

INSTRUCTIONS FOR COMPLETING INVENTORY OF GOVERNMENT HOUSING

(REVISED OCTOBER 2008)

**National Business Center
QMIS Program Office**

Suggestions or comments concerning these instructions are appreciated. Send them to:

Doug Pokorney, Quarters Rental Program Manager
National Business Center, QMIS Program Office
E-mail Doug_B_Pokorney@nbc.gov or Phone 303-969-5050

GENERAL INSTRUCTIONS

CROSS-REFERENCE TO FORM: These instructions are cross-referenced to the inventory form (DI Form 1875). For example, on the form under the **Structure** section, you will see S1 in a circle next to *Rent Class*. On page 11 of these instructions, “S1 – Rent Class” is discussed. In addition, the information collected on the inventory form is utilized by the Quarters Management Information System (QMIS) to establish a rental rate for the government housing unit that is in compliance with OMB Circular A-45, “Rental and Construction of Government Quarters.” Each section (Location, Structure, Amenities/Adjustments, Utilities, Property/Services, and Tenant) and inventory item corresponds to data entered into QMIS.

SEPARATE INVENTORY FORMS: A separate inventory form (DI Form 1875) is to be prepared for each Government Furnished Housing (GFH) and trailer pad. A GFH is defined as a separate living unit designed for occupancy by an individual or family. This would include an apartment, mobile home or single-family house. Thus, each apartment in a multi-apartment building, and each duplex and triplex unit, must be reported on a separate DI Form 1875. Where a multi-unit building (apartment, townhouse, duplex or triplex) is inventoried, care must be exercised to report only that portion of the gross finished floor space of the structure attributable to the individual living unit.

HOUSING CLASSIFICATION: In conducting the inventory it is essential that all housing units be classified uniformly. The design of a structure, rather than its current use, will determine its classification. For example, a house or a mobile home that is designed for occupancy by an individual or a family, but which is used to house unrelated individuals, will be inventoried as a house or a mobile home. However, where a house, mobile home or other structure has been substantially modified or designed for multi-person occupancy, it will be inventoried as a dormitory or bunkhouse. In the case of a structure adapted for use as a multi-person living unit, e.g. a barracks or dormitory, the entire structure should be reported as a single GFH. If, as a result of modification of the structure a GFH should be assigned to a different rent class, a “CHANGE RECORD” should be prepared and submitted.

TRANSACTION: Check the appropriate block to indicate the type of transaction.

If the purpose of the submission is to add a record (housing unit) to the Quarters Management Information System (QMIS) inventory, check “ADD RECORD” and complete the remainder of the form in accordance with these instructions.

If the purpose of the submission is to delete a record that is already in the QMIS inventory, check

“DELETE RECORD” and complete items Q1, and L1 through L7. No further entries are required.

If the purpose of the submission is to change information in a record that is already in the QMIS inventory, check “CHANGE RECORD” and complete items Q1, and L1 through L7. Annotate only those items which require changing.

QUARTERS NUMBER

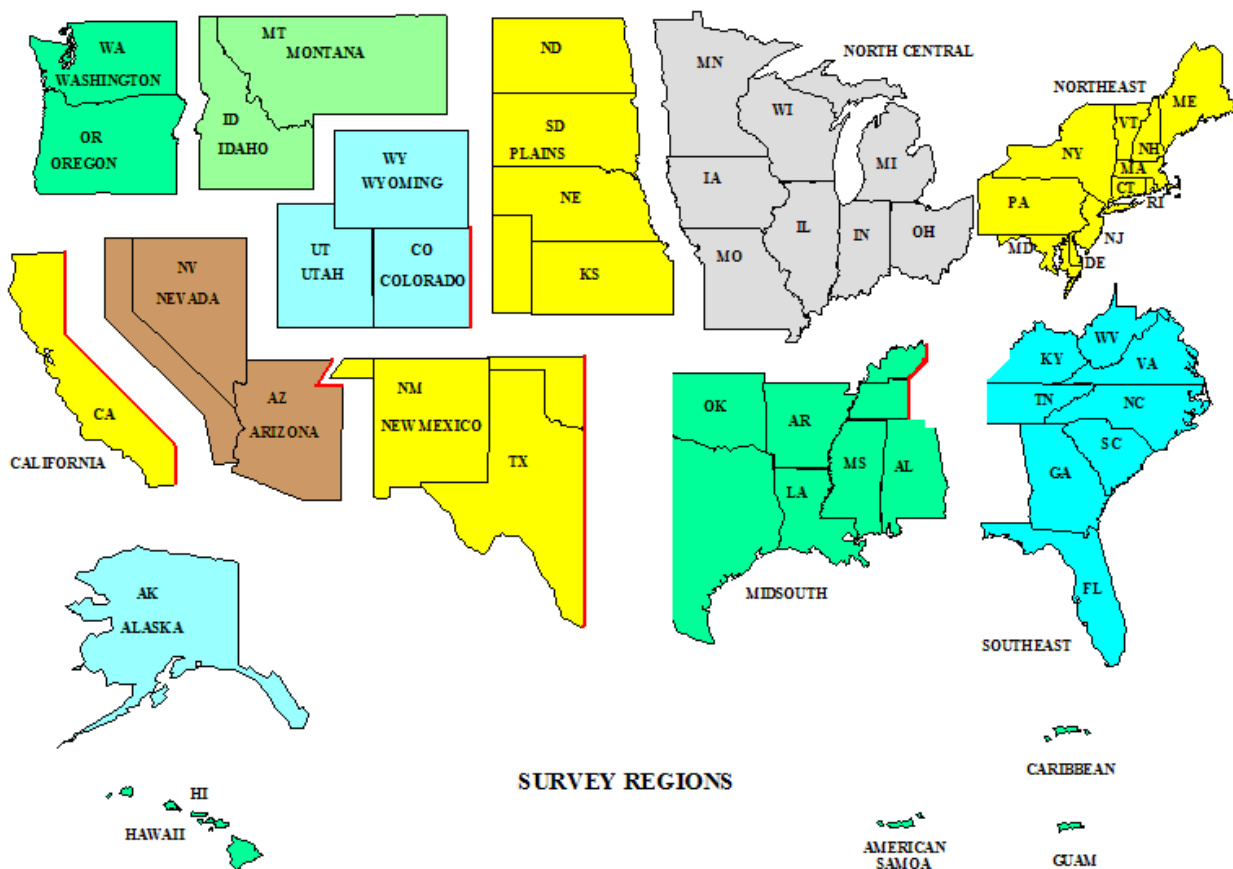
- Q1. AGENCY: Enter the appropriate four digit code assigned to the Department/Agency/Bureau for use when reporting real property to the General Services Administration (GSA) on GSA Form 1166. For example, the Bureau of Indian Affairs will use “1409,” and the U.S. Forest Service will use “1223.”

INSTALLATION: Enter the (up to) seven-digit alphanumeric organizational code assigned to the organizational unit that is responsible for (owns) the housing unit for internal reporting purposes. If none has been assigned, use the GSA installation code.

QUARTERS ID NUMBER: Enter the individual identification (ID) number of the specific housing being inventoried. The number can be either numeric or alphanumeric, at the option of the agency. A maximum of eight digits may be used, and any combination of numbers or letters may be employed. A housing unit in a multi-unit building (e.g. apartment #3) can be designated in a number of ways, however quarters ID numbers must be unique within the organization code or installation code.

LOCATION SECTION

- L1. **QUARTERS NAME** (optional): A name can be used that might be more meaningful than just the local quarters ID number. The name should be meaningful and be independent of the quarters ID number. For example, a name such as “14 Grey River Road,” “Bunkhouse #2” or “Superintendents House” (with no apostrophe) would be appropriate. Apostrophes cannot be used. Do not name the housing with the current occupant’s name or name it “Vacant.”
- L2. **SURVEY REGION**: This field identifies the QMIS survey region in which the housing unit is located, and determines the rental formula that will be applied. *QMIS survey regions differ from the Bureau’s or Agency’s regions.* The actual physical location of the housing determines which QMIS region to use - not the location of the nearest established community.



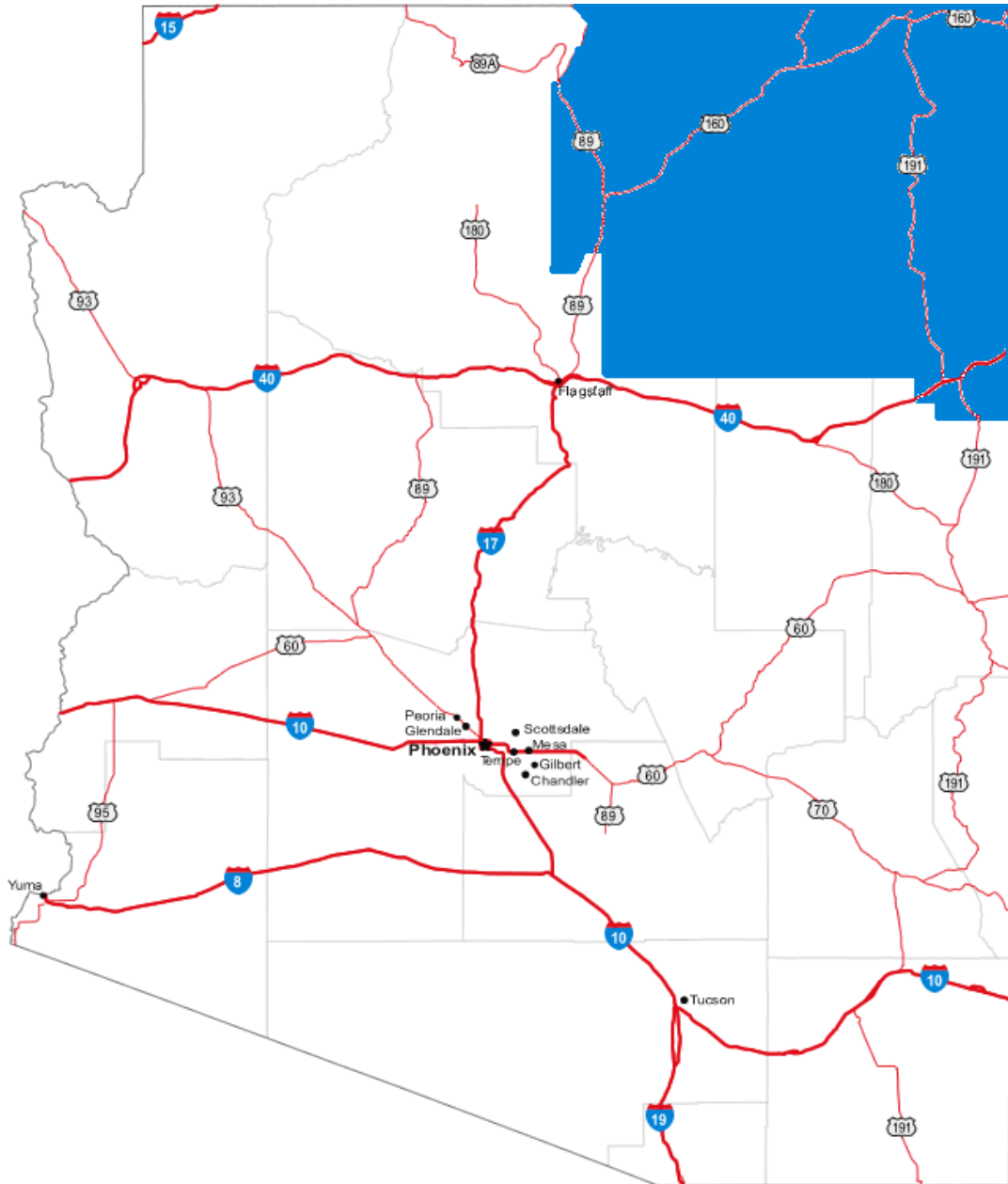
The sixteen QMIS survey region names and corresponding region acronyms (codes) are shown below. For example, if the housing unit is located in the Plains Survey Region, then PL should be entered in the block provided.

<u>SURVEY REGION NAME</u>	<u>CODE</u>	<u>STATES / U.S. TERRITORIES INCLUDED</u>
Alaska	AK	Alaska
Bethel, Alaska	BE	Used only by IHS/Alaska regional native health corporations
Dillingham, Alaska	DL	Used only by IHS/Alaska regional native health corporations
Kotzebue, Alaska	KZ	Used only by IHS/Alaska regional native health corporations
American Samoa	AS	American Samoa
Arizona/Nevada	AN	Eastern California, Arizona except Navajo/Hopi Reservation, Nevada (see Map 1 below)
California	CL	Western California (see Map 2 below)
Caribbean	CB	Puerto Rico, U.S. Virgin Islands
Colorado/Utah/Wyoming	CU	Western Colorado, Utah, Wyoming (see Map 3 below)
Guam	GU	Guam
Hawaii	HI	Hawaii
Idaho/Montana	IM	Idaho, Montana
Mid-South	MS	Eastern Texas, Eastern Oklahoma (see Map 4 below), Arkansas, Louisiana, Mississippi, Alabama, Western Kentucky, Western Tennessee (see MS/SE Map 4 below)
New Mexico	NM	Navajo/Hopi Reservation in Arizona, New Mexico (see AN/NM Map 1 below), Western Texas, Western Oklahoma (see NM/MS Map 5 below)
North Central	NC	Minnesota, Iowa, Missouri, Wisconsin, Illinois, Michigan, Indiana, Ohio
Northeast	NE	Maine, New Hampshire, Vermont, New York, Massachusetts, Connecticut, Rhode Island, Pennsylvania, New Jersey, Maryland, Delaware
Oregon/Washington	OW	Oregon, Washington
Plains	PL	Eastern Colorado, North Dakota, South Dakota, Nebraska, Kansas (see CU/PL Map 3 below)
Southeast	SE	Eastern Kentucky, Eastern Tennessee (see MS/SE Map 4 below), West Virginia, Virginia, North Carolina, South Carolina, Georgia, Florida

MAP 1: Border between AN (Arizona-Nevada) and NM (New Mexico) QMIS Survey Regions
Per National Housing Council decision, July 2007

The Navajo and Hopi Reservations in the State of Arizona shall be included in the NM survey region.
The remainder of the State of Arizona shall be included in the AN survey region.

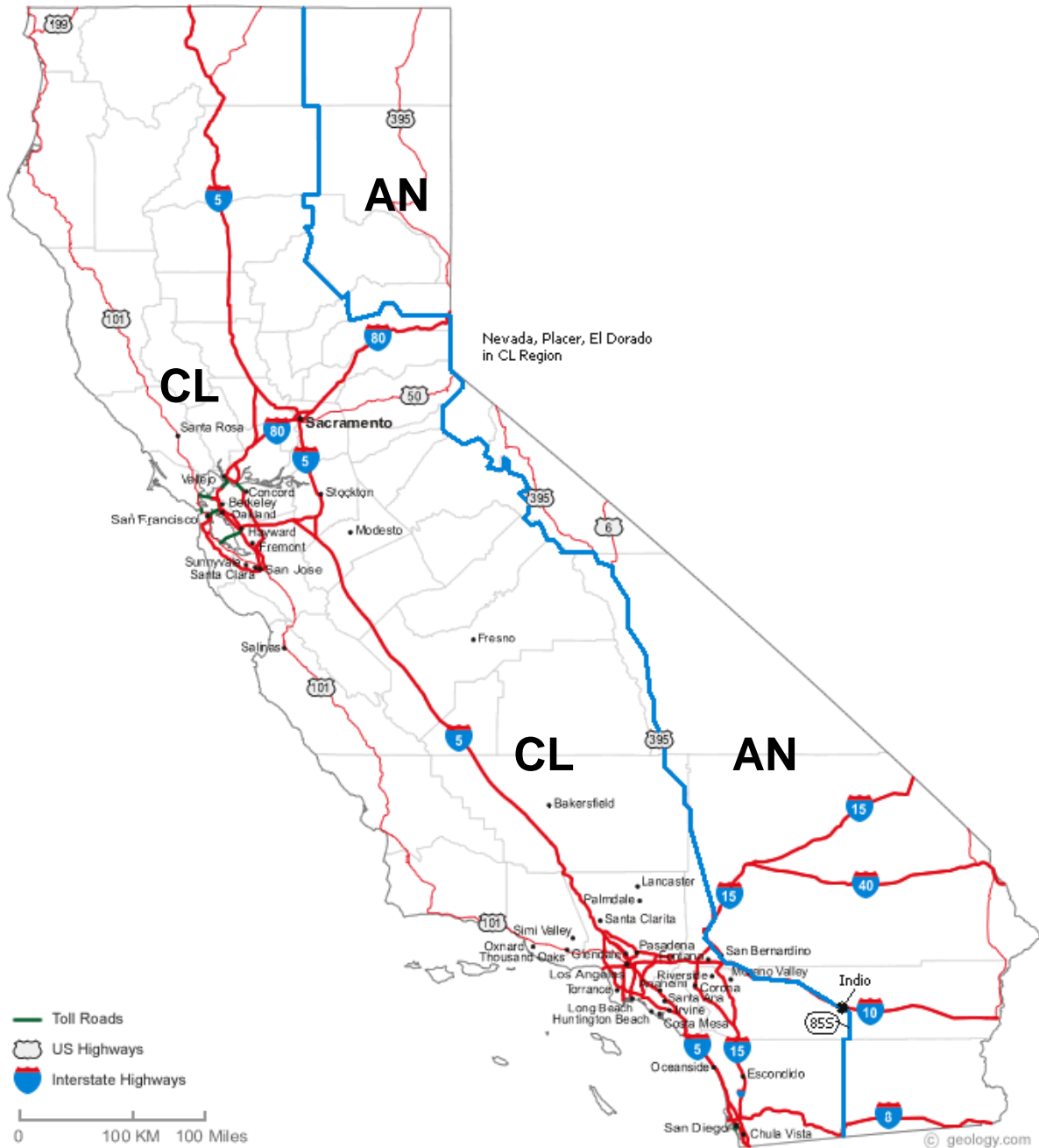
STATE OF ARIZONA



MAP 2: Border between CL (California) and AN (Arizona-Nevada) QMIS Survey Regions
 Per National Housing Council decision July 2007

In the northeastern portion of the State of California, the counties of Modoc, Lassen, Plumas, and Sierra are in the QMIS Arizona-Nevada (AN) region. The counties of Nevada, Placer, and El Dorado are in the QMIS California (CL) region. The counties of Alpine and Mono are in the QMIS Arizona-Nevada (AN) region. At the southern border of Mono County, go east to the crossing point of CA State Hwy. 395 and continue south through Inyo, Kern and San Bernardino counties, to Interstate 15 South. Follow Interstate 15 South, to 215 East (at San Bernardino), to Interstate 10 East, to CA State Hwy. 86 South (east of Indio), to the Riverside County and Imperial County border. Housing located west of this line is in the CL survey region; housing east of this line is in the AN survey region.

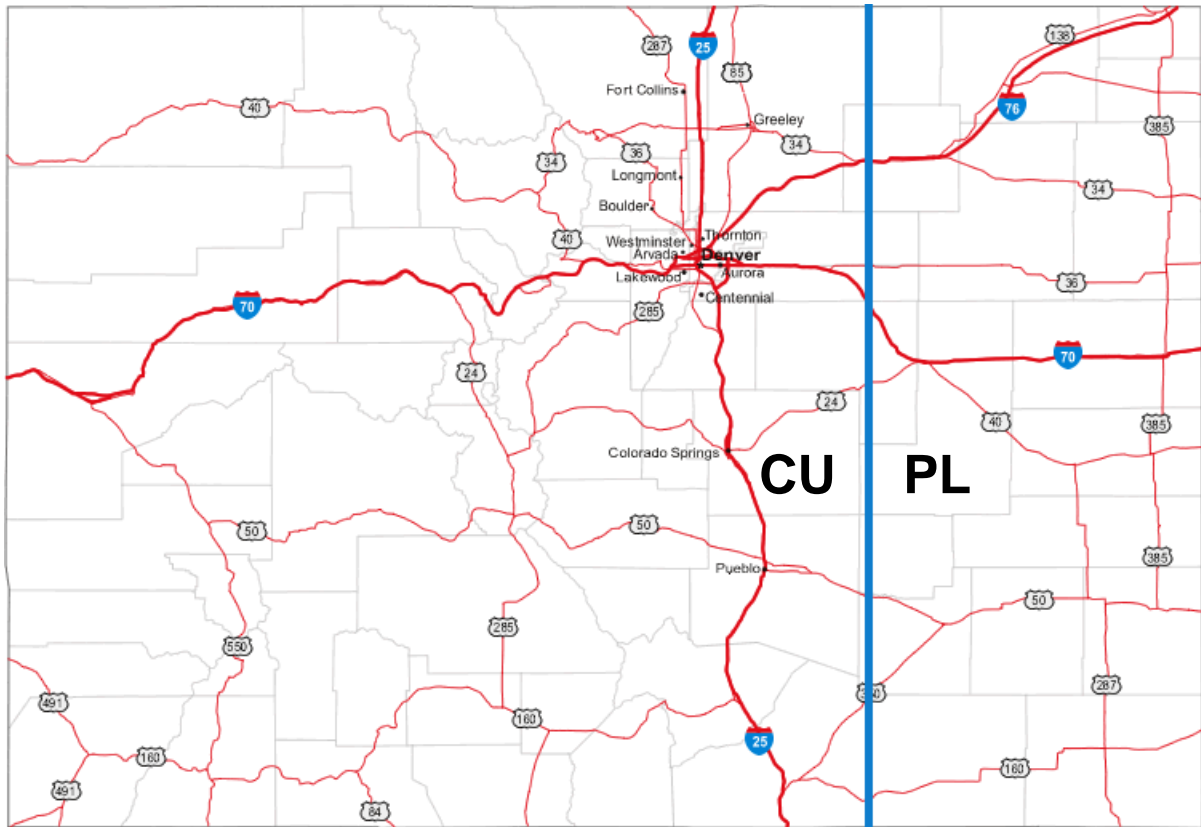
STATE OF CALIFORNIA



MAP 3: Border between CU (Colorado-Utah-Wyoming) and PL (Plains) QMIS Survey Regions
Per National Housing Council decision July 2007

The eastern portion of the State of Colorado, east of 104 degrees Longitude, will be included in the PL survey region. The western portion of Colorado, west of 104 degrees Longitude, will be included in the CU survey region.

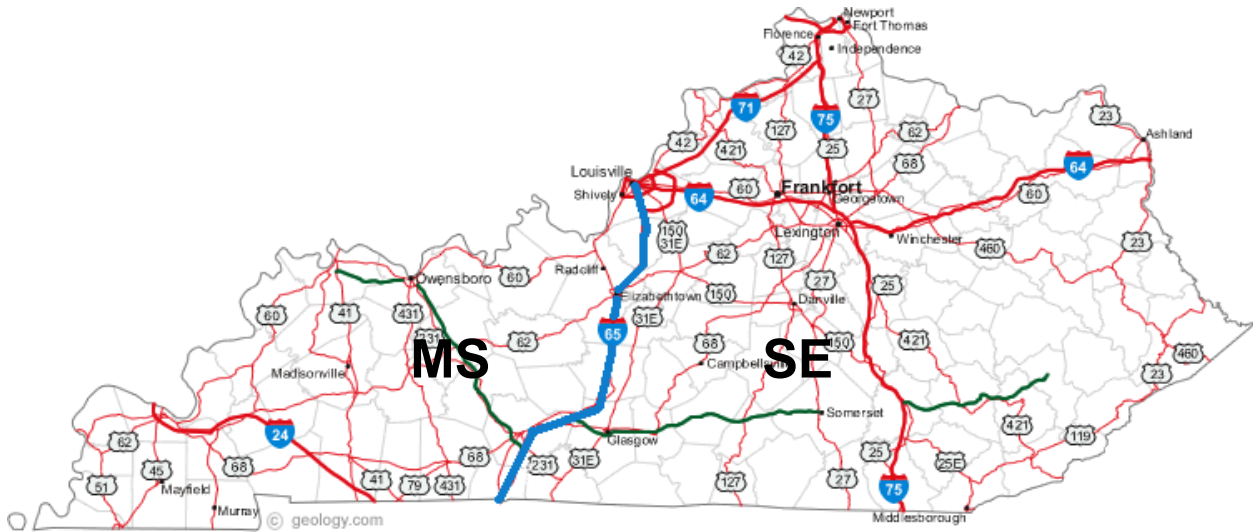
STATE OF COLORADO



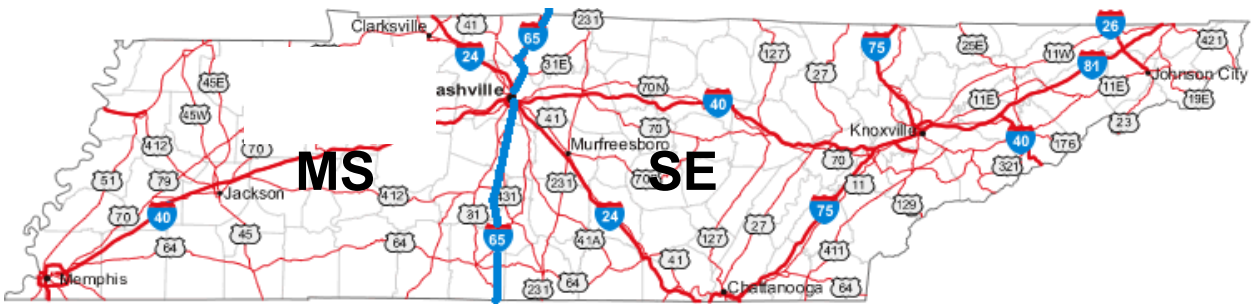
MAP 4: Border between MS (Mid-South) and SE (Southeast) QMIS Survey Regions
Per National Housing Council Decision July 2007

The western portion of the States of Kentucky and Tennessee, west of Hwy. 65, lie in the MS survey region. The eastern portion of Kentucky and Tennessee, east of Hwy. 65, lie in the SE survey region.

STATE OF KENTUCKY



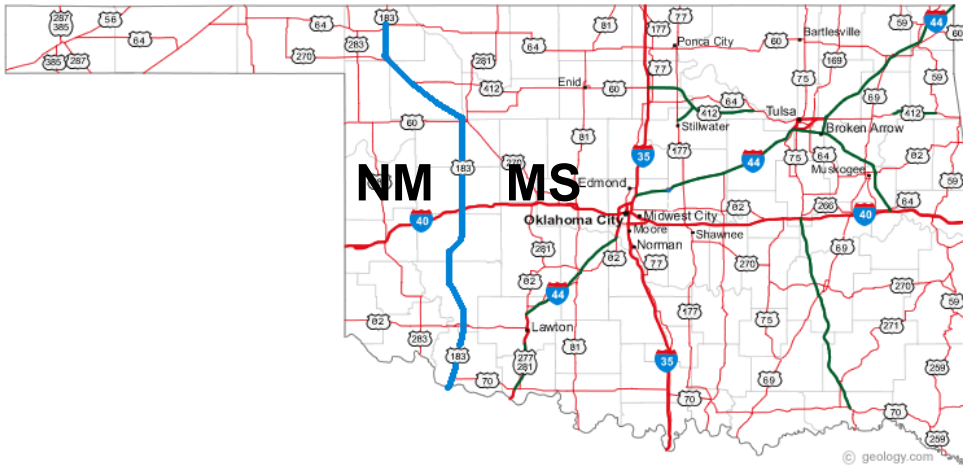
STATE OF TENNESSEE



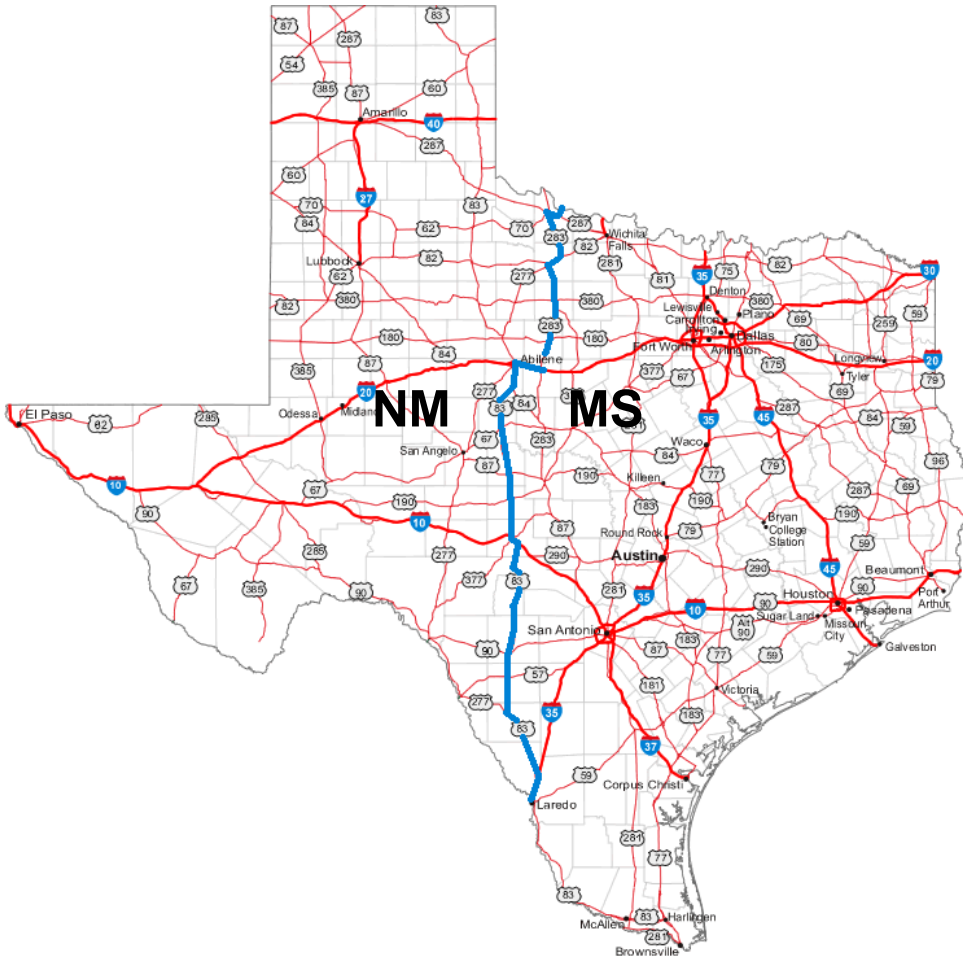
MAP 5: Border between NM (New Mexico) and MS (Mid-South) QMIS Survey Regions
Per National Housing Council decision July 2007

The eastern portion of the States of Oklahoma and Texas, east of Hwy. 183 in Oklahoma, and east of Hwys. 183, 283 and 83 in Texas, lies in the MS survey region. The western portion of Oklahoma and Texas, west of Hwys. 183, 283 and 83 lies in the NM survey region.

STATE OF OKLAHOMA



STATE OF TEXAS



- L3. NEAREST ESTABLISHED COMMUNITY (NEC):
Enter the name of the community nearest to the housing unit which meets or exceeds criteria published in Office of Management and Budget (OMB) Circular A-45 (reproduced below). The NEC does not need to be located in the same state, or in the same QMIS survey region, in which the housing unit is located. Communities in foreign countries (i.e. Canada or Mexico) and communities on Government installations or Indian reservations MAY NOT be designated as NECs.
- OMB Circular A-45, paragraph 6.b. Established Community.
An established community is ordinarily the nearest population center (Metropolitan Statistical Area or an incorporated or unincorporated city or town) having a year-round population of 1,500 or more (5,000 or more in Alaska), provided that it has minimum essential medical facilities (i.e. at least one physician and one dentist) available to all occupants of Government quarters on a non emergency basis and a private rental market with housing available to the general public. Population determinations will be based upon the most recently published decennial census of the United States.
- If the community is not available for selection from the NEC choice list in QMIS, contact the QMIS Program Office to have it added.
- L4. MILES (one-way) BETWEEN HOUSING AND NEC: Enter the number of one-way miles (rounded to the nearest whole mile) between the housing unit and the center of the NEC via the most commonly traveled route. It is important to specify the one-way mileage for each type of road surface, water or air transportation. For example, the tenant may travel 15 miles by paved road, and 4 miles by unpaved road, one way to the NEC.
- L5. MANAGEMENT UNIT (optional): If applicable, bureaus or agencies may elect to assign a unique four digit numeric, alphabetic or alphanumeric code to represent this management unit or district. This may be a unique property system management identification number (e.g. asset number).
- L6. FACILITY MANAGEMENT NUMBER (optional): If applicable, enter the identification number assigned to the housing unit/building by your Facility Management unit. This may be a unique property equipment identification number (equipment ID.) This number may differ from the quarter number.
- L7. JUSTIFICATION OF HOUSING IS APPROVED: Enter a **Y** if the housing was approved by the bureau/agency through a formal justification process. Such documentation should be kept on file at the local or regional housing office.

STRUCTURE SECTION

- S1. **RENT CLASS:** Check the appropriate classification that correctly represents the GFH. Although the classes are generally self-explanatory, the following additional guidance is provided.

APARTMENT: An apartment is an individual unit in a multi-dwelling structure, which does not provide two (2) non-common, non-emergency ground level (or essentially ground level) doorway entrances/exits offering direct access to the outdoors. Where a single family structure (detached or plexed housing, townhouse or row house) has been sub-divided into multiple and separate housekeeping units, each dwelling unit shall be classified as an apartment unless the individual unit has at least two (2) non-common, non-emergency ground level (or essentially ground level) doorway entrances/exits. Windows (except sliding glass doors) shall not be regarded as doorway entrances/exits. Doors installed to be used principally as emergency exits (i.e. a doorway to a fire escape) cannot be regarded as doorway entrances/exits.

BOAT: A houseboat receives the same monthly base rental rate as a mobile home. The NEC and mileage is determined from where the houseboat is most frequently docked.

CABIN/LOOKOUT: A cabin or lookout is a roughly constructed or rustic housing and typically does not have high-quality finished interiors. It generally has fewer amenities than other housing and is usually in a remote location.

DORMITORY/BUNKHOUSE: This housing class includes only dwelling structures originally constructed or modified for multi-person occupancy on a bunkhouse or dormitory basis. Units inventoried as dormitories/bunkhouses must have a configuration which includes common-use bathrooms with multiple sinks, toilets or showers within one bathroom enclosure; or common use kitchens with multiple stoves, refrigerators or sinks within one kitchen enclosure. In addition, sleeping rooms must be open barracks type or semi-private rooms with sleeping accommodations for two or more unrelated occupants. Houses, apartments or mobile homes which are used to house unrelated occupants, but which have not been modified structurally to a dormitory or bunkhouse configuration, must be inventoried as houses, apartments or mobile homes, respectively. An administrative adjustment of -10% is permitted if 3 or more people must share a bedroom or sleeping area. To apply this in QMIS, enter the appropriate dollar deduction in the *Additional Deductions* (A19) in the **Amenities/Adjustments Section**. To apply an administrative adjustment of -10%, which is permitted if there are no cooking facilities in the dormitory, enter the appropriate dollar deduction in the *Additional Deductions* (A19) in the **Amenities/Adjustments Section**.

HOUSE (single family detached): A structure containing only one single dwelling unit, with at least two ground level (or essentially ground level) doorway entrances/exits to the outside. One of the doorway entrances/exits may be through a garage or carport. Windows (except sliding glass doors) shall not be regarded as doorway entrances/exits. A door installed principally as an emergency exit (i.e. a doorway to a fire escape) can not be regarded as a doorway entrance/exit.

MOBILE HOME: A moveable living unit that is located on a site where the wheels and axles have been removed, a skirt is installed around the unit, and the unit cannot be rapidly moved to another site. There are no restrictions on the size, length or width of a mobile home; it is classified as a mobile home solely on being disabled from immediate removal to another site. These include all singlewide and doublewide mobile homes that are used as Government housing.

PLEX (single family attached): A single family housing unit in a building containing two or more single-family living units that are joined, connected or “plexed.” Plexed units are often referred to as duplexes, triplexes, row houses, townhouses, cluster homes, patio homes, etc. While there is no limit on the number of plexed units which may be present in single building, the following conditions must be met.

1. Each single family plexed housing unit must have at least two (2) ground level (or essentially ground level) doorway entrances/exits, which must be of a non-emergency nature. One of the entrances/exits may be through a garage or carport. Windows (except sliding glass doors) shall not be regarded as doorway entrances/exits. A door installed principally as an emergency exit (i.e. a doorway to a fire escape) cannot be regarded as a doorway entrance/exit.
2. The two entrance doors must provide direct access between the outdoors (ground level) and the living unit without the requirement to pass through a common or shared foyer, stairway, walkway or entrance.
3. A minimum of 730 gross square feet, which is the normal square footage for single family residences (1-bedroom), according to OMB Circular A-45.

TRAILER PAD/SPACE: A designated space where a personally-owned trailer or RV is parked for a specific time. For rent purposes, Government-owned trailers or RVs parked on a Trailer Pad are classified as “Travel Trailers” (see below.) Trailer pads or spaces may be dirt, gravel, concrete or asphalt, and are assumed to be singlewide for rent determination purposes. In order to permit charges for government-furnished utilities and related services, the **Structure, Utility, and Tenants** (including any tenant owned appliances) sections should be completed by entering data which describes the *employee-owned travel trailer or RV* that occupies the trailer pad.

TRAVEL TRAILER: A travel trailer is defined as a government-owned RV or movable

living unit of any size, length and width, which has wheels and axles in place which allow rapid movement to another site. Once wheels and axles are removed, the unit is considered a “Mobile Home.”

NOTE ON MODULAR HOUSING: Modular housing includes dwellings partially built at factory and assembled on site. Some modular housing, when completed, has the appearance of dwellings built using standard “on site” construction methods. Therefore, modular dwellings that are identical or similar in appearance to conventionally-constructed dwellings will be inventoried (and valued) as a house, plex, apartment, etc.

- S2. DATE BUILT: The year (19XX or 20XX), month and date on which the dwelling (or trailer pad) was constructed. If the actual construction date is unknown, the age must be determined as accurately as possible from available sources. Estimate a month and date if not known.
- S3. INTERIOR CONDITION: Assessments of the interior condition are subjective and represent an attempt to measure differences in condition for rent valuation purposes, **not** maintenance assessment purposes. Rental appraising and maintenance assessment systems, such as FMSS/Maximo, INFRA, FMIS, etc., have different purposes. When making condition judgments for rental of housing, imagine a potential renter in the private market just looking around, while walking through and around the unit. In 10-15 minutes they make a decision about both the inside and outside condition. Most renters are not engineers. Renters make judgments concerning the *desirability* and *livability* of a rental unit and are willing to pay accordingly.

Significant tenant-funded improvements (independent of rent-financed maintenance) should be pre-approved by the government, but will not be a basis for reporting (rent determining) until a change of tenant. For example, if the current occupant has paid for the unit to be repainted and redecorated so that it looks very good and rendering the condition to be a higher standard (i.e., from “Fair” to “Good”) the condition code should not be changed to reflect the improved condition because it will result in the tenant paying more for his or her own contribution to improvements of the unit. In this situation, do not change the QMIS inventory until there is a transition of occupants.

If the current occupant has caused damage to the unit, which is beyond normal wear and tear and rendering the condition to be a lower standard (i.e., from “Good” to “Fair,”) the condition code should not be changed to reflect the worsened condition because it will result in the occupant paying less for his or her own contribution to the damage of the unit. In this case, repairs need to be made to the unit at the expense of the occupant that is responsible for the damage, above and beyond normal rent charges. Changes should not be made to the QMIS inventory.

Repairs/renovations made by the bureau/agency may render the condition to be a higher standard (i.e., from “Fair” to “Good”) affecting the current occupants. In this case the QMIS inventory should be changed and a new rent calculated to reflect the improvements. The adjusted rent can be implemented immediately with proper written notification to the tenant, normally 30 days.

Evaluating the Interior Condition: Decide the overall interior condition by reviewing the four categories listed below. Usually, all four categories will be in approximately the same condition. If any of the four categories are different, select the predominant interior condition that reflects the same condition for the majority of the categories. Generally, when assessing the condition of a unit, the appearance of wall and floor finishes is more important than plumbing fixtures and countertops. The deterioration of only one of the four categories does not warrant a lower condition code.

The interior ratings of “Excellent,” “Good,” “Fair” and “Poor” will be based on the following four categories:

- 1) Wall Finishes: The interior wall finishes include but are not limited to paint, skim coat of plaster, wall paper, vinyl or linoleum.
- 2) Floor Finishes: The interior floor finishes include but are not limited to carpet, wood, tile, linoleum, vinyl plastic.
- 3) Plumbing Fixtures: The interior plumbing fixtures include sinks, bathtubs, showers, and toilets.
- 4) Countertops: The countertops include but are not limited to those in the kitchen and bathrooms and may be made of ceramic tile, linoleum, stone, marble, granite, concrete or other materials.

Interior Condition Definitions:

EXCELLENT INTERIOR CONDITION: Generally, this condition code only applies to units that are 5 years old or less, and which have been well maintained since first put into service. For units older than 5 years, total replacement or renovation of all four categories at the same time may warrant an Excellent condition. Renovations older than 5 years old should not be continued to be considered in Excellent condition. If only one category is upgraded, Excellent condition should not be considered.

Wall Finishes:	New or like new
Floor Finishes:	New or like new
Plumbing Fixtures:	New or like new
Countertops:	New or like new

GOOD INTERIOR CONDITION: Unit is in good repair and requires minimum maintenance and little repair as indicated in the following examples. The majority of the repairs will require minimum disruption to occupants and minimum expense to correct.

- Wall Finishes: Minor finish defects and staining appearing on wall surfaces that can be remedied by cleaning. In other words, the defects are not permanent. There are small holes (from hanging pictures, etc.) in need of patching, touch-up painting, or some minimum repair to correct.
- Floor Finishes: Floor finishes have minor finish defects and staining that can be remedied by cleaning. There are very few burns, tears, cuts or deep scratches.
- Plumbing Fixtures: Plumbing fixtures have minor finish defects and staining. There are a few stains, scratches and chips. The plumbing fixtures do not leak.
- Countertops: The countertops have minor finish defects. There are few stains, scratches, chips or burns.

FAIR INTERIOR CONDITION: The majority of the four groups need minor maintenance and/or minimum repairs. Each item requires moderate expense to correct. Moderate expense is defined as between one to two days of labor, and material to be less than the cost of 1 day of labor.

- Wall Finishes: There are worn marks, fading, peeling, minor cracking, chipping, stains, and early signs of expected, reversible deterioration. More than 10% of wall surface needs patching or replacement of covering or paint. Other repairs to the walls are required at a moderate expense.
- Floor Finishes: Floor finishes have many finish defects and staining. There are some burns, tears, cuts or deep scratches. Carpets show some wear, discoloration and/or fading. Wood floors have many shrinkage cracks, indentations and much absence of protective coatings. Masonry/stone floors have sandy and eroded mortar joints. Some tiles may be cracked.
- Plumbing Fixtures: Plumbing fixtures have some finish defects and staining. There are scratches and chips. The faucets might have small leaks.
- Countertops: The countertops have some finish defects. There are some stains, scratches, chips or burns.

POOR INTERIOR CONDITION: The unit needs major repairs; substantial deferred maintenance is evident. The majority of the categories are marginally functional or jeopardized. “Marginally functional” can be defined as currently serving its intended purpose, but failure is imminent if major repairs are not completed in the near term. “Jeopardized” can be defined as requiring immediate repair to keep the condition from deteriorating to Obsolete.

Wall Finishes:	Finish is deteriorated to the point of requiring complete replacement. Holes or damage to over 50% of wall finished surface. Major patching or replacement of substrate material and finishes required. Wall finishes require painting and other repairs to walls.
Floor Finishes:	Floor finishes have severe finish defects and staining to the point of requiring complete replacement or refinishing. There are multiple burns, tears, cuts and/or deep scratches.
Plumbing Fixtures:	Plumbing fixtures have severe finish defects and staining. There are numerous stains, scratches and/or chips. The faucets might leak badly.
Countertops:	The countertops have severe finish defects. There are numerous stains, scratches, chips and/or burns.

OBSOLETE INTERIOR CONDITION: Age and/or condition is such that the housing unit should be replaced or undergo major renovation. Housing in obsolete condition is not fit for human habitation, since major health and safety violations are evident.

- S4. EXTERIOR CONDITION: Select the choice that best represents the exterior condition of the housing at the time of the assessment. These assessments are subjective and represent an attempt to measure differences in condition for rent valuation purposes, **not** maintenance assessment purposes. Rental appraising and maintenance assessment systems, such as FMSS/Maximo, INFRA, FMIS, etc., have different purposes. When making condition judgments for rental of housing, imagine a potential renter in the private market just looking around, while walking through and around the unit. In 10-15 minutes they make a decision about both the inside and outside condition. Most renters are not engineers. Renters make judgments concerning the *desirability* and *livability* of a rental unit and then are willing to pay accordingly.

Significant tenant-funded improvements (independent of rent-financed maintenance) should be pre-approved but the government, but will not be a basis for reporting (rent determining) until a change of tenant. For example, if the current occupant has paid for the unit to be repainted and redecorated so that it looks very good and rendering the condition to be a higher standard (i.e., from “Fair” to “Good”), the condition code should not be changed to reflect the improved condition because it will result in the occupant paying more for his or her own contribution to improvement of the unit. In this situation, do not change the QMIS inventory

until there is a transition of occupants.

If the current occupant has caused damage to the unit, which is beyond normal wear and tear and rendering the condition to be a lower standard (i.e., from “Good” to “Fair”), the condition code should not be changed to reflect the worsened condition because it will result in the occupant paying less for his or her own contribution to the damage of the unit. In this case, repairs need to be made to the unit at the expense of the occupant that is responsible for the damage, above and beyond normal rent charges. Changes should not be made to the QMIS inventory.

Repairs/renovations made by the bureau/agency may render the condition to be a higher standard (i.e., from “Fair” to “Good”) affecting the current occupants. In this case, the QMIS inventory should be changed and a new rent calculated to reflect the improvements. The adjusted rent can be implemented immediately with proper written notification to the tenant, normally 30 days.

Evaluating the Exterior Condition: Decide the overall exterior condition by reviewing the four categories listed below. Usually, all four categories will be in approximately the same condition. If any of the four categories are different, select the predominant exterior condition that reflects the same condition for the majority of the categories. Generally, when assessing the condition of a unit, the appearance of roof coverings, exterior walls and windows/doors is more important than patios, driveways, landscaping, etc. The deterioration of only one of the four categories does not warrant a lower condition code.

The exterior ratings of “Excellent,” “Good,” “Fair” and “Poor” will be based on the following four categories:

- 1) Roof Coverings: Roof coverings include but are not limited to asphalt, slate or wood shingles, metal roofs, concrete slabs, or terra cotta tiles.
- 2) Exterior Walls: Exterior walls include the exterior walls only; they do not include windows and doors. Types of walls include but are not limited to stucco, asbestos, vinyl or metal siding, wood, brick or concrete.
- 3) Windows/Doors: Evaluation of windows and doors should be done from both the exterior as well as the interior. Appearance as well as functionality should be evaluated. Doors should include but are not limited to front entrance, rear entrance, garage doors, and sliding glass doors.
- 4) Patios/Pathways/Landscaping: Include all porches/patios, sidewalks, pathways, driveways of all material (asphalt, concrete, stone, etc.) Landscaping should include items installed/planted by the government or past/current tenants. Landscaping should be evaluated as a whole (trees, shrubs, grass, plantings, etc.) Landscaping should not encompass naturally occurring items such as but not limited to boulders, naturally occurring trees, naturally occurring grasses, and/or naturally occurring flowers.

Exterior Condition Definitions:

EXCELLENT EXTERIOR CONDITION: This condition code generally only applies to units that are 5 years old or less, which have been well maintained since first put into service. For units older than 5 years, total replacement or renovation of all four categories at the same time may warrant an Excellent condition. Renovations older than 5 years old should not be continued to be considered in Excellent condition. If only one category is upgraded, Excellent condition should not be considered.

Roof Coverings: New or like new
Exterior Walls: New or like new
Windows/Doors: New or like new
Patios/Pathways/Landscaping: New or like new

GOOD EXTERIOR CONDITION: In good repair and requires minimum maintenance and little repair. Categories require minimum disruption to occupants and minimum expense to correct.

Roof Coverings: The roof has minor defects appearing on surface. Roof has minor staining or obvious wear which can be remedied by cleaning. Some curling and/or cracking of roof covering, but not more than 10% of total surface. Minimum repairs and minimum expense required to correct.

Exterior Walls: There are minor surface defects and staining that can be remedied by cleaning. There is minor local damage in need of patching, painting or some repair. Paint/stain may show some signs of fading.

Windows/Doors: Windows and doors are in good operating condition. Glass is not broken. All hardware is intact and operates as intended. Windows and doors do not leak. There are minor surface defects and staining on paint, caulk, glaze, wood or trim around windows and doors in need of some repair to correct.

Patios/Pathways/Landscaping: Some minor defects on the surfaces of patios and pathways. Patios and pathways have minor staining, cracking or peeling in need of some minimum repair and minimum expense to correct. Landscape may include some yellowing of grass; some wilting of plants. Not more than 10% of total plantings are yellowing/wilting.

FAIR EXTERIOR CONDITION: The majority of the four groups need minor maintenance and/or minimum repairs. Each category requires moderate expense to correct. Moderate expense is defined as between one to two days of labor, and material to be less than the cost of one day of labor.

- Roof coverings: The roof has obvious and expected deterioration of roof material present. Signs of fading, cracking, buckling or loose material. Roof requires repair or replacement of more than 10% of roofing material.
- Exterior walls: There are many surface defects and staining that cannot be remedied by cleaning. There are many areas with local damage in need of patching, painting or some repair requiring moderate expense to correct. Some peeling, cracking and major fading may exist.
- Windows/Doors: Windows and doors may have minor damage to hinges or tracts but can still open and close. Glass may have cracks or scratches. Hardware may have scratches or obvious wear but still operates (i.e., can still be locked). Screens may be missing or torn. There is obvious disintegration, cracking, peeling, fading, staining of paint, caulk, glaze, wood or trim around windows and doors requiring moderate expense to correct.
- Patios/Pathways/Landscaping: Patios and pathways have obvious disintegration, cracking, peeling, fading, staining requiring moderate expense to correct. Landscaping is starting to die. More than 10% of grassy area is yellowing or dead. Plants, shrubs, trees starting to brown from lack of water.

POOR EXTERIOR CONDITION: All four categories need major repairs; substantial deferred maintenance is evident. The majority of the categories are marginally functional or jeopardized. "Marginally functional" can be defined as currently serving its intended purpose but failure is imminent if major repairs are not completed in the near term. "Jeopardized" can be defined as requiring immediate repair to keep the condition from deteriorating to Obsolete.

- Roof Coverings: The roof covering needs to be completely replaced. 50% of the surface is cracking, curling or buckling. Roof may have leaks.
- Exterior Walls: The painting on the exterior walls has extremely bad checking, blistering, peeling, flaking, and fading. No longer repels water, which if not fixed will damage or jeopardize outer sheathing.
- Windows/Doors: Majority of windows and doors need to be replaced. Windows and doors not longer operate correctly or safely. Glass may be broken or missing; no longer expelling the elements. Caulking, paint, trim may be missing or have severe deterioration which no longer repels water.
- Patios/Pathways/Landscaping: Patios and pathways have extensive damage as to cause a safety hazard to occupants or visitors; complete replacement is required. Landscaping has died. No amount of care can revive.

OBSOLETE EXTERIOR CONDITION: Age and/or condition is such that the housing

unit should be replaced or undergo major renovation. Housing in obsolete condition is not fit for human habitation, since major health and safety violations are evident.

S5. INSULATION: Check the choice that represents the degree of insulation present in the dwelling. In determining the insulation classification, consideration must be given not only to insulation levels (ratings) in walls and ceilings, but also to such items as weather-stripping; caulking; the presence or absence of storm or double/triple glazed windows; infiltration barriers offered by doors or storm doors; etc. "Adequate" (full) insulation is present where construction (including insulation levels) meets or exceeds current building standards for the geographic area in which the housing is located. "Minimum" reflects the presence of insulation and or infiltration barriers that are less than the amounts recommended in current building standards. "None" is used to describe a unit with no insulation. Travel trailers and mobile homes constructed prior to September 1977 are presumed to have minimum insulation. HUD trailer home construction standards for travel trailers and mobile homes constructed after September 1977 required adequate (full) insulation for the geographic area in which they are designed to be used.

S6. GROSS FINISHED FLOOR SPACE: Enter the total gross square feet of finished living space in the basement, the first floor and on all additional floors. If there is no finished space in a basement or on additional floors, enter 0 (zero). The gross finished floor space is determined by measuring the exterior dimensions to the nearest inch. For multi-family housing (including duplexes, triplexes and apartments), report only the exterior measurements of the individual unit. Exclude attached garages, unenclosed (or unfinished enclosed) porches, covered and uncovered patios, etc. from the finished area measurements. In determining the gross finished floor space, an adjustment should be made for any housing with exterior walls in excess of 6 inches. Deduct the excess width (wall thickness in excess of six (6) inches) from each affected dimension.

Where finished floor space is included in an attic area or other non-typical portion of a structure, where the roof is also a part of (or all of) the wall (as in the case of an 'A' frame), the square footage is to be determined by including as finished living area only that square footage of floor space that has at least six feet of vertical clearance from the floor. To be considered as finished floor space, a basement area must consist of more than painted walls and tiled floors. The space must comply with recognized finished space building standards/codes, and must have artificial lighting and year-round mechanical ventilation that are equivalent to lighting and ventilation found in the rest of the dwelling.

S7. OFFICIAL USE SPACE: Enter the number of square feet of official use space in each floor level shown. If there is no official use space, enter 0 (zero) for each floor level. Official use space is finished floor space that has been approved in writing for use exclusively for official business purposes and that is unavailable for family living purposes. Examples include a government office or visitor information area in the living unit that is used by the general public.

S8. UNUSED FINISHED SPACE: Enter (for each floor level) the number of square feet of

finished space that has been closed off (locked or otherwise secured) to bar access by the occupants. Finished space may be closed off to reduce the square footage (and the rent) when a portion of the dwelling unit is excessive to the needs of the occupants and no other government housing is available. It is management's discretion whether or not to close off any portion of the unit. See also Bedrooms Used and Bathrooms Used. Enter 0 (zero) if there is no unused finished space.

- S9. UNFINISHED BASEMENT: Enter the total square feet of unfinished basement area. The amount of unfinished basement space, when combined with the finished basement area (entered under Gross Finished Floor Space), must equal the total basement area. If there is no unfinished basement space, enter 0 (zero).
- S10. NUMBER OF PLANNED UNRELATED TENANTS: Occasionally a family dwelling unit (house, apartment or mobile home) is used to house two or more unrelated individuals. For example, a 2-bedroom apartment may be used to house a planned maximum of 4 unrelated employees (two unrelated occupants per bedroom). When a housing unit is to be used as housing for two or more unrelated tenants, enter the number of unrelated tenants that the agency plans to assign to the housing unit. If the housing unit is to be occupied by only one tenant (or family), enter 1. QMIS will divide the rent calculation by this number.
- S11. TOTAL ROOMS: Enter the total number of finished rooms excluding halls, alcoves, pantries, bathrooms, or other areas that are so small they can only be used as a storage area. A dining area qualifies as a separate room rather than merely an extension of the kitchen, or living room, if the dining area is at least partially separated from the kitchen or living room by a wall, however minimal. Do not include unfinished space used as a room.
- NUMBER OF ROOMS USED: Enter the number of rooms that are actually being used. The number of rooms used is the total number of rooms (as recorded in S11 above) minus the number of rooms closed off (locked or otherwise secured) to bar access by the occupant. Rooms may be closed off (at management's discretion) to reduce the number of rooms and square footage (and the rent), when one or more rooms are excessive to the needs of the occupants.
- S12. NUMBER OF BEDROOMS: Enter the number of bedrooms. A room designed for use as a bedroom and that generally meets the requirements below for a bedroom is to be inventoried as a bedroom, regardless of its present use. For example, the entry for an efficiency (studio) apartment is 0 (zero); the entry for a unit with three bedrooms is 3. To determine whether or not a specific area constitutes a bedroom FOR A HOUSE, DUPLEX, CABIN OR APARTMENT ONLY, the guidelines below shall be applied. For mobile homes, houseboats and temporary units, the manufacturer's standards at the time of manufacture must be used.

- 1) Size – Bedrooms must have a minimum size of 80 square feet, and a “least” dimension of 8 feet.
- 2) Egress – Bedrooms must have at least two means of egress, at least one of which shall be a door and the other of which may be a window. Where a window is used as egress, it must be unobstructed; it must be operable from the inside; it must provide a clear opening of not less than 20 inches in width, 24 inches in height and 5.7 square feet in area; and the bottom of the window must not be more than 44 inches off the floor.
- 3) Closet – Bedrooms must have at least one closet enclosing approximately 6 square feet of floor space. Approximately five (5) feet of vertical hanging space should be available.

NOTE: A room used for bedroom purposes is not to be inventoried as a bedroom if the occupant has to cross that living area from another room to reach a bathroom. Access to a bathroom must either be direct or via a hallway. Also, in order for finished area in a basement to qualify as a bedroom it must have windows which permit egress to the outside.

NUMBER OF BEDROOMS USED: Enter the number of bedrooms that are actually being used. A room designed for use as a bedroom, and which meets the bedroom standards above, is to be inventoried as a bedroom, regardless of its present use. The number of bedrooms used is the total number of bedrooms (as recorded in item S12 above) minus the number of bedrooms that have been closed off (locked or otherwise secured) to bar access by the occupant. Bedrooms may be closed off (at management’s discretion) to reduce the number of bedrooms and square footage (and the rent), when one or more bedrooms are excessive to the needs of the occupants.

- S13. NUMBER OF BATHROOMS: Enter the number of bathrooms present for each housekeeping unit. A one-quarter bathroom is represented by either a sink, a toilet or a shower stall. A bathtub (with or without a shower) constitutes a one-half bathroom. Thus, a room which has a sink is a one-quarter bath; if it also has a toilet, then it is a one-half bath; if it also has a shower (but no bathtub), then it is a three-quarter bath. A room equipped with a sink, toilet and a bathtub (with or without a shower) is a full bathroom. A privy (outhouse) is not considered to be a bathroom, and is to be inventoried as 0.00 (zero). A full bath is entered as **1.00**. One and three-quarters bathrooms are entered as 1.75. Variations are 1.00, 1.25, 1.50, 2.50, etc.

NUMBER OF BATHROOMS USED: Enter the number of bathrooms that are actually being used. The number of bathrooms used is the total number of bathrooms (as recorded in item S13 above), minus the number of bathrooms that have been closed off to bar access by the occupant. Bathrooms may be closed off to reduce the number of bathrooms and square footage (and the rent), when the bathroom space is excessive to the needs of the occupants, and no other suitable housing exists. It is management’s discretion whether or not to close off any part of a housing unit.

- S14. DORMITORY ROOMS (optional): If the Rent Class (S1) is classified as “Dormitory,” enter the number of bedrooms in the dormitory which may sleep tenants. Some dorms may only have one large room with several bunk beds; others may have several bedrooms.
- S15. 1-CAR GARAGE: Enter the number of 1-car garages. Normally the entry will be 1.
- S16. 2-CAR GARAGE: Enter the number of 2-car garages. Normally the entry will be 1.
- S17. CARPORT: Enter the number of carports.
- S18. CURRENT USE (optional): Select the appropriate use: QMIS; Office; Training; Conference; Shop; Storage; Excess; Destroy; or Other. The norm will be QMIS, which means the unit is being used as government furnished housing. However, if the unit is *temporarily* being used for some other purpose than employee housing, check that type of use.
- S19. CARBON MONOXIDE DETECTORS: Enter the number of carbon monoxide detectors in the unit.
- S20. SMOKE DETECTORS: Enter the number of smoke detectors in the unit.
- S21. HANDICAP ACCESSIBLE: A checked box means that the unit is handicap accessible in various degrees, i.e. there might be ramps, or wider doors, or lower cabinets, etc. No checkmark means that the unit is not handicap accessible.
- S22. SEASONAL: Enter the choice that reflects the normal occupancy pattern for which the housing is used. A checked box means that the agency will use the housing unit on a seasonal basis. No checkmark means that the agency will use the housing on a year-round basis.
- S23. FIRE SPRINKLERS: A checked box means that the unit has fire sprinklers. No checkmark means that the unit does not have fire sprinklers.
- S24. LEAD PAINT: A checked box means that the unit is known to have lead-based paint. No checkmark means that the unit does not have lead-based paint, or that the presence or absence of lead-based paint is unknown. All units constructed prior to 1977 may have lead-based paint, unless it has been mitigated. The Environmental Protection Agency requires written notification to tenants of known lead-based paint in the housing unit.

AMENITIES/ADJUSTMENTS SECTION

A checked box indicates the amenity is present at the dwelling location. No checkmark represents the amenity is not present at the site. To be present, an amenity must be available at the housing site.

Thus, where a service is available, but a tenant elects not to use or subscribe to the service, the amenity would be marked with a checkmark meaning the service is OK or it exists. To determine if an amenity is present, use the guidelines which appear in OMB Circular A-45 and the regulations of your agency. A-45 applies administrative adjustments to rent only where site amenities at the government housing unit differ from those in comparable housing in the NEC. Specifically, it states:

Living conditions at the locations of some Government housing are not always the same as those found in or immediately adjacent to the survey or appraisal communities. In such communities, the amenities listed below are generally present and their contributory value included in the base rent. The lack of availability of any of these items at the quarters location represents a generally less desirable condition that should be reflected as a negative percentage adjustment to the base rental rate.

A blank box means the amenity is not present or adequate, and a deduction to the base rental rate will be computed.

- A1. ADEQUATE WATER SERVICE: The water delivery system at the housing site should provide potable water (free of significant discoloration or odor) at adequate pressure at usual outlets. If the water delivery system at the housing unit does not meet these conditions, 3% should be deducted from the CPI-MBRR.
- A2. ADEQUATE ELECTRIC SERVICE: Electric service at the housing unit must equal or exceed a 100-ampere power system, and should provide 24-hour service under normal conditions. When evaluating the electric service, housing managers are reminded that OMB Circular A-45 recognizes that occasional temporary power outages are considered to be “normal” conditions. Furthermore, if an adequate back-up generator is available, then the electric service amenity will be considered to be reliable and adequate regardless of the reliability of the primary power source. When electric service is inadequate and unreliable, 3% should be deducted from the CPI-MBRR.
- A3. RELIABLE FUEL FOR HEATING/COOKING: When Adequate Fuel Storage/Delivery is inventoried, it MUST relate to the fuel actually being used for heating and cooking. For example, if electricity is used for heating and cooking and the site has adequate electric service, then this amenity would be inventoried with a checkmark (meaning the storage/delivery is OK). The fact that natural gas, propane or fuel oil delivery may not be available is not relevant if those fuels are not used at the housing unit. There should be sufficient fuel storage capacity to meet prevailing weather conditions and needs. Where electricity is used as the heating, cooling or cooking “fuel,” an adjustment can only be made when a deduction has been made for deficient electric service. If the fuel delivery/storage system is inadequate, 3% should be deducted from the CPI-MBRR.

- A4. ADEQUATE POLICE PROTECTION: Law enforcement personnel, including Government employees with law enforcement authority, should be available on a 24-hour basis. OMB Circular A-45 defines “availability” as the ability of law enforcement officers to respond to emergencies at the housing site as quickly as a law enforcement officer in the NEC could respond to an emergency in the NEC. OMB Circular A-45 further provides that where part-time officers serve the housing site, the fact that the officers are part-time does not necessarily mean that they are less available than officers in the NEC.

The important point is that the availability determination must be based on comparative response times (housing site vs. the NEC) – not the employment conditions of the officers serving the housing site. Finally, OMB Circular A-45 provides that gaps in availability due to temporary illness or injury, use of annual leave, temporary duties, training, or other short absences, do not render law enforcement personnel “unavailable” at the housing site.

If, after applying these guidelines, it is determined that the law enforcement protection at the housing unit is unreliable and inadequate in comparison to the reliability and adequacy of law enforcement protection in the NEC, 3% should be deducted from the CPI-MBRR.

- A5. ADEQUATE FIRE PROTECTION: Fire insurance should be available (for the housing unit) with the premium charge based upon a rating equal to the rating available to comparable housing located in the NEC. Alternatively, adequate equipment, an adequate water or fire retardant chemical supplies, and trained personnel should be available on a 24-hour basis to meet foreseeable emergencies. OMB Circular A-45 provides that if either element is present (adequate insurance or an adequate fire fighting capability), no adjustment is authorized. If both elements are missing, 3% should be deducted from the CPI-MBRR.
- A6. ADEQUATE SANITATION: An adequately functioning sewage disposal system and a solid waste disposal system should be available. OMB Circular A-45 considers septic, cesspool or other systems to be adequate even though they may require periodic maintenance, as long as they are usable during periods of occupancy. If the sanitation service at the housing unit is unreliable or inadequate, 3% should be deducted from the CPI-MBRR.
- A7. NOISE/ODORS OK: If there are frequent disturbing or offensive noises and/or odors at the housing unit, 3% should be deducted from the CPI-MBRR.
- A8. SIDEWALKS: A checked box indicates sidewalks are present. One or more of the following improvements may be available at the housing unit: paved roads/streets, sidewalks or street lights. If any one of these improvements is present, no deduction is authorized. If all three of these improvements are missing (there are no paved roads/streets and there are no sidewalks and there are no street lights), 1% should be deducted from the CPI-MBRR.
- A9. STREET LIGHTS: A checked box indicates street lights are present.
- A10. PAVED STREETS: A checked box indicates paved streets are present.

A11. PHONE IN QUARTERS: A checked box indicates telephone service is *available* in the housing unit, that is, telephone lines have been installed at the housing unit or cellular phone service is available. Leave the box blank if there is no telephone service *available* within the unit. Access to commercial telephone facilities should be available on a 24-hour basis. Deductions (except as provided below) are not allowed for occasional temporary interruptions of telephone service.

OMB Circular A-45 allows specific deductions for various levels of telephone service and privacy. These are explained below.

1. The CPI-MBRR should be reduced by 3% if telephone service is not available within the housing unit or within 100 yards of the unit. Both the *Phone in Quarter* and *Phone Near Quarter* (A13) boxes should be unchecked.
 2. The CPI-MBRR should be reduced by 2% if there is no telephone service within the housing unit, but telephone service (either private or party line) is available within 100 yards of the unit. The *Phone in Quarter* box should be unchecked and the *Phone Near Quarter* (A13) box should be checked.
 3. The CPI-MBRR should be reduced by 1% if telephone service is available in the employee's housing unit, but the service is not a private line and/or the service is not accessible on a 24-hour per day basis. The *Phone in Quarter* box and the *Party* box under *Type of Phone in Quarters* should be checked.
- A12. TYPE OF PHONE IN QUARTERS: Pick *None*, *Party*, or *Private* from the pick list for the appropriate type of line if any. Pick *None* if there is service but the service is not normally available 24 hours per day.
- A13. PHONE NEAR QUARTERS: Enter a checkmark if there is telephone service available within 100 yards of the housing unit, such as a pay phone or an office phone that could be used for personal use; otherwise leave unchecked.
- A14. LOSS OF PRIVACY: Enter 0 (zero) to 10 percent in the blocks provided to reflect the degree to which the occupant is subject to loss of privacy during non-duty hours by virtue of repeated public visits (i.e. occurring several times daily), or the degree to which the occupant is inhibited from enjoying the full range of activities normally associated with rental occupancies due to restrictions imposed by the Government.
- A15. EXCESSIVE SIZE: Enter 0 (zero) to 10 percent in the blocks provided to reflect the degree to which the housing unit is excessive in size to the needs of the tenant(s) occupying the unit. This allowance should be used only where smaller housing is unavailable, and living space (bedrooms, bathrooms, other rooms) can not be physically closed off from tenant access; or where after closing off living space, the remaining housing area is still excessive to the needs of the tenant. Where tenants choose to use all of the space, there is no basis for applying this adjustment.

- A16. INADEQUATE SIZE: Enter 0 (zero) to 10 percent in the blocks provided if the assigned housing unit is inadequate in size for the number of people authorized to occupy the premises. Guidelines for making the determination are available in agency housing management regulations. This adjustment applies only if the Government assigns a tenant to an inadequately-sized unit because a larger, more adequate unit is not available. This deduction cannot be given to tenants who choose to occupy the smaller unit when another adequately-sized unit is available. Likewise, a tenant located in inadequately-sized housing who is later offered larger, more adequate housing must forfeit this deduction if he/she declines to move to the more adequately sized unit.
- A17. EXCESSIVE HEATING AND COOLING: Enter the dollar amount of the deduction in the blocks provided. Enter 0 (zero) in this field if the adjustment is not applicable. The deduction is allowed when excessive heating/cooling costs are the result of structural deficiencies. -.not due to the excessive cost of utilities or lifestyle choices of the tenants. When approved by the agency, this deduction may be allowed for housing requiring an unreasonable additional expense to the occupant for heating or cooling because of poor design or the lack of all-weather construction (i.e., inadequate insulation, inadequate weather stripping, poorly fitting doors or windows, etc.) This adjustment is only allowed when heating/cooling charges are based upon metered usage; it is not applicable when heating/cooling charges are based upon “flat rate” usage.
- A18. ADDITIONAL CHARGES: Enter the dollar amount of additional charges for items that are not included in this inventory. Amounts entered in this field will be added to the rent.
- A19. ADDITIONAL DEDUCTIONS: Enter the dollar amount of additional deductions for items that are not included in this inventory. Amounts entered in this field will be subtracted from the rent.

UTILITIES SECTION

- U1. UTILITIES PROVIDED AT THE HOUSING UNIT: Indicate all utilities provided to the housing unit. The choices are electricity, fuel oil 1, fuel oil 2, natural gas, propane, water and sewer.

BILLED IN RENT: A checkmark indicates the utility costs are to be included as part of the QMIS rent calculation. If this item is checked, *Government Provides* should also be checked.

GOVERNMENT PROVIDES: A checkmark indicates the utility is provided by the government. This may mean the government is producing the utility or paying a private supplier to provide the utility, and the Government wants to bill individual housing units for usage.

METERED: A checkmark indicates the utility is metered. Check even if the utility is provided by a private utility company and metered.

AVERAGE USAGE: Enter an average monthly usage (KwH or gallons) based on utility records from the previous 12 months. Usage should be updated annually. It is required if *Billed in Rent*, *Government Provides* and *Metered* are all three checked.

Billing Scenarios:

1. If the tenant pays a utility company directly, the only box checked is *Metered*. This is the preferred method to bill utilities, per OMB Circular A-45.
2. If the Government provides the utility and it is to be part of the rent calculation but there is no meter, check the *Billed in Rent* and *Government Provides* boxes. QMIS will estimate a utility bill based on the size and type of housing unit, appliances and amenities present in the unit, local weather patterns, and regional average utility rates.
3. If the Government provides the utility and it is to be part of the rent calculation and there is a meter, check the *Billed in Rent*, *Government Provides*, and *Metered* boxes. Then enter the appropriate usage in the *Average Usage* box. QMIS will estimate a utility bill based on regional average utility rates.
4. To bill the tenant for utilities without using QMIS (i.e., Bill of Collection) check *Government Provides* and/or *Metered* if a meter is on the unit.

PROPERTY/SERVICES SECTION

GOVERNMENT FURNISHED APPLIANCES: Only the number of Government-owned appliances are to be recorded in this section; do not include tenant-owned appliances. Insert the number of each Government furnished appliance and the fuel used by each listed appliance. For example, if the housing unit is equipped with two Government-furnished electric refrigerators, insert **2** in the *No.* field and select **E** for electricity in the *Fuel Type* field.

- P1. **BASE RADIO:** An employee who is required to operate a Government base radio in the housing unit is entitled to an electric credit if the electricity required to operate the base radio is recorded on the electric meter. In this case, the entry beside “Base Radio” should be **1**. If the employee is required to operate two Government base radios in the housing unit, and if the electricity used to operate the radios is recorded on the meter, the entry beside “Base Radio” should be **2**.

Credits for metered electric consumption are allowable for electricity provided by the Government or by a private supplier. Credits are not allowable when the electric consumption is estimated (flat rate).

- P2. **CABLE TV:** Check this box if the Government provides cable TV service and the tenants do not pay a private supplier for this service. The number is insignificant; a checkmark should suffice.
- P3. **CENTRAL COOLING (EVAPORATIVE):** Enter the number of evaporative (also called swamp) central cooling systems, and enter the fuel used to operate the central evaporative cooling systems. Do not include window-cooling systems in this count.
- P4. **CENTRAL COOLING (REFRIGERATED):** Enter the number of refrigerated (compressor) central cooling systems, and enter the fuel used to operate the central refrigerated cooling systems. Do not include window-cooling systems in this count.
- P5. **CENTRAL HEATING (ELECTRIC RESISTANCE):** Enter **1** if the primary heating system designed and built into the housing unit is electric resistance. A primary heating system generally operates on an independent and continuous basis. The fuel type for this item will be **E** for electricity. The designed and installed system, whether used or not, is the primary heating system, and the one that must be entered on the inventory. For example, if the tenant chooses to use an alternate heating system, such as a fireplace or wood stove, the fireplace or wood stove shall not be inventoried as the primary heating system.
- P6. **CENTRAL HEATING (FORCED AIR):** Enter a **1** if the heating system designed and built into the housing unit is a forced air system. A primary heating system generally operates on an independent and continuous basis. Select the appropriate fuel type.

- P7. CENTRAL HEATING (HEAT PUMP): Enter a **1** if the heating system designed and built into the housing unit uses a heat pump. A primary heating system generally operates on an independent and continuous basis. The fuel type for this item will be **E** for electricity.
- P8. CENTRAL HEATING (HOT WATER): Enter a **1** if the heating system designed and built into the housing unit heats via hot water. A primary heating system generally operates on an independent and continuous basis. Select the appropriate fuel type.
- P9. CENTRAL HEATING (PANEL): Enter a **1** if the heating system designed and built into the housing unit uses panel heating. A primary heating system generally operates on an independent and continuous basis. The fuel type for this item will be **E** for electricity.
- P10. CENTRAL HEATING (SOLAR): Enter a **1** if the heating system designed and built into the housing unit is solar. A primary heating system generally operates on an independent and continuous basis. The fuel type for this item will be **E** for electricity.
- P11. COMMUNITY DRYER: Government-provided joint use appliance. Enter a **1** if a dryer is provided for common use by all tenants in a multi-dwelling complex. Do not add this item if the dryer is shared by unrelated occupants living in the same house, apartment unit or mobile home. Do not add this item if it is provided by the Government on a coin-operated basis.
- P12. COMMUNITY FREEZER: Government-provided joint use appliance. Enter a **1** if a freezer is provided for common use by all tenants in a complex. Do not add this item if the freezer is shared by unrelated occupants living in the same house, apartment unit or mobile home.
- P13. COMMUNITY POOL: Enter **1** if the Government provides a community swimming pool, which is available (without charge and without invitation) to all occupants in the housing area or installation.
- P14. COMMUNITY WASHER: Government-provided joint use appliances. Enter a **1** if a washer is provided for common use by all tenants in a multi-dwelling building or complex. Do not add this item if the washer is shared by unrelated occupants living in the same house, apartment unit or mobile home. Do not add this item if it is provided by the Government on a coin-operated basis.
- P15. DISHWASHER: Enter the number of government-provided dishwashers. The fuel type will be **E** for electricity.
- P16. DRYER: Enter the number of government-provided dryers. The fuel type could be electricity, natural gas or propane.
- P17. ENGINE HEATER: Enter the number of government-provided engine heaters. The fuel type will be **E** for electricity.

P18. **FIREPLACE:** Enter the number of working fireplaces in the dwelling unit that are usable as fireplaces. Do not include fireplaces that have been closed off or that have been declared unsafe to use. Do not check *Used for Primary Heating* unless the fireplace(s) constitute the only heating system in the housing unit. Where a tenant uses a fireplace or stove in preference to the primary heating system, the fireplace or stove shall not be inventoried as the primary heating system. Enter the appropriate fuel type, i.e., wood, propane, natural gas. Check the *Used For Primary Cooking* if the fireplace is the only means of cooking supplied by the Government. Do not check the box if the fireplace is not the only cooking appliance supplied by the Government.

NOTE: If the occupant installs a tenant-owned insert or stove in a working fireplace which was not equipped with a Government-owned insert or stove, the fireplace shall be inventoried as a working open fireplace. This includes fireplaces with fire screens or glass doors installed.

P19. **FIREPLACE INSERT:** Enter the number of working fireplaces in which a Government-provided insert (with metal or glass doors) has been installed. The term “insert” does not apply to glass doors or a fire screen installed on the fireplace. An “insert” is constructed of cast iron or plate steel, and may have direct venting and/or blowers to increase heat efficiency. Indicate with a checkmark if the fireplace insert is the primary or only heat source/system. Do not enter a check in the *Used For Primary Heating* box if there is an on-demand working central heating system (i.e. panel, forced air, hot water or steam, heat pump, etc.), which was designed and installed for use as the primary heating system. Do not enter a check in the *Used For Primary Heating* box if there is an on-demand working central heating system, but the occupant uses the fireplace, fireplace/insert or fireplace/stove as the primary heat source as a matter of preference.

P20. **FIREWOOD (CORDS):** Enter the number of cords of firewood provided by the Government for the occupant's use in a typical one-year period. Do not include firewood cut by the occupant on Government land during non-duty time under permit arrangements available to the general public.

P21. **FREE STANDING STOVE:** Enter the number of Government-provided free standing stoves with their own dedicated venting system/chimney. Freestanding stoves that are vented through a fireplace are inventoried under *Fireplace Insert* (see item P19, above). Select the appropriate fuel type. Enter a checkmark in *Used For Primary Heating* box if the free standing stove is the only source of heat for the housing unit. Do not check it if another primary heating system has been designed and is installed in the housing unit. Do not enter a check if there is a working central primary heating system, but the occupant uses the free standing stove as the primary heat source as a matter of preference.

Enter a checkmark in *Used For Primary Cooking* box if the free standing stove is the only cooking appliance supplied by the Government. Do not check it if the free standing stove is not the only cooking appliance supplied by the Government.

- P22. FREEZER: Enter the number of government-provided freezers. Enter the fuel type.
- P23. FURNISHED ROOMS: Enter the number of rooms that are furnished with Government-owned furniture. For mobile homes and travel trailers, include rooms that are furnished with furniture provided by the manufacturer and included in the purchase of the unit.
- P24. HOT TUB: Enter the number of government-provided hot tubs. The fuel type will be electricity.
- P25. LAWN CARE (# MOWINGS): Enter the number of times per year the lawn at the housing unit is expected to be mowed by the Government personnel or contractors.
- P26. LAWN MOWER: Enter the number of government-provided lawn mowers.
- P27. MAID SERVICE: Check this box if the Government is providing maid service to the housing unit on a regular basis. This may be daily, weekly or monthly service. The number is insignificant and a checkmark should suffice.
- P28. MICROWAVE: Enter the number of government-provided microwaves. The fuel type will be **E** for electricity.
- P29. PREMIUM CHANNELS: Enter the number of premium channels which can be received at the housing site, and which have been paid for by the Government. Premium channels are those which are not included in local basic cable/satellite subscription fees, but which are made available for an additional charge. Examples of premium channels include HBO, CINEMAX, SHOWTIME, etc.
- P30. PRIVATE POOL: Enter **1** if the Government provides a swimming pool (without charge) on the premises of an individual housing unit property, and if the pool is available for use only by the occupants and invited guests of that unit. Do not add this item if private (non-Government) swimming pool facilities are available to occupants contingent upon payment of user or membership fees.
- P31. RADON MITIGATION FAN: Enter the number of Government-provided radon mitigation fans. Credits for metered electric consumption are allowable for electricity provided by the Government or by a private supplier. Credits are not allowable when the electric consumption is estimated (flat rate).
- P32. RANGE: Enter the number of government-provided ranges, also commonly referred to as a stove. Enter the fuel type. Credits to rent are allowable for housing where a range is not provided by the Government.
- P33. REFRIGERATOR: Enter the number of government-provided refrigerators. Enter the fuel type. Credits to rent are allowable for housing where a refrigerator is not provided by the Government.

- P34. REMOTE CONTROL RELAY: Enter the number of remote control relays provided by the Government. If the tenant pays their own electricity bill to a private supplier, the tenant will receive an electric credit. Credits for metered electric consumption are allowable for electricity provided by the Government or by a private supplier. Credits are not allowable when the electric consumption is estimated (flat rate).
- P35. SATELLITE DISH: Enter **1** if the Government provides a satellite dish and television reception services. If the Government pays the television service subscription fees, the service is considered as being provided by the Government. If the tenant pays the subscription fees for television services received through government-installed cable or satellite equipment, charges for such facilities should not be included in the housing rental charge. If the tenant pays the subscription fees for television services received through employee- or tenant-owned cable or satellite equipment, charges for such facilities should not be included in the housing rental charge.
- P36. SEWER LIFT: Enter **1** if there is a government-provided sewer lift system. If the tenant pays their own electricity bill to a private supplier, the tenant will receive an electric credit. Credits for metered electric consumption are allowable for electricity provided by the Government or by a private supplier. Credits are not allowable when the electric consumption is estimated (flat rate).
- P37. SNOW REMOVAL (# REMOVALS): Enter the number of snow removals provided to the tenant over a typical one-year period. Snow removal means removing snow from sidewalks, doorsteps, driveways, and other areas from which a tenant would normally be expected to remove the snow. It does not include removing snow from roadways, streets, common areas, roof areas (to protect the property), etc.
- P38. SPACE HEATER: Enter the number of government-provided space heaters. Enter the fuel type.
- P39. STORAGE SHED: Enter the number of storage units provided to the tenant exclusive of garages and carports. This would include separate storage sheds, unfinished basements and attic space accessible by a stairway and having a solid floor. A storage unit in an attic or unfinished basement must have a “floor area” of at least 40 square feet, provided that there is at least 78 inches of vertical clearance from the floor. An unfinished basement will not be inventoried as a storage unit if the basement is subject to periodic flooding.
- P40. SUMP PUMP: Enter **1** if there is a government-provided sump pump. If the tenant pays their own electricity bill to a private supplier, the tenant will receive an electric credit. Credits for metered electric consumption are allowable for electricity provided by the Government or by a private supplier. Credits are not allowable when the electric consumption is estimated (flat rate).
- P41. TRASH COMPACTOR: Enter the number of government-provided trash compactors. The

fuel type will be **E** for electricity.

- P42. TRASH REMOVAL: Enter **1** if the Government provides trash removal at, or within a reasonable distance of, the housing unit. This includes curbside pick-up or the provision of dumpsters located in close proximity to the housing. Enter **1** if the tenant is allowed to transport the trash to a disposal site during duty hours. Do not add this item if the tenant is required to transport the trash during non-duty hours to a disposal site.
- P43. WASHER: Enter the number of government-provided washers. Enter the fuel type.
- P44. WATER HEATER: Enter the number of government-provided space water heaters. Enter the fuel type.
- P45. WELL PUMP: Enter **1** if there is a government-provided well pump. If the tenant pays their own electricity bill to a private supplier, the tenant will receive an electric credit. Credits for metered electric consumption are allowable for electricity provided by the Government or by a private supplier. Credits are not allowable when the electric consumption is estimated (flat rate).
- P46. WINDOW AC EVAPORATIVE: Enter the number of Government-provided window evaporative (swamp) air conditioning units. Include only those units which are operable as of the time of the inventory, or which will be repaired and operable by the beginning of the next air-cooling season.
- P47. WINDOW AC REFRIGERATED: Enter the number of Government-provided window refrigerated air conditioning units. Include only those units which are operable as of the time of the inventory, or which will be repaired and operable by the beginning of the next air-cooling season.

TENANTS SECTION

This section is for current tenants only, not previous or past tenants.

- T1. LAST NAME: Enter the last name of the employee assigned to and occupying the housing unit. If the unit is occupied by a family, enter the name of the employee designated as the rent-paying occupant.
- T2. FIRST NAME:
- T3. SOCIAL SECURITY NUMBER: Enter the social security number (SSN) of the employee named above (for internal agency payroll deduction purposes only.)
- T4. ARRIVAL DATE: This is the date (month, day and year) that the employee took possession of the housing unit. This date may be different from the *Lease Start Date* if the tenant is allowed to occupy the housing sooner than the effective date of the lease. This is a required field.
- T5. TYPE: Select the choice that corresponds to the type of appointment under which the occupant is employed.

100-297 GRANT

93-638 TRIBAL

COMMISSION CORPS

CONCESSIONAIRE

CONTRACTOR: An employee of a firm holding a contract for work (or services) who is provided housing in order to fulfill the conditions of the contract.

GENERAL PUBLIC

OTHER (FEDERAL)

OTHER (NON FEDERAL): A member of the general public allowed to lease housing that is temporarily unneeded by the agency.

PERMANENT: A permanent or temporary full-time or part-time employee of the agency. Seasonal employees are not considered as temporary employees for inventory purposes.

RESEARCHER (NON-FEDERAL)

SEASONAL: An employee hired for seasonal work only. These employees typically have a definite term of employment that will terminate when the season expires.

STUDENT VOLUNTEER

TRIBAL

VOLUNTEER (NON-STUDENT): Any person who performing duties for the bureau or agency on a non-pay basis, and who is provided housing as a part of the agreement.

- T6. TENANT PAYS FEDERAL RENT: Enter a checkmark if the tenant is a federal employee, or a contractor with specific written authority to receive the OMB Circular A-45 rents. Contractors and the general public are not entitled to receive A-45 administrative adjustments, such as isolation. Other non-federal tenants who provide some service or benefit to the Government may or may not receive the federal rate for rent, depending on the specific contractual or written authority.
- T7. ROOM NO. (optional): Enter the room number; this field is usually for a dormitory situation.
- T8. DEPARTMENT (optional): Enter the numeric code (organization code) of the organization which actually employs the employee/tenant. The purpose of this field is to identify the organization to bill for the rent, e.g. when an employee is on a detail from one organization to another. This field is only used when the housing site's organization code is different from the tenant's organization code.
- T9. GRADE/RANK (optional): Enter the code for the occupant's pay plan (i.e. GS for general schedule, etc.) and grade.
- T10. DEPARTURE DATE: Enter the month, day and year that the employee actually vacated or plans to vacate the housing unit. For QMIS purposes **do not enter the planned departure date** because after saving that information, the tenant information will no longer be displayed.
- T11. REQUIRED OCCUPANT: Enter a check if the tenant is a required occupant. Check the appropriate reason(s) for the tenant being required to live in government housing, i.e. provide necessary service or protection or both.
- T12. TAX EXEMPT: Enter a check in the box *Condition of Employment* if the occupant is required to live in government housing as a condition of employment. This requirement must be included in the recruitment notice and in the Position Description. Enter a check in the box *Convenience of Government* if the occupant is required to live in government housing as a convenience of the government.

A checkmark in the box *Quarters on Government Premises* indicates the unit is located on Government property. A unit leased from a rental company would not be on government premises. The housing being located on government premises is one of three provisions specified in the IRS (Internal Revenue Service) tax code in order for the rent payments (via payroll deductions) to be federal income tax exempt. More specific details are found in 26 USC 119 of the Internal Revenue Tax code. This form is not used by the payroll office to initiate tax-exempt W-2 statements or for information displayed on leave and earnings statements. The housing officer should see the agency's Personnel Office to obtain the proper tax-exempt paperwork for payroll calculation purposes.

- T13. TERMINATION NOTICE (DAYS) (optional): This is the amount of time **in days** either party, i.e. government or tenant, must give the other to terminate the Quarters Assignment Agreement (DI Form 1881). The number is also entered on the Quarters Assignment Agreement.
- T14. LEASE START DATE (optional): This is the date the lease starts. In many cases the original lease is signed once and not redone until a new Regional Rental Survey is implemented (every four years.)
- T15. LEASE END DATE (optional): This is the effective date for ending the rental agreement and housing rental charges. In most cases this date is the same as the departure date.

TENANT-OWNED APPLIANCES SECTION

Insert the number of and the type of fuel used by each tenant owned appliance listed in this section of the form. For example, if the tenant has one natural gas clothes dryer, insert **1** in the block to the right of DRYER and a **G** (natural gas) in the fuel type. If the tenant does not have a freezer, leave blank the box to the right of FREEZER and leave blank the fuel type block. If utilities are provided by the Government and billed in rent, include all tenant-owned appliances. If the tenant is paying their own utilities directly to the service provider, this information is optional.

TA1. NAME:

TA2. DISHWASHER:

TA3. DRYER:

TA4. ENGINE HEATER:

TA5. FREEZER:

TA6. HOT TUB:

TA7. MICROWAVE:

TA8. RANGE:

TA9. REFRIGERATOR:

TA10. SATELLITE DISH:

TA11. SPACE HEATER:

TA12. TRASH COMPACTOR:

TA13. WASHER:

TA14. WINDOW AC EVAPORATIVE:

TA15. WINDOW AC REFRIGERATED: