|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Date of On-Site Review: | Date of Report: | Project Number: | | Contract Number: |
| Section of the Act:  Section 8 | Name of Owner: | Project Name: | | Project Address:  , |
| Loan Status:  Insured  HUD-Held  Non-Insured  Co-Insured | Contract Administrator:  HUD  CA  PBCA | Type of Subsidy: | | Type of Housing:  Family  Disabled  Elderly  Elderly/Disabled  Other (please specify) |
| Section 8  PAC  Section 236  Section 221(d)(3) BMIR | Rent Supplement  RAP  PRAC  Unsubsidized |

For each applicable category, assess the overall performance by checking the appropriate column. Indicate A (Acceptable) or C (Corrective action required). Include target completion dates (TCD) for all corrective action items. For those items not applicable, place N/A in the TCD column.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **A. General Appearance and Security** | A | **C** | **TCD** | **Enter a score between 1 and 100 for the General Appearance and Security Rating.**  **If this Section was not reviewed, enter 0.**  **is 10% of the overall score.**  **This category is rated** |
| 1. General Appearance |  |  |  |  |
| 2. Security |  |  |  |  |
| **B. Follow-up and Monitoring of Project Inspections** | A | **C** | **TCD** | **Enter a score between 1 and 100 for the Follow-up and Monitoring of Project Inspections Rating** .  **If this Section was not reviewed, enter 0.**  **is 10% of the overall score.**  **This category is rated** |
| 3. Follow-Up and Monitoring of Last Physical Inspection and Observations |  |  |  |  |
| 4. Follow-Up and Monitoring of Lead-Based Paint Inspection |  |  |  |  |
| **C. Maintenance and Standard Operating Procedures** | A | **C** | **TCD** | **Enter a score between 1 and 100 for the Maintenance and Standard Operating Procedures Rating**.  **If this Section was not reviewed, enter 0.**  **is 10% of the overall score.**  **This category is rated** |
| 5. Maintenance |  |  |  |  |
| 6. Vacancy and Turnover |  |  |  |  |
| 7. Energy Conservation |  |  |  |  |
| **D. Financial Management/Procurement** | A | **C** | **TCD** | **Enter a score between 1 and 100 for the Financial Management/Procurement Rating.**  **If this Section was not reviewed, enter 0.**  **is 25% of the overall score.**  **This category is rated** |
| 8. Budget Management |  |  |  |  |
| 9. Cash Controls |  |  |  |  |
| 10. Cost Controls |  |  |  |  |
| 11. Procurement Controls |  |  |  |  |
| 12. Accounts Receivable/Payable |  |  |  |  |
| 13. Accounting and Bookkeeping |  |  |  |  |
| **E. Leasing and Occupancy** | A | **C** | **TCD** | **Enter a score between 1 and 100 for the Leasing and Occupancy Rating.**  **If this Section was not reviewed, enter 0.**  **is 25% of the overall score.**  **This category is rated** |
| 14. Application Processing/ Tenant Selection |  |  |  |  |
| 15. Leases and Deposits |  |  |  |  |
| 16. Eviction/Termination of Assistance Procedures |  |  |  |  |
| 17. Enterprise Income Verification (EIV) System Access and Security Compliance |  |  |  |  |
| 18. Compliance with Using EIV Data and Reports |  |  |  |  |
| 19. Tenant Rental Assistance Certification Systems (TRACS) Monitoring and Compliance |  |  |  |  |
| 20. TRACS Security Requirements |  |  |  |  |
| 21. Tenant File Security |  |  |  |  |
| 22. Summary of Tenant File Review |  |  |  |  |
| **F. Tenant/Management Relations** | A | **C** | **TCD** | **Enter a score between 1 and 100 for the Tenant Services Rating.**  **If this Section was not reviewed, enter 0.**  **is 10% of the overall score.**  **This category is rated** |
| 23. Tenant Concerns |  |  |  |  |
| 24. Provision of Tenant Services |  |  |  |  |
| **G. General Management Practices** | A | **C** | **TCD** | **Enter a score between 1 and 100 for the General Management Practices Rating**.  **If this Section was not reviewed, enter 0.**  **is 10% of the overall score.**  **This category is rated** |
| 25. General Management Operations |  |  |  |  |
| 26. Owner/Agent Participation |  |  |  |  |
| 27. Staffing and Personnel Practices |  |  |  |  |
| **Overall Rating:**  Superior  Above Average  Satisfactory  Below Average  Unsatisfactory Overall Score:  **To calculate an overall score:** Multiply the derived performance value by the assigned percentage of the overall rating for each category. Once all tested categories have been calculated based on the performance indicator and performance indicator values, the total calculated points is divided by the total percentage of overall rating and rounded to the nearest whole number.  For convenience, a utility is included with this form which will perform all of the necessary calculations. | | | | |

|  |  |
| --- | --- |
| Name and Title of Person Preparing this Report: (Please type or print):  , | Name and Title of Person Approving this Report: (Please type or print):  , Senior Compliance Manager |
| Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date: | Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date: |

**NOTE: If this review is conducted by a CA or PBCA as indicated above, the overall rating reflects a review as it relates to compliance with the Housing Assistance Payment Contract (HAP) only.**