

HUD CNA eTool

CNA e-Tool Sorting, Sifting, and Manipulating Data

Janine Cuneo: Great. The recording has started. So again, welcome to CNA e-Tool's virtual classroom, Sorting, Sifting, and Manipulating Data. Again, my name's Janine Cuneo. I'm with ICF, a consulting firm, here on behalf of HUD's office and multi-family housing program. Again, this is a part of these virtual classes we've been holding for the last month or so. They've been on various aspects of the CNA e-tool, and it specifically issues that HUD has detected that causes CNA submission to be rejected.

In this class today, participants are going to see various worksheets of the CNA e-tool, and exports from panels of the validation engine, or the submission portal can be sorted, in both simple and complex ways, in order to identify related entries. And also maybe check for some problems, as well. We're going to work on the first part of the class in the assessment tool. I'll literally be going back and forth through the assessment tools so you can see how in real time sorts happen.

And then the second part we're going to be going into a validation engine and show you in the panels, as well as exporting the panel, how to do that. So luckily, we won't be looking at PowerPoint all day. We'll be going in and out of both the assessment tool, as well as the validation engine. In the end, sorting an x-file, whether you do in it in the assessment tool or an Excel file exported from panels, it really gives you the power to sort, to filter by multiple variables at once in order to fully understand the inputs you've done. And the assessment tool answers any questions you might be having and, or trying to solve problems that might have cropped up when you went through the validation engine, and you got some flag notes you need to solve.

Again, the learning objectives, they are really three-fold. One is to learn how to do this sorting, sifting, and manipulating of data. We're also going to, at the beginning of the class, understand where to access some of the available resources and tools. I'll literally show you that on the website. And then last, we'll be able to turn off the recording, and go to problem -- just see problem areas of questions you might have.

Again, don't forget to mute yourself. For those that are new to the session, look at your name on the right hand of the screen, and look at the microphone, and click on the microphone so it turns red. Thank you.

So, some current highlights of the CNA tool -- really exciting. I heard earlier this week that HUD has approved now, a total of 200 CNA e-tool applications, which is really great news. To me the take-away here is that the e-tool is really gaining traction since it's been launched. People are using it. Deals are getting approved. So, I'm excited to see so many new people in this session. The more you're able to learn about the e-tool and tips and tricks, the better suited you will be to be one of those applications that get approved.

What you're seeing here on the screen is a chart that shows, as of March 15, where some of those numbers were, with regards to approvals, submissions, rejections. Of those, the largest part was

223 CNA e-tool submissions that actually had been returned. Now some of those are the same properties as returned more than once. But I wanted to point that out because sessions like these and other resources that Heather's provided will really help minimize how many returns happen.

So, I want to tell you where some of those resources are. They're on HUD.gov. And I've given you the link right here. I'm actually going to go into this home page. Excuse me one second while I go ahead and toggle to that home page via our WebEx. Great. You should now be seeing by my screen, the capital needs assessment tool home page. Again, this is on HUD.gov. It's really kind of a one-stop-shop. And I want to point out some things for you. If you are ever in a jam and you can't find that portal link that I showed you, I simply just Google "capital needs assessment e-tool" and HUD.gov, and it gets me here. So always don't hesitate to do a little Google searching and it will get you here, as well.

Some important things to note here is that this is where you'll always grab your assessment tool. Again, we're on 1.2, version 6 right now. So, you always can grab your assessment tool. This is for assessors, how you get into the public validation portal, or if you go down here under user, FHA Lender, you'll be able to see this is where you get the tool, as well as the CNA submission portal. Again, because assessors are going to validate through the validation portal. You, as lenders are going to validate and submit through the submission portal; so, two separate portals you're each using.

There's also the instructions manual. You'll see this both in the Needs Assessment section, as well as the FHA Lender Submitter section. They're the same, don't worry. They're giving the same instruction. I really want to make sure you guys know where that is. It's a large document. It's 200 pages. But it is chalk full of good information. To me, the most pertinent information is it literally tells you, line item by line item, the definitions of each category that are in the assessment tool.

So, if you're ever wondering, for example, something called the standard estimated use of a life, just a number pops up and you're like, was that 20 years, was it 20 months, was it 20 days? The instruction manual, if you go ahead and find that standard estimated use of a life definition; it will tell you exactly what it is. So, by the way, it's years, if any of you didn't know that. The standard estimated use of a life is done by years. But I want to make sure you know the instruction manual is really good for definitions.

Also, here is where you can find trainings and webinars, as well as operational bulletins. I want to be sure I point this last bulletin out, called the "CNA e-tool Known Issues and Solutions," or as some of us are calling it, the KIS document. And this is a document that I've noticed has been updated with some regularity when there might be a technical issue that they're seeing. Maybe someone -- maybe the system is having issues with flags. They'll put this issue in there and give you a solution. They'll either tell you a wrap-around solution, as well as update the KIS document of when it's done and finalized. So, I definitely recommend you check that out periodically.

Last thing I wanted to point out was this Ask a Question under the Public Resources. I'm going to go ahead and click on that and show you where it takes you. It actually, as you notice, is going to take me to another website. That website is called hudexchange.info. And the

hudexchange.info should be familiar to most of you. And the reason for that is because on HUD Exchange is the -- how you actually signed up for the class today.

HUD Exchange also does an Ask a Question. This is under program support, as you notice. I'm scrolling under program support and you can ask a question here. And it will pop up to this page. And you go ahead and put your name in step one, and in step two you're going to actually tell what the problem is or the issue you're having. I am having a glitch with flags.

Or you can be a policy question, for example, I don't understand why you've decided the standard estimated useful life is 20; shouldn't it be 50? So, you can ask kind of policy questions as well as financial questions. If you your financial questions are coming out one way and you thought, they should be coming out a different way and you can't figure out the disconnect; feel free to ask that question. The more detail you're able to provide, the better someone is to be able to answer your question. So please take advantage of this.

Also, I want to make sure you know about a couple of the recent updates to some of those publications that I just pointed out to you on HUD.gov. One is the assessor tool I did mention. It is on version 6 now, as of April 2018. I have gotten a couple questions in previous classes, where they've asked, "Janine, I started my assessment back in February. I don't have version 6. I'm on version 5 or maybe even version 4; is that okay?"

Yes, that is okay. But if you're starting a new assessment today, grab version 6 today. So again, if you started in previous versions, HUD is not requiring that you transfer all that information from version 4 to version 6. You can stay on version 4, but if you're starting today on a new assessment in a new application, start with version 6.

Something else I want to make sure you know about is -- this last bullet is about the CNA e-tool for RAD Transactions. The RAD program recently published a guide explaining how that program uses the CNA e-tool. So, if any of you here today are thinking about a RAD application. Make sure you type, check out that publication, first.

All right, let's jump in now to again, sorting, sifting, and manipulating data as it relates to our CNA e-tool. Before we start, I want to make sure everyone understands. There's really three places that you will be typically engaging in sorting, as it relates to the e-tool. The first is you'll be sorting, or you will be able to -- it's your choice if you want to or not. But you will be able to sort on worksheets in the assessment tool.

Remember the assessment tool -- and I'll show you this in a moment -- is the Excel document that all of your inputs go into. And then once you're finished with those inputs, you submit that. And you being as the lender's, going to be doing the submitting. But you would submit that through the submission portal for HUD to review and hopefully approve. So, the assessment tool is the Excel document. And you can sort on worksheet there, like you would do any other Excel document.

Then the two other places that you possibly could engage in sorting is actually after you validate. Just to remind you, assessors validate in the validation engine, the public portal that they can access any time. And lenders are actually going to validate in the submission portal. And you

have to have special access rights to have -- to access the submission portal. And so, if either you are in the validation engine, or you are in the submission portal, after you validate, you can either sort by the panel results, which is really just a simple sorting that goes on there. Or you can actually export your panel results into Excel file and do very complex sorting. I'm going to show you all three of these. Assessment tool sorting, panel results, after you validate, sorting, or exporting those panel results to Excel files and sort that way.

First, I know some of you are probably advanced Excel users. For those that are beginners, I just want to do a quick refresher here on some of the basics of sorting. Again, you're going to want to select the data to sort. That's the big thing. You're going to have to choose data. In Excel file you can select a range of the tabular data. For example, I could go all the way from January to December and do all four rows under that if I'd like. I can also just do January through December and just choose the first two rows. I also can do things just by a column, for example. I can just check out April and sort that way.

You can also sort quickly and easily by using the ascending and descending buttons. Again, this is on the data field of your Excel ribbon on the top of your Excel; I call that Excel ribbon. You can hit data and you can see sort and filter as a tab. And you can do a quick A-Z, Z-A, which is ascending, descending sorts. Or you can go through custom sorts where you actually specify the criteria by clicking on sort.

I want to make sure -- there's a couple Excel data rules that really apply here to our CNA e-tool. Now, you might say to me, there's tons of Excel data rules. That is true. I just want to throw out a couple that I find are really pertinent here. My first one is that you really are going to want make sure you select the entire data field in which you're working.

If you don't -- if you only sort by portions, or for example, just a column, or if you just grab a couple rows, you're going to break logic governing each role. And I guarantee, especially when you're doing the assessment tool, that's going to result in a data load, or what's called an insertion error. And it will become confusing. It's hard to get out of. And it really will skew your results of the sort. So, you're going to want to make sure you select the entire data field. I'll go ahead and mimic how to do that in a few minutes.

The second thing you're going to want to do is you're going to want to follow sound save procedures. And why that especially within the assessment tool, you want to do this way. You're going to want to save your original assessment tool. And then you're going to want to do another file; maybe you're going to call it version two. Open up version two; and that's what you're going to do your sorting on. And the reason for that, again. Just in case you do make any errors or any issues in your sorting process, you can always go back to your original version of the assessment tool.

As many of you know, especially you assessors out there, there's a lot of data you're entering. And the last thing you want to do is make an error in sorting and you've lost, or you're confused by what has happened in your assessment tool, and you can't figure out how to get back to the original. So please make sure you're thinking through sound, safe procedures, by saving an original version prior to sorting. And maybe after that you may want to save each sorted file with

a new name, i.e., version two, three, four, six. So, you can make sure you're not getting yourself or any of the underlined data an error.

So again, you might remember, I mentioned there's three ways of sorting in the assessment -- in the CNA e-tool. The first one is the assessment tool. And so, kind of, things you can think about what I can sort is any really of the assessment tool worksheets that you have can be sorted by any one or more variables. Remember there's multiple worksheets in the assessment tools. So, any of those tabs or worksheets, you can do that sorting by. And then the variable really for the assessment tool sake is the name of a column. And the column heading under which the data appears is in the rows below.

So, example, building type is a variable, number of stories is another one, etc. So, you might want to be able some type of a sort on what I know, first of all, all the building types, walk-up, etc. And then you're going to want to do another sort, because you want to see the number of stories by one, two, and three. So, it allows you to do multiple variable sorts.

Also, I mentioned you could do a custom sort. One way to do that is, you're going to go ahead and hit your sort and filter tab. And you'll go ahead and want to hit this custom sort. You're seeing this on the top right. By doing that you're going to get a sort box that comes up on top of your Excel document. And it allows you to sort -- gives you a custom sort on each of those variables you may choose.

So, in this case that you're seeing here. I've sorted first by year built, then by fair housing act, then by year of rehab. And those are the titles in each one of the columns. You're also good -- on the right-hand side, allowed to sort by kind of order. So, the year built I wanted smallest to largest. You can also do largest by smallest. Or you can do a custom order and I'll show you how to do a custom order, as well.

So, let me go ahead open the assessment tool. Excuse me while I bring that up on our screen. Great. You should all be seeing now our assessment tool. This is a sample assessment tool called San Hosea that has been completed. It is yet to be submitted, but it is completed and is ready for validation and submission. Just to remind you guys all about the assessment tool. There's two ways of looking at it. I have right now -- I do what's called the form version.

And you'll see underneath that -- underneath it is the worksheet. The form version you might have heard people say that it's best to have the form version used when you are manually filling out the assessment tool. There's so many just ways you can really just mess up when you're doing it by a worksheet, so we strongly recommend that you do it by the assessment form. However, you can't sort when you have the assessment form open. So, you're going to want to go ahead and close that.

And then here you have the underlined information, all these worksheets, or what one might also call tabs. You see those on the bottom of the Excel document. You're going to be able to open those and do any type of sort you like. One thing, too, I want to make sure to remember is you're going to want to grab, every time you sort, the entire data field. For the assessment tool, that's really starting at your column where you see all the different variables; site ID, building identifier, etc. You're going to want to grab this entire data field, all the way over to the end and

down. So, you'll notice I've grabbed the entire data field. This way is going to ensure that everything sorts, not just one column sorting and I'm leaving all the other columns stagnant. So, it's allowing the entire thing to sort.

Another thing you're going to want to make sure you think through is on custom sorts, around what -- on the data header. I'm going to go ahead and look that up. You'll notice I'm on the tool ribbon up top; I'm hitting data. And then you're going to see a sort and filter box. I'm going to go ahead and sort. And it goes ahead and pops up my custom sort option.

I want to show you guys really quickly that you'll notice on the right-hand side where it says, my data has headers. It actually is already checked. I can't check or uncheck that. It automatically does that. The reason why is because I've chosen a data field which is a table that is already what's kind of in Excel called a formatted table. It already did a table format for you. And because of that, whenever it does a table format, the format functionality assumes that row six here is actually your header row.

So, it says, oh, yep, we already know this guys, don't worry Janine. Row six is your header. I'm going to make sure that my data has headers. If this is not selected -- and I'm going to show you this when we go through the panels. If this is not selected, you need to determine, when you're choosing your data field, if you want your header to be sorted or not. And it's important to understand that because if you don't do that -- if you don't click, my data has a header, you literally could have the number of stories part of your sorting, which would really throw your results off.

I'm going to do a couple of sorts for us in the assessment tool. Specifically, we're going to ask three questions. Where are the common amenities? What alternatives deliver the best or worst total cost of ownership? And also going to figure out which units are identified as UFAS compliant. So, let's go ahead and go back to that assessment tool and let's see if we can't find this out for us. So, on the first question again, it was, where are the common amenities? We're going to go to the Common Spaces workshop, or Common Areas workshop -- I'm sorry, worksheet, excuse me. I'm going to the Common Areas worksheet.

And I'm going to go again -- I'm going to look at the different headers that are here, and try to figure out, why are we talking about amenities? Where does it help me understand what the naming of some of those amenities are? It does tell me here in the common space, and the type of -- column space idea in column D, as well as the type of column space in E, does help me get a sense of, what are some of those common spaces are.

So, let's go ahead and do a sort by that. Again, I'm grabbing the entire table; all the way down. I'm doing data, sort, common sort; first by type of common, space. And then I'm going to add another level, common space ID. Go ahead and do that sort and see what it gives us. Great, so that sort has showed us that the first four rows are the common space that have amenities. Remember the question was, where are the common amenities? So, we're able to see that the common amenities are all four in the building ID called clubhouse. And more specifically in that clubhouse, there's the common weight room, the exercise, and pool and dressing.

You'll notice that the clubhouse might also have other items in there. I'm going to go all the way down here. I notice also the clubhouse has a leasing and marketing and maybe some other management maintenance-type room. It will say maintenance/garage. So, it both can give you a sense of what are the amenities, and where are they. They are in the clubhouse. But also, you can do a sort and figure out, or if there's enough information on your screen you can look at it quickly and say, oh, and there's also a couple more things in that clubhouse.

The second question we're going to try to dive into is which alternatives deliver the best and worst total cost of ownership result. Now first you're going to have to understand enough about what an alternative is in the CNA e-tool. For those of you that might not remember, the alternative is actually a replacement to what's called a component. Oh, god, Janine, I'm using all the CNA vernacular. So, let's stop.

A component, just to remind you guys, is what an assessor sees on site when they're doing their inspection. And they put into the assessment e-tool every single component that they see; which is either a building or a site improvement system. Now the way in which they put that into the assessment tool just really depends. There's actually a virtual classroom called, grouping and naming of components. If anybody wants to understand that a little bit better. Although the classroom has ended, in a couple weeks we will be posting the slides and the recording, so you can check that out if you'd like to understand that better.

But so all the components are those that are buildings and site improvement systems that get entered in the assessment tool. And then the assessors going to put alternatives to that which is the optional replacement for the component. So, for example, a component might be an existing refrigerator. Then the alternative that they wrote down could either be a refrigerator component, which might be the existing refrigerator, the same model; could be alternative one. And maybe alternative two could be an energy star model. And then, after that, in the recommendations tab, the assessor will make a recommendation to that alternative. Do they think a replacement could happen for the existing refrigerator, by way of just using the same model; alternative one? Or are they going to recommend energy star model, which is alternative two.

Okay, so just to remind yourself, components the building or site improvement of the system. Alternative is the replacement options that the assessor thinks out. And then the recommendation is when the assessor makes a decision about, okay I'm going to recommend to the lender, I want alternative two. I think we should do the energy star model upgrade. And we don't need to do it now. I'm going to do it in the cycle.

So, what we're going to do was the question we had was which alternatives deliver the best or worst total cost of operations. This is something you guys really might want to look up, because it could behoove you to understand which are giving you guys the best, quote, unquote, savings. So, to remind you, the total cost of operation, or what's commonly referred to as TCO. Excuse me, I keep saying operations. It's total cost of ownership. My apologies. TCO; total cost of ownership. And that really displays the average annual cost of ownership, including the amortized cost of acquisition, plus the yearly utilities, over the estimated life of the component. And that allows you understand that total cost of ownership; what is that average annual cost of ownership that is taking part for that alternative.

I'm going to go to the alternative tab. See if we can do a little sort on that. I'm going to see here again -- I want to look up first the different options I have here to sort by, which are the headers. Let's scroll down and look at some of these options here. It does look like for TCO, total cost of ownership, it's going to give you a per year, as well as the savings. Really good to understand what this savings could be. Let's go ahead and do a quick search on that, then. Excuse me, sort on that. Again, I'm grabbing the entire data field, as you can see. I'm going to do a custom sort because I want to make sure -- I want it by TCO savings. And I want to know the largest -- I want to know what's going to be the largest savings.

Great and I'm going to scroll back over to N. And you're going to notice we got up a couple of savings that are really large; in the \$200s. Again, it's an annual savings. And then let's scroll all the way down and let's see what the smallest -- we got a negative \$733. I think what's really important here is not just if you want to look up what is the best and worst result for our total cost of ownership savings. But it also can give you a sense, if you're seeing some flag notes, there might be some really distorted information that's coming out of your savings.

And when I say distorted, you might be, I'm not sure I'm understanding, these numbers look really off. One thing you might want to look at is the TCO savings, and see if something's really an outlier. For example, if you're highest savings is \$276 and you've got an outlier at \$50,000, for example, that might be an error. So, it might give you a sense of, oh I've got to go back and look at that alternative. And actually, if I go back to the component and look at the dates I entered into that component, for an estimated use, for life, to figure out what these savings could be.

The last question we thought of is kind of which units are identified as UFAS compliant. Now, I'm not going to go into all the rules and requirements around accessibility. Again, accessibility was one of those other virtual classes that we're given. And those should be -- slides and recordings should be up in a couple weeks. So, you can go through that classroom as you'd like, for those of you that need to bone up on accessibility. But if you are trying to figure out which units are identified as USAF compliant.

Let's go ahead and go back to the Units worksheet. Now I'm going to scroll around on this to look at the headers again. And I'm not really seeing anything about UFAS compliant; those words up there. So, for those of us in the accessibility to understand, they're talking about the mobility and sensory impaired units. So, I'm going to go ahead and sort by L and M. First, what do we do? We've got the entire data field. I'm grabbing the entire formatted tab; hitting sort. And now I'm going to do that by mobility impaired and sensory. I want to do largest to smallest because I want to see those that have the largest units because that's -- we want to know which units are identified as USAF. So, if it just said zero, that wouldn't be identifying it. I want to see this is one, two, three, etc.

Go back over and you'll notice there is zeros throughout. So, nothing's been identified. I'm going to go back to the PowerPoint for a second. And it shows we're going to do one more thing on the assessment tools. I really want us to check our list of components. We're going to do this both in the assessment tool, and in post-validation analysis of our panels. The component, once again, reminding you guys, components are all that information that's submitted by the assessor, into the assessment tool, for all the building or site improvement systems that they see on the property.

And so, a couple things that you guys might want to look up is kind of, do you have a complete inventory of components? Do you have utility consumption data for all items that consume utilities? And I say here, if needed. Some of you may not be trying to access and understand utility consumption if you're not going after a green [inaudible] or you don't want HUD to consider utility savings as part of your application.

So, let's go ahead back to the assessment tool and look up those questions. Great. So, we're going to go into the component tab. And we want to know a complete inventory of components. Well, one way you might want to look at this and think about this is looking up in these three categories. One is called a Need Category. One is Need Item ID. And the third is Component Type.

These are actually what's called a predefined drop-down list for you; meaning we, as a person filling out the assessment tools, an assessor, you're not literally typing in the words building frame and envelope. This is a drop-down list that you would be choosing. And then based on this building frame and envelope, then a subset of that that would be part of Need Item ID, that you can choose from. Once you choose that, then there's a further subset of a list from Component Types. Once you've made that decision then you're the one that is entering in and naming your component ID, as well as filling in other details that are pertinent to that component.

And so, one way that you might want to do, to look at a complete inventory of a component. A really good way that I find is actually looking up your component types. You're able to see to make sure, did I have all my dishwashers? Am I thinking of all the drywall, etc. So, let's go ahead and do a couple of sorts on the component type to give me a sense of that. Okay, do data. Again, I don't need all of these sorts by. I decided just to do component type. So, one way you can get rid of all these levels is just go ahead and delete levels. It will take it from the bottom up. And then I want to keep my component -- I want to keep one of the levels so I can then sort by component type.

Now I think I'm going to do an A-Z order sort. So, it's going to show me aluminum, then asphalt, etc. You'll notice over here on the left, all these Now Need categories are going to be not the main way of filtering, or, excuse me, sorting component type now. So, I'm able to see on the asphalt, let me just triple-check. Did I make sure I got all my asphalt? I've got asphalt shingles which is great. I've got my sloped roofs in there. I've also got asphalt as it relates to the paving of the parking. Okay, great.

And then you can also look, if you've done a good enough job at naming the component IDs, again, it's robust enough, you're able to see, yep, I included both my east and my west driveway. Okay, good. I think I'm good on my asphalt. So, it's a good way for you to be able to do some crosscheck, especially [inaudible] to make sure you want to understand if you have your complete inventory components.

I also want to show you an example of how to do a custom sort by order. So again, I'm going to take my entire list. And I'm going to go to sort. Now, again, I did component type. Order, you can A to Z or Z to A, so ascending or descending, but you can also make it a custom list. Let me show you how to do that.

What if you really wanted to have dishwashers first and then you just wanted to just go to ascending after that? You can easily do that. One way you do that is you're going to put in your list entry, literally write in, dishwashers. You're going to add that. And now you see dishwashers become a custom list. I want to make sure you click on that custom list; hit okay. Now you see the order is dishwashers. It's not A to Z or Z to A, it goes dishwashers. I click on that. Oh, for some reason it didn't work; sorry. Let me try again. I want to make sure we did this correctly; my apologies.

Oh, great. I now figured out the problem. My apologies. It's actually going -- dishwashers is not plural, it's just a singular. So, let's go ahead and change our -- list to just say singular, dishwasher; my apologies. But it does show you kind of the level of specificity you need to have if you're making your own custom list. And then out of that, I can now click on the singular dishwasher. Make sure it has the order dishwasher. And now you see the dishwashers came up first and then it's defaulted, A through Z.

And that's a good way you can do your own custom list. You can make a custom list, as well. If you want to make a couple of items, for example. If you want to do dishwashers and drywall, I have that example here. That way you would do dishwasher and on the second line, then hit drywall. You'll want to make sure you click on that. Have that as your order; add it. And now you see dishwashers, then drywall, then it goes to A to Z.

Another way you can do a custom sort is on values. You'll notice that you can sort values, cell color, font color, cell icon. So, for example, if you wanted it cell color. There's no cell colors in these, but if you were going to put cell colors, and try to put yellows and reds, etc. Then you would be able to sort by that, as well. So, there are different ways to sort that are not just by order, but also by cell colors or icons, if you have those entered in.

I want to go now to panels and talk with you guys a little bit as, how again, in the post validation. Again, if you are an assessor, you're validating through the engine. If you are lenders, you're validated through the submission portal. But after you've validated, how you can look up panels, do some simple sorting, and then export those panels into an Excel file, and do complex sorting.

So, what I'm showing you here is after you've gone through, as the lender, the submission portal, and had you validate your assessment tool. This is what pops up and it's a long series of panels. You'll see here there's a summary panel. There's a flag, a financial factor, a financial schedule, all the way down to agency CNA decision. So, all these panels are there for you then to diagnose and analyze the information that you validated.

I want to make it really clear that all the information you're seeing here is basically the analysis of the assessment tool. It is not the assessment tool itself. That assessment tool is still your Excel document. And so, if you're playing around with any of the panels and you've made -- you did a sort weird, or even if you then take the panels and export them and kind of mess up on your sorts. You're going to be okay in a sense. You're never going to mess up your underlying assessment tool data. This is just basically an analysis of that data. It is not the data itself. The data itself always stays within the assessment tool Excel document.

Right now, in this example, we have one panel open, called summary. And the rest of them are collapsed. I'm going to go ahead and literally show you guys one of these. Because only certain people have access to the submission portal, I'm actually going to go through the validation engine and do our work through that.

The biggest difference between the panels and the validation engine, which is, again, the public portal that the assessors use to validate, versus the submission portal's validation, is that the submission portal has many more panels. And if you can imagine the reason why. When the lender is doing their validation, they've actually fully completed the assessment tool, meaning they've finalized the financial factors form. And with those financial factors there's many more -- there's much more information that the assessment tool can be analyzed against.

There's also another panel of things like attachments. And you're only going to do attachments if you are submitting. And so, again, you're not going to do any attachments to the validation engine. You only are going to have attachments in the submission portal because you've got to attach those to submit to HUD.

So, let's go ahead and look for a second. I'm going to share my screen. So just remember, for those of you that aren't aware, you can easily get to your validation engine by going back onto the HUD.gov homepage, and under, User Needs Assessor there's a sub bullet under the assessment tool called CNA public validation. I went ahead and clicked on that. And you'll notice this pops up right away. And you -- what you hit is browse, and it should then pop up for you, your own list, and you'll go ahead and search for your latest assessor tool. Once that pops up you'll hit validate and it takes sometimes a couple of minutes, depending upon how many people are using the pop-up validation portal to get that validated.

I went ahead and did that before we met today, just so we wouldn't have to wait on the validation process. Again, sometimes that literally takes 20 seconds, so I just wanted to make sure. And you'll notice again, there's about eight, or so, panels here. You can expand them and collapse them at will by using this little carrot. I'm going to go ahead and click on that. And you'll notice the flag panel has now expanded. In that you can do really some easy, simple sorts. If you go ahead and scroll your -- little arrow across flag ID, you'll notice it goes sorting ascending and descending. Come up and you can go ahead and click on that to sort and descend, as you like. So, on the severity of I really want to see my I flags, I'm going to go ahead and sort in that ascending. And now I'm able to start with looking at my flags with I's.

You can also detach this tabular data. By doing so, you now have that entire flag panel. It's now seen just in a much larger scale. And you're able to do the same thing by scrolling over each column header and doing ascending, descending. This time I'm going to do on component type, name. And it should give me all the component type names, in order. So, you've got all the nothings, and then it starts at aluminum down here. I'm going to go ahead and close out of this expansion. And again, this is just giving you a detach. It is not exporting yet.

How you export is you're going to go ahead and click on this export and it will then open up an Excel -- a simple Excel file for you. We're going to do that actually by expanding the component cell summary. Then we're going to go ahead and hit export. I've already done that before we started today -- hit this export, because it -- by doing that I mess up my WebEx platform. And so,

I don't want to do that to you guys. But I'm going to go -- what I would normally do is go ahead and hit export. And then for many of us, not all of us, but for many of us that are using Explorer, you might get something popping up at the bottom that says, do you want to open or save your component schedule summary? I usually highly recommend you go over to the save button. Hit the carrot or triangle, and do a quick save as. That you're always saving the latest version of your file.

For ease today, I'm going to go ahead and hit open. And I'm going to want to show you that component schedule. Give me one second while I do that. Great. We should all be seeing now, the component schedule summary. The tabular data that was in that panel now comes out a simple Excel file. I want to make sure I say that word again, simple Excel file. And the reason is you'll notice here, it doesn't show that assessment tool a formatted table. And so, when we're doing any sorts here, we really need to double-check that we are doing a sort by the entire data field that we want. If we do not do that, it will one hundred percent mess up your data field.

So, I'm going to go ahead and grab all the way down from A1, go all the way over, and then all the way down and to make sure I get all my data. And when I do a custom sort on that, you'll notice now, my data has headers. I can click or unclick on that. Right now, it is -- let's do an unclick. And that means you'll notice it includes everything in all of row one. Now go ahead and look at row one. I'm going to go ahead and -- I'm going to go ahead and click, my data has headers, right now. And you'll notice on row one, it does not include that as a field in which you will be sorting on. It's very important that you do that, so you do not have your headers as part of your sorts. Rather it's leading your sort. It is not part of your sorts.

So, I want to, for a second, is looking at the complete list of categories -- or, sorry, some ways we can give options here on how we might want to sort, is we can go ahead and do some simple sorts, so you guys can understand what you can find in these panels. So great example here. Let's go ahead and sort on action. And let's see if we can't review all the new features. And so, I'm going to go to action. So, it looks like there's some components that the assessors decided are going to be brand new. You might say to me, Janine, how do I do that when I'm in the assessment tool? How do add a feature in the assessment tool process?

So, the good news is it's actually quite easy. What you're going to do is when you're doing your components, you're going to go ahead and add that component in, as if you're seeing it right then and there. So, for example, if you didn't have an H -- excuse me, if you didn't have an AC system, for example, and you want to add that as a new component. A good thing is it's not that hard.

And so, what you're going to do is when you're in the component tab in the assessment tool, you're going to go ahead and put in AC, just as if you were seeing it right there. And then you'll follow through alternatives. You're going to do the same thing. You'll have an alternative of AC. And then when you go to your decision, instead of saying that you want to repair or replacement, you're going to go ahead and want to click the button that says, add new. And by doing that, it's going to give you a clear sense of that.

And so, I want to show you that the assessor has chosen that they think there are going to be four new items; clubhouse water, faucets and shower savers, and then also in the units, faucets and

shower heads for aerators. And so, a couple places they're trying to get some water savings going on, that they just didn't have there before.

So, it's a good way for you to double-check when you're validating, both if you're the assessor, if you want to be like did I make sure I grabbed all those new categories, or new components that I'm suggesting we add. Or you, as a lender, you might want to be -- want to do a quick sort and understand where is all the new things that he's recommending here? I want to make sure I agree with those are going to be recommended or not. So, it's a great way to be able to sort by is the add new action.

Also, you can do one-time repairs, you see in the add new. So, couple good things you're going to see. The last thing I really want to show you here, as time is winding down, is that this component schedule summary actually does not have all the components. It may not -- excuse me, let me put it this way, it may not have all the components that you've entered into the assessment tool. And the reason for that is the assessment tool has all the components entered, that is listed, even if the replacement is going to fall outside of the 20-year estimated period. Where it's this that we're seeing now, the component summary schedule.

Again, because this is just a summary and it's based on the schedule of the estimate period, it's only going to show you those items that fall within the 20-year estimate period. So, it's a good thing, if you're trying to make sure you have all the components in there, you might want to go back to your assessment tool and search that way.

But if you're wanting to make sure you have all the components that are part of the 20-year estimate period, then this component schedule summary can do that very well. And one quick way you might want to learn, or be able to search by that is through the ASTM. Many of you know ASTM is industry speak. And you're able to look up each individualized component by way of the ASTM. And you can do some simple sorts by that.

Because our time is running down, I want to make sure I leave a couple minutes for questions. Some I'm going to go ahead and stop the recording now, and then we will turn to questions. Excuse me one second while I stop recording.

(END)