TO DO LIST
Upcoming Rent-Setting Events

- ❑ Correct inventory and tenants in QMIS database
- ❑ Install 2009 QMIS software
- ❑ Run draft or final rents; make copies for file
- ❑ Distribute documents to tenants by 1/29/09
- ❑ File signed copies
- ❑ Submit new payroll deductions, effective 3/1/09
- ❑ Backup your QMIS database to CD
- ❑ E-mail "Send" file to management by 5/1/09

November – December 2008:

❑ **Verify your housing inventory and make any corrections to QMIS.** Double-check the Nearest Established Community – Mileage – Rent Class – Planned Tenants – Beds/Baths Used – Utilities – Property/Services. Be sure to *keep a log* of any inventory changes you make in your file. This helps to explain to existing tenants why their rents have changed.

December 2008 - January 2009:

❑ **Install QMIS software** from the NBC web page, http://www.nbc.gov/supportservices/quarter.html. If you do not have Administrator Rights, contact your IT Help Desk to get it installed ASAP.

❑ If you have not done so, ensure that all **Tenants** are correct – before running rents.

❑ **Calculate Draft Rents** for entire installation (Tools – Rents – Installation/Site.)

- ▪ Use 3/1/2009 as the Effective Date
- ▪ If you are in the New Mexico/Mid-South/Southeast Survey Region, select "Survey of Private Rental Market" as the reason for calculating a new rent. If not, use "Application of Consumer Price Index" as the reason for calculating a new rent
- ▪ Check box to print "General Terms and Conditions"

Print rents and review them carefully. Check the accuracy of the "Planned Tenants." Check that the "previous bi-weekly rent" was calculated on 3/2/2008 or after. [If not, you must run a final rent for 3/2/2008, and then run another Draft or Final rent for 3/1/2009.]

Once you are satisfied the rents are accurate, you may send out the Draft Rent, or run and print a Final Rent for your tenants.

❑ **Modify the General Terms and Conditions.** The "General Terms and Conditions" is not specific to a housing unit or tenant. You can create one "master" and copy it for all tenants.

1. Describe or detail the occupant's obligations with respect to quarters (400 DM 3, Section 3.8.2)
2. Any attachments must be explicitly cited in section 10, "Other Conditions" and made a part of the Quarters Assignment Agreement. (400 DM 3, Section 3.8.2) For example, any other policies that apply, such as pet policy or "bunkhouse rules," must be referenced in section 10 and attached.
3. New DOI policy requires if the tenant is non-federal, you must **attach a copy of their revocable license**. In section 10, "Other Conditions," state that "The attached revocable license is made a part of this agreement." (400 DM 3, Section 3.2.3)

❑ **Make a copy of documents for your file**. One for the tenant; one for your housing file.

❑ **Provide printed copies of Draft or Final rents to existing Tenants <u>by January 29, 2009</u>.** It must be U.S. mailed, e-mailed or hand-delivered to tenants by January 29. This provides the 30 days advance written notice *required by law*. Provide the following documents to each existing tenant:

- Monthly Base Rent Computation Schedule – page 1
- Monthly Net Rent Computation Schedule – page 2
- Government Quarters Inventory – pages 3 and 4
- Tenant Rent Notice (Draft or Final) – page 5
- Quarters Assignment Agreement – page 6
- General Terms and Conditions – page 7

❑ **Receive and File Signed Agreements.** If you are in the New Mexico, Mid-South or Southeast Survey regions, <u>all tenants must sign a new Quarters Assignment Agreement</u> and return it to you. The Agreement states: "A new Quarters Assignment Agreement will be required only when rates are revised pursuant to a baseline survey or appraisal." In other words, tenants must sign an Agreement when they move in, and every four years thereafter when a new survey is implemented.

If the tenant refuses to sign the Quarters Assignment Agreement, it is grounds for eviction. Revised rental rates will be collected <u>whether or not the occupant signs a new rental agreement</u>. Signing the agreement does not nullify their appeal rights (400 DM 3, Section 4.3.3.) The Agreement includes a provision for automatic implementation of revised rates without signature. (400 DM 3, Section 4.5.3.) You only need to provide the 30 day advance written notice before implementing a new rent.

❑ A designated Bureau/Agency employee or official must also sign the Agreement.

February 2009:

❑ **Tenant questions.** You may get phone calls from tenants about rent changes. Consider providing the Tenant "Frequently Asked Questions" brochure. (http://www.nbc.gov/supportservices/quarter.html) If a tenant points out an error in their Inventory, verify, and then make the corrections in QMIS *as soon as possible*. Recalculate

and run a corrected Final rent, effective March 1, 2009, and send the tenant the revised printed copies.

❑ **Submit payroll deductions.** If you provided rents on time to your tenants, then by mid-February, you should complete and submit new **payroll deduction forms** for new rents to take effect on **March 1, 2009**. You do not need a signature from the tenant to do the payroll deduction. If you did not get rents out on time to your tenants, you must adjust the payroll effective date accordingly, because you must provide 30 days written notice to your tenants.

March 2009:

❑ **Run Final Rents.** If you have not already done so, calculate <u>Final Rents</u> for the entire installation (Tools – Rents – Installation/Site), effective March 1, 2009. You may print these if you wish, but you do not need to provide copies of both a Draft and Final to the tenants. You must run the calculation because only Final rents are saved in your QMIS database. To verify, check the "Last Rent" tab in QMIS.

❑ **Backup your data.** This is a good time of year to make a backup of your QMIS database for safekeeping. Copy your "xxxx_QMIS.mdb" file onto a CD or USB Drive and file it.

April 2009:

❑ **Send file.** Every year, you must send your regional or national housing manager a copy of your QMIS database. This is the annual "Data Call" to submit your "Send" file to management. In the QMIS Office, we use this data for billing purposes and to survey your nearest established communities.

To create the "Send" file:

1. First, find the name of your QMIS database file. What are the first four letters of your database name? (xxxx_QMIS.mdb) From QMIS, look at the bottom of the window. The name of your file, and its location, are noted at the bottom… "Database - ….."
2. In QMIS, go to "Tools – Send or Backup Data"
3. Select "E-mail"
4. Click "Browse"
5. Navigate to your C:/QMIS folder (this is where you will save the QMIS Send file). Be sure the "QMIS" folder is selected. Click OK on "Browse for Folder" window.
6. Click OK on "Send/Backup Database to" window.
7. Click OK on "Confirm/Send Backup" window.
8. You may get a message stating "the file already exists. Do you want to replace it?" Respond "Yes."
9. Once that window closes, the Send file has been created.
10. Quit QMIS and go to "My Computer." Open your "C:" drive. Open the "QMIS folder." Your Send file is located here; it is named "xxxx_Send.cab," with the same first four letters of your "xxxx_QMIS.mdb" file. DO NOT RENAME the "Send.cab" file, or it

cannot be used by your regional or national manager. You can rename your QMIS database, then re-create the Send file, if you need to do so.

11. E-mail this "xxxx_Send.cab" file, as instructed, to your regional or national housing manager.

❑ **Import Send files.** <u>If you are a regional or national manager</u>, you will need to import your user's "Send" files.

1. First, detach all "Send.cab" files from your e-mail, and save them in your C:/QMIS directory.
2. Open your regional or national QMIS database.
3. In QMIS, go to "Tools – Import Data"
4. Select "E-mail"
5. Click "Browse"
6. Navigate to your C:/QMIS folder (this is where you saved Send files). Select the file you want to import. Click Open on "Select Database to Import" window.
7. Click OK on "Select Database to Import" window.
8. Click OK on "Confirm Import" window.
9. If there are any housing installations in that Send file which are new to your regional or national database, you will get a list of them. Select "OK to Import."
10. If you have imported this database before, you will get a message stating "The file already exists. Do you want to replace it?" Respond "Yes."
11. Once that window closes, the Send file has been imported.
12. Go to Edit – Installation to verify that the Send file contained current 2009 rent calculations. Go to the "Last Rent" tab and ensure the rent was calculated on 3/1/2009 or after. If not, contact the QMIS user, with instructions to run Final rents and re-send.
13. Quit QMIS and go to "My Computer." Open your "C:" drive. Open the "QMIS folder." After importing a file, QMIS creates a copy of the entire database in your C:/QMIS folder. You will see both the "xxxx_Send.cab" file that was e-mailed to you, and the "xxxx_QMIS.mdb" file.   There is no need to keep both files. Delete the "xxxx_Send.cab" file.
14. Once all of your users have submitted their Send files, and you have imported them into the region/national database, create a Send file of the compiled data, and e-mail it to the national office, or the QMIS office.