

## **Housing Counseling Migration to the HUD Exchange February 8, 2016**

Shawna LaRue Moraille: Okay. Welcome, everyone, to HUD's Office of Housing Counseling "Migration to the HUD Exchange." This is Shawna LaRue Moraille from ICF. I am pleased to welcome Jerry Mayer and Sarah Gerecke to provide a welcome. Jerry?

Jerry Mayer: Well, thank you, Shawna. Good afternoon and welcome to today's webinar on our new HUD Exchange webpage. There are almost 400 participants registered for today's webinar so we know that you all are very interested in this topic.

Today's webinar will help you learn about the new features and service improvements you can expect on our new HUD Exchange website. And this webpage will eventually replace our current HUD.gov website that you're all familiar with.

But before we begin our presentation I'd like to hand the mic over to Sarah Gerecke, deputy assistant secretary of the HUD Office of Housing Counseling. Take it away, Sarah.

Sarah Gerecke: Will do, Jerry. Thank you. And welcome everyone; good morning and good afternoon. Very excited about the work we've done to create a user friendly and really robust set of resources for you in the course of changing our homepage to be part of HUD Exchange. I think you'll find today that the HUD Exchange platform will offer you a format and content that are easier for you to navigate and find information.

More and more of our fellow HUD program offices are using HUD Exchange as a one-stop shop for stakeholders to find program updates and training and this way you'll have access to all of the training offered by every HUD program. It is an easy and efficient way for you to learn not only about updates from the Office of Housing Counseling but also the latest about other HUD programs and training opportunities that are available throughout HUD.

I was very pleased to use HUD Exchange recently to find a list of fundraising resources uniquely tailored for rural organizations. And that's the sort of thing that you can expect to find once you take this trip through HUD Exchange today.

For us, the project really reinforces a number of values we have. It helps us be more transparent, so it's easier for you to find information you need. It reinforces our partnership with other HUD offices and also with you. It speaks to our commitment to continually improve our services and programs, and it advances our collective mission to help get services to benefit consumers as they face housing challenges.

Before I turn it back I just want to give a special thank you to Jerry Mayer and to our team lead, Robin Penick who has worked very hard to make this happen. But also a shout out to our wonderful collaborative partners at ICF, Shawna LaRue Moraille, and Vicky Liu.

And so with that, let me turn it back over to Shawna. Thank you.

Shawna LaRue Moraille: Thank you, Sarah. I really appreciate all of the remarks. We are so excited to show you everything that we've built for you today. I will go ahead and present a couple of slides here and walk you through a few key components and what you need to know about the HUD Exchange, and then start the demonstration of the website.

But first I want to make sure that you know that we are supported by the fabulous Chantel Key. Chantal, you want to go over questions?

Chantel Key: Sure. Thanks, Shawna. So at any time during the webinar today please type your question in the question text box. That text box can be found in your go-to webinar toolbar. We will read your questions out loud after each section and we will answer your questions at that time.

Shawna LaRue Moraille: Okay. Great. And I would say that we're going to -- if there's any sort of common questions that we're receiving, those are the types of things that we'll read out loud. Hopefully we can answer some of them over the chat.

So the first thing that we want to do is take a poll question. We want to know what type of organization you represent. So are you: A, a local housing counseling agency; are you B, an oversight agency which would include a HUD-approved intermediary, a state housing finance agency, or a multi-state organization; are you a federal agency -- I know we have other folks from HUD on the call, which is great -- but it might be [inaudible] and others; and then finally, are you someone who just loves web pages and can't get enough demonstrations?

Chantel Key: And the polls are now open. I know we've had a number of people submit their answer in the question text box. If you all will just respond to the poll so we can formalize your answer. That would be appreciated. Thank you.

Shawna LaRue Moraille: Good. And we'll just give it a couple minutes.

Chantel Key: We have about 90 percent of the viewers have voted so far.

Shawna LaRue Moraille: Perfect. Let's hear the results, Chantel.

Chantel Key: Okay. And right now I'm sharing the results with everyone. We have 76 percent voted at local housing counseling agencies; 22 percent voted oversight agency; 1 percent voted federal agency; and 2 percent voted someone who loves web pages and cannot get enough demonstration.

Shawna LaRue Moraille: Okay. That's fantastic. Okay. Great. So most of you are locals and 22 percent of you are oversight agencies, which is a great audience. And I really want to know who chose D as someone who loves web pages and can't get enough demonstrations.

Okay. So today's agenda is as follows. I'm going to walk through the background and the purpose of the HUD Exchange. There have been many of the folks I've been working with over the years that have wanted to know a little bit more about why the HUD Exchange was built and also the overall purpose of it. So I will talk about that.

I will also go into a little bit more detail about what's a user account on the HUD Exchange; why you might choose to have a user account. I will also go through the HUD Exchange -- like how it's organized, just the general architecture. But the majority of the presentation today is on the housing counseling program site pages, including how to find resources, how to find [inaudible] and events, searchable FAQs, searchable resources, all of those things.

So a little bit of background on the HUD Exchange. It was launched in late 2012 and it was formerly called the OneCPD resource exchange. Some of you might be working in the community planning and development -- which is CPD programs. Maybe you've known about the HUD Exchange. We worked with several years with that part of HUD to build -- as Sarah and Jerry said -- a robust, really user-focused platform where people can find events, take trainings, find resources more easily. And also that kind of cross connection between the office that you work with -- housing counseling -- but also being able to find a grantee, for example, who might have HOME funds, or CDBG funds, or something else that you might be working with. So it really is meant to be a one-stop shop.

[inaudible] HUD's customers we're really talking about those that participate in HUD's programs. So we are talking mostly about grantees in your case, or those that participate in the program. It's less about your clients or the general public. That's what the HUD.gov pages will remain. It's a place where you can make sure that knowledge is being managed. You will find that there's the searchable FAQs. It's a common platform where everyone can find these FAQs more easily.

There's enhanced data collection. We have a lot of resources on the HUD Exchange that are available to you. Maybe you're looking for something outside of housing counseling where you simply want an inspection form or something like that that might be used by some of your counseling and homebuyer programs; it's there for you. And it's meant to build your own skills, your own expertise, and definitely reduce your time and increase your productivity just simply trying to find a resource or to get answers to a question. And then the HUD Exchange was designed and delivered by ICF.

Sarah mentioned that a number of offices currently use the HUD Exchange. We thought we'd provide these to you before I start the demonstration. Community planning and development -- that is the part of HUD -- like the HOME program, the community development [inaudible] program and other programs that you might be working with as housing counseling agencies. We also have a presence from Fair Housing and Equal Opportunity. I will show you the [inaudible] fair housing resources that are available to you on the HUD Exchange. Obviously your office that you work with day to day -- housing counseling. The housing office. There is the multi-family programs have a presence on the HUD Exchange. So those that have project based, section 8, things like that in affordable rental housing. Public and Indian housing -- so public housing agencies -- they've also just gotten onto the HUD Exchange, you will see those as we go through.

And the goal here is -- just like these other offices that you see on this page -- is that there will be an abbreviated presence on HUD.gov where you will see many redirects to the HUD Exchange -- and if we have time I'll show you what that would look like -- that Jerry and Robin and I will be working on to make sure that anyone who's going to the HUD.gov pages there are redirects there. In case it is your favorite page that you've bookmarked, it will help those bookmarks go to the HUD Exchange in the future. I just want to make sure that you know that your bookmarks are safe; they will be redirected.

And then, finally, the e-mail that folks receive from Jerry that's super helpful that comes out a couple times a week; that will still be maintained on HUD.gov -- that's the mailing list. And then also housing.counseling@HUD.gov that e-mail box will also remain on the HUD.gov pages.

So I wanted to cover quickly -- there is a piece that I will demonstrate called a user account. And a user account is what you can use whether or not you want to register for HUD training. You can access housing counseling webinars and online training and you can -- it's user focused so there's a learner transcript that you can take a look at to see, "Oh, did I have to stop what I was doing in the middle of an online training and then go back to where I was so that I can complete a training;" that's there for you.

In terms of the housing counseling webinars you can get credit for prior webinars. There are a bunch of housing counseling webinars that you'll be able to view, enroll, and get credit for that training that will become part of your learner transcript.

It is not necessary for you to have a user account if you want to do basic navigation of the housing counseling HUD Exchange pages. So to find a resource you don't have to have a user account, but I think you'll find that having a user account will help you register for future trainings and get credit for older ones, that type of thing.

So I'm going to break here. I wanted to provide the website addresses so you could also add these to your bookmarks here. The HUDexchange.info and then also the specific programming for housing counseling is also provided here.

So we will go into the demonstration today. So in terms of the general architecture of the HUD Exchange -- again, it's almost HUD wide. This front page, there's usually a different picture that's focused here. Today it's really focused on homeless programs -- here in the front. Some of the bigger trainings -- or in this case the middle section here, the national disaster resilience competition that was just announced, grant-based accounting, [inaudible] and fair housing, these rotate depending on what the most popular aspect of all HUD resources would be. So that's there for you.

Some of you are really good about wanting to know the best place to refer a lot of your clients that you counsel to find homeless assistance, find veterans' assistance, all of these types of things that are provided here on the front page it's right there for you.

Across the top here this is the HOME program manage a program is what we're going to go into next. There's a news feature. There's training and events. Get assistance -- which really isn't used by housing counseling; it's where some HUD programs -- people are to ask their technical questions here. And about grantees -- I'll show you a couple of things related to that. It's not all grantees, just some of the grantees so far.

So let's go ahead and get into manage a program. This is the main place that you would go where you would want to find resources by type of program. There's also plans -- you'll see the consolidated plan is listed here. There's also other cross HUD requirements such as environmental review and things like that. But housing counseling is down here; you'll see the housing counseling program page.

So I'm going to spend the majority of the demonstration on this page just to make sure you know what is here so that you can walk through this yourself. So we have here at the top -- obviously this is housing counseling and it's for you. A little bit on how to learn more about the housing counseling program. Sometimes when people want to address realtors or new lender partners and things like that, sometimes there's language here that can be borrowed to talk about what is housing counseling.

You guys are the only ones that have an embedded video that talks about how housing counseling works on your page here, which is exciting to see that. Some of you might be looking for -- you're the housing counseling agency, but you might be interested in how to find other housing counseling agencies in your network. I'm going to go ahead and click on this. Most of the resources are on the HUD Exchange but in some cases right now there are redirects here to the HUD.gov pages.

So this is a pretty important page for some people trying to find how to find housing counseling agency in their jurisdiction or maybe another neighboring jurisdiction and then obviously you can search by those that do housing counseling as well.

There's also the locator app here that's also featured. Some people like to pull up that app and put it on their phone. You can also search by zip code, which is another HUD.gov page. Some people -- this is a place where if you want to provide feedback or you might encourage someone to provide feedback on housing counseling, that is there for you as well.

Probably the main place where most of you are going to go to get your resources is underneath the housing counseling program. So I'm going to go ahead and click on that and show you what's there. This contains the basic information related to all HUD housing counseling agencies. So the first one here is how to become HUD approved. There's a short page here on that HUD approval process that's there for you.

The certification information is also provided here -- it's the next link -- that provides the actual regulation, the comment period, as well as the proposed rule and some FAQs related to the certification.

The two main forms for your program -- the application form, the 9900; and then the 9902, housing counseling activity report. There's almost always a landing page here that is on the HUD Exchange and then if you click on each of these it actually goes to the HUD Exchange resource that you would see. So this is the 9902.

The final rule for your programs -- this is 24 CFR Part 214. Frequently asked questions is here; I'm going to show you that from the main page, so I'm not going to click on that right now. I will also show you this intermediary into the HFA page. The handbook is also provided here; it's a quick, easy way for you to find the handbook. Capacity building toolkits is also here so that each of these resources, each of these capacity-building toolkits are right here for you. This one is best practices for expanding housing counseling services; all of these are now on the HUD Exchange.

And soon we'll be adding a couple for oversight agencies -- I know some of you have been waiting on those. We'll be adding those and you'll definitely get Jerry's e-mail that says that those are available to you.

Housing counseling advisory committee, national industry standards, HECM mortgage counseling -- I'm going to cover a couple of these on the other page. But I just wanted to let you know that the ones that are the most important resources for your program are listed here a click away from the main page.

There is a separate standalone page for those of you that are the oversight agencies -- so how to prove intermediaries, the HFAs are listed here. This includes the list -- and it will be periodically be updated -- of those that are HUD-approved intermediaries. So if you're looking to join, you might be a local on this call or you're looking to join an intermediary or find out a potential partner in your area. Multi-state organizations are listed here and then all the participating state housing finance agencies are also provided here.

Some of you attended a meeting that was held in August 2015 so all the materials are provided here. And other resources that are added for HUD-approved intermediaries and state HFAs will also be added to this page over time.

Okay. Those of you doing HECM counseling -- or Home Equity Conversion Mortgage counseling -- this is an example of a page that we set up where we grouped what you needed to know underneath resources, for example, that talks about the HECM program in general, who's providing HECM counseling. This does go back to the HUD pages in a couple ways. Any program changes, guidance that's provided, all that type of thing. There are HUD intermediaries providing HECM counseling; those are also listed here for you. The eligibility requirements if you're under the HECM counseling, all of these things you'll see. It's a pretty flat setup here to find the most useful information about HECM counseling.

So if you're interested in the [inaudible] program, making home affordable, disaster recovery assistance, [inaudible] lending; those are other related topics we separated just so you knew that they were related but they weren't exactly the housing counseling program.

There is a webinar archive. This is where I mentioned that we would have all of the archives that have been presented for housing counseling over the last -- this goes back to 2013 but it's the most recent ones that you need to know. Some older ones on the [inaudible] have been removed. We put them in the most recent date order here, so if your colleague, for example, missed today's webinar demonstration, next week it will have February 8 and we will have all the webinar resources for you.

This one, for example, on submitting a budget that was held earlier in January -- you can see the slides, this transcript, and then the attachments that were provided. This is what we've done for every single course. And I'll come back to this button here once I go into user management but if you want to get credit for this training this is the button that you would follow, and we'll demonstrate that in a couple of minutes.

So you'll see these go all the way back to 2013. So if there's something that you're looking for these are the most relevant, the most up-to-date. We did not include older webinars that there might have been some changes based upon the content.

The training and events calendar. If you go into the training and events calendar directly from the housing counseling page it is going to pre-populate where it says program and then housing counseling. But you could also go into another program if you're looking for any type of webinar, in-person training, basically the majority of what goes out in Jerry's e-mail every week, that will pre-populate this listing of what's on the training calendar. So it might be that you'd rather just search here to find the type of training you want. You can search by type -- webinars, in person -- you can even do the date range here for what you're looking for. But that's if you go directly from housing counseling to that page.

And we also have this training partners page. This might be helpful for many of you that while we are going to have many courses in training and events for you, you also probably want to -- this is the direct link to Neighborworks training that's happening, NCRC, and also National Council of La Raza, the top three are HUD's funded agencies currently underneath the housing counseling training NOFA. And then there's a few others listed here related to some HFA counseling, financial literacy, some HUD webcasts, single family, things like that that we thought were the most salient in terms of training that you might be looking for.

At the bottom here are news and announcements. So this is what happens each time we get Jerry's e-mail it pre-populates on here so that you know these are the news that are coming out. Again, you're still going to get it in your e-mail, but what if you can't remember the date that Jerry sent it -- you can search your e-mail but you can also search here as well. This is only going to provide the last six latest news, but you can also click on view all housing counseling program news. And you will see everything starting at the top from 2016 all the way to the last part of 2015. We were able to get 2016 on here. But if you want to go back even to 2007 we have the mailing list archived -- this is amazing -- for you to go back and search to try to find -- you can search this page so you can find maybe something came out of the 9902 that you want to find that particular news item. But this goes all the way back -- I'm trying not to do this too quickly, I know sometimes it makes folks a little sick when you demonstrate -- all the way back to 2007.

Okay. Great. So those were the news items. So let me walk you through the rest of the page, and I have a few other things to focus on for you. In the upper right-hand corner, maybe you have a colleague who is not getting -- or you're not getting -- the mailing list from Jerry, this is the information to tell you how to subscribe. If you're a counselor and you need technical support, here's, of course, the [housing.counseling@HUD.gov](mailto:housing.counseling@HUD.gov). And then information on whether or not you want to bulk subscribe people; maybe you're a new organization and you want to bulk subscribe everyone in your organization. You can also unsubscribe yourself as well. And then this also gives the same link that I just showed you on the mailing list archive.

This is a very popular question, I guess, that folks get at HUD is how to subscribe to the Bridge newsletter, which is a great resource if you haven't checked it out, in terms of the latest information about -- they pick different topics each month. So one for veterans more recently, disabilities, there's also a fantastic one that was done on fair housing and really furthering fair housing activities.

So each month there's a different topic that's covered. So this includes, again, if you want to find quick, "What is that Bridge newsletter article that I thought I read?" You can search and try to find that here and then you can also search really quickly to go straight to 2013, for example, on the page. So that's the Bridge how to subscribe but also how to obtain prior versions of the Bridge.

So those of you that want to look at the housing counseling certification housing counselor's page that gets you ready for the certification once that hits the streets this is the [HUDhousingcounselors.com](http://HUDhousingcounselors.com) website, so we wanted to make sure that was front and center here on this page.

I'm not going to click on this, but this is the same page I showed you before about the certification requirements proposed rule. So one thing to keep in mind is that I've mentioned at least twice that there was a couple ways to get to the same information. The reason for this is that people like to find information in different ways and we want to make sure that nothing is lost. That you -- as the user -- don't have to remember or bookmark 20, 30 different web pages on HUD.gov. Everything is here for you in a pretty flat platform.

Same thing we mentioned before about the link to the regulations; this goes directly to the government printing office. The handbook, we mentioned that's on the HUD Exchange. You click on this, you go to the HUD Exchange. What we haven't talked about are the frequently asked questions. So let's go into the frequently asked questions.

I want to make sure that folks understand these are what was on HUD.gov there was a series of PDFs provided that were the frequently asked questions. Those PDFs then were combined into this searchable database. So if you're looking for all of the housing counseling FAQs related to the 9902, for example, then that would pull up here. Ineligible participants, if you're looking at qualifying to be a HUD-approved housing counseling agency, that will also pull up just by some keyword searches. Or fees -- if you're looking for fees related to housing counseling; what are the ins and outs of those fees?



Oh, I also see they have separate FAQs for HECM as well here. You can search at the top here for fees. We also put together these four big buckets of various FAQs. So let's say you're looking for financial management -- this is the one that's available today. We will be adding some additional ones here, but reimbursements are listed here. HECM counseling -- if you click on this all the HECM counseling FAQs will appear related to either fees or HECM counseling requirements. Program requirements we separated into conflict of interest, things like that. Again, there are fees here, housing counseling agency approval -- there's a bunch on that -- reporting and record keeping. So we also wanted to make sure that we were capturing everything you needed to know about reporting and record keeping.

So this is something that will build over time. What is not here are the housing counseling certification proposed rule FAQs. Those are about the proposed rule -- which there will be a final rule in the future, so we did not put it in the searchable database. You will also see that the NOFA FAQs are also not here because those also will go away over time because they're related to that year's NOFA.

So let's go ahead and go back to the housing counseling page -- one more thing. You can also export any of the FAQs into an Excel workbook in case you want to search for what you're looking for there. Some people find that helpful. Some people have used an export of their FAQs also for their own policies and procedures.

So let me go back to housing counseling. And I think because there's almost 400 of you this is running a little slow so hopefully it's not coming through too bad. Everything you want to know about the NOFA process is underneath grant information and awards. So if we go grant information you will see -- similar to what I showed you with the HECM pages what we did was we provided a pretty flat place where you can go through and look -- okay for 2016, obviously there's the general section that's open. What if you're looking for information related to 2014 and 2015? So you'll see the NOFA requirements, you will see information if it was a housing counseling training grant, and then you'll see, obviously, the federal register notice but then we also put the FAQs up here in its own section so you could also find those related to, in this case, 2014 and 2015.

Some general information -- if you're like, "I can't find my page where I've put in the system for awards management." Or, "I don't remember if I got an award last year, or if I don't know if my agency --" we have housing counseling grant awards all the way back to 2000. So if you want to go back and look at those, these are the press releases associated with each year in which housing counseling funds were awarded. That was the general page. The Dun & Bradstreet, LOCKS, eLOCKS, all of these things hopefully will be helpful for you to find something pretty easy related to the NOFA.

If you're looking for older information or you like to time travel, we have the 2013 NOFA. It's available here in a pretty flat format, and then also on 2012 as well where you've got some information about the NOFA, the awards, that type of thing.

And as newer NOFAs are published we'll make sure that the prior years we just build upon this page so you have 2014-2015 which will come next.

So that's the housing counseling grant information page. I provided you with the grant awards already on a prior page but you can also get to the grant awards from here.

Systems and reporting; let's go on to that next. Systems and reporting. So there is a page that provides an overview of the housing counseling system, or HCS. You also can directly log in to housing counseling here as well.

So housing counseling -- the overview page -- let's go to that. Very similar to what you saw for the NOFA pages as well, where it talks a little bit about what's HCS, technical support available to you. To try to find that help desk number -- again, you don't have to try to find that on the HUD pages, it's right here for you. And then information related to resources for the housing counseling system. So that's HCS.

The client management system; this also provides you with information on the housing counseling system. If you have technical assistance that you're needing related to CMS; these are the requirements for the 9902 as well as any information you might need about CMS. Information about the forms, the 9902 desk guide. There's also a fantastic webinar if you haven't taken it that happened in September that provided a lot of tips related to the 9902. In that particular webinar material it goes right into the PowerPoint, so if you want to go ahead and take a look at that. So that's CMS; I wanted to make sure that you saw that.

Okay. Further down on the page there is a 9902 results pages that has these national reports on the 9902 by quarter.

The latest research and studies -- this is also a really exciting part of the HUD Exchange for housing counseling is that they're a series of the most recent program studies research that was conducted; that type of thing. So housing counseling work, sustainable ownership, for example. You might remember that this was on the HUD.gov pages; it talked about how housing counseling is effective in terms of post-purchase and pre-purchase counseling. And it relates to a lot of studies.

One thing we did was we actually provided the PDFs in this version of the PDF so that you go directly to the website for each of these studies; it's something we added into this PDF. This is something we can easily do on the HUD Exchange to make sure that you can quickly find the information as quickly as possible. Okay. So that was housing counseling work sustainable home ownership.

The state of the nation's housing is the joint center's page related to this past year's state of the nation's housing, which goes into the latest trends in terms of home ownership rates, rental rates, underserved populations. There was also a webinar done on this in the fall by Chris Herbert, who's the chair there.

The national foreclosure mitigation counseling -- NFMC -- this program evaluation is housed on the Neighborworks' page. We provided a direct link here.

HUD data sets. This goes into HUD data sets related to income limits and things like that if you click on that link.

There is a page here at the bottom that talks about the housing counseling federal advisory committee, about applying for membership and things like that. This is a page that will be growing over time related to what is going on with that particular committee. So more, soon, on that.

That's generally what the page looks like; I wanted to make sure that you saw that. If you wanted to go ahead and set up a user account -- and I mentioned a user account would be to get credit for any type of housing counseling, training, and events -- you would click on, "Log in to my HUD Exchange." This is already pre-populated because I already have a user account name; this is my college nickname. If you want to create an account you would click on this, so let me show you that real fast because I have this set up on the stage site for you.

So if you click on the set up a user account this is a one-page setup to create a user account. I pre-populated this just so we wouldn't spend too much time here and have information here -- obviously fake information. I actually live in Columbus, Ohio and not Washington, D.C. You have to have the state name populated here. For that you would obviously create a login and password.

But you need the state information because what we've done is -- I'm going to click on HUD grantee -- and what we've done is pre-populated all of the housing counseling agencies here, based upon a run from HCS that provides the organizations that are already participating in the housing counseling program. So it's really important that you choose the correct organization type here. So most of you are going to be HUD grantee -- it sounds like a couple of you might actually be HUD, and you would click on there to create an account.

But going back to my page -- when I mentioned here -- I just want to show you just for a second. You're going to see some things that -- because I work on the HUD Exchange in many different capacities -- that won't apply to you. Once you have a HUD user account set up then you could go in here and check out your own learner transcript; the HUD Exchange learn.

So each piece of the HUD Exchange is done by user and each of the users -- I'm sorry; somebody's calling on the other line so I'm cutting out. Each of the users have an ability to look at what training courses are coming up for myself. I could also search -- as I did -- the course catalog. You could search here for housing counseling and find out the latest ones that are housing counseling.

So let me just pick one here. Perhaps you want to go through this LHCA is best practices, lessons learned from those LHCAs.

So if you searched and you found this -- you clicked on it -- you have to go ahead and enroll here on the upper right-hand side. This tells you how to log in and things like that, but you'll also get an e-mail as well. If you log in and you enroll in the course and then you would go in and follow the directions as to how to take the course. If there are webinars it's on the honor system, but you might find an online training. Jerry's been featuring financial management that's been available across HUD; it covers all the HUD programs. That financial training -- here you would say this is not a webinar, it would say, "Take the module." And you would go ahead and take the module. But no matter what after you enroll you want to mark as complete to make sure that you mark as complete so that becomes a part of your learning transcript.

So that way once you have a user account you can check out what the classes are that you have enrolled in, what have you completed -- the difference between enrolled is that maybe you haven't finished it yet; you started the financial management training and you're not finished. And then those that you've completed you could also click on those.

So having courses here at your fingertips HUD is also able to also run reports to find out how many people attended various trainings. It's all, again, a one-stop shop. You probably are doing maybe a few other things related to the work for your organization -- maybe you have other HUD programs that you're working on.

Okay. Great. So I'm going to go back to the HUD Exchange. I was showing you on the stage site, but I'm going to go back to the normal page here. Or I'm going to attempt to. So that was a little bit about user account that I wanted to show you -- so now it recognizes you at the top.

One thing that's different that I just wanted to make sure that you know of -- this e-mail updates in the upper right hand corner, the e-mail updates would be if you wanted to get the HUD Exchange e-mail updates. This is not the same thing as what we showed you for the housing counseling updates; that still comes through the mailing list that we talked about before. But you could click on that and you can choose -- maybe you're interested in [inaudible] fair housing or some other type of programs, you can click on there and say, "I want e-mail updates on a variety of different mailing lists that have gone out."

Okay. So I wanted to make sure that you knew that. Contact us is about the HUD Exchange, any feedback about the HUD Exchange, etc.

So I showed you manage a program -- this is why I'm on this page. We're going to spend just a couple minutes here. So outside of housing counseling if you want the latest on [inaudible] fair housing and you want to click on this page where you can get the latest information about the final rule information. There is resources on the most recent tool that was unveiled at the end of December in case you missed it. This tool is just for localities, entitlements; it's not for state programs yet, that's coming soon. There's a guide book, things like that that you can go into if you would like to know more about [inaudible] fair housing. Lots of training and things like that that's available.

Other things in manage a program that you might also find helpful -- obviously some of the other CPD programs like HOME and CDBG have their own pages. But also the consolidated plan. So

some of you that are working with your local jurisdictions or your state may not know that there's a whole section on the consolidated plan. You guys don't care as much about what is it, how it's put together, perhaps.

But what I wanted to feature here is there are available -- this is through the program that they use, this system called the integrated dispersment information system -- IDIS. You could go ahead and search for a specific grantee's consolidated plan. Maybe you want to see if there's a funding that's available for housing counseling. This is a great place where if you want to search -- I'm based in Ohio. If you want to search to find out those that have consolidated plans and action plans, etc. So you want to go ahead and do that. So for the state of Ohio, for example, you could check to see the state plan, etc. The action plan, updates, how they're going to spend their money each and every year. But it might be helpful to find that for your jurisdiction. If they're in IDIS then we have them; if they're not in IDIS then we don't have them. But as action plans and com plans are getting updated in IDIS we get a refresh.

The financial management system -- I mentioned that a couple times -- that this has been something that's on Jerry's website for a number of months. If you want to go through -- it's not specific to housing counseling but there's great information related to financial management that you want to take a look at, it's there for you. So that's financial management.

If you're interested in just a little bit on the homeless programs, things like that, it's there. We have a little bit about voucher programs, have some resources as well. So rural -- I want to click on this for a second because it's something that Sarah mentioned where this is all things rural. It's meant to be a one-stop shop. It's like a mini-communities of practice where you can find out information about things related to rural programs.

So there's peer learning that's available that you can sign up for a mailing list. There are case studies. Information about the SHOP program is here, things like that. There's also been a number of announcements related to USDA, SHOP, the rural gateway, there was a peer conference call, things like that. So if that's something that you're interested in there's information there.

There's a bunch of other -- again, this is going to point you back to some places at HUD, but if you're interested in other areas of the rural programs those are provided there as well. We're going to do more and more of these communities of practice; that's just an example of one that was put together for the rural folks.

So that's manage a program. If you want to go into kind of broad news you can do the same thing that we talked about here. It's not pre-populated with housing counseling but you can choose topics that you want to cover. You can also choose by program, so you can come in here and put in housing counseling and it will pull up the latest news items related to housing counseling so you can get the news there, things like that.

Training and events. This is where I said on the landing page for housing counseling by program, and then also by housing counseling. It was pre-populated but you can also search here to find out the latest training and events as well.

So they also give you view your learner transcript over here -- same thing if you had a user account that I just talked about.

The get assistance page I mentioned is not really used for housing counseling but it is a place where you can get the same links that you can from the landing page.

About grantees there is a way -- so let's say that you want to find an organization that is working for the local continuum of care, perhaps, or if you're looking for an entitlement of a grantee in a jurisdiction. I'm from Fort Wayne, Indiana. So if I want to look up the organizations that are working in Fort Wayne, Indiana -- again, this is not all organizations, but it's some organizations -- then you can search by program at the top if you want, or it can provide all the ones for Fort Wayne, for example. And again [inaudible] there you can find that information here about who's actually working in the community planning and development department -- my friend Heather. And it's also great to -- this is an e-mail address; some of these we have web addresses for, individual entitlements and things like that for a jurisdiction.

So in case this is helpful to you we thought we'd show you quickly about grantees. This page is also one of those that will be enhanced or developed over time.

Okay. Let me show you this search feature. You might notice any page we go to on the HUD Exchange you will always have this search. So let's say I am looking for the 9900s, you don't have [inaudible] in to the manage-a-program and then housing counseling. You can go ahead and pull up the 9900 just from the search criteria that you put in.

This is a simple search over here if you're just putting it up in the upper right hand corner. But you can see that some of these are put together by program. So you'll see you can find the housing counseling program you're like, maybe I didn't remember the form name but I'm going to look in housing counseling. You can click on that. It narrows the results. You can also narrow the results at the bottom here by reports, FAQs, resources. Let's see if they have FAQs related to the 9900. Wow, look at all the FAQs that are here. So if you're not sure what you're looking for - or I'm not sure because I use the search all the time. I don't know if I want the FAQs, I don't know if I want [inaudible]. But that way you can kind of collapse the results into what you're actually looking for, and it provides that for you.

Okay. Great. So you can clear all and go back. I wasn't looking for a FAQ, I was actually looking for -- maybe there's guides in trainings that have been done, for example. Okay; this is not the right one for that one. But you definitely can find the form, you can find the FAQs, you can find various things that have been put together. And this will populate over time as well. There's a few other trainings that we're going to add related to the 9900 and the 9902.

Okay. So with about five minutes left. I don't know -- Robin, Sarah, Jerry, if you guys want to make any brief closing remarks here. Is there anything in the questions, Chantel, that you think is a salient point that we want to mention here in the last few minutes?

Chantel Key: Well, we received a number of questions from our participants asking if the slides are going to be available and if the e-mail links can be provided to everyone.

Shawna LaRue Moraille: The slides will be available. What we've done for the past webinars that we've provided is that we will definitely make sure that Jerry has a link on his e-mail that goes out. And then also when I mentioned on the training and events I mentioned that you probably saw that there was the February 8 demonstration; you will be able to go into there and get the slides and information, as well. So there are two ways to get it.

Chantel Key: And there's about 10 questions in the question pool right now; how did you want to handle those?

Shawna LaRue Moraille: Well, give us a flavor as to what's actually there.

Chantel Key: Okay. Someone wanted you to just go over briefly, will the HUD.gov website no longer be available and the HUD Exchange be the replacement?

Shawna LaRue Moraille: Okay. So that's -- real quick, just to make sure folks understand -- there will always be HUD.gov pages. Those pages are going to be abbreviated and there will be redirects to the HUD Exchange. The HUD.gov pages are used for not just you guys but also for clients, the public, etc. So there's always going to be a presence on HUD.gov.

Chantel Key: Okay. The next one is how do we update the information for our agency on a page? Our agency is listed but the address and other information has changed.

Shawna LaRue Moraille: Okay. So that's easy. You can actually update your address and information by simply going in to your user accounts and updating it. So the first page under my account I can update -- it has the personal information, you just update it right here. If for some reason you're having difficulty with that you can always e-mail us in the contact us in the upper right hand corner if you're having difficulty.

Jerry Mayer: Could I just jump in and add to that?

Shawna LaRue Moraille: Sure.

Jerry Mayer: If you're referring to your listing that's reflected on the HUD.gov part of the housing counselor website you can change your information in the HCS system as well to what Shawna described for your user information on HUD Exchange. But for your agency information that the public will see if you go into HCS and revise your profile it will pop up on the webpage shortly thereafter.

Shawna LaRue Moraille: Thank you for saying that. That is what populates this page that is underneath find a counselor. And this is all -- there's a reason why this is on HUD.gov; it pulls directly from HCS. Thank you, Jerry.

Jerry Mayer: You're welcome.

Shawna LaRue Moraille: And you might just want to check both, just to dot your Is and cross your Ts.

Chantel Key: Okay. We have another question. They wanted to know if they can use some of the links to the resources, if they can put those links on their own website for the public to access, such as their research articles. Or do they need to go through another avenue to put the link on their website?

Shawna LaRue Moraille: That's a great idea. And no; they do not need to go -- as far as I know, no other avenue. That would be a great thing to provide people. So just use all of our links; no problem.

Chantel Key: Do we still utilize the HCS site for our 9902 verification?

Shawna LaRue Moraille: Yes. Jerry, do you want to add to that?

Jerry Mayer: I'm sorry. Please repeat the question.

Chantel Key: Do we still utilize the HCS site for our 9902 verification?

Jerry Mayer: Yes. You do normal business through HCS; that's not changed.

Chantel Key: If people are submitting their agency information to HCS each quarter their system information should be correct on this page; is that correct?

Jerry Mayer: Yes. But they should check their profile to make sure their contact information is correct.

Chantel Key: How do we get credit for this training?

Shawna LaRue Moraille: You can set up a user account first, as I showed you. And then you can go ahead and find the webinar, either through training and events or you could also go into the webinar archives. Because this will populate with the February 8 archive webinar that we're having today. And then there's a get credit button. And don't forget -- once you hit get credit you have to enroll first and then you have to say completed the course. There's a couple of steps in the process. Great question. Others?

Chantel Key: Where is the link to the HCS for 9902 reporting?

Shawna LaRue Moraille: The landing page for the HUD Exchange has an overview page of HCS and then also a log in. So the log in is what you can use to go into HCS.

Chantel Key: Someone also asked about mortgagee letters. Are they here or on HUD.gov?



Shawna LaRue Moraille: Okay. So on the housing counseling main page -- I just went into the resources for housing counseling. And I went into this is a link to mortgagee letters, but it does direct you to HUD.gov. Basically, the way to think about it is this is not managed by housing counseling it's managed by another part of HUD. So in this case it will just direct those mortgagee letters and you can -- in this case -- search by year and things like this. But it's important that it's on HUD.gov.

Chantel Key: Can paralegals of the organization of legal aid society create an account to have a running record of training and obtain resources within the organization?

Shawna LaRue Moraille: Anyone can have -- any one who is doing business with HUD can have a HUD Exchange user account. No problem.

Chantel Key: Will the access to HCO change?

Shawna LaRue Moraille: HCO?

Jerry Mayer: Oh. That is housing counselor online; it's one of the client management systems that are commonly used out in the industry. And the migration to HUD Exchange has no effect on HCO.

Shawna LaRue Moraille: Or any client management system.

Jerry Mayer: Exactly.

Shawna LaRue Moraille: Okay. Any other questions? If you didn't get your question answered, please go ahead and -- let me flash up the last slide so people can see this. So we do want some evaluations. This is the link that you should use, it just happens to be called surveymonkey.com. And then any questions that you have, please e-mail into housing.counseling@HUD.gov. Or if you happen to be working with a point of contact you can certainly ask your questions there.

Thank you so much for everyone attending. Jerry? Sarah? Robin? You want to say thanks?

Jerry Mayer: Well, thank you, everybody. We really appreciate you attending today. And Sarah, do you have any comments?

Sarah Gerecke: Yeah. I just want to say thank you, also. I hope you all got a lot out of it. We look forward to your feedback, and thanks again to everyone that worked to launch this website.

Shawna LaRue Moraille: Thanks, everyone. This will conclude the webinar. Have a great rest of your day.

(END)