Meetings

Use the Meetings form, accessed from the SC Daily log, to record time spent in Meetings. Meetings are not reported as a line item on the HUD report, but they are reflected as a percentage of your Time Allocation of Monthly Tasks as reported in Section 8 of the HUD report.

While this feature helps to track time spent in property management meetings and other types of meetings, its primary purpose is to document meetings for management reports, such as the Activity Summary.

Create Meeting

The required fields in the body of the Create Meeting form include the Date and Meeting Name. The optional fields on this form are Duration and Meeting Activities/Notes.
First, specify the date of the Meeting by choosing Click Here To Select. This will open a calendar that allows a date to be selected. A specific Meeting record can be submitted for one specific day.

To go to a previous or upcoming month, click on the name of the month to see those dates. Once a date is selected, the calendar will automatically close.

To change the selected date, click Clear Selection at the bottom left corner of the Meeting calendar.

The Meeting Name is the name or type of meeting attended. Manually type the Meeting Name into the field.

The box to the right of the Meeting Name helps track meetings with Property Management Staff. This is important because the HUD Report asks for the percentage of time spent each month in meetings with Property Management Staff.

If this box is checked and duration is added, the information from this record will be tallied in the brown reference box on the Create Service Hours Form next to superscript 2.

If the box to the right of the Meeting name is left unchecked, the Meeting record is automatically deemed as an Other Meeting not associated with property management. The information from this record will also appear in the brown reference box on the Create Service Hours Form next to Superscript 3.
While it is optional to enter duration on the Create Meeting form, it is also considered a best practice. Manually type the amount of hours into the hours column and use the drop down menu to add the number of minutes.

The duration that is entered here feeds automatically into the brown Service Hours data column chart located on the right side of the Create Service Hours Form. Meetings with Property Management staff feed into the data field next to superscript 2. Other Meetings feed into superscript 3 on the Create Service Hours Form.

The last section of this form offers a place to type notes specific to the meeting. List any Meeting Activities / Notes by manually typing the description into this field.

*This image is from the Create Service Hours Form. For more information on the Service Hours feature, see the Service Hours section of the Training Manual.
Editing or Deleting Meeting

Initially there will not be any records selected. Use the drop down menu to select a specific Meeting record. The Meeting record will open automatically after it is selected.

Once the changes are complete, go to the bottom of the edit Meeting page and click Update to save edits to this record. Or, to delete this record, simply click on Delete. To exit out of the record without making any changes, click Cancel.
Print Report of Meeting

A Meeting Report can be accessed from the SC Daily Log. Meeting reports can be run for a day, month, or custom range. A report can be saved as a PDF and printed.

Initially, the report will default to the current month. To view a different date or range, click the blue link displaying the current month.

This will open a Report Date Range Selection tool. A report can be run for a specific day, month, or custom date range. Once the range has been specified, click OK and it will bring up all the Meeting records for the date range. To exit out of the calendar without making any changes or choosing a date range, click Cancel.
The body of the report page will list each Meeting record that was entered during the date range. Each record is broken down by **Date, Duration, Details, With Property Management, and Service Coordinator**. Existing records can be edited directly from the report screen and new records can also be added on the report screen.

![Table](image)

- **Edit** a record directly from this page by clicking on the blue edit link to the right of each particular record. This feature will open the record. Once the desired changes are made and saved, the record will close and this particular Meeting Report screen will be visible once again.

- **To add an additional Meeting record directly from this report screen**, choose **Click Here to Create New Meeting** and a Create Meeting form will open. Once the new record is created, it will close and this particular Meeting Report screen will be visible once again.

- **To print a version of this report**, click **Print Version** at the top right portion of the Meeting report screen. This will download a PDF version of the report which can then be opened and printed.