



OFFICE OF
HOUSING COUNSELING

Housing Counseling System (HCS) Today and in the Future

"Open Doors with Housing Counseling"

August 08, 2019

Speakers

- Joel Ibañez, U.S. Department of Housing and Urban Development (HUD), Office of Housing Counseling
- Speakers:
 - George Grotheer, U.S. Department of Housing and Urban Development (HUD), Office of Housing Counseling
 - Kristin Ackerman, U.S. Department of Housing and Urban Development (HUD), Office of Housing Counseling
 - Theresa Houck, Salient CRGT

Agenda

- Latest HCS Updates
- Two Common Questions/Answers
- Tips for HUD Intermediaries
- Future HCS Enhancements
- Housing Counseling Agency Management System (HCAMS)

Questions will be answered at the end of the presentation.

**Time for
Mentimeter!**



Latest HCS Updates

Data Quality Alerts

Data Quality Alerts have been added to the 9902 form in HCS to alert agency users to possible errors in 9902 reporting.

The alerts will check for:

- ✓ (0) impacts entered in Section 10 Impact and Scope of One-on-One Counseling Services
 - Indicates agency is not reporting any impacts.
- ✓ Total impacts entered in Section 10 total is the same as the Section 9 total for one-on-one counseling.
 - Indicates agency is not reporting multiple impacts.
- ✓ Total impacts entered for 10c (developing a sustainable budget) is less than Section 9 total for one-on-one counseling.
 - Indicates agency is not developing a budget with counseled clients, this is a counseling requirement
- ✓ (0) impacts reported for 10e - households gained access to resources to improve their housing situation
 - Indicates agency is not properly reporting impacts
- ✓ Agency's yearly budget is not entered.

Data Quality Alerts (cont)

- If data quality alerts have NOT been identified for a 9902, there is no change to the display of the 9902.
- Do not display on Consolidated 9902

Housing Counseling Agency Activity Report		U.S. Department of Housing and Urban Development Office of Housing Counseling Federal Housing Commissioner		OMB Approval No: 2502-0261 Exp. 07/31/2019							
1. Counseling Agency Name			2. Reporting Period and Budget								
Agency Name XYZ AGENCY Agency ID: 80020 Agency Type: LHCA 4000 Legato Rd Suite 600 FAIRFAX, VA 22033-2892 Parent Agency Name (if applicable) XYZ AGENCY Agency ID: 80754 Agency Type: National Intermediary			Reporting Period: <input type="text" value="Quarter 2"/>								
			Fiscal Year: 2019 From: 10/01/2018 To: 03/31/2019 Submission Date: 04/09/2019 Update Date: 06/14/2019 Total budget, all sources: \$218,517.00 Total HUD Funding, all grants: \$5,509.85								
			HUD Funding Sources Passed @ 3% 2018-1 COMP 10/01/2017 - 09/30/2019 2018 Comprehensive Housing Counseling Grant Program. FR-6200-N-33 Funding: \$5,509.85								
Validated: Validated Last Validated: 06/14/2019 Validated by: C57569			Only reports completed by 04/30/2019 will be credited for on time submission.								
<input type="button" value="Update"/> <input type="button" value="PDF Version"/> <input type="button" value="Close"/>			<table border="1"> <thead> <tr> <th colspan="2">TOTAL</th> </tr> <tr> <th>All Activities</th> <th>All HUD Funded Activities</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table>			TOTAL		All Activities	All HUD Funded Activities		
TOTAL											
All Activities	All HUD Funded Activities										
3. Ethnicity of Households (select only one)											
a. Hispanic			393	332							
b. Not Hispanic			8	5							
c. Chose not to respond			2	1							
Section 3 Total			403	338							
4. Race of Households											

Data Quality Alerts (cont)

- If data quality alerts have been identified for a 9902, a Data Quality Alerts section will display below the Validation information.
- Click the **Review Data Quality Alerts** button to display the specific alerts for that 9902.

1. Counseling Agency Name		2. Reporting Period and Budget							
Agency Name XYZ AGENCY Agency ID: 80020 Agency Type: LHCA 4000 Legato Rd Suite 600 FAIRFAX, VA 22033-2892 Parent Agency Name (if applicable) XYZ AGENCY Agency ID: 80754 Agency Type: National Intermediary		U.S. Department of Housing and Urban Development Office of Housing Counseling Federal Housing Commissioner OMB Approval No: 2502-0261 Exp. 07/31/2019 Reporting Period: <input type="text" value="Quarter 2"/> Fiscal Year: 2019 From: 10/01/2018 To: 03/31/2019 Submission Date: 04/09/2019 Update Date: 06/14/2019 Total budget, all sources: \$218,517.00 Total HUD Funding, all grants: \$5,509.85 HUD Funding Sources Passed @ 3% 2018-1 COMP 10/01/2017 - 09/30/2019 2018 Comprehensive Housing Counseling Grant Program. FR-6200-N-33 Funding: \$5,509.85							
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Data Quality Alerts Data Quality Alerts have been identified for this 9902 report and have not been addressed.									
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a.	Hispanic	393	332						
b.	Not Hispanic	8	5						
c.	Choose not to respond	0	1						

Data Quality Alerts (cont)

- Data Quality Alert pop-up display list all applicable alerts for the 9902

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✕

Data Quality Alert

The 9902 report has been accepted by the system. Areas have been identified for review of data quality. Use the form below to address these or reach out to your POC if you have questions.

- Total impacts reported in Section 10 is the same as the total of Section 9 indicating multiple impacts have not been reported.
- 10c (developing a sustainable household budget) is less than the section 9 total indicating agency is not developing a required budget.
- 0 impacts reported for 10e (households gained access to resources to improve their housing situation).

To remove the alerts, return to your CMS to enter the necessary adjustments and resubmit.

For any alert that represents accurate reporting, select the check box, provide a comment, and click **Accept**.

To return to the 9902, click **Close**.

Accept
Close

Data Quality Alerts

- The Data Quality Alerts indicate that while the 9902 has been submitted and accepted by HCS, there are some indicators that there may be some errors in reporting
- The agency user should review the information provided in the Data Quality Alert pop-up. The user has three options:
 1. Ignore the Data Quality Alerts for the moment
 2. Update the 9902 reporting to remove the alerts
 3. Accept the alerts to indicate that the reporting reflects valid reporting on the counseling activities conducted during the reporting period

Data Quality Alerts

- If the reporting reflects valid reporting on the counseling activities conducted during the reporting period, the agency user should **Accept** the alerts
- Accepting an alert tells the HUD POC that:
 - The agency has reviewed the alerts and confirmed that the reporting is accurate
 - Since the reporting is accurate, the agency will not change the 9902 reporting to remove the alerts
- The alerts are only meant to identify possible data quality issues. **There is no negative impact to the agency user for accepting the alerts.**

Data Quality Alerts

- Instructions for managing alerts:
<https://www.hudexchange.info/programs/housing-counseling/hcs/#improvement-releases>
- HCS Improvement Release v.14.18.0.0 - June 2019

Resources and assistance to support HUD's community partners

HUD EXCHANGE
Secretary Ben Carson

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Programs ▾ | Resources ▾ | Trainings | Program Support ▾ | Grantees ▾ | News | 🔍

Home > Programs > Housing Counseling > Housing Counseling System

Housing Counseling System

This page contains information on the Housing Counseling System (HCS). Select a topic to find relevant guidance and resources.

Email to Obtain an ID and Password for Log in and Assistance.

Learn more about how Housing Counseling Agencies can leverage technology in their counseling delivery.

[Log In to HCS](#)

Note: HCS is a separate website from the HUD Exchange. If you have trouble accessing HCS, follow the instructions on the **Technical Support** section of this page.

Find by Topic

- Overview
- Technical Support
- Resources
- Improvement Releases**

Improvement Release

HCS improvement releases summarize the improvements included with each new release of HCS.

- **HCS Improvement Release v.14.18.0.0 - June 2019** Major changes include:
 - Data Quality Alerts for HUD-9902
 - Grant Information displayed on Agency Profile Page
- **HCS Improvement Release v.14.17.0.0 - February 2019** Major changes include:
 - A calculated client projection added to the grantee budget allocation page
 - HUD Points of Contact can add multiple service zip codes to an agency profile
 - 9902 reporting status will only be considered late if initial report was submitted after the deadline

Client Data

- Agencies can access the client data submitted from their CMS
- Click the numeric link for the **Total YTD Reported**

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

Agency Summary Agency Information Personnel Contact Information HUD Affiliation Counselor/Client

XYZ AGENCY

<p style="text-align: center;">Acknowledgment</p> <p>Agency ID: 80096 Agency Type: LHCA Parent Name: XYZ Parent Agency Parent ID: 80084 Parent Type: National Intermediary Agency Services Begin: 12/05/1991 CMS: HCO</p>	<p style="text-align: center;">Performance Review</p> <p>Fiscal Year: 2019 Status: Approved Last Review Date: 08/12/2015 Last Review Result: IN COMPLIANCE Next Scheduled Review Date: 07/31/2018</p>																								
<p style="text-align: center;">Data Input and Validation</p> <p>Last Data Input By: CS7569 Last Data Input Date: 06/20/2019 Last Validated By: MX0096 Last Validated Date: 03/28/2019 Next Validation NLT Data: (06/27/2019)</p>	<p style="text-align: center;">HUD Comments</p> <p>Comments: Add New</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Subject</th> <th>Author</th> <th>Date</th> <th>Action</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>	Subject	Author	Date	Action																				
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<p style="text-align: center;">Essential Contacts</p> <p>HUD Agency Contact: ✓ HUD POC Phone: ✓ HUD POC Email: ✓ POC Assigned: ✓</p>	<p style="text-align: center;">HUD-9902 Submission Summary - FY 2018</p> <p>View Submission History</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr><td>2018 - Quarter 1</td><td>01/31/2018</td><td>✓</td></tr> <tr><td>2018 - Quarter 2</td><td>04/16/2018</td><td>✓</td></tr> <tr><td>2018 - Quarter 3</td><td>07/20/2018</td><td>✓</td></tr> <tr><td>2018 - Quarter 4</td><td>10/18/2018</td><td>✓</td></tr> </tbody> </table>	2018 - Quarter 1	01/31/2018	✓	2018 - Quarter 2	04/16/2018	✓	2018 - Quarter 3	07/20/2018	✓	2018 - Quarter 4	10/18/2018	✓												
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2019 - Quarter 2	04/26/2019	✓																							
2019 - Quarter 3	access 9902	N/A																							
2019 - Quarter 4	access 9902	N/A																							
<p style="text-align: center;">Public Access Selection</p> <p>HUD Web Site ✓ HUD IVR ✓</p>	<p style="text-align: center;">HUD Grant Award - No grant application submitted for this FY</p> <p style="text-align: center;">No HUD Sub Allocation Grant Funded last FY</p>																								
<p style="text-align: center;">Public Services Information</p>	<p style="text-align: center;">Agency Total Counseling Budget Amount</p> <p>\$55,816.00</p>																								

Client Data

- List of the client data for One-on-One Counseling and Group Education Attendees displays
- Click the **Excel** icon to download the data.

Housing Counseling Activities Detailed Report - Fiscal Year 2019 XYZ AGENCY (80096) - Total Counseling Activities: 35



One-on-One Counseling - 14

Client ID	Case Number	CMS Counselor ID	Counseling Purpose	Start Date	End Date	Qtr	Grant	Ethnicity	Race	Income Level	Rural Area Status	Limited English Proficiency Status	Impacts
181836667	180853994	93705	Rental Topics	10/1/18		1		Not Hispanic	Black or African American	30 - 49% of AMI	Not Rural	Not Limited	H/H that received information on fair housing, fair lending and/or accessibility rights. H/H for whom counselor developed a sustainable household budget through the provision of financial management and/or budget services.
181972801	181972343	93705	Rental Topics	10/9/18		1		Not Hispanic	Black or African American	< 30% of Area Median Income (AMI)	Not Rural	Not Limited	H/H that received information on fair housing, fair lending and/or accessibility rights. H/H for whom counselor developed a sustainable household budget through the provision of financial management and/or budget services.
181987978	181988202	93705	Rental Topics	10/10/18		1		Not Hispanic	White	< 30% of Area Median Income (AMI)	Not Rural	Not Limited	H/H that received information on fair housing, fair lending and/or accessibility rights. H/H for whom counselor developed a sustainable household budget through the provision of financial management and/or budget services.
182013960	182013057	93705	Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	10/11/18		1		Not Hispanic	Black or African American	80 - 100% of AMI	Not Rural	Not Limited	H/H that received information on fair housing, fair lending and/or accessibility rights. H/H for whom counselor developed a sustainable household budget through the provision of financial management and/or budget services.
182159530	182159707	93705	Rental Topics	10/19/18		1		Not Hispanic	Black or African American	< 30% of Area Median Income (AMI)	Not Rural	Not Limited	H/H that received information on fair housing, fair lending and/or accessibility rights. H/H for whom counselor developed a sustainable household budget through the provision of financial management and/or budget services.
182183250	182183213	93705	Rental Topics	10/22/18		1		Not Hispanic	Black or African American	< 30% of Area Median Income	Not Rural	Not Limited	H/H that received information on fair housing, fair lending and/or accessibility rights. H/H for whom counselor developed a sustainable household

Client Data

- Client Data Reporting should support the agency's 9902 reporting
- YTD Declared in 9902 represents the total counseling activities reported in the most recent 9902 reported by that agency in that fiscal year

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

Agency Summary Agency Information Personnel Contact Information HUD Affiliation Counselor/Client

XYZ AGENCY

Acknowledgment		Performance Review	
Agency ID:	Agency Type: LHCA	Fiscal Year: 2019	Status: Approved
Parent Name: XYZ Parent Agency		Last Review Date: 08/12/2015	Last Review Result: IN COMPLIANCE
Parent ID:	Parent Type: National Intermediary	Next Scheduled Review Date: 07/31/2018	
Agency Services Begin: 12/05/1991			
CMS: hco			

Data Input and Validation	
Last Data Input By: C57569	
Last Data Input Date: 06/20/2019	
Last Validated By:	
Last Validated Date: 03/28/2019	
Next Validation NLT Data: (06/27/2019)	

Essential Contacts	
HUD Agency Contact:	✓
HUD POC Phone:	✓
HUD POC Email:	✓
POC Assigned:	✓

Clients & Counselors			
Counselors			
Total	18	Projected for FY:	0
Trained	2	YTD Declared in 9902:	35
		Total YTD Reported :	35

HUD Comments			
Comments: Add New			
Subject	Author	Date	Action

HUD-9902 Submission Summary - FY 2018			
View Submission History			
2018 - Quarter 1	01/31/2018	✓	
2018 - Quarter 2	04/16/2018	✓	
2018 - Quarter 3	07/20/2018	✓	
2018 - Quarter 4	10/18/2018	✓	

HUD-9902 Submission Summary - FY 2019			
View Submission History			
2019 - Quarter 1	01/28/2019	✓	
2019 - Quarter 2	04/26/2019	✓	
2019 - Quarter 3	access 9902	N/A	
2019 - Quarter 4	access 9902	N/A	

HUD Grant Award - No grant application submitted for this FY

No HUD Sub Allocation Grant Funded last FY

Public Access Selection

9902 On-Time Submission Date

- Old method - used Last Updated Date
- New method – uses original submission Date
- Example
 - Originally submitted 04/26/2019
 - Last updated 06/24/2019
 - On-time (green check mark)

June 24, 2019 CS7569/Th

Housing Counseling Agency Activity Report U.S. Department of Housing and Urban Development Office of Housing Counseling Federal Housing Commissioner		OMB Approval No: 2502-0261 Exp. 07/31/2019
1. Counseling Agency Name Agency Name: XYZ AGENCY Agency ID: 80096 Agency Type: LHCA 75 S. Dock Street SHARON, PA 16146-1860 Parent Agency Name (if applicable): XYZ Parent Agency Agency ID: 80084 Agency Type: National Intermediary		2. Reporting Period and Budget Reporting Period: Quarter 2 Fiscal Year: 2019 From: 10/01/2018 To: 03/31/2019 Submission Date: 04/26/2019 Update Date: 06/24/2019 Total budget, all sources: \$55,816.00 Total HUD Funding, all grants: \$0.00 HUD Funding Sources Passed @ 0% 2018-1 COMP 10/01/2017 - 09/30/2019 2018 Comprehensive Housing Counseling Grant Program. FR-6200-N-33 Funding: \$0.00
Validated: Validated Last Validated: 06/24/2019 Validated by: System		Only reports completed by 04/30/2019 will be credited for on time submission.
Data Quality Alerts Data Quality Alerts have been identified for this 9902 report and have not been addressed. Review Data Quality Alerts		

HUD-9902 Submission Summary - FY 2019		
View Submission History		
2019 - Quarter 1	01/28/2019	✓
2019 - Quarter 2	04/26/2019	✓
2019 - Quarter 3	access 9902	N/A
2019 - Quarter 4	access 9902	N/A

Two Common Questions and Answers

Two Common Questions

- How does an agency confirm successful 9902 submission?
- How does an agency report grant activities for multiple years?

Agency Submission History

- After an agency submits data from their CMS, they should always log into HCS to confirm the submission was successful and to validate
- If the agency does not see the 9902-report showing as reported on the agency profile, check the submission history

Agency Submission History

Agency Summary | Agency Information | Personnel | Contact Information | HUD Affiliation | Counselor/Client

XYZ Agency

Acknowledgment		Performance Review	
Agency ID:	Agency Type: Branch Inter Agency	Fiscal Year: 2019	Status: Participating
Parent Name: XYZ Parent Agency		Last Review Date: 05/18/2016	
Parent ID:	Parent Type: National Intermediary	Last Review Result: IN COMPLIANCE	
Agency Services Begin: 10/07/2006		Next Scheduled Review Date: 03/19/2018	
CMS: DMS Professional Suite			

Data Input and Validation		HUD Comments			
Last Data Input By:		Comments: Add New			
Last Data Input Date: 05/03/2019		Subject	Author	Date	Action
Last Validated By:					
Last Validated Date: 05/03/2019					
Next Validation NLT Data: (08/02/2019)					

Essential Contacts		
HUD Agency Contact:	<input checked="" type="checkbox"/>	
HUD POC Phone:	<input checked="" type="checkbox"/>	
HUD POC Email:	<input checked="" type="checkbox"/>	
POC Assigned:	<input checked="" type="checkbox"/>	

HUD-9902 Submission Summary - FY 2018			
View Submission History			
2018 - Quarter 1	02/13/2018		✓
2018 - Quarter 2	04/20/2018		✓
2018 - Quarter 3	07/09/2018		✓
2018 - Quarter 4	12/18/2018		✓

HUD-9902 Submission Summary - FY 2019			
View Submission History			
2019 - Quarter 1	03/13/2019		LATE
2019 - Quarter 2	05/03/2019		LATE
2019 - Quarter 3	access 9902		N/A
2019 - Quarter 4	access 9902		N/A

HUD Grant Award - No grant application submitted for this FY			
Grant Allocations for FY 2019			

Clients & Counselors			
Counselors	Clients		
Total	99	Projected for FY:	0
Trained	83	YTD Declared in 9902:	701
		Total YTD Reported :	227

Agency Submission History

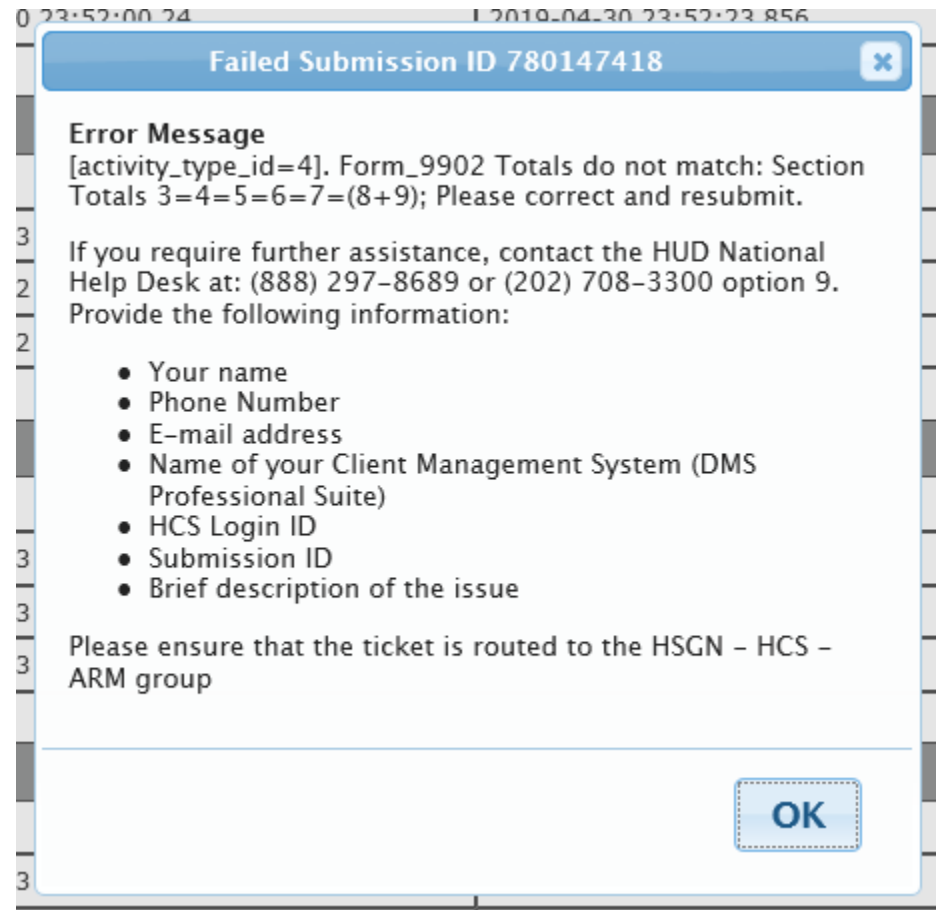
- The agency's submissions are sorted by type
- If a submission failed, click the **Failed** link for more information

CMS Submission History - Fiscal Year 2019 XYZ Age (4495)

Agency Profile					
Submission ID	Submission Type	Date Received	Date Processed	CMS	Submission Status
780147392	Agency Profile	2019-05-02 18:20:15.923	2019-05-02 18:21:23.453	DMS Professional Suite	Successful
780147389	Agency Profile	2019-05-02 17:30:33.636	2019-05-02 17:31:23.293	DMS Professional Suite	Successful
780147223	Agency Profile	2019-04-30 23:52:00.24	2019-04-30 23:52:23.856	DMS Professional Suite	Successful
Show More					
Counselor Profiles					
Submission ID	Submission Type	Date Received	Date Processed	CMS	Submission Status
780147417	Counselor Profiles	2019-05-03 11:04:39.296	2019-05-03 11:05:33.456	DMS Professional Suite	Successful
780147393	Counselor Profiles	2019-05-02 18:22:02.086	2019-05-02 18:22:33.436	DMS Professional Suite	Successful
780147390	Counselor Profiles	2019-05-02 17:31:47.936	2019-05-02 17:32:33.446	DMS Professional Suite	Successful
Show More					
Form 9902 and Group Session Attendees					
Submission ID	Submission Type	Date Received	Date Processed	CMS	Submission Status
780147420	Form 9902 and Group Session Attendees	2019-05-03 12:25:42.016	2019-05-03 12:26:43.193	DMS Professional Suite	Successful
780147418	Form 9902 and Group Session Attendees	2019-05-03 11:07:27.276	2019-05-03 11:08:43.02	DMS Professional Suite	Failed
780147416	Form 9902 and Group Session Attendees	2019-05-03 10:59:53.133	2019-05-03 11:00:43.033	DMS Professional Suite	Failed
Show More					
One-on-One Counseling Profiles					
Submission ID	Submission Type	Date Received	Date Processed	CMS	Submission Status
780147419	One-on-One Counseling Profiles	2019-05-03 12:22:22.4	2019-05-03 12:22:58.3	DMS Professional Suite	Successful
780147394	One-on-One Counseling Profiles	2019-05-02 18:24:53.156	2019-05-02 18:25:59.25	DMS Professional Suite	Successful
780147391	One-on-One Counseling Profiles	2019-05-02 17:34:46.49	2019-05-02 17:35:56.65	DMS Professional Suite	Failed
Show More					

Agency Submission History

- The agency's submissions are sorted by type
- If a submission failed, click the **Failed** link for more information



HUD 9902 Grant Reporting

- Scenario: An agency has funding from a grant that has a performance period that spans multiple fiscal years
 - Example: NOFA 2018-1 COMP; performance period is 10/01/2017 – 09/30/2019 (all of FY 2018 and FY 2019)
- HUD 9902 forms are cumulative for the fiscal year, not grant performance period

June 20, 2019 CS/569/1

Housing Counseling Agency Activity Report U.S. Department of Housing and Urban Development Office of Housing Counseling Federal Housing Commissioner		OMB Approval No: 2502-0261 Exp. 07/31/2019										
1. Counseling Agency Name Agency Name XYZ Agency Agency ID: 84495 Agency Type: Branch Inter Agency 123 Main St. Suite B Columbia, MD 21046 Parent Agency Name (if applicable) XYZ Parent Agency Agency ID: 90302 Agency Type: National Intermediary		2. Reporting Period and Budget Reporting Period: <input type="text" value="Quarter 3"/> Fiscal Year: 2019 From: 10/01/2018 To: 06/30/2019 Submission Date: Update Date: Total budget, all sources: \$1,435,685.45 Total HUD Funding, all grants: \$169,885.28										
		HUD Funding Sources Passed @ 12% 2018-1 COMP 10/01/2017 - 09/30/2019 2018 Comprehensive Housing Counseling Grant Program: FR-6200-N-33 Funding: \$169,885.28										
Validated: Not Validated		Only reports completed by 07/31/2019 will be credited for on time submission.										
<input type="button" value="Update"/> <input type="button" value="PDF Version"/> <input type="button" value="Close"/> <input type="button" value="Validate"/>		<table border="1"> <thead> <tr> <th colspan="3">TOTAL</th> </tr> <tr> <th>All Activities</th> <th>All HUD Funded Activities</th> <th>Calculated HUD Housing Counseling Activities</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> </tr> </tbody> </table>		TOTAL			All Activities	All HUD Funded Activities	Calculated HUD Housing Counseling Activities			
TOTAL												
All Activities	All HUD Funded Activities	Calculated HUD Housing Counseling Activities										
3. Ethnicity of Households (select only one)												
a. Hispanic	0	0	0.00									
b. Not Hispanic	0	0	0.00									
c. Chose not to respond	0	0	0.00									
Section 3 Total	0	0	0.00									
4. Race of Households												
Single Race												
a. American Indian/Alaskan Native	0	0	0.00									

HUD 9902 Grant Reporting

- The FY 2019 9902 should only include reporting on NOFA 2018-1 COMP for those counseling activities funded by the grant that occurred in FY 2019
- Counseling activities that occurred in FY 2018 and were funded by the 2018-1 COMP grant, should only be reported in the FY 2018 9902 and not reported in FY 2019

June 20, 2019 CS/569/1

Housing Counseling Agency Activity Report U.S. Department of Housing and Urban Development Office of Housing Counseling Federal Housing Commissioner		OMB Approval No: 2502-0261 Exp. 07/31/2019										
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c. Chose not to respond	0	0	0.00									
Section 3 Total	0	0	0.00									
4. Race of Households												
Single Race												
a. American Indian/Alaskan Native	0	0	0.00									

HUD 9902 Grant Reporting

- **Scenario:** An agency has funding from a grant that has a performance period that spans multiple fiscal years, and is reporting an FY 2019 9902.
- **Example:** NOFA 2018-1 COMP; performance period is 10/01/2017 – 09/30/2019 (all of FY 2018 and FY 2019)
- The FY 2019 9902 should only include reporting on NOFA 2018-1 COMP for those counseling activities funded by the grant that occurred in FY 2019.
- Counseling activities that occurred in FY 2018 and were funded by the 2018-1 COMP grant, should not be reported on in an FY 2019 9902.

Tips for HUD Intermediaries

Agency Review Spreadsheet

- The Agency Review Spreadsheet can be used to identify agencies that have not completed their agency profile validation
- To access the spreadsheet, go to:
Agency > Advanced Agency Search

The screenshot displays the 'HOUSING COUNSELING SYSTEM' interface. At the top, a navigation bar includes links for HOME, AGENCY, HUD-9902, BUDGET ALLOCATION, CMS SUBMISSION VERIFICATION, and APPROVED CMS PRODUCTS. Below this, a dropdown menu is open, with 'Advanced Agency Search' highlighted by a red box. Other options in the menu include Basic Agency Search, Counselor Information, and Client Information. Below the menu, there are tabs for Agency Summary, Agency Information, Personnel, Contact Information, HUD Affiliation, and Counselor/Client. The main content area shows the profile for 'XYZ Parent Agency', which is divided into two sections: Acknowledgment and Performance Review.

Acknowledgment		Performance Review	
Agency ID: 80754	Agency Type: National Intermediary	Fiscal Year: 2019	Status: Approved
Agency Services Begin: 01/01/1997		Last Review Date:	
CMS: CounselorMax		Last Review Result:	
		Next Scheduled Review Date:	

Agency Review Spreadsheet (cont)

- Click **Search** without entering criteria to return all sub-agencies

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 BUDGET ALLOCATION CMS SUBMISSION VERIFICATION APPROVED CMS PRODUCTS

Advanced Agency Search for FY: 2019 ▼

Search for Agencies using agency ID, or agency name. Multiple agency ID's may be provided when divided by comma. Full or partial agency name may be used for searches.

[Basic Agency Search](#)

Data Search Scope: All searches are confined to the agencies under your jurisdiction. Specifying no criteria displays all agencies under your jurisdiction.

- | Search by Agency Information
- | Search by HUD Office and POC
- | Search by Agency Location
- | Search by Agency Type and Services
- | Search by Agency Status and Validation
- | Search by 9902 Information
- | Search by Agency Grant
- | Search by Agency Review and Performance

Agency Review Spreadsheet (cont)

- Click the **Agency Review Spreadsheet** to download the excel file

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 BUDGET ALLOCATION CMS SUBMISSION VERIFICATION APPROVED CMS PRODUCTS

Agency List

129 Agency(s) Found

Search Criteria: • Fiscal Year: 2019

Basic Agency Spreadsheet Agency Contact Spreadsheet **Agency Review Spreadsheet**

Agency ID	Agency Name	Address	State	Agency Type	Agency Status	Last Updated	Last Edit user	Certified Counselor
APPROPRIATE HOUSE OF CONTE		1400 E...						

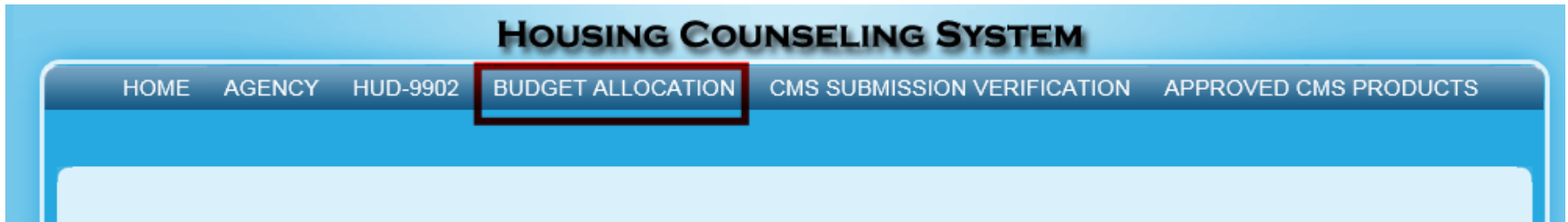
Agency Review Spreadsheet (cont)

- Last two columns of the spreadsheet show:
 - Last Validated Date
 - Next Validation Date

	X	Y	Z	AA
1	Parent Agency Name	Parent Agency Type	Last Validated Date	Next Validation Date
4	XYZ Parent Agency	National Intermediary	1/11/2019	4/12/2019
4	XYZ Parent Agency	National Intermediary	5/7/2019	8/6/2019
4	XYZ Parent Agency	National Intermediary	5/9/2019	8/8/2019
4	XYZ Parent Agency	National Intermediary	4/9/2019	7/9/2019
4	XYZ Parent Agency	National Intermediary	4/5/2019	7/5/2019
4	XYZ Parent Agency	National Intermediary	5/22/2019	8/21/2019
4	XYZ Parent Agency	National Intermediary	4/8/2019	7/8/2019
4	XYZ Parent Agency	National Intermediary	4/8/2019	7/8/2019
4	XYZ Parent Agency	National Intermediary	5/20/2019	8/19/2019
4	XYZ Parent Agency	National Intermediary	5/20/2019	8/19/2019

Budget Allocation

- If the sub-allocation plan changed during the grant's performance period, be sure to update HCS to reflect actual allocations
- To access a budget allocation screen, click the **Budget Allocation** link



Budget Allocation (cont)

- The Agency's grant menu will display
- Click the **Budget Allocation** link for the grant you would like to manage

Grant Menu					
Instructions: To view/manage budget allocation for a given fiscal year details click on the appropriate link associated with the grant and funding period you wish to access.					
NOFA	NOFA Description	Award Amount	Grant Type	Funding Period	Go To
NOFA 2018-3	Supplemental Training NOFA for 2017 Training Grant Awardees	\$50,000.00	TRNG	04/01/2018 - 09/30/2018	N/A
NOFA 2018-2	FY18 NOFA Housing Counseling Training Grant FR-6200-N-30	\$100,000.00	TRNG	07/01/2018 - 09/30/2019	N/A
NOFA 2018-1	2018 Comprehensive Housing Counseling Grant Program. FR-6200-N-33	\$3,000,000.00	COMP	10/01/2017 - 09/30/2019	-Budget Allocation -9902 Projection
NOFA 2017-2	Training NOFA	\$100,000.00	TRNG	10/01/2016 - 03/31/2018	N/A
NOFA 2017-1	2017 Comprehensive Housing Counseling Grant Program. FR-6000-N-33; FR-6100-N-33	\$3,000,000.00	COMP	10/01/2016 - 03/31/2018	-Budget Allocation -9902 Projection
	NOFA for HUD's FY16-17 Housing				

Budget Allocation (cont)

- The **Budget Allocation** page for that grant will display.
- Enter the actual sub-allocations in the **Qtr 4** tab
- Click the **Save** button.
- The updated value will display on the agency's 9902s for that fiscal year

Grant Award Agency's Budget Allocation - NOFA 2018-1 - COMPREHENSIVE COUNSELING

Instructions: [?](#)

Agency Name: XYZ Parent Agency	HUD Office: Headquarters SF-HUD	Application ID: 0011-018
Agency Type: National Intermediary	Grant Type: COMPREHENSIVE COUNSELING	Agency ID: 80754
GTR: Jerrold, Mayer H	Last update: 11/06/18 01:11	Fiscal Year: 2018
Funding Start Date: 10/01/2017	Funding End Date: 09/30/2019	
Year 1 Start Date: 10/01/2017	Year 1 End Date: 09/30/2018	2018 ▾

Calculated Projections		Total Negotiated HUD Funded Activities Projection
Projected Number of HUD Funded Clients	Grant vs Budget Ratio = 87,154 Clients Cost per Client = 46,464 Clients Application Projection = N/A	31,500

BUDGET	FUNDED	ALLOCATION
Total Budget: \$ <input type="text" value="3,000,000.00"/>	Administrative Funds: \$ <input type="text" value="425,000.00"/>	To Be Sub-Allocated: \$ 2,575,000.00
Award: \$ 3,000,000.00	Indirect Cost: \$ <input type="text" value="0.00"/>	Sub-Allocated: \$ 2,515,000.00
Grant Ratio: 100 %	To Be Sub-Allocated: \$ 2,575,000.00	FY 2018 Total Allocation: \$ 2,940,000.00
		FY 2018 Balance: \$ 60,000.00
		FY 2019 Allocation: \$ 0.00
		Remaining Funds: \$ 60,000.00

Qtr 1 (Initial)		Qtr 2 (Adjustment)		Qtr 3 (Adjustment)		Qtr 4 (Adjustment)	
Status	Sub-Agency	Agency ID	Agency Type	# of Counselors	# of Projected Clients	Sub-Allocation	Agency Total Budget
Active	XYZ AGENCY	82225	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="0.00"/>	\$ 24,000.00
Active	XYZ AGENCY	80923	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="15,000.00"/>	\$ 26,215.00
Active	XYZ AGENCY	81465	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="15,000.00"/>	\$ 50,000.00
Active	XYZ AGENCY	81940	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="15,000.00"/>	\$ 53,000.00
Active	XYZ AGENCY	81181	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="15,000.00"/>	\$ 66,592.00
Active	XYZ AGENCY	84012	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="15,000.00"/>	\$ 73,790.00
Active	XYZ AGENCY	80229	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="15,000.00"/>	\$ 88,970.00
Active	XYZ AGENCY	81173	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="25,000.00"/>	\$ 107,980.00
Active	XYZ AGENCY	81126	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="25,000.00"/>	\$ 109,856.00


Budget Allocation (cont)

- If there are remaining funds, the balance will be available to sub-allocate for the next fiscal year of the grant's performance period
- Select the next year from the **Fiscal Year** select list

Grant Award Agency's Budget Allocation - NOFA 2018-1 - COMPREHENSIVE COUNSELING


Instructions: [?](#)

Agency Name: XYZ Parent Agency	HUD Office: Headquarters SF-HUD	Application ID: 0011-018
Agency Type: National Intermediary	Grant Type: COMPREHENSIVE COUNSELING	Agency ID: 80754
GTR: Jerrold, Mayer H	Last update: 11/06/18 01:11	Fiscal Year: 2018
Funding Start Date: 10/01/2017	Funding End Date: 09/30/2019	
Year 1 Start Date: 10/01/2017	Year 1 End Date: 09/30/2018	



Calculated Projections		Total Negotiated HUD Funded Activities Projection
Projected Number of HUD Funded Clients	Grant vs Budget Ratio = 87,154 Clients Cost per Client = 46,464 Clients Application Projection = N/A	31,500

BUDGET	FUNDED	ALLOCATION
Total Budget: \$ <input type="text" value="3,000,000.00"/>	Administrative Funds: \$ <input type="text" value="425,000.00"/>	To Be Sub-Allocated: \$ 2,575,000.00
Award: \$ 3,000,000.00	Indirect Cost: \$ <input type="text" value="0.00"/>	Sub-Allocated: \$ 2,515,000.00
Grant Ratio: 100 %	To Be Sub-Allocated: \$ 2,575,000.00	FY 2018 Total Allocation: \$ 2,940,000.00
		FY 2018 Balance: \$ 60,000.00
		FY 2019 Allocation: \$ 0.00
		Remaining Funds: \$ 60,000.00



Allocate Evenly
Allocate By # of Counselors
Allocate By # of Clients

Print
Cancel
Close this window
9902 Projection

	Qtr 1 (Initial)	Qtr 2 (Adjustment)	Qtr 3 (Adjustment)	Qtr 4 (Adjustment)			
Status	Sub-Agency	Agency ID	Agency Type	# of Counselors	# of Projected Clients	Sub-Allocation	Agency Total Budget
Active	XYZ AGENCY	82225	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="24,000.00"/>
Active	XYZ AGENCY	80923	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="15,000.00"/>	\$ <input type="text" value="26,215.00"/>
Active	XYZ AGENCY	81465	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ <input type="text" value="15,000.00"/>	\$ <input type="text" value="50,000.00"/>

OFFICE OF HOUSING COUNSELING

Budget Allocation (cont)

- The budget allocation page for the next year in the grant's performance period will display
- Enter the sub-allocations for the remaining funds and **Save**

Grant Award Agency's Budget Allocation - NOFA 2018-1 - COMPREHENSIVE COUNSELING

Instructions: ?

Agency Name: XYZ Parent Agency	HUD Office: Headquarters SF-HUD	Application ID: 0011-018
Agency Type: National Intermediary	Grant Type: COMPREHENSIVE COUNSELING	Agency ID: 80754
GTR: Jerrold, Mayer H	Last update: 09/14/18 09:09	Fiscal Year: 2019
Funding Start Date: 10/01/2017	Funding End Date: 09/30/2019	
Year 2 Start Date: 10/01/2018	Year 2 End Date: 09/30/2019	2019 ▾

Calculated Projections		Total Negotiated HUD Funded Activities Projection
Projected Number of HUD Funded Clients	Grant vs Budget Ratio = 87,154 Clients Cost per Client = 46,464 Clients Application Projection = N/A	31,500

BUDGET	FUNDED	ALLOCATION
Total Budget: \$ <input type="text" value="0.00"/>	Administrative Funds: \$ <input type="text" value="0.00"/>	To Be Sub-Allocated: \$ 60,000.00
FY 2018 Balance: \$ 60,000.00	Indirect Cost: \$ <input type="text" value="0.00"/>	Sub-Allocated: \$ 10,000.00
Grant Ratio:	To Be Sub-Allocated: \$ 60,000.00	FY 2019 Total Allocation: \$ 10,000.00
Agency Total Budget < HUD Grant		FY 2019 Balance: \$ 50,000.00
		Remaining Funds: \$ 50,000.00

		Qtr 1 (Adjustment)	Qtr 2 (Adjustment)	Qtr 3 (Adjustment)	Qtr 4 (Adjustment)		
Status	Sub-Agency	Agency ID	Agency Type	# of Counselors	# of Projected Clients	Sub-Allocation	Agency Total Budget
Inactive	XYZ AGENCY	81122	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ 10,000.00	\$ 165,353.00
Inactive	XYZ AGENCY	81070	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ 0.00	\$ 175,851.00
Active	XYZ AGENCY	81465	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ 0.00	\$ 50,000.00
Active	XYZ AGENCY	81940	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ 0.00	\$ 53,000.00
Active	XYZ AGENCY	81181	LHCA	<input type="text" value="0"/>	<input type="text" value="0"/>	\$ 0.00	\$ 66,592.00

Future HCS Enhancements

Future HCS Enhancements

- **HUD 9902 Certification**

- Agencies will be required to certify each 9902
- The existing **Validate** process that agencies already use today will be changed to **Certify**

1. Counseling Agency Name		2. Reporting Period and Budget											
Agency Name XYZ AGENCY Agency ID: 81177 Agency Type: Sub Grantee 56 Warren St Ste 200 Roxbury, MA 02119-3236 Parent Agency Name (if applicable) XYZ Parent Agency Agency ID: 80754 Agency Type: National Intermediary		U.S. Department of Housing and Urban Development Office of Housing Counseling Federal Housing Commissioner OMB Approval No: 2502-0261 Exp. 07/31/2019 Reporting Period: <input type="text" value="Quarter 2"/> Fiscal Year: 2019 From: 10/01/2018 To: 03/31/2019 Submission Date: 04/11/2019 Update Date: 04/11/2019 Total budget, all sources: \$169,150.00 Total HUD Funding, all grants: \$0.00 HUD Funding Sources Passed @ 0% 2018-1 COMP 10/01/2017 - 09/30/2019 2018 Comprehensive Housing Counseling Grant Program. FR-6200-N-33 Funding: \$0.00											
Validated: Not Validated		Only reports completed by 04/30/2019 will be credited for on time submission.											
Data Quality Alerts Data Quality Alerts have been identified for this 9902 report and have not been addressed. <input type="button" value="Review Data Quality Alerts"/>													
<input type="button" value="Update"/> <input type="button" value="PDF Version"/> <input type="button" value="Close"/> <input type="button" value="Validate"/>		<table border="1"> <thead> <tr> <th colspan="2">TOTAL</th> </tr> <tr> <th>All Activities</th> <th>All HUD Funded Activities</th> </tr> </thead> <tbody> <tr> <td colspan="2">3. Ethnicity of Households (select only one)</td> </tr> <tr> <td>a. Hispanic</td> <td>31</td> </tr> <tr> <td>b. Not Hispanic</td> <td>129</td> </tr> </tbody> </table>		TOTAL		All Activities	All HUD Funded Activities	3. Ethnicity of Households (select only one)		a. Hispanic	31	b. Not Hispanic	129
TOTAL													
All Activities	All HUD Funded Activities												
3. Ethnicity of Households (select only one)													
a. Hispanic	31												
b. Not Hispanic	129												

Future HCS Enhancements (cont)

- HUD Point of Contact (POC) dashboard
- Agency status – removal of the auto-terminate

Housing Counseling Agency Management System (HCAMS)

Housing Counseling Agency Management System (HCAMS)

- **VISION**: To create a ‘one-stop-shop’ that can effectively manage key business processes and daily OHC work in a streamlined fashion by automating key tasks that will conserve time, effort and money
- **This will include:**
 1. Create a cloud-based system that can share/obtain data with/from other HUD systems (FHA Connection, LOCCS, etc.)
 2. Automating current procedures that are performed manually and hosting these in HCAMS
 3. Integrating HCAMS with HCS and other internal HUD software programs currently used by OHC

Housing Counseling Agency Management System (HCAMS)

The initial release will include the following functionalities:

1. Performance Reviews: Interactive agency self-certification and data/document transfers that will allow for streamlined compliance auditing
2. Reporting/Monitoring: Certain elements of Quarterly Report will be submitted electronically via HCAMS, while 9902 reports will still be housed in HCS
3. Complaint Module: external complaint module managed by HUD staff through complaints received via housing.counseling@hud.gov

Housing Counseling Agency Management System (HCAMS)

Additional Points:

1. HCAMS User Manual: will be released to all HUD-approved HCS users, prior to training
2. Internal and external interactive training sessions will be conducted via **webinar**, and archived on OHC's **HUD Exchange** webpage
3. HCS will remain operational after the launch of HCAMS-V1
4. CMS providers will continue to route all required data fields into HCS until further instructed regarding HCAMS

Resources

- Housing Counseling System (HCS) HUD Exchange page:
 - <https://www.hudexchange.info/programs/housing-counseling/hcs/#overview>
- HCS Log In: <https://entp.hud.gov/hud-9902/cfm/>
- HCS Technical Support:
 - (888) 297-8689 or (202) 708-3300 and choose option 9
- Client Management System (CMS) HUD Exchange page:
 - <https://www.hudexchange.info/programs/housing-counseling/cms/#overview>

Q and A

