord.
- Mark the voucher file as 'Port Out' from the 'Voucher' option in the 'Applicant/Tenant' file.
- From the 'Port Out Reimbursement' option under the 'Section 8' menu, add a record in order to create a HAP Payment that can be sent to the Receiving PHA2.
  - Select the Receiving PHA2 as the landlord.
  - Select the applicable tenant.
  - Enter the HAP, URP, Admin, and Hard to House fee amounts if applicable.
  - Enter the effective date.
- From the 'HAP Processing' option under the 'Section 8' menu, generate a HAP check and send it to the Receiving PHA2. This payment must be made within 30 days of receipt of Part II of Form HUD-52665 indicating the billing amount. The Initial PHA is also responsible for ensuring that subsequent billing amounts are received no later than the fifth working day of each month for which the monthly billing amount is due.

## Receiving PHA1

**After the Receiving PHA2 executes a HAP Contract on behalf of the family**, process an Action **5-Portability Move-out** from the 'Actions' option in the 'Applicant/Tenant' file, using an effective date earlier than the HAP Contract date. **This action will create a Form HUD-50058, which must be reported to PIC by the Receiving PHA1.**

- ❖ The Receiving PHA1 should keep in contact with the Initial PHA until a HAP Contract is executed or until the family fails to lease a unit. This will ensure that the appropriate action is processed and submitted to PIC.

## Participating Family Not Absorbed by Receiving PHA Ports back into Initial PHA's Jurisdiction

### Receiving PHA

In **HDSWin**, place the tenant in '**Shop**' mode using the 'Actions' option from the 'Applicant/Tenant' file. Shop mode will place the family in an active but not housed status. This will allow the family to search for a unit and at the same time stop any HAP checks from being generated. It may be necessary to process an Action **9-Annual Reexamination Searching** in **HDSWin** (using the 'Actions' option under the 'Applicant/Tenant' file) if the participating family is due for an annual reexamination during the search process. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**

Contact the Initial PHA to alert the agency to expect the family.

**Complete Form HUD-52665 Part II** and send it to the Initial PHA indicating the HAP Contract is being terminated. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

## Initial PHA

The Initial PHA must inform the Receiving PHA **immediately** that it will absorb the family's housing choice voucher assistance. The Initial PHA's payment standards are used when the portable family leases a unit. The family will need to be informed of the Initial PHA's policies and payment standards before it begins its search.

### In **HDSWin**:

- From the 'Port Out Reimbursement' option under the 'Section 8' menu, process a 'Stop Bill'. This will stop future HAP checks from being generated and sent to Receiving PHA1. This also will change the voucher status for the applicable tenant to 'Available'.
- Re-Issue the voucher and mark the voucher file as 'Port In' and 'Absorbed' from the 'Voucher' option in the 'Applicant/Tenant' file.
- Enter all essential family information, such as household members, income, assets, etc., using the appropriate option from the 'Applicant/Tenant' file.
- Set up the landlord using the 'Landlord' option under the 'Section 8' menu.
- Set up the unit that the family will be leasing in the 'Units' file under the 'Applicant' menu.
- **After a HAP Contract has been executed on behalf of the family**, process an Action **4-Portability Move-in** from the 'Actions' option in the 'Applicant/Tenant' file. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA after the Receiving PHA has processed an Action 5-Portability Move-out.** Please note, **HDSWin** will automatically complete the following fields on **Form HUD-50058** based on the voucher and tenant data entered:
  - **12d Did family move into your PHA jurisdiction under portability?** This field should be marked Yes.
  - **12e Cost Billed per month.** Must equal \$0.
  - **12f PHA code billed.** Must be blank.

**Complete Form HUD-52665 Part II** and send it to the Receiving PHA within 10 working days of HAP Contract execution. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

## Receiving PHA

**After the Initial PHA executes a HAP Contract on behalf of the family**, process an Action **5-Portability Move-out** from the 'Actions' option in the 'Applicant/Tenant' file, using an effective date earlier than the HAP Contract date. **This action will create a Form HUD-50058, which must be reported to PIC by the Initial PHA.**

## Participating Family Not Absorbed by Receiving PHA and Ends Participation

### Receiving PHA

In **HDSWin**, the Receiving PHA should process an Action **6-End of Participation** using the 'Actions' option under the 'Applicant/Tenant' file. **This action will create a Form HUD-50058, which must be reported to PIC by the Receiving PHA.**

**Complete Form HUD-52665 Part II** and send it to the Initial PHA indicating that the HAP Contract is being terminated. You may generate this form in **HDSWin** using the 'Recert Forms' option in the 'Applicant/Tenant' file.

### Initial PHA

In **HDSWin** from the 'Port Out Reimbursement' option under the 'Section 8' menu, process a 'Stop Bill'. This will stop future HAP checks from being generated and change the voucher status for the applicable tenant to 'Available' so that it may be issued to another applicant.

- ❖ Please remember that if an Action **10-Issuance of Voucher** was previously processed and submitted to PIC for this family, it may be necessary to process an Action **11-Expiration of Voucher** and submit the action to PIC.

## Special Notes

- When the Receiving PHA processes an Action 4-Portability Move-in to PIC and is administering the voucher, the “50058 Required” count on the Delinquency Report will decrease by 1 for the Initial PHA and increase by 1 for the Receiving PHA.
- When the Receiving PHA processes an Action 9-Annual Reexamination Searching to PIC, and is administering the voucher, the “50058 Required” count on the Delinquency Report will no longer be decreased by 1 for the Initial PHA or increased by 1 for the Receiving PHA. The family will be counted in the Receiving PHA’s “50058 Reported” count on The Delinquency Report.
- To properly report an “Administered Voucher”, the Receiving PHA must report an amount billed in field 12e greater than \$0 and the appropriate PHA code in field 12f.
- Remember that overlapping effective dates does not apply to portability. An Action 5-Portability Move-out must be processed in PIC before PIC will accept an Action 4-Portability Move-in.
- Overlapping effective dates will apply if the Initial PHA has not processed an Action 5-Portability Move-out. PIC will accept an Action 1-New Admission from the Receiving PHA as long as the effective date is later than the last effective date updated in PIC. The Initial PHA will still be able to either process an Action 5-Portability Move-out or Action 6-End of Participation, or process an Online EOP under the Overlapping Report found in the Viewer Sub-module. *Be advised that an Action 1-New Admission reports waiting list data, whereas an Action 4-Portability Move-in does not, therefore the data reported on the PIC Monthly “New Admissions Report” will be affected.*
- Only process an Action 5-Portability Move-out if a HAP contract has been executed on behalf of the family, otherwise, process an Action 6-End of Participation.