



We Open the Doors to an Affordable Place to Call Home





Optimizing Compliance and Asset Management with Technology

National Council of State Housing Agencies
Annual Conference & Showplace
October 15, 2018

Holly Holtzen, Chief Operating Officer





Difficulty
sharing
Information

Aging
portfolio
/ more
complex

Staff
turnover

Improving
customer
experience

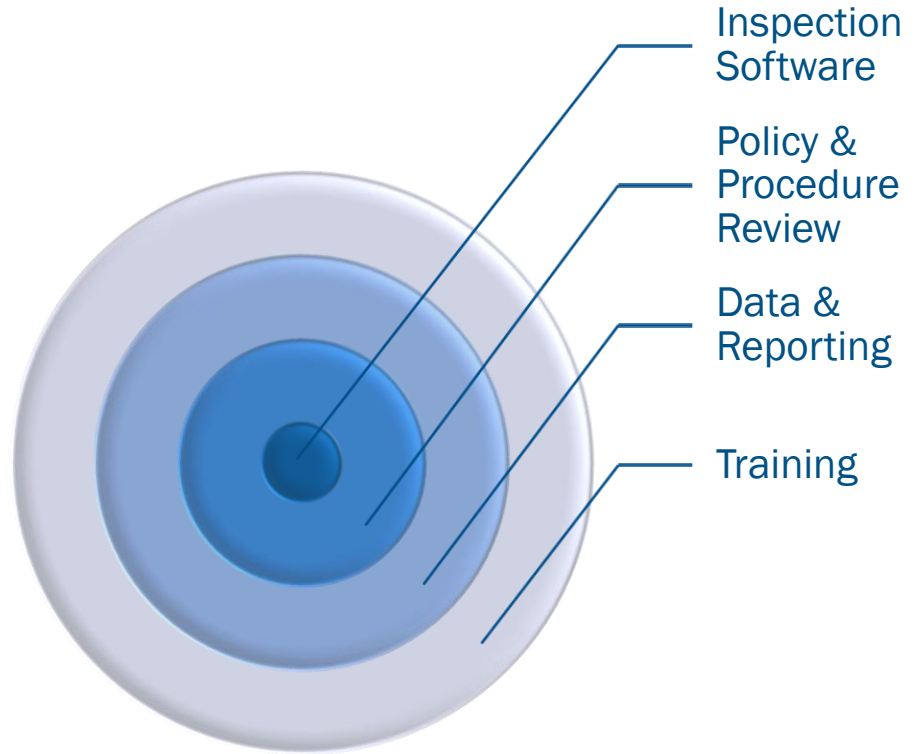
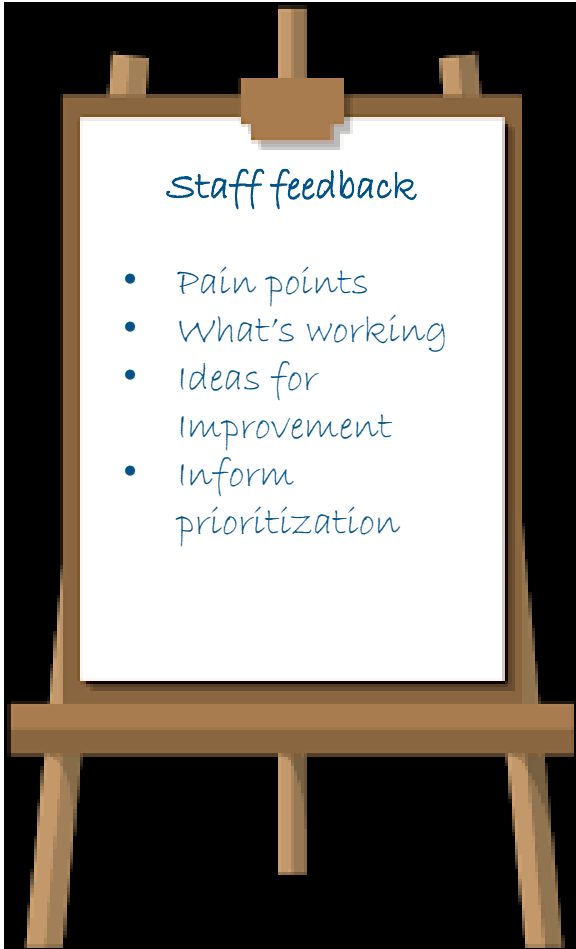
Cumbersome
process

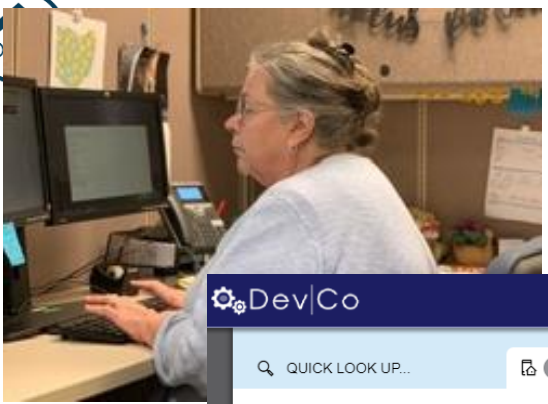
Consistency
between
inspectors

Same
information
in multiple
places

Important
information
only on
paper

Staff
experience





Create Audits

DevCo

QUICK LOOK UP... 24 AUDITS 99,999 COMMUNICATIONS 99,999 REPORTS PROJECT TAB : CREATED DYNAMICALLY FROM CONTROLLER

MY AUDITS ONLY CREATE AUDITS

FILTER PROJECT FILTER PROJECT / PM NAME FILTER PRIMARY ADDRESS

Ability to filter by date, users, and items that need action

List of "My Audits"

ID	Project Name	Address	Created	Last Modified	Status	Alerts	Actions
19200114 #1	Great American Apartments THE NOT SO LONG PROPERTY MANAGER NAME	3045 Cumberland Woods Street, COLUMBUS, OH 43219	12/21	10/21	✓	🔔 12/10	📁 🗑️ 🧠 🔥 👤 📧 📄 🗓️
19200115 #2	Great American Apartments THE NOT SO LONG	3045 Cumberland Woods Street, Suite 21	12/21	10/21	✓	🔔 12/10	📁 🗑️ 🧠 🔥 👤 📧 📄 🗓️
19200116 #3	Great American THE NOT SO LONG	s Street, Suite 21	12/21	10/21	✓	🔔 12/10	📁 🗑️ 🧠 🔥 👤 📧 📄 🗓️
19200133 #4	Great American Apartments THE NOT SO LONG PROPERTY MANAGER NAME	3045 Cumberland Woods Street, Suite COLUMBUS, OH 43219	12/21	10/21	✓	🔔 12/10	📁 🗑️ 🧠 🔥 👤 📧 📄 🗓️
19200234 #5	Great American Apartments THE NOT SO LONG PROPERTY MANAGER NAME	3045 Cumberland Woods Street, Suite 21 COLUMBUS, OH 43219	12/21	10/21	✓	🔔 12/10	📁 🗑️ 🧠 🔥 👤 📧 📄 🗓️
19200221 #6	Great American Apartments THE NOT SO LONG PROPERTY MANAGER NAME	3045 Cumberland Woods Street, Suite 21 COLUMBUS, OH 43219	12/21	10/21	✓	🔔 12/10	📁 🗑️ 🧠 🔥 👤 📧 📄 🗓️

HIDE NON CRITICAL SCROLL TO TOP



QUICK LOOK UP...

24 AUDITS

99,999 COMMUNICATIONS

99,999 REPORTS

PROJECT TAB :: CREATED DYNAMICALLY FROM CONTROLLER

- Details
- Communications
- Documents
- Notes
- Comments
- Photos
- Findings
- Follow-ups
- Reports

The Garden Oaks
Project #: 1920114

Last Audit Completed: December 12, 2017
Next Audit Due By: December 31, 2018
Current Project Score : 88% / B-

Total Buildings	99
Total Building Common Areas	99
Total Project Common Areas	10
Total Units	9,999
• Market Rate	8,999
• Subsidized	1,000
Total Programs	5
• Program Name 1	250
• Program Name 2	250
• Program Name 3	50
• Program Name 4	550
• Program Name 5	1000

OWNER: Jane Doe Properties

Jane Doe
(123) 344-4444 (123) 448-8888
bob@bob.com
123 Sesame Street
Suite 123
City State 12345

Managed By: The Really Long Named Property Manager Name

Bob Doe
(123) 344-3333 (123) 448-3333
bob3@bob.com
12333 Sesame Street
Suite 12345
City2 State2, 22222

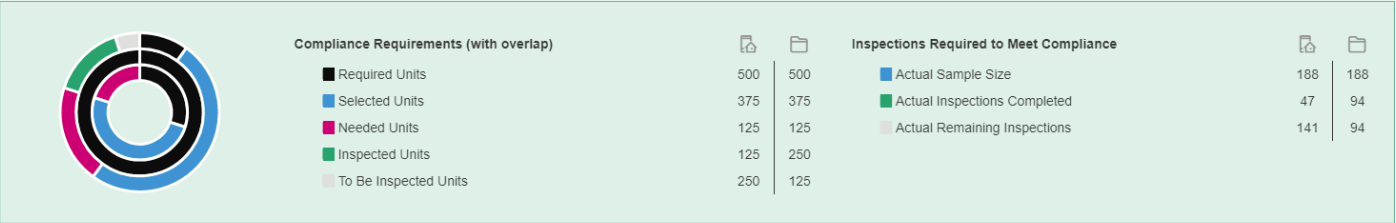
Clickable items to access user assignments, findings and reports

19200114 Great American Apartments 3045 Cumberland Woods St COLUMBUS, OH 43219 12/21 2018 0* / 72

- COMPLIANCE
- ASSIGNMENT
- FINDINGS
- FOLLOW-UPS
- REPORTS
- DOCUMENTS
- COMMENTS
- PHOTOS

- COMPLIANCE
- ASSIGNMENT
- FINDINGS
- FOLLOW-UPS
- REPORTS
- DOCUMENTS
- COMMENTS
- PHOTOS

0 ALL REQUIRED UNIT COUNTS FOR EACH PROGRAM HAVE BEEN SELECTED. 12 INSPECTABLE AREAS NEED ASSIGNMENT. 13 REQUIRED UNITS NEED TO BE SELECTED. 14 FILE AUDITS NEED TO BE COMPLETED. 15 PHYSICAL AUDITS NEED TO BE COMPLETED. 16 SCHEDULE CONFLICTS NEED TO BE RESOLVED.





Quick Tips

QUICK LOOK UP... 24 AUDITS 99,999 COMMUNICATIONS 99,999 REPORTS PROJECT 200114 :: REVIEW AND ASSIGN INSPECTABLE AREAS

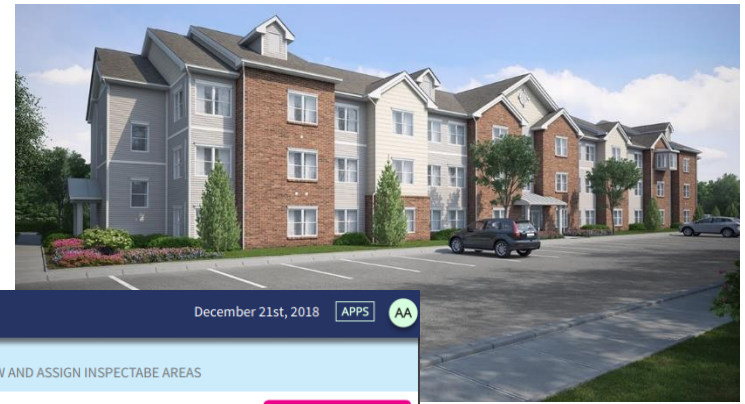
MY AUDITS ONLY PROJECT IDS WITH "114" SCHEDULED 1/20/17 - 12/25/18 CREATE AUDITS

FILTER PROJECT FILTER PROJECT / PM NAME FILTER PRIMARY ADDRESS

Lead Name	Project ID	Property Name	Address	Inspection Date	Findings	Follow-up	Compliance	Notes
19200114	AUDIT 2015697	The Garden Oaks	123456 Silverwood Street, Third Floor	12/22	0 / 21	12/30	0%	
19200114	AUDIT 2011234	3045 Cumberland Woods Street, Suite 202	COLUMBUS, OH 43219	12/20	0 / 72	12/30	0%	
19200114	AUDIT 11233	Kings Highlands Apartments	1296 Woodnell Ave	12/20	5 / 44	12/21	0%	
18200114	AUDIT 2011232	Hogans Heroes Depot	114 Hogan Way E., Number 4021	12/20	666 / 999	12/30	0%	
17200114	AUDIT 2011231	Tall Elms Retirement Home	5188 Mound Street	12/20	0 / 21	12/30	0%	
16200114	AUDIT 2011230	Commons At Main	57 East Main Street	12/20	5 / 21	12/30	0%	
15200114	AUDIT 2011299	Life On High Apartments	280 South High Street	12/19	0 / 21	12/30	0%	
14200114	AUDIT 2011298	The Glades	568 Kings Mills Drive	12/20	5 / 44	12/21	0%	
13200114	AUDIT 2011297	Corner to Corner Living	12 Columbine Avenue	8/19	0 / 21	12/30	0%	
12200114	AUDIT 2011247	Cooke Road Suites	126 Cooke Road	7/18	12 / 21	12/30	0%	
11200114	AUDIT 201875	The Ville Studios	882 Weber Blvd	6/18	12 / 21	12/30	0%	
10200114	AUDIT 20133	Oscar's Respite and Lodge	123456 Sesame Street	5/18	12 / 21	12/30	0%	
10200114	AUDIT 20155	Sister & Sister Apartments	123456 Sesame Street	4/18	12 / 21	12/30	88%	

Quick Tips Callouts:

- CLICK TO SCHEDULE AUDITS
- CLICK TO RESCHEDULE AUDITS
- INSPECTIONS IN PROGRESS
- INSPECTIONS COMPLETE
- AUDIT COMPLIANT
- REOPEN AUDIT
- NO FOLLOWUPS
- NEW FOLLOWUP
- VIEW ON MAP
- VIEW CONTACT DETAILS
- VIEW BUILDINGS AND COMMON AREAS
- OPEN AUDIT DETAILS IN A TAB
- AUDITORS
- SCHEDULE CONFLICTS
- UNASSIGNED ITEMS
- TOTAL FINDINGS FOR AUDIT HAS CRITICAL FINDINGS
- 10 INSPECTABLE ITEMS FOR
- FINDING ICON FOLLOWUP DESCRIPTION
- DOCUMENT STATUS DOCCAT IS PENDING
- DOCUMENT STATUS DOCCAT RECEIVED
- STEP DESCRIPTION
- NO VIEW HISTORY



Dev|Co AUDITS HISTORY MANAGE ADMIN December 21st, 2018 APPS

QUICK LOOK UP... AUDITS COMMUNICATIONS 99,999 REPORTS 99,999 PROJECT 200114 :: REVIEW AND ASSIGN INSPECTABLE AREAS

MY AUDITS ONLY PROJECT IDS WITH "114" SCHEDULED 1/20/17 - 12/25/18 CREATE AUDITS 22

FILTER PROJECT FILTER PROJECT / PM NAME FILTER PRIMARY ADDRESS

19200114 The Garden Oaks 123456 Silverwood Street, Third Floor 12/22 0* / 21 12/21

123457 Silvegwood Street COLUMBUS, OH 43219 TOWN HOMES 2 PROGRAMS

INSPECTION AREAS

- ELEVATORS
- ADA
- FLOORS
- LAUNDRY
- UTILITY
- COMMON AREAS
- FITNESS ROOMS
- GARAGE
- MORE...

123459 Silvegwood Street COLUMBUS, OH 43219 UNITS 5 PROGRAMS

- ELEVATORS
- ADA
- FLOORS
- LAUNDRY
- UTILITY
- COMMON AREAS
- FITNESS ROOMS
- GARAGE
- MORE...

123456 Silvegwood Street COLUMBUS, OH 43219 TOWN HOMES 2 PROGRAMS

- ELEVATORS
- ADA
- FLOORS
- LAUNDRY
- UTILITY
- COMMON AREAS
- FITNESS ROOMS
- GARAGE
- MORE...

+ ADD INSPECTABLE AREA TO PROJECT

19200114 Great American Apartments 3045 Cumberland Woods Street, Suite 202 12/22 0* / 72 12/30

ALLITA PC ©2018 - YYYY: V 1.0.0 HIDE NON CRITICAL SCROLL TO TOP We are offline Leave us a Message

Each property is geo-coded

App clears areas as they have been inspected and advises the lead auditor when a deficiency has been identified

Help available when you need it!

Users can add comments concerning a finding on a building, unit or area



Sometimes a picture says it all.

MY FINDINGS ALL FINDINGS THIS AUDIT ALL AUDITS

12/22/2018 1:15:38 PM: FND#: 123456
By Holly Swisher
123457 Silverwood Street
Columbus, OH 43219

REPLY

1 1 0 0

Building: Elevator #2:
Inspection Group SD Finding Description
Here

DELETE REPLY

12/22/2018 1:16:01 PM: FLWUP#: 123456
Requested By: Holly Swisher
Assigned To: {{Property Manager Contact}}

Auto-generated follow-up for SD with tasks and due date auto-set for same day.

0 0 0

REPLY
{{CATEGORY NAME}} DOCUMENT REQUESTED
PHOTO REQUESTED

REPLY

12/22/2018 1:18:01 PM: CMNT#: 123456
By Holly Swisher

Custom comment based on stuff I saw...

2 0 0

REPLY

12/22/2018 1:16:01 PM: PIC#: 1234
By Holly Swisher

2

12/22/2018 1:20:01 PM: DOC#: 901234
By Holly Swisher

Document Category Name 1
Document Category Name 2
Document Category Name 3

Cleaned_fileName-with characters_that_wrap_longer.PDF
1.3 MB PDF



Scheduling tool ensures conflicts are resolved prior to being on the road and estimates how long it will take to complete a physical inspection.

80 HOURS ASSIGNED ACROSS 5 AUDITORS

EDIT ESTIMATED HOURS

It will take an ESTIMATED 107:00 to complete this audit.
27:00 Need Assigned

12/22/2018 12/23/2018 ADD A DAY

VIEW AUDITOR STATS & DETAILED SCHEDULE

CLICK TO ADD AUDITORS

	AA	HS		BG	BG	
19200114 12/22/2018 The Garden Oaks	✖	✖	✔	✖	✔	
19200115 12/22/2018 The Other Place	✖				✔	
19200116 12/22/2018 The Other Other Place		✖		✔		
19200117 12/22/2018 The Womping Willows				✖	✔	

NOTE: YOU CAN ONLY APPROVE SCHEDULE CONFLICTS FOR AUDITS THAT YOU ARE THE LEAD. IF YOU ARE NOT THE LEAD, YOU CAN REQUEST APPROVAL FOR THE CONFLICT BY THE LEAD OF THAT AUDIT.

