

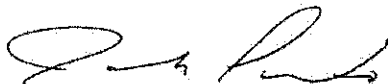
Hidalgo County - Urban County Program  
427 E. Duranta Ave, Ste 107  
Alamo, Tx 78516  
April 12th 2018

**Sole Source of Rehab Pro Direct**

Rehab Pro Direct is a leading business management software solution designed specifically for the administration of CDBG, Lead Hazard, HOME, Weatherization and other similar housing rehabilitation programs. There is no other system exactly like Rehab Pro Direct available for purchase, as this system is unique in its high-quality interface, timesaving functionality, and friendly supportive services.

HAPPY Software, an MRI Company, is the sole creator and distributor of Rehab Pro Direct. The software is only sold under the Rehab Pro Direct name. Rehab Pro Direct and related services cannot be obtained from resellers or other vendors. All installation, technical support, updates, upgrades, training and related services are provided, and can only be provided, directly by HAPPY Software.

I certify the above statement is true and correct.



Joe Panto, Senior Director, Sales  
HAPPY Software, Inc.

April 3, 2018

Steve de la Garza, Division Director  
Hidalgo County  
427 E. Duranta Avenue, Suite 107  
Alamo, TX 78516

## Purchase Agreement Rehab Pro Direct

I, Steve de la Garza, Division Director of the Hidalgo County, am authorized and agree to purchase from HAPPY Software, Inc. the products and services listed below.

### HAPPY Support

Item	Price	Quantity	Price
Rehab Pro Direct & Mobile Inspections	\$1,020.00	2	\$2,040.00
- Licensing			
- Hosting			
- Technical Support			
- Software Updates			
- \$85 per named user, per month (billed annually)			
Rehab Pro Direct & Mobile Inspections (Administrative)	\$510.00	1	\$510.00
- Licensing			
- Hosting			
- Technical Support			
- Software Updates			
- \$42.50 per named user, per month (billed annually)			
<b>Total HAPPY Support:</b>			<b>\$2,550.00</b>

### Services

Item	Price	Quantity	Price
Setup & Configuration - Rehab Pro Direct (per hour)	\$200.00	2	\$400.00
- Agency			
- Programs			
- Users			
- Market Areas & Income Limits			
- Active Grants			
- Letter Templates			
Internet-based Training - Rehab Pro Direct (per hour)	\$200.00	3	\$600.00
- Initial Training (2 hrs)			
- Follow Up Training (1 hr)			

Custom Form Programming (per page)	\$50.00	TBD	\$0.00
- First 5 Forms Free of Charge			
- Additional Forms are \$50 Per Page			

**Total Services: \$1,000.00**

<b>Total Due:</b>	<b>\$3,550.00</b>
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**Notes and Conditions**

- \* Use of Rehab Pro Direct is subject to Terms of Use.
- \* Rehab Pro Direct is accessible using Safari 7.x, Internet Explorer 10.x, or Chrome 27.x web browsers (or greater) on a Windows or Mac computer.
- \* Mobile Inspections requires Apple iPad (3rd Gen+) or iPad Mini.
- \* This quote does not include hardware, data conversion, or custom programming services.
- \* Standard support includes e-mail and integrated support tickets.
- \* 50% due upon completion of Kick Off Meeting. 50% due upon "Go Live".

- \* Use of Rehab Pro Direct is subject to Terms of Use.
- \* Rehab Pro Direct is accessible using Safari 7.x, Internet Explorer 10.x, or Chrome 27.x web browsers (or greater) on a Windows or Mac computer.
- \* Mobile Inspections requires Apple iPad (3rd Gen+) or iPad Mini.
- \* Includes allowance for integration of 10 Custom Forms.
- \* This quote does not include hardware, data conversion, or custom programming services.
- \* Standard support includes e-mail and integrated support tickets.
- \* 50% due upon completion of Kick Off Meeting. 50% due upon "Go Live".

The pricing on this Purchase Agreement is valid until 4/30/2018.

Payment Terms are Net 30 days after delivery. A 1.5% monthly charge will be applied to all late payments.

This agreement is subject to the terms and conditions of the HAPPY Software License and Definition of Support, and is final and binding unless cancelled in writing within 10 days of signing. Additional terms are not accepted.

New York State is the choice of law and forum for any actions brought regarding this agreement.

Purchaser is responsible for any applicable sales and use tax.

X \_\_\_\_\_  
 Steve de la Garza, Division Director  
 Hidalgo County

\_\_\_\_\_  
 Date



# Request for Taxpayer Identification Number and Certification

Give Form to the  
 requester. Do not  
 send to the IRS.

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type.  
 See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>MRI Software LLC</b>	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate  <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ <u>  P  </u> <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small>  <input type="checkbox"/> Other (see instructions) ▶	4 Exemptions (codes apply only to certain entities, not individuals; see Instructions on page 3):  Exempt payee code (if any) _____  Exemption from FATCA reporting code (if any) _____  <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions. <b>28925 Fountain Parkway</b>	Requester's name and address (optional)
6 City, state, and ZIP code <b>Solon, OH 44139</b>	
7 List account number(s) here (optional)	

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number										
OR										
Employer identification number										
2	7		-	1	4	9	9	6	0	9

## Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification Instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶ <u>01/20/2018</u>
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## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (Interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

## Online Grant Management: Sole Source Justification



While there are many vendors providing online grant management systems, **ZoomGrants provides the optimal solution to local governments that manage pass-through funding from the U.S. Department of Housing and Urban Development (HUD) Community Planning and Development (CPD) Programs (CDBG, HOME, HOPWA, ESG, COC, etc.).**

**“ZoomGrants is the only service I’ve found that is built for the public sector by people who have worked in the public sector.”**

*S. Bontrager, Housing Program Manager  
City of Elk Grove, CA*

Since ZoomGrants’ inception in 2002, we have worked closely with many governments across the country and have experienced a variety of procurement processes. While we understand the need to follow proper bidding and quote procedures, **ZoomGrants is easily justifiable as a Sole Source for online federal grant management services.** Because we would love to help simplify your procurement process, we developed this document, which answers the most important question to ask when considering a Sole Source vendor, to provide significant justification for Sole Source use of ZoomGrants as an online grant management solution provider. We’ve also created a template from which you can copy and paste content as you build your own justification materials to present to the decision-making body in your organization.

### **Q: Why and in what ways is ZoomGrants the only vendor that can provide this particular service?**

**A: ZoomGrants has provided technology to and been a trusted advisor for HUD CPD Entitlement Communities across the country since 2008.**

**A: ZoomGrants was originally designed to increase efficiency and efficacy in HUD CPD Entitlement Communities and Urban Counties and has been constantly improved ever since.**

- ∞ The technology and user interface developed by ZoomGrants offers unique tools targeted directly to program managers who administer HUD CPD funding.
- ∞ Our uniquely optimized reporting and post-funding management tools (i.e. checklists, tasks, monitoring, site visit tools, etc.) can be customized with HUD specific language to streamline connectivity and data entry into the IDIS system and increase the ease of overall program management and administration.
- ∞ Our technology connects users with a library of HUD CPD focused application content and reporting resources as well as contacts from other HUD CPD Entitlements utilizing the ZoomGrants system.

**A: ZoomGrants is the only online federal grant management vendor with HUD-CPD-Entitlement-trained staff.**

**A: ZoomGrants is the only vendor of its kind to belong and/or participate with several of the most influential community development associations in the United States:**

- ∞ National Community Development Association (NCDCA) [www.ncda-online.org](http://www.ncda-online.org)
- ∞ National County Community and Economic Development Association (NACCED) [www.nacced.org](http://www.nacced.org)
- ∞ Council of State Community Development Agencies <http://www.coscda.org/>
- ∞ Ohio Conference of Community Development (OCCD) <https://www.occd.org/>
- ∞ Florida Community Development Association (FCDA) <http://www.fcda-online.org/>
- ∞ Northwest Association of Community Development Managers (NWACDM) <http://nwacdm.org/>

## Sole Source Business Rationale

\*\*\*\*\*

This procurement for \_\_\_\_\_ is for the purchase of ZoomGrants for the purpose of managing our HUD CPD grant programs and applications online. More specifically, this purchase is for 'Federal Online Grant Management Services' and will be used for accepting, reviewing, managing, and awarding grant applications as well as automatically checking the IRS and SAM databases and managing post-decision activities like disbursement tracking, monitoring, and reporting. This unique product or service is economically only available from ZoomGrants because of ZoomGrants' HUD-CPD-Entitlement-Community-focused content, expertise, consultation, access to resources, and robust reporting features that simplify the entire grant administration process and make reporting to the IDIS system much more efficient and sustainable.

### What is ZoomGrants?

ZoomGrants is a cloud-based (Internet) solution to federal grant management. ZoomGrants transforms our paper or spreadsheet-based grant application process into a streamlined system that is simplified for all involved, including administrators, reviewers, and applicants.

### Why do we need to purchase ZoomGrants?

Today, when local governments are striving for a leaner (Kaizen) style of government, ZoomGrants is an innovative partner that can help us achieve our goals for effectiveness, efficiency, and sustainability by saving countless hours and freeing up budget space for other priorities, thereby reducing government waste.

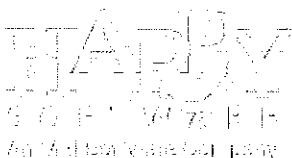
### How will ZoomGrants be used?

ZoomGrants will be used by our department to accept, review, and manage HUD CPD funding applications (like CDBG, HOME, HOPWA, and ESG) online. ZoomGrants is designed for HUD CPD Programs and the system would improve our grant management process by streamlining all aspects of the lifecycle of those funds. As HUD continues to ask local governments to do more with less funding, ZoomGrants would help our department use a unique technology to spend less time on grant management so we can focus on other important tasks.

### Why can only ZoomGrants provide our needed product or service?

ZoomGrants is the only provider of online federal grant management technology that offers HUD CPD-focused training, consultation, and application content directly related to the programs our department manages, and is already a trusted partner of numerous cities and counties across the country. Staff at ZoomGrants have spent significant time working with and managing HUD CPD Programs. Their experience, coupled with a product that is optimized for communities like ours, makes ZoomGrants a unique vendor that provides the best solution for our grant management needs

ZoomGrants is the only online application management provider to integrate with an All-In-One Cloud Solution for Managing Residential Rehabilitation. Rehab Pro Direct is specifically tailored to assist HUD CPD programs and State Housing Improvement Programs with their Housing Rehabilitation on-site inspections, work write-ups, site visits, reports, etc. all from an iPad®. Subscribing to both ZoomGrants and Rehab Pro Direct will allow the data received from the initial application, followed by the review and approval for funding to be seamlessly sent directly into your Housing Inspectors Rehab Pro Direct account without having to manually enter the data. This unique integration between these two solutions allows city and county governments who manage these funds to do more with less and streamline the way they deliver funding and services to their respective communities.



HAPPY Software, an MRI Software Company is a major provider of friendly software solutions to housing agencies of every size administering Section 8 and Public Housing programs.

Live Demo



Stop fraud in its tracks. Over 20,000 referrals provided. Log in or Register for FREE.

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## Rehab Pro Direct

Rehab Pro Direct is HAPPY's all-in-one Cloud solution for managing your CDBG, HOME, Lead Hazard, Healthy Homes, Weatherization, and other residential rehab programs.

This easy-to-use system will help you stay on top of project tasks, generate program reports, and make sure everything is perfectly documented in your case file.



DISCOVER REHAB PRO DIRECT

### LIVE SOFTWARE DEMO

Sign up for a free custom demo that features our housing software in action.

### GET PRICING INFORMATION

Receive a personalized quote. Our software is surprisingly affordable for agencies of all sizes.



"Rehab Pro Direct effectively manages our day to day housing rehabilitation activities while giving managers real time, actionable data used to improve and enhance the City's housing programs and services."  
 - (W.W., North Carolina)

## All the Tools to Run Your Residential Rehab Programs!

### Mobile Inspections:

Rehab Pro Direct's integrated Mobile Inspections for the iPad® makes being on the road a breeze, putting all the tools you need to review the file, collect new information about the property, and perfectly document the work. It's like fitting your office into the palm of your hand.

### Waiting List:

Our integrated waiting list system lets you set the rules about how applicants are served and ensure the integrity of the list.

### Eligibility:

Easily determine eligibility and maintain all associated documentation. Our built-in forms and letters make it simple to gather all the information required to certify income, and our document storage system lets you keep supporting documents organized.

### Work Write-ups:

Take the drudgery and double-data entry out of creating Work Write-Ups by using our iPad-based data collection system. Use that same data and our pre-loaded specifications to create perfect Work Write-Ups with ease.

### Tracking:

Stay on top of your active Rehab projects. Manage all aspects of your contracts and contractors.

### Monitor Balances:

Take all the surprises out of managing your grants. You'll always know just where you stand. Track grants, balances and funding allocation in real-time.

**Alerts:**

Never miss an important deadline or task again. Assign tasks for each Case File and have staff automatically notified as they become due.

**Store Documents:**

Keep your files under control with our electronic case file system. Upload signed contracts, specifications, and other scanned documents for easy access from anywhere.

**Create Letters & Forms:**

Generating documents has never been faster. Print or email documents directly to Owners, Heads of Households and Contractors.

**Generate Reports:**

Produce program reports in seconds, not hours. Get the information you need quickly, so you can make the right decisions.



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HAPPY Software, an MRI Software Company is a major provider of friendly software solutions to housing agencies of every size administering Section 8 and Public Housing programs.

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## News & Events

### MRI Software Acquires HAPPY Software, Inc., Creating a Public and Affordable Housing Tech Powerhouse

By Jessica Yerdon on March 8, 2018

*Third PHA Software Acquisition Expands MRI's Solutions for Public Housing Authorities and Housing Choice Voucher Programs*

**Solon, Ohio – March 8, 2018** – MRI Software, a global leader in real estate software solutions, today announced the acquisition of HAPPY Software, a provider of innovative housing solutions and services for public housing authorities in the United States. With this acquisition, MRI's third within the public housing space in just five months, the company now serves nearly 35 percent of U.S. public housing authorities.

Based in Saratoga Springs, New York, HAPPY Software provides property management solutions to more than 465 housing agencies of every size, administering Public Housing and Housing Choice Voucher programs. HAPPY's suite of fully configurable, web-based portal solutions help housing authorities more effectively manage key functions such as applicant and waitlist tracking, tenant screening, and online payment handling.

"For two decades, HAPPY Software has built a standard for excellence culminating in today's impressive 98 percent client retention rate," said David Camer, Senior Vice President of Residential Solutions at MRI Software. "The addition of HAPPY to the MRI Software family represents another milestone in our strategy to provide world-class technology solutions to the public housing sector while further scaling our footprint in the market. We intend to continue supporting HAPPY's solution set and extend its portal offerings to our existing PHA clients, while also leveraging HAPPY's expertise to develop a next-generation, web-based platform for the public and affordable housing market."

In October of 2017, MRI announced the acquisitions of Tenmast Software and HAB, Inc., providers of PHA and private affordable housing management software. Taken together, MRI's three public housing acquisitions, in addition to the company's Affordable Housing Bostonpost solutions, make MRI a major force in the U.S. public and affordable housing software markets.

"Our mission at HAPPY Software has always been to provide public housing organizations with the very best software solutions and the highest level of service," said Joe Matrianni, Chief Executive Officer and founder of HAPPY Software. "Joining forces with MRI is a continuation of that mission, bringing a deep reserve of resources and innovation to develop feature and functionality enhancements that will even better serve the industry."

#### About MRI Software

MRI Software is a leading provider of innovative real estate software applications and hosted solutions. MRI's comprehensive and flexible technology platform coupled with an open and connected ecosystem meets the unique needs of real estate businesses — from property-level management and accounting to investment modeling and analytics for the global commercial and residential markets. A pioneer of the real estate software industry, MRI develops lasting client relationships based on nearly five decades of expertise and insight. Through leading solutions and a rich partner ecosystem, MRI liberates real estate companies to elevate their business and gain a competitive edge. For more information, please visit [mrisoftware.com](http://mrisoftware.com).

#### About HAPPY Software

HAPPY Software is a rapidly growing company based in Saratoga Springs, NY that has been providing innovative housing software and services to housing agencies administering Housing and Urban Development (HUD) programs for more than 20 years. HAPPY Software has a well-established reputation for quality, easy-to-use products and friendly, attentive customer support. The company's client retention rate is at least 98 percent historically.

#### Search

To search, type and hit enter...

#### Categories

- General News & Announcements (4)
- Upcoming Events (6)

HAPPY Software actively supports the housing industry by sponsoring events, exhibiting and advertising with several housing associations including NAHRO, PHADA, Community Action Partnership, National Leased Housing Association and many State Housing Groups.

###

Posted in [General News & Announcements](#) | [Leave a response](#)

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## Apr. – Jun. HAPPY's Regional Training Roadshow

By Jessica Yerdon on March 1, 2018

HAPPY is coming to a town near you this spring for a can't miss training event. Join us for a jam-packed day of learning, networking, and fun.

[Click here to learn more](#)

Posted in [Upcoming Events](#) | [1 Response](#)

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## Apr. 18-20 Iowa NAHRO Spring Conference

By Jessica Yerdon on March 1, 2018

Learn how our housing management solution can make your workday more efficient and HAPPY-er. Stop by our booth and visit with us to find out how we can have a positive impact on your housing programs. The Iowa NAHRO Spring Conference is located at the Marriott in West Des Moines, IA.

Email [sales@happysoftware.com](mailto:sales@happysoftware.com) to set up a one-on-one meeting at the show.

Posted in [Upcoming Events](#) | [Leave a response](#)

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## May 21-23 PSWRC-NAHRO Annual Conference

By Jessica Yerdon on March 1, 2018

Learn how our housing management solution can make your workday more efficient and HAPPY-er. Stop by our booth and visit with us to find out how we can have a positive impact on your housing programs. The PSWRC-NAHRO Annual Conference is located at the Sheraton Grand in Sacramento, CA.

Email [sales@happysoftware.com](mailto:sales@happysoftware.com) to set up a one-on-one meeting at the show.

Posted in [Upcoming Events](#) | [Leave a response](#)

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## Apr. 11-13 OHAC Spring Conference

By Jessica Yerdon on March 1, 2018

Learn how our housing management solution can make your workday more efficient and HAPPY-er. Stop by our booth and visit with us to find out how we can have a positive impact on your housing programs. The OHAC Spring Conference is located at the Kalahari Resort & Convention Center in Sandusky, OH.

Email [sales@happysoftware.com](mailto:sales@happysoftware.com) to set up a one-on-one meeting at the show.

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## Product Tour: Upgrade Your Workday with Housing Pro

By Jessica Yerdon on November 9, 2016

Welcome to a better day: Managing your programs has never been easier. Housing Pro has everything you need to make everyday tasks simple and less time consuming. Learn how powerful dashboards and the Hub can help you prioritize your workload by bringing critical information to the forefront. You don't have to look for what you need anymore; what you need now comes to you. Housing Pro will change the way you work.

**Date:**

March 21st at 2pm (EDT)

April 25th at 2pm (EDT)

[Click Here to Register](#)

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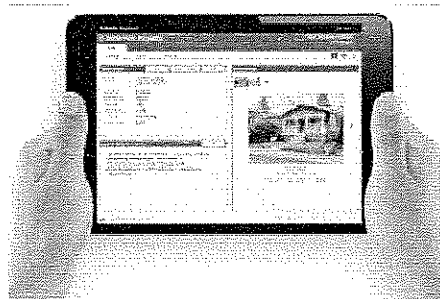
## Rehab Pro Direct

By Jennifer Kelly on May 20, 2014

Does your agency manage CDBG, Lead Hazard, Healthy Homes or other residential rehabilitation programs? If so, it's time to replace your paper files and get organized with Rehab Pro Direct™ – HAPPY's new cloud-based, Software as a Service solution that will help you more efficiently administer these programs and save you time.

Developed with the input of rehab specialists, this all-in-one solution makes sure you're on top of your projects at every stage:

- Monitor your waiting list
- Track household eligibility
- Schedule Inspections
- Enter repairs while in the field
- Generate bids and case file documents
- Track contract details and change orders
- Allocate funding
- View grant balances in real-time
- Receive automated alerts to upcoming tasks
- Store case file documentation electronically



Accessible through a browser or iPad application, Rehab Pro Direct lets users quickly access all the information they need from anywhere, any time. And because it's web-based, you don't have to worry about anything technical. We take care of backups, upgrades, and security so you can concentrate on what matters – administering your program and getting on with the job.

Rehab Pro Direct is affordable, easy to setup, and simple to use. Visit us online at [www.RehabProDirect.com](http://www.RehabProDirect.com) or contact our Rehab Pro Direct Team directly at 888-484-2779 opt. 7 to learn more about how this solution can make you happy!

Posted in General News & Announcements

## Save the Date for HAPPY's 2015 User Conference!

By Jennifer Kelly on December 15, 2014

### Mark Your Calendar!

Join us on June 15-17, 2015 in Saratoga Springs, New York for HAPPY's 2015 User Conference.

**First Look at Housing Pro 9.** Get an exclusive first look at the new, streamlined Housing Pro interface that will be available to Housing Pro clients in late 2015. (Click for a Sneak Peek at the New Interface) Attendees will also have the opportunity to be selected as a beta testing site, allowing your Agency pre-release access and a discounted Upgrade rate.

**Great Location.** The conference will be held right in our backyard (literally) at the brand new Embassy Suites Saratoga Springs. This location gives us the unique opportunity to invite you to our offices for hands-on training, a meet and greet with staff and an office tour. While in town, take in the sights including the historic downtown, Saratoga battlefield and mineral springs and you will see why Saratoga Springs was named the "happiest" city in New York.

**Affordable.** A reduced early-bird registration conference rate of \$395 makes attending the HAPPY User Conference affordable for even small PHAs. Albany International Airport, located 30 minutes south of Saratoga Springs, is serviced by most major airlines including low-cost provider Southwest. The Embassy Suites hotel offers a competitive rate of \$159 per night and includes a complimentary cooked-to-order breakfast and evening cocktail reception.

Watch for more conference information coming your way in the upcoming weeks. For additional information, you can also contact our Sales Team at [sales@happysoftware.com](mailto:sales@happysoftware.com) or 888-GT-HAPPY option 4. We hope to see you in the spring!

Posted in Upcoming Events | Leave a response

## Secure Methods for Sending PII

By Jennifer Kelly on July 16, 2013



A HAPPY client was recently informed by their HUD Field Office that e-mailing a HUD 50058 form to another housing agency as part of the Port-Out process was a violation of program guidelines regarding Personally Identifiable Information (PII) and Sensitive Personally Identifiable Information<sup>1</sup>. This came as a surprise to the agency, since sending the 50058 is required under Portability and sending it via e-mail seems like an efficient and reasonable action to take. As it turns out, according to PIH 2010-15, PII can only be sent electronically if the message and any attachments are encrypted<sup>2</sup>, a process to secure e-mail that is seldom used and complicated.

*So what does this mean for your agency?*

E-mail is not considered a secure method to transmit PII or Sensitive PII, while U.S. mail and the FAX are. But e-mail and other electronic means of transmitting information are more cost effective, faster and more convenient. To start, agencies should only use e-mail to send letters and forms that do not contain PII. For documents that do contain PII and Sensitive PII, HAPPY has created a secure way to transfer these forms electronically using our online AssistanceCheck<sup>®</sup> System. This innovative service enables your applicants, tenants, and property owners to find answers, submit requests, update their case file (with agency approval), send and receive documents and complete re-certifications online – on their own, at any time, all within a secure and encrypted environment that meets HUD's requirements.

Contact our sales department to learn more about how AssistanceCheck can provide your agency with an added level of PII protection and a significant savings in time and money.

<sup>1</sup> Office of Management and Budget, M-07-16

**Personally Identifiable Information (PII)**

"... information which can be used to distinguish or trace an individual's identity, such as their name, social security number, biometric records, etc. alone, or when combined with other personal or identifying information which is linked or linkable to a specific individual, such as date and place of birth, mother's maiden name, etc."

**Sensitive Personally Identifiable Information**

PII that when lost, compromised or disclosed without authorization could substantially harm an individual. Examples of sensitive PII include social security or driver's license numbers, medical records, and financial account numbers such as credit or debit card numbers.

<sup>2</sup> USDA Office of Public and Indian Housing, Notice PIH 2010-15 (HA) Section 3, IV, 5

"...When sending sensitive PII via email, make sure both the message and any attachments are encrypted."

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## Press Release: HAPPY's Online Waiting List Service Securely Accepts a Record Number of Housing Applications

By Jennifer Kelly on December 13, 2012

### HAPPY Software's Online Waiting List Service Securely Accepts a Record Number of Housing Applications

Saratoga Springs, NY – December 11, 2012 – HAPPY Software, Inc. announced statistical information regarding the collection of applications for federally assisted housing using their WaitListCheck™ online system.

In the last two months, HAPPY's WaitListCheck system was used to open major waiting lists in Houston, Portland, Virginia Beach, and the Orlando area. Together, these Housing Authorities collected more than 120,000 applications online, including one opening that saw 45,000 applications collected in just one day – smashing a competing vendor's published daily record of 8,800. Peak usage of the system saw sustained periods of use where more than 6,000 applications were taken hourly. To date, the company knows of no other system that has collected nearly as many applications per day, week, month or in total as the WaitListCheck system.

In the past, Housing Authorities in high demand areas who announced waiting list openings faced massive lines as needy families sought to complete applications at the agency's offices. Typically, people would form lines hours and days before the actual opening, causing expensive and difficult crowd management issues and unnecessary difficulty for low-income families and the elderly. The online application collection system included in WaitListCheck allows for the orderly, 24/7 collection of applications and largely eliminates the cost, labor, and potential public safety concerns associated with traditional paper application taking. Michael Kelsch, Assistant Managing Director of the Houston Housing Authority indicated, "We took over 83,000 applications without a hitch. Many of our staff did not even know the waiting list was open, as there was no extra traffic at our offices."

WaitListCheck also provides the ability for families who have completed the application process to check their progress on the web at [www.waitlistcheck.com](http://www.waitlistcheck.com) or via an automated toll-free phone system. Currently more than 1 million families across the U.S. view status information about their application through this system, providing the opportunity for already burdened housing staff to focus on assisting families rather than answering status questions over the phone. Current usage of the system indicates that more than 5,500 families check their waiting list status each day, preserving countless federal dollars for more constructive use. Art Waller, Housing Programs Administrator at the City of Virginia Beach shared his enthusiasm about these savings, stating that, "WaitListCheck is the most economical way to establish and maintain the waiting list application process – and our clients love it!"

**HAPPY Software, Inc. is a privately owned leading provider of software and consulting services to state and local government agencies administering federally funded housing programs. In business since 1997, the company has clients in 49 States and Puerto Rico. Additional information can be found at [www.happysoftware.com](http://www.happysoftware.com) or by contacting 888-GT-HAPPY.**

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