



OFFICE OF  
HOUSING COUNSELING

# 9902 Data Displays Demonstration

Audio is available only by  
conference call.

Please call: **844-291-5491**

Participant Access Code: **3674169**

to join the conference call portion of the webinar

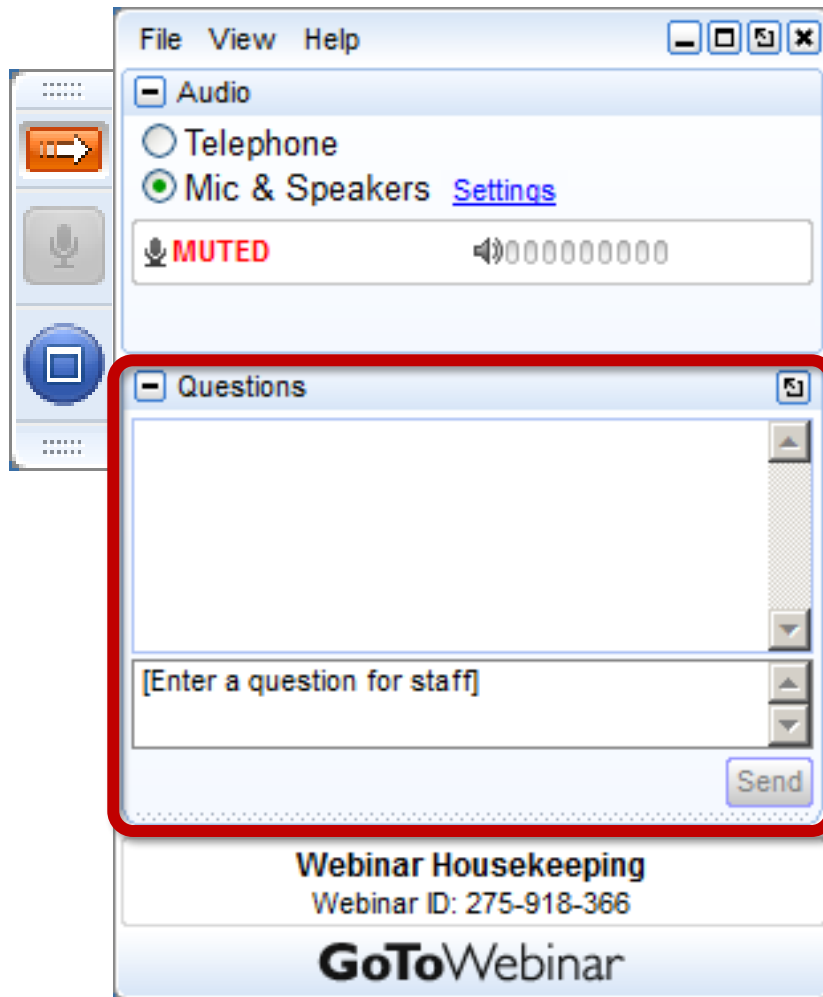
**July 14, 2020**

# Webinar Logistics



- Audio is being recorded. The playback number along with the PowerPoint and a transcript will be available on the HUD Exchange at [www.hudexchange.info/programs/housing-counseling/webinars/](http://www.hudexchange.info/programs/housing-counseling/webinars/)
- The webinar will be posted in 7-10 days.
- The Training Digest on HUD Exchange will be updated when the webinar is posted.
- Handouts were sent out prior to the webinar. They are also available in the Control Panel. Just click on document name to download.

# Other Ways to Ask Questions



- Please submit your text questions and comments using the Questions Panel. We will answer some of them during the webinar.
- You can also send questions and comments to *housing.counseling@hud.gov* with the webinar topic in the subject line.

# Please Mute Your Phones During Discussions



- There may be an open discussion period.
  - All the phones may be unmuted by the operator for the discussion.
  - If so, mute your phone during these discussions until you want to make a comment.

# Certificate of Training



- If you logged into the webinar, you will receive a Certificate of Training from GoToWebinar within 48 hours.
- Please print it out and save for your records.

# Get Credit!



- Webinar materials will be posted on the HUD Exchange in the Webinar Archive
  - <https://www.hudexchange.info/programs/housing-counseling/webinars/>
  - Find by date or by topic
- To obtain credit
  - select the webinar, and
  - click “Get Credit for this Training”

## Get Credit for this Training

If you have attended or completed this training, select the button below in order to get credit and add the course to your transcript.

Get Credit

# Housing Counseling Training Digest

<https://www.hudexchange.info/programs/housing-counseling/training-digest/>



## Housing Counseling Weekly Training Digest

This page is updated weekly to reflect trainings hosted by:

- HUD Office of Housing Counseling (OHC)
- OHC-funded training partners
- Other partners that host trainings of interest to housing counselors

Please email [housing.counseling@hud.gov](mailto:housing.counseling@hud.gov) to notify HUD about upcoming training and events for housing counselors.

Content current as of November 5, 2018

[Subscribe to the Housing Counseling Mailing List](#) to receive training updates in your inbox.

**View  
upcoming  
training  
hosted  
by OHC and  
other  
partners**



### Upcoming Training Calendar

View upcoming trainings for Housing Counseling and other HUD-funded programs.



### Webinar Archive

View past webinars hosted by the Office of Housing Counseling and access related materials.



### Online Training

Access self-paced online training modules, such as Introduction to Housing Counseling.



# Welcome

**Jerrold Mayer**

Director

The Office of Outreach and Capacity Building

Office of Housing Counseling (OHC)

U.S. Department of Housing and Urban Development



# Presenters and Q and A

- **Presenters** – Rachael Laurilliard and Dan Hegner, ICF
- **Q and A** – Melissa Noe, Virginia Holman, and Jane Charida, HUD

# Agenda

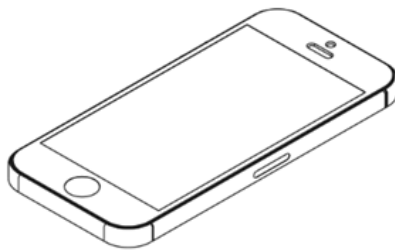


- HUD-9902 Reporting Background
  - HUD-9902 Form
  - Purpose of HUD-9902 Reporting
  - Purpose of 9902 Data Displays
- New 9902 Displays
- Resources

# Polling

- There will be polling provided in Mentimeter throughout this presentation. When prompted by the icon to the right, please respond to questions at [www.menti.com](http://www.menti.com) using your computer or smart phone.

Time for  
Mentimeter!



1

Grab your phone

[www.menti.com](http://www.menti.com)

2

Go to [www.menti.com](http://www.menti.com)



3

Enter the code and vote!

# HUD-9902 Reporting Background

Time for  
Mentimeter!



# HUD-9902 Form

- Cumulative fiscal year-to-date Housing Counseling Program data, due quarterly
  - Also required for non-participating agencies who wish to become HUD-approved (sections 8 and 9 only)
- 9902 data should be transmitted to HUD's Housing Counseling System (HCS) through an approved Client Management System (CMS)

# Purpose of HUD-9902 Reporting

- Demonstrate the program's impact to Congress and other industry stakeholders (e.g., lenders, foundations, etc.)
- Captures all the good work of HUD-approved housing counseling agencies
- Allows analysis of demographic characteristics, income levels, counseling types, and counseling outcomes

# Purpose of New 9902 Data Displays

The 9902 Data Displays are dynamic, interactive dashboards that display data from the HUD-9902 Housing Counseling Activity Report. The 9902 Data Displays:

- Share information about HUD's Housing Counseling Program impacts and services with housing counseling agencies and interested stakeholders
- Improve data accuracy of quarterly 9902 submissions
- Identify 9902 data trends
- Centralize 9902 guidance and data for agencies as part of the [9902 Online Toolkit](#)

# 9902 Data Displays Demo

Time for  
Mentimeter!





# Where Can You Find the HUD-9902 Toolkit?

- OHC's HUD Exchange Landing page!
- Under "Systems and Reporting" you will find a link to the Housing Counseling 9902 Online Toolkit

<https://www.hudexchange.info/housing-counseling/>

## Systems and Reporting

[Housing Counseling System \(HCS\) Overview | Log-in](#)

[Client Management System \(CMS\)](#)

**eLOCCS:** [Sign into Secure Systems](#) and select eLOCCS from the main menu

- [eLOCCS FAQ Guidance](#)



[Housing Counseling 9902 Online Toolkit](#)

[Program Activity and Outcome Results \(9902\)](#)

# Housing Counseling 9902 Online Toolkit



## **New** Program Impact Data Displays

The 9902 Data Displays are dynamic, interactive dashboards that display data from the HUD-9902 Housing Counseling Activity Report.



## Housing Counseling 9902 Online Toolkit

### Overview

Reviewing the 9902 Online Toolkit will assist housing counseling agencies to comply with federal grant requirements, increase effectiveness, and maximize efficiency in completing reports.

This toolkit is comprised of four parts:

1. HUD-9902 General Overview
2. Completing the HUD-9902 Report
3. Client Management System Guidance
4.  Program Impact Data Displays: Dynamic, interactive dashboards that display data from the HUD-9902 Housing Counseling Activity Report.




### HUD-9902 General Overview

This section of the toolkit helps housing counseling agencies complete the HUD-9902 and improve reporting accuracy.



### Completing the HUD-9902 Report

This page explores the HUD-9902 form section by section and provides users with tips and examples for filling out the form.



### Client Management System Guidance

This section of the toolkit provides housing counseling agencies with information on Client Management Systems (CMS).



### Program Impact Data Displays

The 9902 Data Displays are dynamic, interactive dashboards that display data from the HUD-9902 Housing Counseling Activity Report.

# Data Display Demo

## Housing Counseling Program Impact Data Displays

The 9902 Data Displays are dynamic, interactive dashboards that display data from the HUD-9902 Housing Counseling Activity Report. The 9902 Data Displays:

- Share information about HUD's Housing Counseling Program impacts and services with housing counseling agencies and interested stakeholders
- Improve data accuracy of quarterly 9902 submissions
- Identify 9902 data trends
- Centralize 9902 guidance and data for agencies as part of the [9902 Online Toolkit](#)

[View the 9902 Data Display Quick Guide](#), which provides instructions on using and exporting the Data Displays.

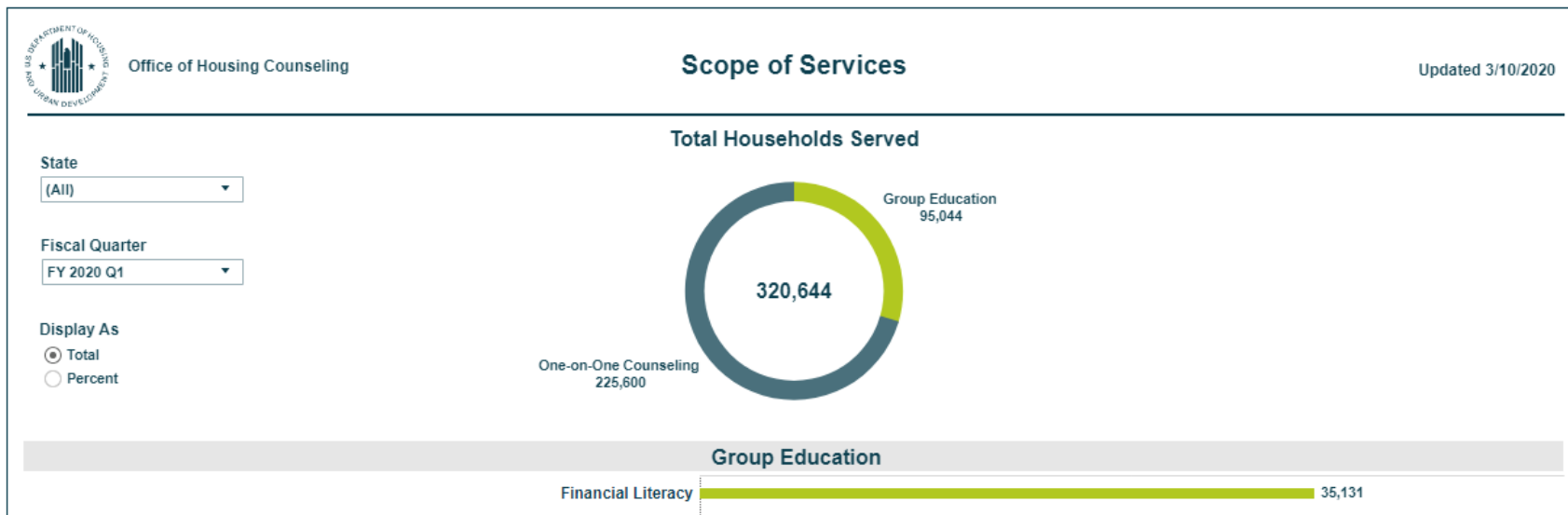
[View an archive of HUD-9902 national-level data in excel for FY 2007 - FY 2020.](#)

**Please Note:** Data displayed on this page is populated by agency-level data submitted through HUD's Housing Counseling System (HCS) as part of HUD's 9902 reporting process.

Quarter 1 FY 2020 data is the latest data displayed on this page. HUD Form-9902 data is **cumulative** – additional data will be submitted over the course of FY 2020.

Scope of Services	Households Served by State	Race and Ethnicity	Income Level	Impact of Services	State Profiles
-------------------	----------------------------	--------------------	--------------	--------------------	----------------

### Scope of Services



# HUD Exchange Resources

Time for  
Mentimeter!



# 9902 Resources

- [HUD-9902 Online Toolkit](#)
  - [HUD-9902 General Overview](#)
  - [Completing the HUD-9902 Report](#)
  - [Client Management System Guidance](#)
  - [New Program Impact Data Displays](#)
- [HUD-9902 Form and Instructions](#)
- [HUD-9902 Frequently Asked Questions](#)



# Office of Housing Counseling



Find us at:

[www.hudexchange.info/counseling](http://www.hudexchange.info/counseling)

Counselor Training and Testing website:

[www.hudhousingcounselors.com](http://www.hudhousingcounselors.com)

Email us at:

[housing.counseling@hud.gov](mailto:housing.counseling@hud.gov)

The Bridge:

<https://www.hudexchange.info/programs/housing-counseling/the-bridge/>

# Conclusion

**THANKS**  
for  
**ATTENDING**