

Management and Occupancy Review Specialist



A certification program for management personnel and regulatory agencies

Management and Occupancy Review Specialist (MORS) gives management personnel an understanding of the process used by Contract Administrators in conducting HUD-mandated Management and Occupancy Reviews (MOR).

Who should attend: Managers and contract administrator staff who wish to enhance their skills.

OVERVIEW

Management and Occupancy Reviews are conducted by contract administrators as part of an annual assessment of management performance and property compliance with HUD guidelines and regulations. The MORS program reviews these guidelines and regulations and their relevance to the MOR process, and examines the common errors that lead to poor performance on MORs by both management staff and contract administrator staff.

WHAT YOU'LL LEARN

HUD Form 9834 HUD Form 9834 is used to document the Management and Occupancy Review. MORS will take you from the desk reviews of the contract administrator before they arrive on-site, to making corrections or challenging findings after the MOR has been completed.

Regulations and guidelines Learn what is behind each item on the HUD Form 9834. MORS uses material from Title 24 of the Code of Federal Regulations; HUD Handbook 4350.3, Rev. 1; HUD Handbook 4350.1; along with a variety of HUD notices.

Planning MORS will teach you to spot and correct potential trouble spots in advance of the review. While NCHM cannot guarantee you'll receive a superior rating on the MOR, we can guarantee that you'll have a greater understanding of the process, guidelines, and regulations—and the potential pitfalls.

Collective experience MORS features both individual performance and group case studies, providing an opportunity for participants to share their ideas and experience, enhancing the learning that occurs during the program.

PILLAR COURSE:	No
DURATION:	Three-day program
CERTIFICATION / EXAM:	Includes half-day certification exam
INSTRUCTION FORMAT:	Lecture supported by multimedia presentation
PREREQUISITES/LEVEL:	None/Suitable for all levels
INTENDED AUDIENCE:	Property managers; Contract Administrator staff
OFFERED:	Regularly scheduled; also Special Group
MATERIALS PROVIDED:	MORS manual; HUD Form 9834
MATERIALS TO BRING:	Calculator (required); highlighter, pen/pencil

Course agenda

DAY 1

- 8:00..... Registration
- 8:30..... Overview of program and manual; introductions
- 9:00..... The Contract Administrator Desk Review
- 10:00..... Break
- 10:15..... Desk Review (contd.)
- 10:45..... General appearance, security, and maintenance
- 12:00..... Lunch (not provided)
- 1:00..... General appearance, security, and maintenance (contd.)
- 1:30..... Case study and quiz
- 2:30..... Financial management and procurement
- 3:00..... Break
- 3:15..... Financial management and procurement (contd.)
- 3:30..... Case study and quiz; adjourn at 5:00

DAY 2

- 8:30..... Review
- 9:00..... File reviews/file audits
- 10:00..... Break
- 10:15..... File reviews/file audits (contd.)
- 12:00..... Lunch (not provided)
- 1:00..... File reviews/file audits (contd.)
- 3:00..... Break
- 3:15..... Case studies/exercises
- 4:15..... Resident satisfaction; adjourn at 5:00

DAY 3

- 8:30..... Review
- 9:00..... Post-management review process; making corrections and appealing findings
- 10:00..... Break
- 10:15..... Final question-and-answer session
- 10:30..... Certification exam
- 2:30..... Exam period concludes



333 North 1st St., Suite 305 Jacksonville Beach, FL 32250
 TEL: 800-368-5625 / FAX: (904) 372 2324 • www.nchm.org

NCHM admits students without regard to race, color, creed or ethnic origin, or disability to all of its educational programs.