



Final Transcript

HUD – US DEPT OF HOUSING & URBAN DEVELOPMENT: HUD Certification Requirements

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SPEAKERS

Virginia Holman
Jerry Mayer
Kim Jakeway
Tammy Dunn
Robin Penick
Rachael Laurilliard

PRESENTATION

Moderator Ladies and gentlemen, thank you for standing by. Welcome to the HUD Certification Requirements conference call. At this time, your telephone lines are in a listen-only mode. [Operator instructions]. As a reminder, your conference call today is being recorded.

I'll now turn the conference call over to your host, Virginia Holman.

Please go ahead.

Virginia

Thank you very much. Welcome, everybody, to today's very important conference call, where we're going to review the Certification Requirements to make sure you are prepared for the final compliance date of August 1, 2021. But before I turn it over to the presenters, I have some logistics to go over.

As the operator said, the audio is being recorded. We'll be posting a playback number, the PowerPoint and a transcript on HUD Exchange in the Archive section. That usually takes about a week. I did send out the PowerPoint this morning to everyone who had registered, but they're also available in the control panel on the right-hand side of your screen. Just click on the document name and it will download.

Your questions are very important to us. A lot of you have discovered the question box, but it, again, is on the right-hand side of your screen in the control panel. Just write your questions in, and we have staff that are monitoring those questions. After the webinar is over, and actually any time in the future when you have questions or comments on any topic, you can send it to housing.com@hud.gov, and put the topic you're interested in in the subject line so we get it to the right person.

If you have logged on to the webinar, you're going to receive a Certificate of Training from GoToWebinar, and that usually is within about 48 hours. You need to print it out and save it for your records.

Some other ways to visit our webinars is, OHC archives all of the webinars that we either present or host. You find them in the Webinar Archives on HUD Exchange. In the future, if you want to take a webinar on any topic, including this one, you can search by date or topic in those archives. And then after you've watched it, if you want to obtain credit that goes into your HUD Exchange account, you just select the webinar and then click on the green button that says Get Training. It realizes this is a separate certificate from what GoToWebinar will send you.

Also, something to bookmark is our Training Digest, which comes out at least weekly, and gives you all the training that we're hosting or presenting, as well as the webinars by all of our training partners. So, get used to looking at that. There's a multitude of no-cost training available to you.

And now, let me turn it over to Jerry Mayer, the Director of the Office of Housing Counseling, Office of Outreach and Capacity Building. Jerry?

Jerry

Well, thank you, Ginger, and welcome to today's presentation. I'd like to thank our presenters from the HUD Office of Housing Counseling for bringing us this important information on the Housing Counselor Certification Program, and especially thank you to all the housing counselors who are joining us today to learn more.

Next slide, please. The purpose of this webinar is to provide an overview of the certification resources HUD has available to assist housing counselors in becoming HUD Certified by the final compliance date. Our certification team is standing by to help you with any technical assistance problems you may be encountering, especially those FHA Connection issues you need to tackle to complete the certification process.

Today, you will hear lots of reminders about the final compliance date, which is coming on August 1, 2021. HUD is not contemplating any extension to that date, so it is very important to complete the entire certification process for your agency's continued participation in all of HUD's affected programs.

HUD is actively reaching out to housing counseling agencies that do not currently have a certified housing counselor. So, please look out for those letters and emails from HUD to help you access those technical assistance resources and solve these problems that you may be encountering in your journey to certification.

I also want to remind all agencies that it is critical that every housing counseling agency has enough certified housing counselors to carry out their agency's work plan. So, please review your work plan to assure that you have sufficient certified housing counselors on board.

Next slide, please. Here you see a graphic on the certification timeline, and as you can see, it's about a two-month journey from the start of the certification process to its completion. And since right now it's only a little over 60 days until the final compliance date, it is vital that housing counselors that have not yet begun this process begin it right now, and you're doing that right now by joining this webinar and learning how to get started.

Next slide, please. Today's presenters, we have Kim Jakeway, who is a supervisor in HUD's Office of Outreach and Capacity Building, and

specializes in housing counselor certification issues. Tammy Dunn is a specialist in the Office of Outreach and Capacity Building, and is a member of the certification team. Robin Penick is a Senior Program Officer in the Office of Outreach and Capacity Building, and is the certification team leader. We're also joined by Rachael Laurilliard, who is joining us from ICF, and they are our technical assistance provider under HUD's Community Compass Grant Program. And then finally, helping us with your questions is our certification team.

Next slide, please. So, today's agenda, we will cover the Housing Counseling Certification final rule, the exam, FHA Connection, the final compliance date. We'll cover some questions and answers, and show you some additional resources.

Without any further delay, I'd like to turn the mic over to Rachael for some Mentimeter questions.

Rachael

Thanks so much, Jerry. Today we'll be using Mentimeter. I think a lot of you are familiar with this polling platform. You can use Mentimeter on your phone, or any other device you have, or in your desktop, if you don't have your phone handy. All you have to do is go to www.menti.com, and

then you'll enter the code. I'm going to bring up the code in just a moment here. Go ahead and type in menti.com. Now, the code's at the top of the screen. Any time we're doing Mentimeter you'll always be able to find that code at the top of your screen. It's 39435211.

As we get started today, we would love to know what brings you here. Maybe you need a refresher on all parts of the certification process, maybe you're looking for specific tips, but you're pretty familiar, or maybe you just have no idea where to start. We're going to really cover the process from A to Z today. And as Jerry mentioned, you'll be hearing from a variety of HUD certification team members who can help you out with things like the exam, FHA Connection, the requirements of the final rule, and then what will happen after the final compliance date. Hopefully this will be useful information to everyone regardless of where you are in the process.

I see that responses are rolling in, and we have about an even split between you all, so that's great that there's some diversity of needs on the call today. It looks like most people need a refresher, or just looking for specific tips. I'm glad to see that the smallest amount of people who have no idea where to start, as Jerry said, we hope that you've already gotten

started. Maybe you started studying. But if not, and this is new to you, that's totally fine. I think today's webinar will cover everything that you need to do so you can get certified by the final compliance date.

You can keep submitting your responses, but I'm going to go back to the webinar deck and turn it over to Kim Jakeway to cover the certification final rule. Kim.

Kim

Great. Thank you, Rachael. Good morning and good afternoon, everyone. I'm Kim Jakeway, and I'm going to walk you through the certification final rule. There are three key provisions to the certification final rule. First, the definition has a counseling list standardized. The statutory definition housing counseling is independent expert advice customized to the need of consumers to address the consumer's housing barriers, and to help achieve their housing goals. It must include intake, financial, and housing affordability analysis, an action plan, except for reverse mortgage counseling, and a reasonable effort to have follow-up communication with clients when possible.

Second, the final rule requires that individuals providing housing counseling and/or provided in connection with any HUD program

administered by HUD must be provided by HUD certified housing counselor working for HUD-approved housing counseling agencies.

And third, as you're aware, that due to the COVID-19 national emergency, HUD released a final rule on December 4, 2020, following the interim final rule that officially extended the housing counseling certification deadline to August 1, 2021. As Jerry mentioned, please be aware that this August 1, 2021 date is firm, and it will not be extended.

Next slide. This is a great graphic to show you exactly what is required in order to become a HUD certified housing counselor. A counselor must take and pass the HUD housing counselor certification exam, and they must work for a HUD-approved housing counseling agency, and that qualifies an individual to be considered a HUD-certified housing counselor.

With that, I'm now going to pass the presentation over to Rachael.

Rachael

Thanks, Kim, for reviewing those important provisions. I'm going to move on to the next Mentimeter slide. We're about to talk about the exam, so we would love to know if you all have scheduled your exam yet.

We have a view different options here. Maybe you've already taken it and passed, that's great. Congratulations to those of you who have passed. Maybe you've taken it before, but you're still working on passing it, that's great that you already studied, you've taken it, so that's great that you're joining today, and wishing you luck on that part of your process.

And a few of you seem to have had it scheduled already, so that's great, too. And we recognize that some of you might not need to take it, so maybe some of you are in a leadership position at your organization, or you have an administrative role, but you're just on the phone today to learn more about the certification requirements. And then finally, some of you may not have scheduled the exam yet.

It looks like many of you have not scheduled it yet, but if you do plan to take it, and get certified by the final rule, we encourage you all to schedule that as soon as possible. For many people, scheduling the exam really helps them work towards their final goal of taking it and passing once they have a date to work towards, so a concrete date, and then, also, scheduling it now will just help avoid any sort of limited availability that may come up with the proctors, that's online or in person.

Moving on to the next question. We'd love to know from those of you who have not taken the exam yet, and that seems like a good amount of you on the call have not taken it yet, why have you not taken it yet? But we have a few answers here, and we are allowing you to pick multiple options. Maybe you don't have enough time to study, you have a competing workload, maybe you just feel unprepared and you're not sure where to start, or you're a nervous test taker. Maybe you didn't realize the deadline was coming up, so hopefully this webinar is giving you some important information. Maybe you have alternative plans for your future, or you are lacking the funding to reimburse exam costs.

Just let us know why you haven't taken it. I think this will just help us know where you're coming from and give you the support you need to take and pass the exam.

It seems like a lot of you are struggling with time to study, competing workload, feeling unprepared, you're a nervous test taker. We recognize everyone has a lot of work on their plate right now, and the work that you're doing during the day is so important. Hopefully you all are able to make [indiscernible] study time, and access the resources that we go over today to help you use your study time wisely. For those of you that feel

unprepared or are just nervous test takers, I hope that the tips that we go over today will help you with some of those feelings of unpreparedness.

You can keep responding to that question and getting your answers in. I'm going to go back to the slide deck. I'm going to cover some information about the exam. For those of you who haven't scheduled it yet, or haven't really started studying, I think this section will be really important to you and give you a lot of good information.

There are six exam topics that the exam covers. They are financial management, housing affordability, fair housing, home ownership, avoiding foreclosure, and tenancy. All of the exam materials are targeted towards these six topic areas. I'll go over these resources in depth in the following slides, but there are a few different places that you can grab study resources. Just make sure that you're sort of looking through all the different places to grab those resources, including hudhousingcounselors.com. The training materials available on the Training Digest. And then finally, study groups are finding a study buddy.

Doing a little bit of a deeper look into the resources of hudhousingcounselors.com. [Hudhousingcounselors.com](https://hudhousingcounselors.com) is really the one-

stop shop for all HUD-approved and HUD-created study resources. So, we really recommend that you sign into hudhousingcounselors.com now and create an account. Your account is also where you take the test online, and where your exam results show up, or where you schedule your exam for taking it in person or online. It's really critical that everyone has that account. And all of the resources are accessible through this account.

The first resource that we recommend you all access is the Knowledge Assessment Tool. The Knowledge Assessment Tool is a really important place to start, because not only does it walk you through some test questions that you can assess how prepared you are for each separate topic, but it also tells you the rationale behind the right answers to each of those questions, and gives you a little summary at the end of where you should focus your studies on.

We really recommend that you take this on day one. As soon as you're ready to get started studying, you can take the Knowledge Assessment Tool, and you can come back to it and take it at future dates as well to monitor your progress.

The next thing that we recommend that you do when you're studying is look through all the training modules and study guides. You can see the screenshot here. There are different modules available for all of the different exam topics. These are really key to preparing yourself for the exam since they cover the information on the exam, and are broken out by these topic areas. And we've also heard from colleagues really recommending that folks read through all of the narrative sections of these study guides. Some people who are having trouble passing the exam have skipped over some of those narrative areas and just focused on the practice problems, or other parts of the study guide. If you're one of those folks that have taken the exam before, but you're still working on passing it, really recommend you revisiting these study guides and reading them from start to finish.

And then finally, there are some practice exams on hudhousingcounselors.com as well that you should definitely take as you become more prepared for the exam.

The next place that we recommend that you look for exam materials is the HUD Exchange Training Digest. Ginger mentioned this at the beginning of the webinar. The Training Digest is updated on a weekly basis, and it

has information from a lot of different HUD partners. It has HUD funded training partner classes, including RCAC, [indiscernible], National Stabilization Corporation, NCRC and Neighbor Works. These HUD training partners are putting on courses almost every week covering all the different exam topics. You can take an A to Z course to brush up on all of the exam topics, or you could sign up for different courses based on topic areas if you really need to brush up on a specific topic.

There are also a lot of other training partners, aside from the ones listed here, highlighted on this page. So, definitely recommend bookmarking this page and coming back to it to see what training opportunities are available. And it's updated on Mondays, so every Monday you can refresh the page and see the latest training available.

The next place we recommend that you take a look at is the other study resources section of the website. So, there's a study groups page on the HUD Exchange, and these different partners, as well as some other partners, are hosting study groups in the coming months that are maybe just a little bit of a different way to connect with other folks studying for the exam, ask common questions, also could link you up with a study buddy. Maybe if there's no one at your housing counseling agency who's

studying at the same time as you, you can connect to someone else who is also getting prepared for the exam. And that could be a way to just ask your common questions and share information with each other.

We also wanted to highlight that there's a HUD housing counselor exam prep Facebook Group. This is not a HUD-sponsored resource. It's just a community group for counselors to connect with each other and informally share study techniques. But this can be a really good way to connect with other professionals who need to take the exam.

The next resource I wanted to highlight is the exam checklist. There's a link in the slides that Ginger added into the GoToWebinar, but you can click the link to download this checklist. It really walks through some quick bullet points on how to prepare for the certification exam, how to register, and schedule the exam, and then some reminders for the day that you take the exam. I'm going to go into a little bit more detail in the following slides on these bullets, but this could be a really great resource for you to print out and keep with you with some great reminders as you start to schedule your exam.

In this next slide, we really recommend that you review all the information sort of at the beginning of the process so you know what to expect. The in-person exam and the online exam has different requirements, but no matter where you're taking the exam, read through these materials so you can arrive confident and prepared, especially those of you who responded that you might have some nerves around test taking. I think that's a common thing that people experience, but having everything aligned and knowing what you're going to expect when you take your exam can really help alleviate that nervousness that people experience on test day.

We also wanted to let you know that you can request accommodations if necessary. The HUD housing counselor certification exam is available in English and Spanish. So, if you have limited English proficiency and limited Spanish proficiency, maybe you have a different first language, you can request additional exam time through hudhousingcounselors.com. And if you have any other learning disability or any other factor that might require a reasonable accommodation, you can request it on that page as well.

There's a link here to the certification exam preparation and testing page, which walks through all this information. So, recommend taking a look at

that and bookmarking it so that you can come back to it if you have a question about the exam process.

And then finally, just recommend arriving early. Whether you're taking the exam in person or online, just getting there a little bit early so that you can feel relaxed and go back through your study materials before the exam starts is a good tip that we've heard for counselors looking to ease those test-taking nerves.

Now I'll talk a little bit specifically about the online exam. This is a very good option if you are located far away from a testing center, or you would prefer not to go to a testing center. We know COVID-19 is still a concern. So, if you'd like to take the exam online, there are a lot of technology requirements that you can review in advance just to make sure that your device meets all the requirements needed. We recommend reviewing that and just making sure that your computer will work with the software involved. There used to be a requirement for a freestanding webcam, but now everyone can use the webcam built into their laptops. That's been a new advancement that took place last summer, and a lot of people have found that to be really helpful in taking the exam.

The exam calculator that's provided on screen during the exam is also linked here. We recommend that you play around with the calculator and maybe do some of the practice problems using the actual calculator, just so you are very familiar with how to use it before the exam starts.

There's also a Five Steps to Success article that we recommend reading through. This is specific to taking the exam online, and really walks through those technology requirements I referenced. There's also a Tips for Successful Online Exam located on hudhousingcounselors.com.

There's many resources available to make sure that you have the right software on your computer, and you know all the steps to get up. But if you encounter any issues while you're getting set up or during your online test, you can visit [Criteria's Help Desk Site](#) for support. We linked that here, too. We just want to make sure everyone has all the information they need to succeed with taking the exam online.

Which leads me into our next topic of proctoring. Taking the exam online, there are online proctors that you'll interact with during the exam.

It's just important to know what to expect from those online proctors.

You'll have to remove any sticky notes or papers from your workspace, so

the proctors will remind you about that if you have anything out. It's a good idea to just review your surrounding area and make sure you remove all those in advance of taking the exam.

You also have to remove all items, such as watches, bracelets, and necklaces, anything from your neck and wrist before the exam. Glasses are permitted, of course. We want everyone to be able to see the questions they are answering. But the proctor may ask you to remove them for inspection at some point during the process. Just don't be worried if that happens. You'll definitely be able to put them to back on. They might just need to look at them for a moment or two.

And the proctor may contact you during the exam to check the surrounding area based on something they see or hear. These are just protocols that they follow during the exam. Just be prepared for that type of interaction with your online proctor.

Moving on to taking the exam in person. Again, we suggest arriving a little bit early for your exam just so that you're not rushing and you can get set up in your test-taking center. Test takers are required to present two forms of ID, and that information is located online at the exam

preparedness page that is linked to in the slide deck. Just make sure you have the correct identification on you when you arrive to the center.

Don't bring any unnecessary personal items with you to the testing center. So, any unneeded bags or other devices. You'll have to place all of your personal items in a cabinet or locker prior to entering the testing area, so just recommend leaving anything you don't need at home. And then we also recommend printing your assessment confirmation email and bringing it with you, or having it handy on your phone. And then, again, the practice on that exam calculator is really helpful before you get to the testing site. It's actually the same calculator for online exams as it is at the testing center. No matter which exam you're taking, online or onsite, you can use this calculator before the exam to make sure that you're prepared.

And again, you may be asked to remove your glasses quickly for examination, or proctors may ask you to turn out your pockets, so just be prepared for that type of interaction with your proctor.

All right. I'm going to ask a quick Mentimeter question before we move on to our next section. Going back to Mentimeter, we would love to know if your agency has at least one FHA Connection application coordinator.

After you take your exam and pass it, you're not quite done with the process, and that's what Tammy will talk about in our next section. And we need agencies to identify an FHA Connection application coordinator, so just looking to see where everyone is at in this process. Some of you say yes, actually most of you say yes, that's great to hear. A few of you do not have one, and then some of you don't know what that is. That's totally fine if you don't have one, or haven't heard of that before, because Tammy is going to walk through everything you need to know about coordinators in the next section.

Everyone can continue entering their responses, but I will turn it over to Tammy.

Tammy

Thanks, Rachael. Okay. It looks like that we had several people who did not know if they had a coordinator or not. So, we're going to kind of talk through this process a little bit. You've already taken the exam and you've passed it, congratulations. Now the next thing that you're going to do is get them to FHA Connection. As part of passing the test, you will have uploaded your test results into FHA Connection, but that does not mean that you are actually in FHA Connection.

So, what you would need to do is go in to FHA Connection, and you're, first and foremost, going to request a user ID and password. This will be sent to you via email, and it will come in an encrypted email, so you may have to look for it in your junk email, or something along those lines.

Once you receive it, then you will go in and create your user ID and password, and request for your FHA Connection coordinator [indiscernible] by your agency, for them to verify your employment.

When you do that, you will want to find out how many, if you have branches, or a subgrantee, you want to make sure—and this is really super important—that you put in as many of the agency IDs that you are going to be performing counseling services with. You want to put in all those IDs so that your coordinator can verify your employment with all of them.

Next slide, please. Next slide, please. Hello?

W

Sorry, Tammy. I think I got lost, sorry.

Tammy

Oh, no worries.

W Yes, we can hear you. Do you want me to cover the counselor side, or do you want to move on to coordinator function?

Tammy I just wanted to go on to the next slide.

W I think—

Tammy Are you all having trouble hearing me?

W I can hear you. Can you hear us?

Tammy Okay, yes.

W Sorry. I was showing this slide on the screen, which I think is a really helpful graphic for folks walking through the process from A to Z that you were covering, and you gave some helpful tips to counselors on putting in all their HCS IDs. I could leave it on this slide if you have any other advice for counselors, or I could advance more to coordinator. Let me know where you'd like to—

Tammy Yes, if you would go ahead and move on to the next slide, please.

W Okay, sure.

Tammy Thanks.

W Tammy, I don't think we can hear you.

Tammy Well, I think that maybe I've lost my connection to the slides. Okay, here we go. I'm sorry, I'm still back on the other one, but I have it saved, so we'll just go on. I'm going to talk about the coordinators.

Every agency is required to have an FHA coordinator. We do recommend having more than one, at least two, but they can have up to four. That's so that there is more than one person that can verify the counselor's employment, should people leave or new employees start, either way, that way there's more than one person. There is a link that shows all the instructions for anyone that wanted to be the coordinator. The coordinator does not have to be a counselor. That's really important to know, that they do not have to be a counselor, but your agency does need at least one, and preferably two or more.

I'm going to go on to the next slide. After passing the exam, counselors, like I said a few minutes ago, will transfer their results into the FHA Connection. This is just a very start of becoming verified in FHA Connection. The employment has to be verified. I think I gave you a pretty good insight into how that happens. You get an email, and then you go in, complete the email instructions, and get your employment verified, and then you are in FHA Connection and considered a housing counselor, certified housing counselor.

One thing that we did really well that our [indiscernible] people did very well is give screenshots for the instructions on how to do the FHA Connection. It's super easy if you follow the instructions. We highly recommend that people print those instructions and have them sitting side by side with your computer as you go through the system to complete that process.

Once your employment has been validated by your coordinator, then you can have your certificate. It can be printed or saved. There's four steps to get access to it, but they're really super simple. It takes less than a minute. Again, we do have a link to that in the slide deck, also.

And again, if you are going to be a counselor or a coordinator, you work at a branch, or for more than one agency or multiple branches of one agency, we do recommend that you make sure you go in and put in all of those agency IDs when you go in to FHA Connection. There is no limit to how many branches that you can be certified in, so just make sure that you get them all from your agency.

And now I will turn it over to Robin Penick.

Rachael

Thanks, Tammy. Sorry, Robin, can I interject for just one moment before you move on to your presentation? I just wanted to highlight two things. The first thing is just this branch scenario graphic on the slide deck. Sorry, Tammy, your connection problems, so I wanted to make sure, folks, that was on the screen. We just put a quick scenario here where local housing counseling agency employs six counselors across its three branches. So, here's just a little example of how this might affect you. If you're a local housing counseling agency and you have six total certified counselors, and let's say they provide services out of the local housing counseling agency ID, the parents, and also one of the branches, each counselor would have to get their employment verified at the HCSID of the branch, and the HSCID of the local.

You can see here, branch A, one certified counselor got their employment validated at the HSCID of the branch, and also the local housing counseling agency.

This might apply to people who work for a subgrantee, or for an affiliate, and also work out of a parent or intermediary that provides direct services, or it's really applicable to anyone who has a branch agency. I just wanted to make sure everyone sees this graphic and understands how it might affect them, and there are instructions on that website. That was a great tip, Tammy, to print out those instructions and have them side by side with you as you apply for certification.

Before we move on to Robin, I do want to just ask a second Mentimeter question. After hearing Tammy's presentation, just let us know if you still have questions about how to use FHA Connection. We will be taking questions in the question box. And if you do have questions, you can also email ohdtechnicalassistance@hudexchange.info for technical assistance. I think that email box has reached out to all of you in one way or another over the past few months regarding TA. That email address will be in the last slide of this presentation. You can also email

housing.counseling@hud.gov with questions. If you have any questions related to your user ID, or you can't access your account, it's really great to email housing.counseling@hud.gov. That's Tammy, Robin, and other folks on this call, deal with those system access issues in that inbox.

That's a great way to get those problems resolved. If you haven't logged in to the system in a while, that you need to correct some of your data, you might be experiencing some account lockout issues. We can definitely help you out with those.

It seems like most of you don't have questions, but if you're unsure, or do have questions, again, you can email those to inboxes, or you can write them in the chat if there's a question you want us to answer during this webinar.

All right. Thanks for letting me butt in there, and I'll pass it on to Robin now.

Robin

Thank you, Rachael. I appreciate that. I'm going to talk about what's going to happen after August 1, 2021, and that's once the certification rule is finalized. The most important point regarding this compliance date is that after August 1, 2021, if an agency does not have the sufficient number

of counselors to deliver the counseling services described within that agency work plan, the agency will be placed in active status. If you are an agency with zero certified counselors after August 1, 2021, you will be placed in inactive status.

What happens when you're in inactive status? Well, if you're a grantee, if you have HUD housing counseling funds, any expenses that are incurred by the program during that time that you're in inactive status will not be eligible for reimbursement with the HUD housing counseling funds. So, be prepared, if you don't have counselors after that August 1, 2021 date, you're not going to be able to provide services that are required for HUD programs, and you're not going to be eligible to have expenses reimbursed.

We highly recommend that you make sure that all your counselors are certified prior to that date. And part of the responsibility is maintaining that certification data information within the FHA Connection. So, as an agency administrator, you need to make sure that you have staff that can access the FHA Connection and make sure you have your counselors, their employment verified within the system.

Just as a reminder, that new counselors, if they're not certified and you hire them after August 1, 2021, they may only perform administrative duties until they do become HUD-certified.

Next slide. So, if an agency loses its only certified counselor, the agency will be placed in inactive status. HUD strongly recommends that agencies create a plan to maintain enough certified counselors to carry out the agency work plan. We think it's good to have backup for your certified counselor. You might have a program manager that's not necessarily involved in everyday counseling, but if they were certified they could serve as a backup for that counselor should they be out for an extended leave for whatever reason, or if the agency finds themselves in a place where they need immediately another certified counselor.

When a HUD-certified counselor is no longer employed by the agency, the agency must notify their HUD point of contact within 15 days of that change. That's typical for any type of agency change that is made. The agency application coordinator must also validate the end of the HUD-certified counselor's employment in the FHA Connection. Just as an agency has to verify the counselor's employment with the agency, the agency's also responsible for ending that employment within the FHA

Connection. Once again, this is how HUD tracks agencies that do have HUD-certified counselors.

We do have FAQs on our website on the HUD Exchange in regards to post-compliance date and agency responsibilities after the final compliance day.

With that, I'm going to turn it over to Ginger. I believe she's going to head up the questions and hopefully we'll have answers for you.

Virginia

Thank you, Robin, and looking at the question box, it looks like most of our questions were answered as they were written in. Hold on a second. Here's one that just came in about the billing if you don't have a certified counselor. It says, "Can we still bill for HUD for intake staff if they aren't certified? The intake staff helps with initial intake and filing, but does not do active counseling."

Robin

I'll start this one, and see if anybody else wants to chime in on this one. If you don't have a certified counselor, that's going to put the agency in inactive status. And you wouldn't be able to bill for any expenses if the agency is in inactive status.

Jerry Robin, I just want to add to that. [Overlapping voices] that you experience right now, as long as you have a HUD-certified housing counselor, those are generally unchanged. So, whatever you're currently billing for, if you have a HUD-certified housing counselor, after August 1st, you just go on billing for that. And client intake and office-type functions are not required to be done by a HUD-certified housing counselor.

Virginia Thank you, Jerry and Robin. There were several questions about the relationship, if somebody is trying to get their agency approved, sort of a chicken and the egg thing, should they have their counselors approved as part of the application process, should they wait until the agency is certified or approved by HUD? What should be the process there?

Jerry I'd like to field this one, Ginger. As part of the application process, your agency must be approved before you can certify your housing counselor, because in order to access FHA Connection, you must be a HUD participating housing counseling agency. So, the order of chicken and egg, so to speak, is the approval process first, and then the certification of your counselors. But after August 1st, in order to become HUD-approved,

you're going to need to have certified housing counselors who have passed the exam to complete the approval process.

Right now, today, you can get an agency approved without a HUD-certified housing counselor being on staff, but once August 1st rolls around, that agency, newly approved, would be subject to an activation after the final compliance date. So, the real message is, do them at the same time, but your agency approval comes first, followed by your counselors being certified in FHA Connection.

Virginia

If you continue to have questions, reach out to your POC, who can then reach out of the certification team to make sure you're getting the absolute correct answer. Do we have one more polling question, Rachael?

W

Ginger, I do see one question on here that we didn't answer, and that was if staff are studying for the exam, can it be billed to the grant? I'm going to answer that with a yes, and there are some contingencies with that, but just to make sure that folks know. To take the exam, the FY20 grant had money set aside specifically for the exam, and that can only be used to take the exam, but to study for the exam, they can charge the time that the counselors are studying to the grant.

Virginia Oh, thank you very much. I think that will help everybody with this.

Rachael, do we have one more Mentimeter question?

Rachael We don't have any more Mentimeter questions, Ginger. I had that last question up about if people still had questions. I think a lot of people responded to it. It looks like we answered a lot of folk's questions, and that's great. If anyone does still have a question, I think, as Ginger mentioned, please ask your POC if you have a specific programmatic question, like some of the ones that have come up today. If you need technical assistance, you can email ohctechnicalassistance@hudexchange.info. If you need help figuring out FHA Connection, or you need just general information on studying, things like that, we could help you with TA. And then if you have other general questions, you can email housing.counseling@hud.gov. And specifically anything related to accessing your FHA Connection user ID or account can be directed there.

I just wanted to highlight those emails. Thanks, Ginger.

Virginia Okay, thank you. As we said at the beginning, the PowerPoint, a written transcript, and an audio replay number are going to be posted in the archives on HUD Exchange in about a week. That will give you complete information about what went on today, and we certainly appreciate all your attendance and your hard work to become a certified counselor.

Jerry, did you want to make a final remark?

Jerry Oh, just thank you, everyone, for joining us today. Please reach out if you have any questions at all about the process. Don't go down the rabbit hole trying to sort it out yourself when we're standing by to help you through any and all problems that you may encounter. Just reach out to housing.counseling@hud.gov, and we will assist you right away.

Virginia Thank you. Again, thank you, everyone, for attending. As everyone said during the webinar, there are lots of resources available. Do not hesitate to access them and ask about them, and use every tool that you have available. Thank you again, and watch for more webinars.

HUD – US DEPT OF HOUSING & URBAN DEVELOPMENT

Host: Kristen Villalvazo

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Coordinator

Ladies and gentlemen, that will conclude your conference call for today.

Thank you for your participation, and for using AT&T Event

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