

## **Union Notification on iREMS Property Assignment Robotics Process Automation (RPA)**

### **1. Current Practice of Reassigning Properties in integrated Relate Estate Management System (iREMS)/Web Access Security System (WASS)**

Currently reassigning properties from one Account Executive to another in iREMS can be quite tedious and frustrating (many steps). There is currently no existing method for bulk reassigning multiple properties from one Account Executive to another. Currently each property must be individually reassigned, which is time consuming when numerous properties need to be moved due to staff changes.

Please reference this [link](#) to review all required steps to complete one property assignment.

### **2. The Nature, Scope, and Rationale for the Proposed Change:**

Multifamily is prepared to deploy an automated robotics process to assist field operations personnel in assigning properties to staff within iREMS. Currently, making property assignments in iREMS is cumbersome, as multiple steps are required for each individual change, and these changes are amplified if there are staffing changes. In the new process, staff may use a simple spreadsheet to identify needed changes, and the bot will click through all the changes in iREMS automatically. This will save a substantial amount of time for operations staff. The deployment of this tool will not impact the decision-making or management of property assignments to individual staff. It only improves the process through which property assignments are executed in iREMS.

The change is estimated to save 400 work hours a year for field staff responsible for assigning properties to Account Executives.

### **3. A statement explaining the new change**


Instead of users manually reassigning Account Executives via the WASS/iREMS “Property Assignment Maintenance” Page, the RPA bot will crawl and automatically change the Account Executives from a spreadsheet. Each MFH regional office will complete a spreadsheet that lists the H\_IDs of individuals who are to be unassigned from properties using a Property ID. On a separate tab of the spreadsheet, H\_IDs will be listed of individuals who are to be associated with properties they are newly assigned to with a Property\_ID. The RPA will copy the data from spreadsheet and make the changes on the WASS/iREMS “Property Assignment maintenance Page. The person executing the bot will receive a report of any errors that may have occurred during the process.

### **4. The proposed implementation date:**

The RPA was deployed to production on March 23<sup>rd</sup>, 2022, after User Acceptance testing (UAT) was successful. Five (5) users representing each of the 5 Multifamily regional offices were given licenses to run the RPA on behalf of their region for property reassignment. All 5 users have been trained and are ready to begin use of the system immediately. An additional license from an existing RPA is being repurposed for the iREMS/WASS Property Reassignment RPA and is likely to be used by the Office of Residential Care Facilities (ORCF).

### **Current Required Steps to Reassign a Property**

To begin the reassignment process, the user signs into Secure Systems and then selects the Property Assignment Maintenance option. This brings the user to this screen:



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**systems**

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### Property Assignment Maintenance

Please enter a User ID:	
User ID	<input type="text"/>
Choose a Function:	
	Assign Property <input type="button" value="v"/>
For View or Unassign Property, optionally provide Servicing Site:	
For Assign Property, provide one of the following:	
Property ID	<input type="text"/>
FHA Number	<input type="text"/>
Contract Number	<input type="text"/>
Servicing Site	<input type="button" value="v"/>
For Assign Property, show Property Owners:	
	Current Owners <input type="button" value="v"/>
Show:	
	Active Properties <input type="button" value="v"/>
Sort by:	
	Property Name <input type="button" value="v"/>
For UnAssign Property, Optionally enter a role	
Role Code	<input type="text"/>

The first step is to unassign the property from the current Account Executive (*first touch*). This is accomplished by entering the H# for the current Account Executive and choosing the function of View or Unassign Property. Select Submit and you get this screen:

**Secure Systems**

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**View/Unassign Property for User : H46488 [ SHAWN M WALKEY ]**

To unassign a property, check the box and click submit.

Select/Deselect All

Property ID	Property Name	Owner TIN	Role Code	Role Description
<input type="checkbox"/> 800241993	10th and Jefferson		SPM	Supervisory Project Manager
<input type="checkbox"/> 800214879	128TH PLACE		SPM	Supervisory Project Manager
<input type="checkbox"/> 800245963	12TH AND WEDGEWOOD		SPM	Supervisory Project Manager
<input type="checkbox"/> 800004587	135TH STREET APARTMENTS		SPM	Supervisory Project Manager
<input type="checkbox"/> 800225534	18 Watercress Green		SPM	Supervisory Project Manager
<input type="checkbox"/> 800243515	2009 Vineville		SPM	Supervisory Project Manager
<input type="checkbox"/> 800242410	23 West Apartments		SPM	Supervisory Project Manager

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Welcome SHAWN WALKEY

This will display all of the properties assigned to the Account Executive. Check the box next to each property to be unassigned and select the submit button. A message will appear confirming the properties have been unassigned.

Next, go back to the Property Assignment Maintenance screen and enter the H# for the new Account Executive and select the servicing site and select submit. This will display all properties for that servicing site as follows:

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**systems**

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- Financial Assessment Submission - PHA (FASPHA)
- Financial Assessment Subsystem - Multifamily Housing (FASS)
- Mark-to-Market (M2M)
- Multifamily Delinquency and Default Reporting System (MDDR)
- Public Housing
- Assessment System: Scores and Status (NASS)
- Physical Assessment Subsystem (PASS)
- Quality Assurance Subsystem (QASS)
- Integrated Real Estate Management System (iREMS)

**Assign Property for User : H46488 [ SHAWN M WALKEY ]**

**Choose a Role:**

Role Description - (System ID - Role Code)	
	Backup Project Manager (REMS - BPM)
	Project Manager (REMS - PM)
	Supervisory Project Manager (REMS - SPM)

**Choose at least one Property:**  
 Current property owners are shown below.  
 Properties with no TIN listed have not been assigned owner information.  
 Only active properties are shown.

Property ID	Property Name	TIN
800241993	10th and Jefferson	475006001 *
800245963	12TH AND WEDGEWOOD	611818217 *
800225534	18 Watercross Green	262708592 *
800243515	2009 Vineville	010651063 *
800248530	310 AT NULU	
800247455	315 LITCHFORD	
800237707	3343 memorial	463020083 *
800210948	901 Place Apartments	820867148 *
800012450	A.R.P. MANOR	560673290 *
800012102	AARON HENRY ESTATES--JONESTOWN	640671423 *

Submit    Cancel

Select the appropriate Role Description. In the example above, the properties are listed in alphabetical order; however, the properties spelled with all capital letters are listed first, then those that are spelled with the first letter capitalized then lower case. The user needs to scroll down and highlight each property they are assigning to the Account Executive (*second touch*). This can be 50 or more properties. If the user accidentally forgets to hold down the CTL key when they select the property, all selections are lost and they have to start back at the beginning (*potential touch 3*). Once the properties are selected, select the Submit button.

A confirmation of the properties is pop up on the screen.

The screenshot displays the 'System Administration' interface for 'Secure Systems'. The header includes navigation links: 'faq | help | search | home | logout'. The main title is 'System Administration'. Below the header, there is a navigation menu on the left with sections for 'system administration' and 'systems'. The 'system administration' section includes links for Business Partners, Maintenance, Data Warehouse, Password Change, Property Assignment Maintenance, and User Maintenance. The 'systems' section includes links for Active Partners Performance System (APPS), Financial Assessment Submission - PHA (FASPHA), Financial Assessment Subsystem - Multifamily Housing (FASS), Mark-to-Market (M2M), Multifamily Delinquency and Default Reporting System (MDDR), Public Housing, Assessment System: Scores and Status (NASS), Physical Assessment Subsystem (PASS), Quality Assurance Subsystem (QASS), and Integrated Real Estate Management System (IREMS). The main content area is titled 'Assign Property Confirmation for User H46488'. It contains two tables. The first table, 'User Information', shows details for User ID H46488, First Name SHAWN, Middle Initial M, and Last Name WALKEY. The second table, 'Properties to Assign to User H46488 for Role PM', lists three properties: 800247012 (ABBINGTON AT LINWOOD), 800007481 (ABEL COURT), and 800078939 (ACADEMY PLACE APTS). At the bottom of the main content area, there are two buttons: 'Confirm' and 'Cancel'.

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**Secure Systems**

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**systems**

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**Assign Property Confirmation for User H46488**

User Information	
User ID	H46488
First Name	SHAWN
Middle Initial	M
Last Name	WALKEY

Properties to Assign to User H46488 for Role PM .		
Property ID	Property Name	TIN
800247012	ABBINGTON AT LINWOOD	
800007481	ABEL COURT	813596171
800078939	ACADEMY PLACE APTS	615534716

Select the Confirm button.

If the Account Executive happens to be assigned to the property as a Backup Property Manager or already assigned as the Property Manager, once you select the Confirm button the user will receive the following error message:

The screenshot shows the 'System Administration' interface for 'Secure Systems'. The user is 'SHAWN M WALKEY' with ID 'H46488'. The page title is 'Assign Property for User : H46488 [ SHAWN M WALKEY ]'. A red error message states: 'You cannot complete this function due to the following error(s). Error Message: Either this user already has a REMS role assigned for this Property, or you are trying to assign two incompatible roles to this user.' Below the error, there is a 'Choose a Role:' section with a table of roles: Backup Project Manager (REMS - BPM), Project Manager (REMS - PM), and Supervisory Project Manager (REMS - SPM). A second error message says: 'Choose at least one Property: Properties with no TIN listed have not been assigned owner information.' Below this is a table of properties with columns for Property ID, Property Name, and TIN.

Property ID	Property Name	TIN
800000061	Shawnee Apartments	841103056
800000061	Shawnee Apartments	310994208
800000061	Shawnee Apartments	611437301 *
800000126	Community Options, Inc.	630955721 *
800000128	AHEPA 310 APARTMENTS	630859667 *
800000132	AHEPA 310 II	630955243 *
800000137	ALAMEDA TERRACE APTS	630985617
800000137	ALAMEDA TERRACE APTS	630156594
800000137	ALAMEDA TERRACE APTS	813935836 *
800000140	Parkway Place	630985617

By selecting the Cancel button, the user will be backed out of the screens; however, there is no way for the user to identify the problem record. The user must exit the Property Maintenance Screen and go into iREMS to look up each property record to identify the problem record. Once identified, the user starts the process of assigning the properties to the new Account Executive all over again (*potential touch 3 or 4*).

Once the properties have been successfully assigned to the new Account Executive, the Supervisory Project Manager needs to be reassigned if the new Account Executive has a different Branch Chief than the previous Account Executive. The process is the same as assigning an Account Executive (*touch 5 or 6*).

In closing, a revision to the current process of reassigning properties from one Account Executive to another should be considered. The current process involves a great deal of non value-added steps that could be replaced by a modernized method utilizing robotics. This method could easily recreate the steps noted above based on a spreadsheet or other type of list containing the needed changes. With upwards of 30,000 properties in Multifamily's nationwide portfolio, such an improvement would save valuable Info Specialist and Branch Chief time which could more effectively be spent elsewhere.