Welcome to HUD’s Virtual Classroom

• Please mute your phone line at this time. You will find a microphone icon near the right edge of your screen, next to your name. Click on this, it will turn red, and your phone will be muted.

• If your PC has a microphone, please make sure it is turned off.

• Once we get through the initial presentation, the presenter will ask you to un-mute your phones (click on the red microphone icon, it will turn black, and your line will be un-muted), and then we can talk to each other in the ‘virtual classroom’.

• In the meantime, if you have a question for the presenter, please enter it in the Chat box on the right side of your screen. If you don’t see a Chat box, click the blue Chat icon at the top right of your screen, and the Chat box will open.
HUD’s CNA e-Tool

Virtual Classroom: Sorting, Sifting and Manipulating Data

Office of Multifamily Housing Programs
Today’s Webinar Will Have Two Sections

- Recorded Portion
  - Participants self-mute
  - Use Chat to interact with presenter
  - Lessons Learned
  - Initial Questions

- Virtual Classroom
  - Recording turned off
  - Participants and presenter interact voice to voice
  - Participants can share screens
Webinar Logistics: Recorded Portion

• Participants please mute your phone lines

• If technical issues related to WebEx, insert them in the Chat Box
Learning Objectives:
Sorting, Sifting and Manipulating Data

• Learn how sort, sift, and manipulate data in the CNA e-Tool to ensure your data is complete and error-free

• Understand where to access available resources and tools

• Discuss problem areas with the presenter and other participants
The CNA E-Tool

Current Highlights
CONSIDER:

CNA Submitted by Status (568 Total)

- Approved: 223 (39%)
- Returned: 125 (22%)
- Submitted: 32 (6%)
- Under Review: 167 (29%)
- Ready for Dec.: 21 (4%)

As of May 15, 2018
HUD CNA e-Tool Webpage

https://www.hud.gov/program_offices/housing/mfh/cna

Capital Needs Assessment Tool (CNA e Tool)

The Capital Needs Assessment (CNA) e-Tool automates and standardizes the preparation, submission and review of a capital needs assessment. Its use is now available on a voluntary basis and will become mandatory starting November 1, 2017 for FHA multifamily mortgage insurance applications.

Use of the CNA e-Tool for all Rental Assistance Demonstration conversions; 10-year update capital needs assessments for FHA-insured multifamily properties; and other asset management milestones, such as partial payment of claims, are available on a voluntary basis and will become mandatory starting February 1, 2018.

User: Needs Assessor
  ➢ Assessment Tool 1.2A v5 (Web Portal)
  ➢ CNA Public Validation (Web Portal)
  ➢ Instructions for use of the CNA e-Tool (PDF)

User: FHA Lender Submitter

User: HUD Reviewer
  ➢ CNA HUD Review (Web Portal)
  ➢ Government Internal User Manual (PDF)
  ➢ HUD User Access Guide (PDF)
  ➢ RIR Financial Factors Tool v2.0 (XLSX)
The Ask A Question (AAQ) Resource

• Link on CNA e-Tool homepage
  HUDExchange.info > Program Support > Ask A Question
CNA e-Tool: Recent Updates (on HUD CNA e-Tool webpage)

• Assessor Tool v1.2A v6 (April 2018)
• CNA e-Tool Release 2.2 Changes document
• 2018 Operational Bulletins
• CNA e-Tool Known Issues and Solutions (February 2018)
• RfR Financial Factors Tool 2.0
• Using CNA e-Tool for RAD Transactions
Lessons Learned

Sorting, Sifting and Manipulating Data
Basics of Sorting in Excel

- Select the Data to Sort

- Sort quickly and easily

- Sort by specifying criteria
Excel Data Sort Rules Apply

• Be sure to select the entire data field
  – Sorting a portion of the field will break logic governing each row and result in Data Load and/or Sequel Insertion errors.

• Follow sound SAVE procedures
  – Save Original Versions PRIOR to sorting
  – Save each sorted file with new name
Assessment Tool
What Can I Sort?

• Any of the Assessment Tool worksheets can be sorted by any 1 or more variables.
• What's a variable? The name of the column, the column heading under which data appears in the rows below.
Custom Sorting
Sort Examples in Assessment Tool
Example ??s Answered w Sorts

• Where are the common amenities?
  – Sort Common Spaces worksheet (col E & D)

• Which alternatives deliver best/worst TCO result?
  – Sort Alternatives worksheet (col N)

• Which units are identified as UFAS compliant?
  – Sort Units worksheet (cols L & M)
Check your List of Components

• Do you have a complete inventory of components???
  – Sort components by Need Category, Item, Component Types & ID (cols B, C, D, E)

• Do you have utility consumption data for all items that consume utilities, (if needed)?
  – Sort by Type of Utility & Usage/Yr (cols J & L)
Panels
(post-Validation)
Complete a Robust Analysis of Your Preferred Actions

• Export the Component Schedule Summary
  – Complete list of categories (check ATSM)
  – Review all New Features
  – Check the one-time repairs
  – Check Components with RUL different than the Standard
  – Confirm the accuracy of duration entry(ies)
Duration Reminder

• Duration should not exceed 2 (a spread of 5 years: 2+1+2 = 5) and the spread must be no greater than the total useful life of a component. All spreads are odd #s.
• If EUL of Carpet is 6, maximum spread is 5. Maximum duration is 2.
• If the duration is too high, meaning cycle length is greater than EUL, the replacement cycles will overlap doubling costs.
• Longer Duration should be used only for “averaging” replacements for older properties where individual component age is unknown.

Replacement Cycle = Duration + Start Year + Duration

<table>
<thead>
<tr>
<th>Duration</th>
<th>Spread in Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
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<td>3</td>
<td>7</td>
</tr>
<tr>
<td>4</td>
<td>9</td>
</tr>
</tbody>
</table>
Questions?
Thank you!

The Recorded Portion of the Webinar Has Ended
Webinar Logistics: Virtual Classroom Portion

- Participants take your phone lines **off mute**
- Recording is **off**

- Group discussion

- If technical issues related to WebEx, insert them in the Chat Box