HUD CNA eTool

CNA e-Tool V.3 - Getting Started

Nicole Hertzman: Welcome to this HUD sponsored webinar, on how to get started using version 3.0, of the CNA eTool, which will be launched on August 24th 2020. This webinar is being recorded. One of the four sessions of this webinar will be posted on the HUD Exchange. It will be accessible from the CNA eTool page of the -- of hud.gov website.

It will be available sometime after the fourth session is delivered live. There will be no live questions during this webinar and participants will be needed throughout the presentation. If you have any questions however, please enter them in the WebEx Q&A box on your screen, as shown on this slide.

We will do our best to get to as many of your questions as possible, during the two Q&A segments of this presentation. If you are experiencing any technical issues related to WebEx, please provide a description of what you're experiencing in the chat box. At this time, I'd like to introduce Tony Gallo, of ICF, who will be the presenter during this webinar.

Tony Gallo: Thank you Nicole. Again, I'm Tony Gallo of ICF and I'm very happy to be with you today. ICF is a contractor under a cooperative agreement with HUD. We've been supporting HUD's office with multifamily production for the past several years. I may have met some of you when I did in-person training on the Legacy CNA eTool a few years ago.

With me today, are HUD's Kevin Hann and Sean Quadopersy, the experts on the CNA eTool and HUD's secure systems and my esteemed clients. And they will be answering questions at the two question and answer sessions, during today's webinar. Also with me are our webinar operator, Nicole Hertzman and Chris Richmond, who will be triaging your questions during the webinar.

The new version of the CNA eTool is a fully web-based application. It's more advanced and much easier to use than the Legacy dual system, which consists of the Excel Spreadsheet and web portal. Version 3.0 streamlines the process of preparing, submitting, reviewing and approving capital needs assessments. There are no separate portals and no emailing of Excel files between parties.

Once you're in the system and depending upon your role, you may view, review, enter information and submit the CNA, all using a single new user interface. HUD will provide you with various resources to assist you in navigating version 3.0, including this webinar. Some of these resources, will be mentioned later in this presentation.

The focus of today's webinar is to assist users in getting ready to use the new version 3.0. First, we'll learn how to obtain access to use the new eTool. This involves getting registered as a user. Second, we'll give instructions on how to convert the Legacy assessment tool to the new web app, CNA eTool.

This involves transferring the data and the Excel files, into the new system's database. So, let's start with obtaining access. To obtain access to the new CNA eTool, all users must go through certain steps which we will discuss shortly. As said on the previous slide, the way to access the CNA eTool version 3.0 has changed for certain groups of users.

Therefore, the purpose of this webinar, is to ensure that users understand, one, how individuals obtain access through HUD secure systems, as well as log-in credentials, to access the eTool. We'll discuss how the process differs, depending upon the user category. Two, we'll discuss the role of the coordinator and how they go into secure systems and grant or evoke access to individuals within your organization.

Three, we'll talk about the different CNA user paths or how the user type and program type determines what you will see on the screen. And four, how you transfer data from CNA's began in the -- the current CNA eTool spreadsheet to version 3.0 and when you'll be able to do so. A CNA must still be prepared in compliance with chapter five, appendix 5G of the multifamily accelerated processing or map guide.

But the mechanics of entering and submitting the information required has changed. Version 3.0 works with the same set of informational data, as previously required in the Legacy eTool. It's the way that users interact with that data that has changed and will be much easier. So version 3.0 of the CNA eTool will be used by needs assessors, FHA approved lenders, Public Housing Agencies or PHAs, who are engaging in RAD transactions only.

The two remaining Participating Administrative Entities or PAEs, for mark to mark -- mark to market restriction only, HUD multifamily staff and in the future UFDA employees. So first, we'll discuss how to access the CNA eTool. The CNA eTool is hosted on HUD secure systems platform. The security measures require a user ID known as an M-ID and password to access the CNA eTool. This process protects the confidentiality of the data, submitted through the secure systems platform.

It takes time to get credentials for secure systems, so those of you who don't currently have access, should begin the process as soon as possible. FHA approved lenders who have submitted CNAs using the Legacy submission portal, should already have their credentials. They will simply use the same credentials or user IDs and passwords to log into version 3.0. Again, lenders need not reapply to access the new version.

They can simple use their current M-ID to log in. PHAs and PAEs, will now be submitting their CNAs to HUD using the new CNA eTool web app as well. As submitters, PHA and PAE organizations need to log in to secure systems to use the CNA eTool also using M-IDs just like lenders. Now, in the Legacy system, the needs assessors did not have to log in to any system at all. Instead they used the assessment tool Excel Spreadsheet, saved on their individual computers to enter data.

Going forward however, the needs assessors will be required to log in to secure systems to access the CNA eTool and enter all of the data using the version 3.0 web app hosted there. They will no longer have to work on assessment tool Excel files on their individual computers. So to paraphrase what we discussed on the last slide, everyone involved in preparing and submitting CNAs to HUD using the CNA eTool version 3.0 must be registered to obtain credentials.

Their log in M-IDs to access the eTool. This is a two-step process. Step one, before any individuals in an organization can register in HUD secure systems, the organization itself must be registered in HUD's Active Partners Performance System called APPS, as a multifamily business partner. One of the principals of the organization must do so using the organization's Tax Identification Number or TIN.

Step two, individuals in the organization must register in secure systems, either as coordinators or standard users. We'll discuss the distinction between coordinators and regular users later in this webinar. As mentioned at the beginning of the presentation, there are different types of organizations that may register to use the CNA eTool.

They include, FHA approved lenders; multifamily business partners, which include needs assessors; participating administrative entities or PAEs; and USDA and multifamily participants which consist of PHAs. The process for registering and obtaining M-IDs for users differs by organization type. We are going to show you a brief overview video, on how to obtain an M-ID. This video is currently accessible from HUD's CNA eTool homepage and will be accessible from the HUD exchange website as well.

[Video playing]

In order to obtain access to the CNA eTool, both coordinators and regular users must obtain an M-ID. HUD has two different kinds of M-IDS. Mortgagee IDs and multifamily participant IDs. Mortgagee IDs are intended for lenders and are issued from FHA connection. Multifamily participant IDs are issued from the web access security sub-system known as WASS and are intended for PHAs, needs assessors, PAEs and USDA users.

Lenders should sign up for an M-ID from FHA connection via the URL, as shown on the screen. Please note, if a lender has already acquired access or roles in connection with the Legacy system, then they will not have to do anything to get prepared for release 3.0, because their original credentials will still allow them to access the system. PHAs should request an M-ID through the WASS portal at the URL, as shown on the screen.

Needs assessors, PAEs and USDA users should request an M-ID through the WASS portal, at the URL, as shown on the screen. If you are applying for an M-ID, your organization should already be a HUD registered entity, through HUD's Active Partners Performance System, known as APPS. Each organization must also have a coordinator in place, before a user can apply for their credentials.

Within FHA connection, get started by registering a new user. Lenders that are designated as coordinators, should complete the application coordinator registration form to request their M-ID. Regular lender users should request their M-ID using the standard user registration form.

Lender coordinators and lender users, will be asked to provide personal information, including your full name and social security number, as part of the FHA connection registration process.

You are also required to enter your organization's name, TIN, a telephone number, your email address, a password and your mother's maiden name. Your password will be recorded exactly as you type it and is case sensitive. Choose a password that meets the complexity requirements listed. You are required to provide your mother's maiden name, for future password reset requests.

Title one and title two lenders, service bureaus and multifamily lenders, must complete the additional section of the form, on system application selection. Press send when the form is complete. Please refer to the FHA connection guide for additional resources on registration. All other users will apply for an M-ID through the WASS portal. To apply for a coordinator M-ID in WASS, select the coordinator field and fill out the featured form.

To apply for a user M-ID, select the user field and fill out the featured form. You will be asked to provide personal information including your full name and social security number. After providing your personal information, input information about your organization. Needs assessors, PAE users and USDA users will enter your organization's name and Tax Identification Number, also known as a TIN.

You may obtain this information from your organization's coordinator. Do not enter your social security number in this field. You are representing your organization when you work on a capital needs assessment, not an individual. PHA users will enter your PHA ID number. Click send application once you have provided all of the information on the form. For both the FHA connection system and WASS, the user and the organization's coordinator will receive an email notification each time a user registers for their M-ID.

After a user's registration information is verified, their organization's coordinator will retrieve the employee's M-ID and share that information with the user. Both users and coordinators can access the CNA eTool screen once they receive their M-ID by signing in on the secure systems log in screen and entering the newly issued credentials. Please keep in mind the following useful tips when signing up for an M-ID.

Do not share your password or credential information with anyone, even if it is within your organization. When accessing secure systems, please use Chrome as your browser. An M-ID will become inactive if it's not used for 90 days. Log in to the secure system platform, every so often to ensure that your account remains active. And finally, you are required by HUD to ensure that your personal identifiable information is protected. Make sure that in sharing your TIN you do so in a secure way.

Tony Gallo: We hope you enjoyed the video. It's accessible from HUD's CNA eTool homepage. Now that you understand how a user obtains access to the CNA eTool, we will discuss the role of the organizational coordinator. As stated earlier in this presentation, each organization that uses the CNA eTool version 3.0 must have a coordinator. The coordinator grants or evokes access of individuals associated with the organization prove secure system.

They perform this role in the system's administration page within the HUD's secure systems website as shown on the screen. The coordinator must obtain an M-ID, just like everyone else in the organization, who will access the CNA eTool version 3.0. However, coordinators have a special designation within secure systems.

There is a video that we're not going to show you today, that walks you through the steps a coordinator takes with regards to other users within their firm or organization. This video is also available from HUD's CNA eTool homepage, at the URL shown on the screen and it will be accessible from the HUD Exchange website. Before we go on to questions, I wanted to summarize what you've just heard because it is -- it sounds a little complicated I realize.

So to summarize, if you do not have an M-ID yet, please make sure you do the following. Make sure your organization or firm is registered in APPS and an executive or principal should do this using the firm's TIN. Make sure someone in your organization is registered as a coordinator. This person needs to first get their M-ID and apply to be a coordinator for your organization within FHA secure systems.

And then, make sure you yourself register to get your M-ID and have your coordinator give you a CNA eTool user role, within FHA secure systems. Okay, so now we're going to discuss the CNA user roles and the different user types. The design of version 3.0 of the CNA eTool is predicated on the user path approach, meaning who the user is and the HUD program for which the CNA is being prepared.

Who the user is and which program the CNA is being prepared for, determine what information is requested on the screen, what screens the user can view, what screens users may edit and are responsible for entering data into and who can submit a completed CNA to the approving agency. In other words, the system is programmed to allow certain users to do certain things, to lead them down a particular allowable path.

This user path provides the framework for anyone who touches the CNA and determines the user's responsibilities. On the next slide, we'll discuss the three user types. There are three main types of users in the CNA eTool and each play a role. They are submitters, preparers and approving agencies.

First, we'll discuss submitters. The submitter first initiates the CNA and sends it to the assigned preparer. Once the preparer has finished completing the required input screens, the CNA is sent back to the submitter to review, finalize and ultimately submit to the approving agency. And all of these functions occur within the web app.

Next, we'll discuss the preparer role. The preparer prepares the bulk of the CNA after receiving the assignment from a submitter and then, we'll talk about approving agencies. The approving agency reviews and either approves or returns the CNA back to the submitter for revisions. We'll talk next more about these roles and the types of entities that function under each of them.

The submitter is the entity that initiates the CNA, assigns it to the preparer and ultimately submits it to the approving agency. In many cases, the submitter is a lender. However, the submitter entity type may vary. For instance, for most office of recapitalization programs, the submitter is a PHA or a PAE. For some select programs, the submitter is also the preparer. The most common scenario however is as follows.

The lender acts as the submitter and the lender in that role, will initiate the CNA, by first creating it in the CNA eTool. They'll send it to an assigned needs assessor as their partner in completing the CNA. They will make the ultimate repair and replace decisions, they will determine the financial factors including reserve funding and estimate period reserve schedule. They will finalize and submit the CNA to the relevant approving agency and they will interact with the agency reviewer needs assessor, during the agency review and approval process.

The preparer is generally the needs assessor. The firm or individual with whom the lender works to conduct the property assessment and prepare the bulk of the CNA eTool for submission. The needs assessor will work with the submitter, as their partner, to prepare the assigned CNA. They will report their findings in the CNA eTool by entering the required data into the non-financial screen. And they will send the CNA to the submitter, once they finish preparing their part of the CNA.

In most cases, the preparer may not submit the CNA directly through the approving agency. In our current example, their partner, the lender, must be the submitter. Occasionally, needs assessors however initiate, prepare and submit CNAs for selected programs, that do not involve a lender or PHA. For example, PRACs and some office of recapitalization programs. Agency reviewers are employees or contractors of HUD and eventually maybe UFDA, who review and approve the CNA after it's submitted.

The approving agency will review the submitted CNA; they'll correspond with submitters during review and approve or return the CNA. Agency reviewers may not change anything in the body of the CNA eTool. They may provide comments and request changes, but they do not have right access to any of the input screens, so they cannot change anything within the CNA itself. So now that we've -- know the different types of users for version 3.0, let's talk about the three types of CNAs that are available, within version 3.0 for HUD transactions.

There are asset development CNAs, those for asset management and asset recapitalization. In the CNA eTool version 3.0, you can identify what type of CNA and for what program it will be used in the CNA summary screen. The submitter does this from the CNA summary screen, which is the first screen you see after you log in and then from your dashboard, select the CNA to work on. So you can see from this screen, the approving agency is a dropdown.

There's a dropdown for CNA type, which includes the three types we just discussed and there's a dropdown for program events which has the full list of programs or events that that particular user has access to. Here's a list of HUD programs under each CNA type, from which specific submitters may select. For a complete description of the types of users, their roles and the programs which they may select, you can refer to the user path matrix, that will be available shortly on HUD CNA webpage.

And it will also be part of the new CNA eTool user guide, that will be published soon. To review the Legacy system version 2.4, which is currently available, it has a different architecture entirely. The Legacy system works as follows. The needs assessor does the following, they download a copy of the CNA eTool Excel spreadsheet from the CNA eTool page of the hud.gov website.

They complete all but the last two tabs or forms of the spreadsheet, which are the financial forms and they send the Excel spreadsheet, along with all required attachments and narratives via email to the lender. Upon receipt of the Spreadsheet, the lender does the following. They upload the Excel file into the submission portal, accessible from the CNA eTool page of hub.gov. They review the submissions for completeness, making sure all of the required attachments are included.

They review the screens and use the repair replace decision form to determine whether to use the needs assessor’s recommendations for components or alternatives. They review all of the flags and enter all of the notes for all warning and severe flags. They work with the needs assessor, to finalize all of these things I've just mentioned and they submit the CNA and all required attachments to HUD through the submission portal.

Upon review of the CNA eTool and attachments, HUD enters their comments and either sends the eTool back to the lender for additional information, approves the submission or returns it. In version 3.0, the CNA is assigned, prepared, reviewed and submitted within the same single web app. There are several steps to this in summary. Step one, the submitter, usually the lender, initiates or sets up the CNA on the eTool dashboard screen.

The submitter selects the preparer, usually the needs assessor, as they partner in the eTool. Step two, the submitter sends the eTool to the preparer. The preparer completes all of the eTool screens, except for the financial factors and repair replace decision screen. When the preparer has completed all of his or her screens, the preparer sends the CNA through the eTool to the submitter.

The preparer and submitter may send the CNA back and forth, as many times as necessary within the eTool web app. The preparer and submitter may validate the CNA in the eTool as many times as they want, as they edit the data. And again, the nice thing is, there is no separate Excel file to deal with. Step three, the submitter submits the final CNA through the same version 3.0 web app to HUD, the approving agency.

And step four, HUD receives and reviews the CNA eTool through the web app and notifies the submitter whether changes need to be made. The submitter and HUD may send the CNA back and forth easily during the review process. All of the steps that we just discussed take place within the same 3.0 web app, using the user interface, that pretty much looks identical for all users. And the steps of sending between the partners and submitting to HUD, all happen through a simple click of a button within the web app.

The user dashboard as you see on the screen, lets you easily see who has the CNA at any moment, as well as where it is in the process. No matter who has it, you can always open it and view it as well. This slide represents the basic CNA eTool user path. Note that the preparer, usually the needs assessor, may send the eTool to the submitter. But in this particular case, the preparer may not submit the eTool directly to HUD.

Likewise, in this case, HUD may send the CNA to the submitter, but not directly to the preparer. And to reiterate, everything gets transmitted through the CNA eTool web app. One thing to note however, the partners can exchange a single version or create new versions and edit and exchange them as often as needed, to arrive at a final version. Please note though, that the partners need to establish version control, as multiple copies may be created and it's important to know which one is ultimately going to submitted to the approving agency.

As we mentioned earlier in this presentation, there are a few instances, in which the needs assessor may be both a preparer and a submitter. This can occur when the CNA is prepared under the following programs or situations. Project-Based Rental Assistance Contracts or PRACs, namely for sections 202 and 811 properties.

Renewal of a HAP or section 8 contract or rent increase, particularly when the rent increase would affect the property's HAP payments, change of property ownership of uninsured properties, other asset management uses, such as an update to a reserve for a placement analysis. Rental Assistance Demonstration or RAD conversion to HUD multifamily housing, RAD conversion of section 202 PRAC properties, post mark to market properties and other asset recapitalizations.

So now that you know how to obtain access to the CNA eTool and about the different user types, we'll talk about how and when, you may transfer data from a CNA eTool Spreadsheet into the version 3.0 database. If you've entered CNA data into the legacy assessment tool Excel Spreadsheet, you may transfer that data into the new version 3.0 database shortly before launch. Here's some date ranges to be aware of. If you're in the midst of working on a Legacy assessment tool spreadsheet, you'll have the opportunity to transfer your data to the new tool for a four-week period.

The exact dates are from July 27th to midnight Eastern, on August 20th. Starting August 21st, the Legacy CNA eTool will go offline and all related systems will be turned off for three days, until the new CNA eTool launches on August 24th. We call this the blackout period. Once this blackout period begins, there will no longer be the public validation portal or the submission portal, into which data stored in any assessment tool Excel files you still have, may be uploaded. You'll no longer be able to transfer any data from the assessment tool to version 3.0. We will show you a brief video that shows how to transfer data from the Legacy assessment tool Excel Spreadsheet to version 3.0.

[Video playing]

In this video, we walk through the process of transferring data from Legacy CNAs, so it can be retrieved when version 3.0, of the CNA eTool web application, goes live. When the new version goes live, the old assessment tool Excel files, will become obsolete. Both the Legacy public validation portal and lender submission portal will no longer be available. So, what happens to all the data saved and everyone's assessment tool Excel files? Well, prior to the launch of the new eTool, any data stored in a Legacy CNA assessment tool Excel Spreadsheet, can be transferred during the period specified by HUD to be usable within the new eTool.

The data transfer period is scheduled to begin on Monday, July 27th and end on Thursday August 20th at 11:59 p.m. Eastern. As we'll see, in some cases, the data will transfer over to version 3.0 automatically. However, in some cases, you will need to take some action to ensure the data is transferred. We will discuss both of these scenarios. This is a fairly simple process for the user, as the database does most of the work on the backend.

Let's start by identifying what will automatically be transferred to 3.0 without you having to take any action. For instance, any CNAs that have already been submitted to HUD, are already in the system database and will automatically transfer over to the new system. Therefore, you don't have to take any further action for CNAs in the following statuses. Submitted, under review, returned, approved. Once version 3.0 goes live, you will be able to locate and open these CNAs in the new system when you need to.

Therefore, you do not need to worry about the assessment tool files that were already validated and submitted to HUD. Similarly, no further action is needed for CNAs that are saved as draft. Even though these CNAs were not fully submitted, data from CNAs and saved as draft status is also already stored in the system database and will be transferred automatically. You can verify the status in the submission portal in the locate CNA tab.

So, now let's talk about the assessment tool Excel files that do require attention and action. We will first address users who have the role of submitter. Generally, submitters are lenders and PHAs. So, lenders and PHAs for projects that you eventually intend to submit to HUD, any assessment tool files that are currently being worked on by your needs assessors, require some action on your part.

The basic rule of thumb is this. In order for the data from the needs assessors Excel files to be transferred over to version 3.0, the data must be saved to the system data base. To do that, you'll use the existing legacy submission portal to validate the CNA. The process is exactly the same, as how you to typically log into the CNA eTool submission portal and validate the assessment tool in the legacy system.

The process consists of two steps. The first step is to contact your needs assessor and get the latest working draft of the assessment tool Excel file for the project from which you want to transfer the data. Second, log into the current legacy submission portal, select the Excel file to upload and validate it in the CNA submission tab. Through the validation process, the data is recorded into the system database and is then ready to be transferred. That's it.

There are a couple of things to note. One, you do not need to actually submit the CNA, in order for the data to be stored in the new system database and transferred over to the new system. Indeed, there may be severe flags or other issues resulting from data saved in the assessment tool, that is less than 100 percent complete, which may prevent submission. That is okay. As long as the assessment tool validates successfully, the data will be recorded.

The received for validation status will indicate successful validation. You may choose or want to further click save as draft, but it is not necessary. Validation alone is sufficient to record the data into the database. Remember however, that the validation must occur within the time period specified by HUD. HUD will notify you about these dates. Again, the data transfer period is scheduled to begin on Monday July 27th and end on Thursday August 20th at 11:59 p.m. Eastern.

The system will only select the assessment tool data, validated with a timestamp that falls within the specified dates of the transfer period. Once the CNA data has been transferred to version 3.0, only you and your organization, will be able to retrieve and send it back to your needs assessor, to keep working on it in version 3.0. And only you as a lender or PHA will be able to submit that CNA to HUD, once your needs assessor completes that CNA.

In summary, lenders and PHAs, having logged into the submission portal, must validate these active project assessment tools that you will eventually submit. Next, let's talk about the assessment tool files to which needs assessors should pay attention. As described earlier, any draft assessment tool files for active projects, should be sent to the lenders or PHAs, so that they may transfer the data.

However, a needs assessor may want to transfer data from assessment tool files that are used as templates or a library of commonly used components or standard unit types. Given that assessment tool Excel files will become obsolete once version 3.0 goes live, transferring the data saved in assessment tool templates now, would allow you to avoid having to rebuild the library data manually, in the version 3.0 eTool.

In brief, to transfer the data, you, as the needs assessor, must log into the Legacy submission portal, upload your assessment tool file and validate it. Until now, you only had access to the public validation portal which required no log in. But now, in order to log into the submission portal like lenders do, you must have a valid access ID for HUD secure systems to use the submission portal.

Since the needs assessors may not be familiar with the legacy submission portal, we will review the steps for accessing it in detail. Step one, navigate to the CNA eTool page on the hub.gov website, at the URL shown on the screen. Then, select the link to the lender CNA submission web portal. The screen will refresh and the secure systems log in screen will appear. Step two, log into HUD secure systems.

You must have an M-ID and log into the legacy submission portal. Remember, all needs assessors must have an M-ID prior to the launch of version 3.0. Step three, click on the CNA submission tab. Next, upload the assessment tool Excel file you want to transfer. Then, select validate. This screen should look identical to the public validation portal screen and that's pretty much it.

As is the case with lenders and PHAs, once you validate the assessment tool in the submission portal, the data is recorded into the database, where it will be transferred and made available in your brand new eTool version 3.0 dashboard.

Please note that in most cases, you will not be able to send to your lender or submit to HUD any CNA that you yourself transferred using the submission portal because your role as a preparer is registered in the system.

The CNAs you transfer will appear on your dashboard and you can edit them, but they will only be stored within your dashboard. Anyone within your firm or organization, will have access to them as well. But they cannot be viewed or sent to anyone else within the eTool system. Therefore, any actual life case CNAs, CNAs that will ultimately be submitted to the approving agency, must be transferred by your lenders or PHAs as described earlier.

However, there are some exceptions. In some instances, a needs assessor may also be the submitter of the CNA directly to HUD. In the new eTool, needs assessors may submit to HUD directly, any CNAs prepared for the following programs. Project Rental Assistance Contracts or PRACs, HAP renewals, when there is no insured mortgage, rent increases and/or amendments to HAP contracts when there is no insured mortgage, properties without HUD mortgage insurance, other for HUD asset management purposes, RAD multifamily, RAD for PRACS, post mark to market and other asset recapitalizations.

For such CNAs, the data transfer process is the same as noted previously. Once the assessment tool is prepared for these programs are validated and the data is transferred, selecting one of the programs under the CNA type in the new eTool version 3.0 entry screen, will allow the user to submit to HUD. To conclude, please note the following data transfer timeline. The data transfer open period will be during the dates noted on the timeline as stated earlier in this video.

Any assessment tools validated the day before or the day after the designated time, will not transfer. The validation must happen using the CNA submission portal, not the public validation portal. Any assessment tool files validated in the public validation portal will not transfer. Both the needs assessors as preparers and the lenders and PHAs as submitters, must have valid access IDs, to log into the submission portal.

So it's important that you obtain your access ID before the data transfer period begins. Following the transfer period, the current Legacy CNA eTool system, will go offline for a few days, while the database goes through its conversion. After the blackout period, the new web app, CNA eTool version 3.0 will be online. All users will now access the web app, using their M-IDs and be introduced to the new and improved CNA eTool.

Tony Gallo: We hope you enjoyed that video. Now, I'll reiterate some of the important points from the video. If you're a needs assessor, in the middle of completing your assessment tools that you know will not be fully submitted before August 20th when the blackout period begins, you’ll want to make sure to take some steps to transfer the data. You can transfer the data by having your lender validate the assessment tool in the submission portal.

Again, some important things to note are, the CNA must be validated by your lender. If you're going to ultimately submit the CNA to HUD or eventually to UFDA, you cannot do it yourself. The validation must be performed in the submission portal and not the public validation portal. And, the CNA must be validated within the four-week period from July 27th to August 20th. If your lender validates a day early, the data will not transfer.

If your lender forgets about it, until the day after the data transfer period ends, it's too late. It's okay if your lender validates the assessment tool multiple times during that period. Every instance of validation however will create a unique assessment ID and the data will transfer over as separate multiple versions of the CNA. You wouldn't want to end up with hundreds of versions of the same CNA in version 3.0, so please validate judiciously.

If your lender has already submitted the CNA created from the assessment tool file or has it saved as draft, you don't have to worry about it. Any of the CNAs in the recorded status discussed in the video, will be transferred automatically. But, if you have updates or changes that you made in the assessment tool since then, you should make sure to transfer that updated assessment tool file data.

So make sure to email those work in progress assessment tool files to your lenders in time for them to validate the files, within the four-week window. Now, if you have a library of template assessment tools, with standard data in them, make sure you transfer those also. For those, make sure you get your M-ID before the transfer period begins and log in to the submission portal yourself to validate them.

Your lender shouldn't be validating those. Remember that you won’t be able to send these CNAs to any lender to submit and you won’t be able to submit them to HUD, unless the CNA eTool or the CNA is of a certain type. But you will have them in your new version 3.0 CNA eTool, to copy the data from, as part of your firm's library. This ends the instructional section of the webinar. During the rest of the session, we'll discuss resources that will help you in gaining access and converting data to version 3.0 of the CNA eTool.

FHA lenders may receive assistance on issues relating to user access through the FHA connection helpdesk. The email for the helpdesk is sfadmin@hub.gov. That’s S as in Sam, F as in Frank, admin@hud.gov. However, please note that if a lender's M-ID is terminated, it must be reactivated by the organization's coordinator. FHA connection support cannot do this.

Secure systems support. Helpdesk support is available to users other than lenders who have issues with secure systems. This support is provided by the Public and Indian Housing or PIH Real Estate Assessment Center, also known as REAC Technical Assistance Center or REAC Tac.

The helpdesk is available by phone, at 1-888-245-4860, from Monday through Friday, 7:00 a.m. to 8:30 p.m. Eastern. The REAC TAC website URL is shown on this slide, also in the chat box. This slide shows the place where you can ask additional questions that come up after you've left this webinar and for some time to come. The Ask A Question or AAQ virtual helpdesk, is accessible through the CNA eTool page, on HUDs website or directly through the HUD

Exchange. You can go to hudexchange.info, then to program support, where you can access Ask A Question.

Don't forget that after you confirm who you are on step one, on step two, when the system asks you what your question is about, be sure to choose CNA eTool. When version 3.0 of the CNA eTool launches, there will be resources available on the CNA eTool page, on the hud.gov website. Some of these resources are available right now.

There will be a new CNA eTool user guide that walks the reader through how to navigate through the input screens and other important issues, regarding the tool's functionality. A user access guide, which includes a lot of the information described in this webinar, is currently available.

The web based training modules that were developed and posted to the HUD exchange when the Legacy tool was introduced have been updated to reflect how version 3.0 works. These modules will be accessible on or near the launch date. And, please don't forget to sign up for the upcoming webinar on user basics for version 3.0.

Thank you for attending the webinar. Please sign up if you haven't already for the second webinar, user basics and if there's nothing else, we can end the webinar. Again thank you for attending and have a great day.

(END)