



Final Transcript

HUD-US DEPT OF HOUSING & URBAN DEVELOPMENT: Navigating HUD Exchange

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SPEAKERS

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PRESENTATION

Moderator Ladies and gentlemen, thank you for standing by, and welcome to the Navigating HUD Exchange. At this time, all participants are in a listen-only mode. Later, we'll conduct a question and answer session; instructions will be given at that time. [Operator instructions]. As a reminder, today's call is being recorded.

I'd now like to turn the conference over to your host, Virginia Holman.

Please go ahead.

Virginia

Thank you very much, and welcome to today's really important webinar on navigating the HUD Exchange. We hope that everybody uses it all the time, but it has lots of tools that we'd like to update you on.

As the operator said, the audio is being recorded. We will be posting the playback number along with the PowerPoint and a transcript on HUD Exchange in the Archives section, and that's usually about seven to ten days for it to get on there. The training digest on HUD Exchange will also be updated when that webinar is posted.

I did send out the handout this morning. It is also available in the control panel on the right-hand side of your screen. So, if you just click on the document name, you can go ahead and download it.

There are going to be some polling questions, so please take time to respond to those. Because of the large number of attendees we have today, we will probably not take live questions, but we do have some alternate ways for you to ask those questions. Again, on the panel on the right-hand side of your screen there is a box labeled questions, and if you just type your questions, some of us will be watching and monitoring

those and passing them onto the presenters. After the webinar, you can also send your questions and comments to housing.counseling@HUD.gov and put the webinar topic, the HUD Exchange, in the subject line so we can get it to right people. Again, because of the large number of people, we probably will not have an open discussion.

At this point, I'd like to turn the call over to Jerry Mayer, the Director of the Office of Outreach and Capacity Building. Jerry?

Jerry

Thank you, Ginger, and welcome, everyone, to today's webinar on how to navigate the HUD Office of Housing Counseling's webpage on the HUD Exchange. The HUD Exchange is part of HUD's Community Compass Grant Program and is maintained by ICF for the Office of Housing Counseling.

We're pleased to be able to bring the advantages and features of the HUD Exchange to all of our housing counseling industry professionals. We transitioned to the HUD Exchange platform about three years ago because we wanted a place for you to go to get the latest information and gain access to technical assistance. The flexibility of the HUD Exchange platform allows us to be more responsive and rapidly post information.

Some of the highlights you'll hear about today will help you navigate HUD Exchange to find the great resources that are located there including toolkits, webinars, newsletters, systems, guidance, and a whole lot more. Our presenter today is Shawna Moraille. She is the lead person from ICF for the Office of Housing Counseling.

So, without further ado, take it away, Shawna.

Shawna

Thanks so much, Jerry. Good afternoon, everyone, or good morning depending upon where you are in the country. I am pleased to be here and deliver this webinar with my deputy manager on the Community Compass Grant, Rachael Laurilliard. She will be taking a deep dive on the HUD Exchange showing you many different topics from some basic functions as well as what's available on HUD's Housing Counseling program page.

And then I'm also joined by Jane Charida and Virginia Holman, and they will be monitoring the inbox, helping us with polls, etc. So, thanks so much to those folks for supporting.

So, just a little bit on the background of the HUD Exchange. The HUD Exchange has been around for a very long time in former uses. We were developed separately underneath the Neighborhood Stabilization Program; that was NSPTA. We had a home TA website for the home program which is in CPD [ph], and we also had a home list like Resource Exchange. So, we all got together in 2009 and now are part of the National HUD Exchange.

So, we're going to talk about some basic HUD Exchange functions, how to set up a user account, the homepage that's available and hopefully you'll bookmark. There's a training section. There's resources and frequently asked questions.

Rachael will also show the site wide search which is probably the more popular way to find your resources, and then also this Need Housing Assistance page that is pretty important to show you and all the good resources that are there. So, there are some housing counseling specific pages or functions that Rachael will demonstrate for you, most importantly, how do you sign up for Jerry Meyer's listserv, the housing counseling mailing list. She'll show you where to sign up there. Particularly, if you're new to the Housing Counseling Program, that's

always a great one to get. You find about trainings and other offerings around the country.

Rachael's also going to navigate the specific Housing Counseling Program pages, how to find housing counseling agencies. Some of I know because you provide referrals or maybe somebody calls you who's looking for a housing counseling particular type that you don't offer type of service, you might use it for referrals that type of thing. So, Rachael will show you that.

There are, as Jerry said, a variety of program resources, toolkits, guidance, etc., that we will show you from basic all the way to advanced courses. We do have for the Housing Counseling Program a training digest that is available weekly. It's updated weekly that we launched last year, so Rachael will show you that.

And then also for this particular training, we'll talk about how you'll get a certificate after the webinar. However, lots of folks have HUD Exchange user accounts and want to make sure that this course is listed as a webinar that they've taken, and so Rachael will show you how to get credit for webinars and also take online training modules.

We thought we'd open up with a polling question for you to self-identify what type of organization you represent. So, please select one of the following, and the polls are open. The first option is participating local Housing Counseling Agency, so you work with HUD's Housing Counseling Program today and you're a local.

Maybe you're a participating Housing Counseling Agency, but you actually are a sub-grantee of a HUD intermediary or a State Housing Finance Agency like NeighborWorks, NCRC, many of our partners out there. Maybe you're a participating intermediary, so you have HUD approval because you're a large regional or national organization, State Housing Finance Agency, etc. So, that's a participating intermediary.

Some of you may be non-participating. We did market this on the HUD Exchange as well as the Housing Counseling mailing list, so maybe you're joining because you're working in the home program and you may need to become a participating agency in the future.

And then finally, federal agency, might be HUD staff, CFPB or others.

So, please, the polls are open. Make a selection.

Wonderful. Look at those results. So, it's wonderful to see there are 20% of you that are local participating. Some of you are participating as a sub-grantee to an intermediary. You have 13% intermediaries out there or state HFAs, etc., but we have 40%, so we have to speak to you on this webinar, it's a good reminder that are non-participating. It's wonderful to have you, and we're really happy that you're here. There's lots of great resources that you'll see on the HUD Exchange for Housing Counseling Program. And then finally, we do have some HUD staff and other federal agency staff as well, so thanks, everyone.

We'll go through the background and purpose of the HUD Exchange. I was thinking of one when I said 2009, so yes, we rebranded ourselves HUD Exchange in 2012. As Jerry mentioned, this is part of Community Compass, which is a technical assistance grant that we manage the HUD Exchange and develop resources, etc.

The HUD Exchange is meant to be like a multimodal online platform. It's very dynamic. We are the knowledge management for a lot of HUD's programs, and I'll show you those sections of HUD that we currently participate.

We have a really robust data resources, data collection, like I mentioned like frequently asked questions, etc., but we really want to make sure that we continue to be a good repository of the best resources available. We're here to help you build skills and cross-expertise. I mean the fact that we have this webinar for housing counseling agencies and some of you are non-participating, this is for you to learn about HUD's Housing Counseling Program and what's available for you on the HUD Exchange.

We do want to reduce time, increase productivity. Rachael's going to briefly mention a tool. For those of you that are non-participating, you might want to take this tool to figure out if you're ready to start participating in HUD's Housing Counseling Program, the Housing Counseling Agency Eligibility Tool, and that is an example of trying to help you folks save time and energy.

We do customize based on user experience. We'll leave some time at the end if folks want to write in and give us any general feedback about the HUD Exchange. We'd like to hear from you later, but we do pride ourselves on listening to what you're feedback is because we don't assume that we have all the answers on the HUD Exchange team.

The HUD Exchange was designed and delivered by ICF, the company that Rachael and I work for, but we're working on HUD's behalf. I mean really, they direct the content on the HUD Exchange. We work with offices day in and day out like HUD's Housing Counseling Program, those in community planning and development, etc., to make sure that we're giving you the best customer service possible.

We have so many offices now that currently participate on the HUD Exchange, so community planning and development. If you're here from the Community Development Program for example, that's within CPD or the home program.

We also work with Fair Housing and Equal Opportunity. There are a lot of resources related to Fair Housing on the HUD Exchange, and there will be more in the future.

HUD's Housing Counseling Program as I mentioned. We work with housing. Both multifamily—various offices within multifamily have resources on the HUD Exchange. Public and Indian Housing and also

Healthy Homes and Lead Hazard Control has a small footprint today, and that will be expanded in the future.

Housing counseling is unique because, as I mentioned before, they have their own mailing list and their own mailing list functions, and Jerry and others that we work with day in and day out in the Office of Capacity Building manage all those functions with a large team of people.

I'm going to turn it over to my colleague Rachael Laurilliard, and she's going to talk about the basic HUD Exchange functions. Rachael?

Rachael

Thanks so much, Shawna. I'm Rachael, and as Shawna mentioned, I help manage the Office of Housing Counseling content on the HUD Exchange. Shawna and I with HUD's directive built out all of these pages for you, so I'm really excited to show you what we have today and the different ways that you can use the HUD Exchange for your goals.

First, a quick slide before we get started is I wanted to go over how to set up a user account and why you might need one. A lot of you on the phone might already have a user account, but there might be some confusion as to why you would need one or what you can do with your user account.

So, the user account really allows you to do a bunch of the different functions on the website, so for example, you can access the housing counseling online training modules. You can take the Housing Counseling Agency Eligibility Tool. I'll talk a little bit more about this tool later. You can get create for housing counseling webinars. You can register for HUD trainings, and you can also access different tools and other sorts of functions like the CPD Income Eligibility Calculator for example.

So, the Housing Counseling Agency Eligibility Tool that I mentioned, this allows prospective agencies to find out if they are ready to seek approval to become HUD approved. The income calculator that I mentioned, this allows the HUD CPD-funded programs to determine if someone is income eligible prior to providing them with housing counseling services. So, this calculator is not required, but it's definitely helpful to some housing counseling agencies.

And then others might just want to make a user account to register for HUD trainings and webinars including those that have already taken place. Shawna mentioned this before, but a Get Credit button is available for all

past webinars. And then you can also receive a transcript for online training.

And then finally, we just wanted to note that a HUD Exchange account is not a housing counseling system account. HCS is a separate system that is not affiliated with the HUD Exchange, so these different account credentials allow you to do different things.

Now I'm going to show you how to set up a user account. It's fairly easy. I'll navigate to the website to show you how. So, if you're looking at the HUD Exchange website, this our landing page or our homepage. At the top right corner of page, and actually on every page on the HUD Exchange, you'll find a login button. Once you click that login button, you'll see that my user credentials are already prepopulated because I already have an account, and I clicked remember me. So, it's pretty easy to log in. I don't have to remember my password or anything like that.

But if you're a new user to the HUD Exchange, you'll want to click this create an account button under the New to HUD Exchange section. So, I'll click create an account, and now you can see all of the different fields that are required for you to set up a user account.

There's just one page of information that we ask users to fill out as well as establishing a username and password, and the information is really just your name, your location, your phone number, and your email address.

The location information is important because it allows you to select the organization that you work for. For example, if you select Alaska, you'll see at the bottom that the organization type comes up.

Let's say that I click state or local government, then you'll see in the dropdown list all of the different state and local government agencies that we have registered for user accounts logged here. So, you can either pick one of these if it applies to you, or you can enter your organization name and attach it to your account.

So, entering your organization information is important for a variety of reasons when you have a HUD Exchange account, but one of the reasons is for the Housing Counseling Agency Eligibility Tool. It will allow the tool to see who you are and where you work for and then route you through the proper pathway based on your organization. So, for example, if you're a non-profit or a government entity, it'll take you to specific screens within the tool, but if you're a for-profit entity or a HUD

employee at national headquarters, you are ineligible to become HUD-approved. So, you won't be able to complete the tool.

So, those are some of the things that this information is used for once you create your account, and at the end once you fill it all out, you can simply click Create Account at the bottom of the page here. And then, you're all set.

Shawna

Rachael, can I just mention for a second? It is different than being on the HUD Exchange mailing list. I always tell people that in the upper right-hand corner of the HUD Exchange, if you see your name up there, some type of "Hi, Shawna," for example, then you'll be able to tell if you have a HUD Exchange account. So, they are two different functions that are available.

Rachael

Thanks, Shawna.

Virginia

Excuse me. We do have a question. It says, "What if you work for two organizations, full time for one and on contract for the other?" I guess this is in terms of what organization to select.

Rachael

The HUD Exchange only allows you to select one organization, so my advice would be to select whichever one that you most often come to the website in relation to. If it's either, you can just pick whichever one is your more full-time employer. Thanks for that question, Ginger.

Now that I've gone over the HUD Exchange creating an account process, I'll talk a little bit about the most visited page on our site, that's right, the homepage of course. So, I will show you a few things on the homepage, and we swap out the main story on the homepage every so often. So, you can see in the screenshot in the slide deck we are featuring actually a housing counseling training, and we feature housing counseling content quite a bit on the HUD Exchange homepage. But we swap out this story every couple of weeks with anything super relevant or interesting to the visitors to our site, so right now the story is about the CDBG low- and moderate-income data that's currently available.

Some other items that are available on the site, I'll scroll down, right on the homepage are recent news items that are relevant to folks, a subscription link to sign up for HUD Exchange emails. So, I'll go over this a little bit more later, but as folks have already mentioned, the Housing Counseling Office runs their own mailing list. So, there's a

separate subscription process to that mailing list, but if you'd like to subscribe to other HUD Exchange programs or systems, for example getting updates about the COC Program, the CDBGR Program, anything like that, you can click on the Subscribe button right from the homepage.

We also feature resources and programs and topics, and we swap these out on a regular basis. If you're new to HUD, there's some overall information about HUD policy areas, and then at the bottom, we highlight some different trainings. So, we have training videos, online trainings, and then upcoming webinars. So, you can see this webinar right now is featured on the homepage.

Next, I'm going to talk about some different areas of the website that sort of relate to all programs and systems, so users can look at the trainings part of the website or the resource library or the frequently asked questions. They can search through materials that apply to all different sorts of programs and systems.

I'll go back to the HUD Exchange. On the website, there's a mega menu which means at the top you can see programs, resources, and trainings. But if you hover over any of these items that has an arrow next to it, you

can expand to see the content beneath it. So, for example, resources, you can click to see that the resource library and the FAQ collections are both available from this landing page.

I'm going to start with training, so to get there, you just click on Trainings at the top of the page. This mega menu is on every page of the site, so no matter where you are, you can always click back to get to any of these items. So, within the training section of the website, you can browse through all of our self-paced online trainings. I mentioned this earlier, but the Office of Housing Counseling has a bunch of self-paced training modules that are great to take, such as Intro to Housing Counseling. That one is really good if you're looking for just a quick overview of the program, and I think that only takes about 25 minutes.

You can also register for upcoming webinars, and then you can view past trainings and see if there's any content available for you to browse. So, we post these all for housing counseling and many other programs post things on the site as well.

Then the resource library is similar. It lets you browse just through resources, which is typically written guidance. So, for example, folks post

HUD guidance and training manuals here as well as new HUD regulations get posted here, things like that. You can browse through just by searching or you can order by date or relevance if you search. You can also drill down to specific programs and systems on the left-hand side of the page.

And then finally, the FAQ collections. There's a housing counseling FAQ collection which I'll talk about a little bit later, but we have FAQ collections for pretty much every program and system that has a presence on the site. So, for example, if I wanted to look at, IDIS FAQs, I could click on that collection, and then you can filter down by topic and use the keyword search to browse just that specific FAQ collection.

Next, I'm going to talk about the site-wide search. So, the site-wide search is different than these individual searches that I mentioned. So, for example, if you're looking at the training section of the site and you use the search bar on the page, you're only searching through trainings. So, that's really great if you know that you want to see all of the trainings available on a specific topic or there's one specific training and you know the title of it.

But let's say you don't really know if something's a training or a resource or you just want to see all the search results for housing counseling certification for example. On any page of the site, you can press the button for the magnifying glass in the top corner, and then you can enter your search terms. So, housing counseling certification is what I'm entering, and it's pretty much like Google, but just for the HUD Exchange.

So, when I type in housing counseling certification, it'll give me results in order. You can see there's always a recommended result typically, so it recognized the word housing counseling, and it's saying, oh, maybe you want to go to the housing counseling landing page. But also, you can see that it's giving me certification-specific resources. So, if this is the page I want, I'll click on that and get to my search result.

But let's say if what I want to search for is not coming up in the search results, if none of these look right to me, you can actually click on the topics on the left-hand side to drill down even further. That's really good if let's say you come here and you type in financial management or something like that, that could relate to many different programs and systems across the site, so clicking on these program names for more general terms like that can really help narrow down your results.

Shawna Rachael, sometimes I'm not sure if something is considered a resource versus like a page on the HUD Exchange, so I find the magnifying glass is my go-to because it gives me pages and it gives me resources. So, I just wanted to add that quick tip.

Rachael Definitely. Thanks, Shawna. That's the site-wide search. Next, I'm going to talk about the Need Homeless and Housing Assistance page on the HUD Exchange. This page is really useful for a variety of reasons, but first and foremost, the audience of the HUD Exchange are not members of the general public. It's grantees of HUD funding. With that said, members of the general public often find their way to the HUD Exchange looking for assistance, and we definitely want to make sure that we can point them in the right direction.

So, on the HUD Exchange at the top of every page there is an orange button that takes you to this Need Housing Assistance page. You can find it from any page. If you're a member of the public, but have found your way to the HUD Exchange, it'll be really easy for you to just locate this button.

You can see on this page that we've broken the resources down into types, so there's housing assistance, food, health and safety, disasters, employment and job training, and resources for veterans. This page can be especially useful for housing counselors that are looking to make a referral or to send their clients to specific resources. This has a lot of really helpful links. So, if someone's looking for employment or job training or maybe disaster preparedness or recovery resources, this is a really good collection of links that we have found people most often are looking for access to.

Now, I'll go back to the slide deck, and we are going to start talking about the housing counseling specific functions. So, thus far on the webinar, I've covered different parts of the HUD Exchange that are helpful to any user no matter what they're coming to the website for, and going forward, I'll talk about the housing counseling specific resources on the HUD Exchange.

First, we're going to do our second polling question. This polling question is, "How comfortable are you navigating the housing counseling content on the HUD Exchange?"

Answer one is, “I access information often and am comfortable finding resources.” Answer two is, “I search for information sometimes, but need more tips for finding information.” And then number three is, “I do not search for information often because I don’t know much about the HUD Exchange.” So, go ahead and select your answer. The polls are open.

Shawna

I can’t wait to see the results, Rachael.

Rachael

This will be really helpful for the rest of the presentation because I’ll know how familiar everyone is and hopefully be able to show you some tips based on your level of familiarity.

Great. I see that the least amount of people say they access information often and are comfortable finding resources. That is perfectly okay because this webinar will help everyone a lot. And then I see it’s about even with people who search sometimes but would like more tips for finding information and then people who aren’t very familiar with the HUD Exchange.

So, that's great. That means you're all in the right place, and this webinar will give you awesome tips and tricks for finding your resources and then also just give you a better picture of everything that's available.

Shawna

Rachael, if you don't mind, I think one thing to add just since we do have some folks that said that they're not sure where to go, I mean I, because I cross so many different programs, I work in the home program, I work in CDBG, I work in housing counseling, I find just going to the Program tab in the mega menu is where I start literally getting to know what's on the mini sites for individual programs—thank you, Rachael—and then kind of jumping off from there.

We just have like a smattering of individual programs here, but you can also click on the View All Programs and then search if you're looking for Housing Trust Fund or what have you. But I really find that that's like one of the main takeaways that I would say would be really helpful and to get those individuals pages bookmarked and/or just get used to using that program tab.

Rachael

Thanks, Shawna. Yes, that's a really helpful tip. I think the programs part of the mega menu, like Shawna said, you can access a few different

programs, and we do rotate these out. But you can also view all and filter down to your specific program.

We organize all of the content on the HUD Exchange by mini site, so each office has a mini site. I'll be talking mostly about the housing counseling mini site today, but there's also mini sites for pretty much every program in the system. So, even though you can find all the resources and training across the site for all programs and systems, if you're looking for specific topical information, this is often the best place to go.

This actually jumps me right into what I was going to do next which is show you all the landing page for the Housing Counseling Program mini site. So, as Shawna said, you can just click on it right from this menu, and now we're looking at the mini site landing page for housing counseling.

So, the housing counseling landing page is really robust. It changes often, and we highlight any new resources or pages that we've launched right here on the landing page. It's really a great place to check if you're looking to find new resources or maybe just see what's been updated recently. We have so many links on this page just so people don't have to spend too much time searching for what they need.

I'm going to actually scroll down the landing page and just sort of highlight what's new or what's available. On the left-hand side of the page, we typically highlight new pages that we've launched, and we update screenshots, things like that. On the right-side of the page, it's more of a menu for different things you might want to access based on the topic. So, you can see as I scroll down the landing page on this right-hand side we have information about the mailing list. We have agency approval information, which I'll talk about a bit more in a second.

We also have housing counselor certification information, several different pages related to policy guidance, so that can be FAQs, a link to the handbook, mortgagee letters. We have grant information and awards, and then system and reporting. So, we have information about HCS, CMS's 9902 Reporting, things like that.

And then in the center of the page we're featuring mostly things that we have launched recently or reorganized or things we want to call extra attention to. I'm not going to click on everything right now because most of this I'm covering later in our presentation.

And then further down the page we have information organized into different resource types. We have all of our training information all right there in one section and our research and studies page. And then finally, the housing counseling news and announcement section is populated with the six most recent news items, and the news items are just copies of the mailing list messages that Jerry sends out.

One thing I wanted to highlight now since we have so many non-participating agencies on the line who may want to become HUD approved at some point or just learn more about agency approval are these agency approval links, so we have a whole page dedicated to becoming a HUD-approved housing counseling agency. This gives you a good overview of different ways to participate in the program. It also goes through the qualifying criteria and how to submit applications for approval.

We feature some frequently asked questions on this webpage that people often ask when they're trying to become HUD-approved, and then on the top right corner you can also access the Agency Eligibility Tool. Now, this is the tool I was talking about earlier on in the presentation where we draw on user's account type information. The tool is a series of yes/no

questions. It doesn't take very long to complete, and it really helps you understand all of the criteria for becoming a HUD-approved agency and understand whether or not you would be ready to apply for HUD approval or if there's anything you need to do to become ready.

Shawna

Rachael, we know that a lot of HUD intermediaries also use that tool when they are talking to agencies that are looking to affiliate with a HUD intermediary or a state housing finance agency, so really that tool is for a lot of different purposes and should be used as such.

Rachael

Yes, Shawna. Thank you. Speaking of intermediaries, we also have a page dedicated to intermediaries under the agency approval section as well.

So, the first thing that I am going to show you right from this landing page is how to find other housing counseling agencies. Right at the top you can see there's a link for finding a housing counselor. If you click that link, you're taken to the Agency Customer Service Feedback and Finding a Housing Counselor page.

There's a couple of different ways to search. You can either search a map online or you can search by zip code, and this link is on the forefront right at the top of the housing counseling landing page because it's really useful for HCAs who may be providing referrals to agencies who provide other services or who may want to see what other HCAs are working in their area in case they're able to expand.

And then going back to our landing page, the next thing I wanted to touch on which we've talked about a lot but it's super important is the housing counseling mailing list. So, as we said earlier, there are two different mailing lists. One is specific to housing counseling, and then the HUD Exchange has a site-wide mailing lists where you can sign up for specific programs and topics.

Jerry Mayer, who kicked off the webinar, runs the housing counseling mailing list, and he sends really important updates every week. So, if you need housing counseling news or are looking for more updates or notifications about upcoming trainings, things like that, you should really subscribe. So, you can subscribe just by clicking this button, and you can send an email to listserv@HUDlist.HUD.gov and that will subscribe you. If you're looking to bulk subscribe, let's say you want to subscribe

everyone from your agency, you can just click that button and then list out all the staff emails that you'd like to subscribe right in the email.

The next page I wanted to highlight is the Housing Counseling Outreach Information. We're featuring this on the middle of the webpage right now, and this has a lot of really important fact sheets, flyers, posters, videos, and different guides for agencies to use. You can also order these materials free of charge for your agency, and you can order up to 25 copies. So, if you'd like to be sent copies of any of these materials, there's instructions for doing that right on this outreach page.

I'll just scroll through this flyers, posters, and fact sheets page so you can see what's all available, but there's quite a bit of information. So, there's first-time homebuyer brochures. There's beat the odds info graphics. There's a bunch of disaster recovery flyers, and these are really great because they are available in many different languages you can see on this table. There's also mortgage fact sheets and then some different fact sheets and flyers. So, that's our outreach page, and now I'm going to go back to the homepage.

I'll show the Capacity Building Toolkit and just our toolkits in general.

So all of our toolkits are available in this resource section of the landing page. If you click on Toolkits, you'll be taken to this toolkit page that shows you all of the different topics that you can browse through.

Outreach was one of them that I just touched on.

The Capacity Building Toolkit is the one I really wanted to highlight because this toolkit has a ton of really great resources and just a lot of information. For example, there's a Healthy Housing Toolkit and a Rental Counseling Toolkit. You can also see a Managing Expenditures and Avoiding Recapture Toolkit. In this middle tab on Sample Program Policies and Procedures, there is information on client disclosure, monitoring and performance information including the 9910 form, information on client action plans, and then some other sample forms.

Shawna

I would just say, Rachael, just this particular stuff that you're showing right now that if you are just getting yourself going in terms of your Housing Counseling Program, this is where a lot of the best information lives in terms of like the disclosure toolkit, budgeting, work plan, etc.

Rachael

Thanks, Shawna. Yes, definitely. Finally, there are some toolkits specifically for intermediaries on a variety of topics such as reporting, orientation, eligibility criteria, and quality control.

So, we just really wanted to highlight this specific toolkit because the information is pretty robust and pretty helpful, especially for agencies that are getting started, but again, this toolkits page that's available right off the housing counseling homepage has a bunch of different topics on here. So, if you're interested you can browse through all of the ones available.

Next, I wanted to touch on the disaster recovery and emergency preparedness information. We have a toolkit that collects all of the different disaster-related materials including specific information about CDBG-DR and then a collection of webinars as well. But the page that we update probably the most often is this Disaster and Emergency News and Resources for Housing Counselors page. So, we update this every time there's a new disaster that FEMA has declared individual assistance for. We post it to this FEMA Declarations tab.

We also keep an ongoing list of housing counseling disaster resources.

These are all specific to housing counselors, but the really awesome thing

about this page is that as it's grown over time, we realized that a lot of the links that would be helpful for housing counselors are actually helpful for the public at large or for anyone coming to the site. So, information that has been posted on this page really helps inform the disaster list on that Need Housing Assistance page that I covered earlier. It's really been a collaborative effort to build out all of these resource links and make sure everyone has all of the resource and information they need across the HUD Exchange. It was a big effort last year to post all of the disasters that happened, and we are continuing to focus on that going forward.

Whenever there was a large disaster that occurred, we collected information specific to that disaster in these tabs on the left, so any FEMA announcements or presidential declarations that might be of interest to folks as well as specific guidance or information that went out from FHA or Freddie Mac, things like that, those are all gathered on these different tabs.

Shawna

Can I just mention, though, just because we work on so many other programs including the Community Development Block Grant Disaster Recovery that this page has really grown over time particularly because of the 2017 national disasters. So, we know this page has been a go-to for

not just housing counselors, but across HUD grantees because a lot of those declarations happened well before there is Community Development Block Grant Disaster Recovery funds. So, hopefully, folks find that this page is useful to them in any program.

Rachael

Definitely, and as far as I know, this is one of the pages that gets updated most often on the site in terms of disaster news and announcements, so I definitely think it can be helpful to folks no matter if they're participating in HUD's Housing Counseling Program or a different program.

And then I also wanted to highlight the Disaster Recovery Toolkit which launched in 2018, so it's fairly new. It's a really comprehensive guide for housing counseling agencies, but it also creates some synergy across programs. It connects the Housing Counseling Program to the CDBG-DR program and gives some best practices and advice for how to coordinate with your community post disaster.

The guide is separated into preparing for a disaster and then operating post disaster guide. Both of the guides really help housing counseling agencies themselves recover their agency from a disaster and get their agency in order. They also help them work with their clients to help their clients be

prepared and operate after a disaster, get the assistance they need. This resource collection is really comprehensive. This is also continuing to grow overtime. This is our first cut that has been launched but we are going to continue creating resources and adding them to this toolkit over time. When any resources get added to this Jerry will announce that via his listserv to make sure people know to come in and check out the new resources. This is a very comprehensive and a really robust guide to preparing and operating post disaster.

Shawna

If I could say two quick things on this. This guide is helpful for anyone who needs to create a continuity of operations plan or COOP. We have a nice template there, some samples. Also, if you're curious if you're working in disaster recovery and don't know the role of what a housing counseling agency can do for you, maybe that's why you're here today, this toolkit is one of the places to start.

Rachael

Yes. Absolutely. Thanks, Shawna. I'm going to continue on highlighting all the different resources we have available. We've covered, so far, capacity building, disaster recovery and preparedness, and now I'm going to talk about 9902 reporting. A little bit different than what we've been talking about but 9902 reporting is obviously an essential requirement for

anyone participating in the HUD program. It's also really an important tool for agencies to access the impacts that they're having in their community and agencies are impacting their community in terms of counseling. It's a really measurable way to keep track of how the counseling housing agency is functioning and how they're affecting their community. Then also what types of clients that they're counseling and all that type of data.

The 9902 form it's pretty robust. There's many different sections to it and many different items that need to be reported on. We've broken this toolkit into a couple of different sections. The 9902 General Overview page really just gets at the bones of the 9902 reporting. It goes through the reporting period schedule but it also talks about what is 9902 reporting, who files the 9902, how do they report, making sure your reporting is accurate, all that. This is really good for staff turnover or anyone who's curious about 9902 reporting requirements.

Then we also have a deep dive into the 9902 report, which is available from that landing page as well. This goes through frequently asked questions. Then it goes through every single section of the form and offers tips for reporting on every section. If you're looking specifically

how to report on improving financial capacity with your clients you can go to section 10 and click on that Impact and then it'll give you examples of who to count in your section and then also helpful hints on how to add up your numbers and things like that. Then there's some case studies at the end so you can see how you would count real-life clients in your 9902.

Also available on that landing page is client management system or CMS guidance. Agencies use client management systems to keep track of all their client data and to transmit their 9902 reports. That guidance is available right here as well and then national quarterly 9902 report.

HUD is in the midst of creating more robust views of the 9902 data so definitely be on the lookout for that within the next year. That'll be available from this landing page, too, as soon as it launches. That will allow people to look at nationwide and state level 9902 data. It'll have several different dashboards that people can toggle, data views in and that will really help communicate 9902 impacts and help agencies understand the big picture of 9902 data. We're definitely really excited about that.

Shawna

Rachael, before you go back, just show the completes, show the deeper dive just for a second. Just that I think that especially if you're new to an

agency or new overall just to have individual links that go through section by section of the 9902 is definitely I think one of my favorite parts of the toolkit that Rachael's showing you today that goes into greater detail and provides HUD's best guidance for how to complete those sections. I just wanted to have you pause right there just for a quick look.

Rachael

Yes. Thanks, Shawna. This is also printable so you can print any one of these sections or you can download the full toolkit as a PDF and print it out. I know we're all different learners and some of us like to print things out and highlight them. We wanted to be able to give people that functionality as well.

Then I'm going to talk about the housing counseling certification pages. This just recently launched and it's a suite of information available. Some of this was available before so you might recognize some of these pages such as the Final Rule and Exam page. A lot of this information is brand new.

They contain a ton of information regarding counselor certification, the exam, the various HUD programs covered by the Final Rule, how to apply for certification and then FHA connection and much more. There's also a

page dedicated towards tracking, agency progress towards meeting their goals, success stories, and then there's certification specific FAQs that are available in the FAQ database.

Now, like I said there's a ton of information here and many of these pages are brand new. We're actually going to have a webinar in May that touches on all of these pages and all the information that's available for agencies or anyone who's getting HUD certified housing counselors. I'm not going to do that big of a deep dive during this webinar because the information is so robust. I just wanted to make sure everyone was aware of all the different pages that are available.

The FAQs specifically are going to be super useful for folks so I'll open that page. I also wanted to touch on this HUD programs covered by the Housing Counseling Certification Final Rule. I know there's a lot of people on this webinar that are not currently participating agencies but they might be affected by the Certification Final Rule. If you're part of one of the other HUD programs and you think you're affected you could go to this page and click on one of these programs and find out if you might be affected by the Final Rule. Then if you determine that you are affected there's a bunch of next steps and different options for you to

proceed. This is a really great resource that's just become available recently in 2019.

Shawna, do you have anything to add about this page? Hopefully, you're [ph] creating this great resource.

Shawn

Yes. We hope this page is helpful not just for those of you that are new but also for others who currently participate and where you might want to talk to your local CDBG or home grantee or those that work in public housing because the short scenarios that we wrote underneath each of those programs they help you with your talking points about how the rule is triggered or may be triggered for those other HUD programs. I think this page will really be useful for many of you. We're working on some real case examples that we'll add at some point in the future.

I think you got it, Rachael. I hope people find it helpful.

Rachael

Yes. Definitely. Thanks, Shawna. Also the FAQs, which I also opened, there are FAQs as I mentioned earlier for the Office of Housing Counseling and other programs and systems site-wide. The housing counseling FAQs cover a lot of different topics. You can see on the left-

hand side there are reimbursement related FAQs, FAQs for HECM counseling, a variety of different program requirements that are covered as well as some reporting and recordkeeping questions for example 9902 or HCS CMS. A really robust section of our FAQs all relate to certification so you can browse through all of these different topics, for example program requirements, questions specific to the exam, any of these topics here and also on specific HUD programs you can filter down to the program that you're interested in learning more about.

Every FAQ has a keyword search. If you're looking specifically for an FAQ on something you can type it in right here on this keyword search page. Just a note that the FAQ keyword search functions a little bit differently than the site-wide search. When you search-site wide it acts in a similar way to Google where no matter what words you put in, how many, and in whatever order it will show you the most relevant search results. The FAQ keyword search shows you the results in order of what you've searched so it's actually better to use a smaller phrase when you're searching because it's looking at those terms in order.

For example, I'm typing in, "How do I become HUD certified?" That won't yield anything because there's no question that exactly says those

words in that order. It's much better to type in "certification" and that yields a bunch of results. That's just a quick note about searching for FAQs. I know I've received that question before.

Shawn

That's a really good tip, Rachael, and obviously this works the same across the other FAQ databases on the HUD Exchange. We have, and will continue to do so, tag more than one program. Those of you that work in CBD programs like [indiscernible] CDBG we've tagged those FAQs here in that database as well as housing counseling because it's all the same source. The Excel where you can download the results in Excel in the up right-hand corner is something that I frequently use in order to grab everything that I want to look at and do a deeper dive.

Rachael

Yes. Thanks, Shawna, the export to Excel is definitely super helpful.

Finally, I just wanted to go back to the landing page and highlight all of the training information we have available since there's many different resources to look through. It's all super helpful and updated really often. The first resource is the Housing Counseling Weekly Training Digest. This gets updated every Monday. Right at the top of the page there are

important links that are drawn attention to such as the upcoming trainings, the webinar archive and the online training collection.

If you keep scrolling, you'll notice that there are HUD Office of Housing Counseling specific trainings right at the top. Then there are some non-housing counseling trainings of interest that we call attention to sometimes in case you're interested in a program that's not affiliated with the Office of Housing Counseling but might be helpful for folks. Then we have sections for each of our HUD funded training partners, so for example, NeighborWorks, RCAC, NCRC, and [indiscernible]. They all have a ton of upcoming trainings and we update these every week as well.

Then if you keep going there's other training partners for the Office of Housing Counseling. We have a ton of training partners that have housing counseling trainings of interest. I highly recommend checking out this page if you're interested in upcoming trainings. We also call out some HECM trainings at the bottom.

Shawna

HECM is, for those of you that don't know, it's the Home Equity Conversion Mortgage Program where there is specific counseling that is required to be done with that program.

Rachael Thanks, Shawna.

Shawna Sure.

Rachael We can get carried away with our acronyms sometimes. Great. I just wanted to finally talk about the online training and then the webinar archives.

This is an online training module page. We have a bunch of different trainings here. We are continuously working on new ones so definitely come back and check in the future for new ones that we're going to release.

Right now the Introduction to Housing Counseling training is available. That's just a really great overview of the program. I think I mentioned this early on in the webinar. It only takes 25 minutes and it provides a lot of useful information so I highly recommend taking that. We also have recordkeeping and requirements trainings and then a network monitoring training for intermediaries.

There are instructions at the top of this page to accessing each of these trainings. You need an HUD Exchange account, as we went through earlier. Once you have a HUD Exchange account it's really easy to just launch these in our learning management system.

Our Webinar Archives, we post all of our webinars here once they've passed. All of our webinars have transcripts, slides, and audio replay information available. The audio replay information is only available for one year following the webinar but the slides and transcript are available at any time.

You can browse all the past trainings in order. This chronological page is helpful if you're just looking for the latest trainings. If you're looking for all of the webinars that were conducted on a specific topic we have a page that's organized by topic. Let's say you're looking for all of the trainings related to HECM counseling, home equity conversion mortgage as Shawna pointed out, and they're all collected in this section. You can browse through any of these. We have a bunch of social media trainings, trainings specifically related to the NOFA, a bunch of different categories.

Shawna

This is what I was saying the team that Rachael and I work on support HUD's Office of Housing Counseling their capacity building team, and many of those folks are leading these webinars in terms of the content and the delivery as well. They also have a CPA firm who provides a deeper dive on billing methodologies, etc. Really, this is like a team effort in terms of the housing counseling webinars.

Rachael

Thanks, Shawna. Finally before we wrap up I will just demonstrate how you would get credit for a training, an online training or a webinar. We'll use some of the skills that we learned earlier in this webinar. You'll go to the top and you'll log in. If you are new to the HUD Exchange you'll create an account and you'll just enter those pretty basic information fields that I touched on earlier. If you're lucky like me your login information will be prepopulated because you clicked remember me and you'll log in.

If you type in your user name, type in your password and it doesn't come up you can contact us and we will send you a new password; that definitely happens so no worries there. Once you log in you will be looking at My HUD Exchange. You can see everything that's available to you. You might want to take the Housing Counseling Agency Eligibility Tool.

In this case you know that you want to get credit for a training. You'll find the housing counseling training. You can do that a couple of ways. You can either go to the training section like I showed earlier. Let's say we want to go to the Housing Counseling Program mini site first. You can make a quick stop off, check out the landing page, see if anything new launched since you last came here, scroll down to the bottom and find your training digest, see what's upcoming, maybe register for some trainings, and then realized that, oh, you took this Understanding Indirect Rates Training.

Maybe you want to check out the slides or look at the transcript for something you missed and then you never got credit. You'll just click Get Credit. Then it launches our learning management system and you can get credit for the training on this page. You'll enroll and once you enroll you'll be able to mark as complete. It's pretty much the same process if you wanted to take an online training. Let's say I go back to our online training page. I decided I want to take Intro to Health and Counseling.

Shawna

The course that everyone should take.

- Rachael Then I'll just click Go to Training. Then it'll just launch the training automatically from the learning management system.
- Shawna I don't know if you mentioned this but it's probably evident. These are self-paced online training. You can take them. You can stop them if you need to. You might do ten minutes and then come back later. Then your transcript will tell you if you've completed the course or haven't completed the course so you can come back at any time.
- Rachael Yes, definitely. Thanks, Shawna.
- Shawna Sure. No problem.
- Rachael I just caught us up on our slide deck. I did not use the slide deck to guide me through most of this demonstration, as you'll understand, because it's really about the HUD Exchange. These slides will be up on the website for posterity and they have all of the links that you would need to access. So, definitely check out the slide deck in the future if you forget something I went over or you want to grab the link for something you know I spoke about, this will be available to you.

Finally, before we take questions I wanted to ask a final polling question.

Jane Actually, Rachael, before we do the poll if the operator could give instructions on how to ask questions over the phone that would be great.

Moderator [Operator instructions.] One moment please while we wait for our first question.

Shawna Should we go ahead and do the poll, Jane, while we're waiting for folks to queue up?

Jane Sure. It's open now.

Rachael Great. Our last polling question is, "Following this webinar what is the first page you plan to visit on the HUD Exchange?" Option 1 is, "Create a HUD Exchange account." Option 2 is, "Immediately request a password reset for HCS." Option 3 is, "Take an online training." Option 4 is, "Visit the Certification page." And option 5 is, "Receive credit for a past webinar on the Webinar Archive page." Any answer is right except one.

Shawna Wonderful.

Rachael Great. It looks like we have some mixed results here. Most people think create a HUD Exchange account; that's great. Hopefully folks learned all the different things they can do with HUD Exchange account that they didn't know before. Only 3% of you it looks like said, "Request a password reset for HCS." That was not the right answer but I'm going to assume you're joking.

Shawna Can I remind folks, Rachael, you request a password reset by emailing housing.counseling@HUD.gov and please put in the subject line HCS password support. Thank you.

Rachael Perfect. Yes. Thank you, Shawna. The rest of you there were mixed results between taking an online training, visiting the certification pages, and receiving credit for a past webinar. That's great.

Shawna Good next steps.

Rachael All right. I think we're ready to take some questions now.

Moderator Thank you. Our first question is going to be coming from the line of Charles Thomas. Please go ahead.

Charles Yes. I'm Charles Thomas and I'm with West Virginia Housing Development in Charleston, West Virginia. I have a few basic questions about the new HUD-approved housing counseling because we are such a rural state and the only single family program that we do is with the home program. It's a leverage program that we usually do with USDA and we'll do up to 14,999.

My first question is with the new HUD-approved housing counseling does this have to be a face-to-face home buyer education course?

Shawna It does not.

Charles It can be an online course.

Shawna Well, you have to provide housing counseling to them but the format is up to you.

Charles Okay. So it could be over the phone?

Shawna Yes. There's telephonic one-on-one counseling that many housing counseling agencies provide. I just noticed that you're not currently an intermediary. You're the state housing finance agency in West Virginia but I noticed that you folks aren't currently participating. Is that right?

Charles Correct. We're having to totally rely—we're offering this program. We know that this requirement is coming down. Another question I have is how often—because I went out on HUD Exchange, I use it a lot.

Shawna Great.

Charles I don't think that when I last looked the people that said that they were HUD-approved housing counselors, how often is that updated? Because I doubt that some of the people that showed as HUD-approved have completed what is going to be required.

Shawna You're looking up by agency?

Charles Well, I'm looking up by West Virginia of who's a HUD-approved housing counselor.

Shawna You're looking at the agency. Yes. We have the agency search. I think that's what Rachael's going to pull up. Currently that agency search doesn't tell you, and you're exactly right, if they have counselors that are certified.

Charles Right.

Shawna Rachael's going to do like a real test case here. We're going to pull West Virginia and we're going to see the organizations there. It's my understanding that this list of HUD-approved agency is updated, Jane, daily?

Jane That's correct. Yes.

Shawna So it's real-time, real-time.

Rachael Also, because the Final Rule for certified counselors is not—the final compliance date is not until August 2020.

Charles Right.

Rachael Just because people are shown on this list doesn't mean that they've met that requirement yet because they were HUD-approved and it hasn't been 2020 yet. They aren't technically required to comply until that date.

Shawna You have the choice. Right? You can choose to participate as a state housing finance agency or you can rely upon your organizations and —

Charles And that's what we hope to do.

Shawna Okay. Then you might need to get a couple of them independently become HUD-approved if you're not seeing them on the list, or encourage them to join a HUD intermediary that's available nationally.

Charles Can she scroll her list down so I can see the rest of it?

Shawna Sure.

Charles Like you're saying these could be but they've not because, to my understanding, not only does an individual have to be HUD-approved housing counselor but the agency also has to be HUD-approved.

Shawna Right. If a HUD certified housing counselor works for a HUD-approved housing counseling agency, there are really two steps here.

Charles Right.

Shawna Thanks for your question.

Charles It can be, if necessary, they can provide the counseling by phone because West Virginia is a very spread out state. It's very rural. We've had challenges in the past. We just don't even have people offering housing counseling like we used to. Everybody had NeighborWorks America and were having home buyer ed courses and we had to get to the point to where we were having to let people take them online. It was going to be two to three hours for them to drive to a class. You can't expect somebody to do that, especially low income person. They may not even have a vehicle.

Shawna Right. [Audio disruption]. Yes. We actually have a technology page that you might be interested that Rachael can switch to. We're providing various platforms that might be very helpful for you as well.

Charles Yes. That's great.

Moderator Thank you. [Operator instructions.] We have a question from the line of Charlene Newman. Please go ahead. Charlene, your question?

Shawna Hopefully we didn't lose her.

Moderator [Operator instructions.]

Shawna Jane, do we have any questions that have been written in that we should cover in the meantime?

Jane Yes. We've had some people ask if you could show again how to get credit training, please.

Shawna Wonderful.

Rachael Sure. I think just so we're clear the Get Credit button is only available once the webinar audio replay and slides are available. For this webinar, for example, you might have to wait a bit to get credit because the Get

Credit button is accessible to anyone on the HUD Exchange. Only those who are able to view the slides and transcript can get credit.

The most recent webinars are available on the Webinar Archive page. If I wanted to get credit for the Overview, Financial, and Administrative Reviews Webinar which took place on February 14th, I could click that and then the Get Credit button is here on the right. Today's webinar page looks very similar to this. Once the material has been posted and the audio replay information is available you'll be able to get credit. A certificate will be sent to you from Go-To webinar following this presentation so you'll get that as well.

Shawna

Other questions, Jane?

Jane

Somebody had a question about how to update their profile? They moved from an MSO to a LACA.

Rachael

Sure. Once you've logged in to your HUD Exchange account under My HUD Exchange you'll see a bunch of different options and in the top left corner Update My Account is the best place to do that. So, you can change your password, you can update your information, or you can

change your learner profile. To update your organization right now it says, "I'm a TA provider ICF," but let's say I switched to organizations. I can go to Update. Then I could switch my organization type by unselecting TA Provider and selecting something different or I could dropdown and select a different organization name.

Shawna Great question. We know folks change jobs so it's nice that you can kind of manage this yourself. I wish I could manage my own profile in other sites as well as we can here. Other questions?

Moderator We have a question from the line of Tracy. Please go ahead.

Tracy Yes. Good afternoon, everyone. My question is the intermediaries or the persons that have the TA grants to do the training, are they at liberty to say who can attend the trainings and who cannot to become a HUD-approved counsel agency?

Shawna When you say, "at liberty" what do you mean? Are you looking to know if the HUD has four training partners and do they have criteria for attendance or what's your question?

Tracy Yes. Say that if you're an attendee who worked in the past with HUD and then when you try to come in to receive training that updates your portfolio in housing counseling and then they tell you you're not qualified to become one when you know that you've had intensive training with your agency HUD, do they have the right to tell someone that?

Shawna I think I know what you're saying now. All the HUD intermediaries across the country can have, in addition to the basic criteria, their own and go above and beyond what's required for you to be a part of their network on an agency level and also on the counselor level.

Jane, would you say anything differently or clarify what I just said?

Jane That's correct. It's on an individual basis based on the organization.

Tracy Thank you, guys, for answering the question.

Shawna Absolutely. You might try—there are a lot of organizations that have capacity to add other sub-grantees or affiliates. If one doesn't have the need for your services go to somebody else. There's a lot of need right

now particularly with these other HUD covered programs. I just encourage you to find another national partner or regional partner, etc.

Tracy Thank you.

Shawna Of course.

Moderator Thank you. We have a question from the line of Jeanette Velazquez. Please go ahead.

Jeanette Yes. I had a question about the 9902. If a member changes the type of services, so for example, if they were in foreclosure intervention and then they were interested in financial literacy after they've resolved their delinquency, would we go ahead and close their file and then reopen a new one? This was something that was brought up during a NeighborWorks training and I just want to see if there's any guidance on that. Is there a place on the HUD Exchange that I can find that specific item?

Jane Please send your question to the housing.counseling@HUD.gov mailbox so we can make sure you get the best answer.

Rachael Yes. If you send it to that email address and they provide you with guidance we will update the 9902 toolkit with that guidance so that others have it. To my knowledge I don't think we have guidance on that on the website yet but I really appreciate your question. We can definitely make sure that's posted once we have an answer.

Jeanette Okay. Sounds good. Thank you.

Jane Are there any other callers in the queue?

Moderator Yes. We have a question from the line of Mario Trevino. Please go ahead.

Mario Hi. Good afternoon. My question is I work for Bryan College Station Habitat for Humanity here in Texas. I know we do home buyer classes as part of our process. I just wanted to see what are our options, whether we have to become HUD-approved agencies or do we go through an intermediary so we can make our services HUD-approved and have some counselors here at our affiliate.

Shawna Rachael, do you mind showing him—we have a resource that kind of sorts through. You're going to go somewhere different but that's fine.

Rachael I can go to a different page. I was thinking about the options at the bottom of this page for partnering or becoming HUD-approved.

Shawna Yes. That's a good place to go. I also like the overview that we have with the Housing Counseling Agency Eligibility Tool. This might be helpful for our friend from West Virginia as well just to kind of understand the options. It's on the HUD Approval page. You can go to the HUD Approval page, just how to participate, yes, whatever you want to do.

I find that this one page guidance with the options on how to participate can be really helpful to you. It talks about your organization and taking like the Housing Counseling Agency Eligibility Tool as a first step. Then you decide based upon your results, and the tool itself has a lot of guidance within it. It's meant to be an educational tool that explains the requirements for becoming HUD approved. Then you decide, am I going to use this to work with HUD and get the HUD approval or am I going to work with a national organization or those that have networks as you see here?

Mario Right.

Shawna Sometimes those national organizations require HUD approval as well. They also have their own criteria that we talked about with one of the other callers. I think this is a quick-at-a-glance. Between Rachael's options and I think this graphic hopefully that gives you a good start to be able to help you make your decision.

Mario All right. I'm guessing the home buyer classes that we have already in place would be part of what we submit as part of our application.

Shawna There are some specific requirements that you'll need to meet in terms of your type of housing counseling that you deliver. You might want to take the Intro to Housing Counseling that basic 25 minute course and that also goes through some of the options.

Then there's a part one and part two of the requirements of the grant so you might want to look there as well because they're going to talk about the changes that you may need to make. For example underneath the certification rule, you have to cover the entire process of home ownership

and there's several different things to talk about including disposition of that property. Maybe you didn't have disposition covered in your current counseling; you might need to add that element. So if you go through those couple of courses then that will help you make a decision. Also, a lot of the national intermediaries and other organizations are great in terms of providing technical assistance to help you.

Mario Great. All right. Thank you very much.

Shawna Yes. Sure. No problem. I think that's our last caller is what I had heard. Did anything change, Shawn?

Moderator We have a question from Heypin. Please go ahead.

Heypin Just a quick question. I know that you'll be sending our certificates in a couple of days. Even though we get the certificate we would still have to go to the website and claim the credit. Is that correct?

Rachael If you want for it to show up on your HUD Exchange Learning Management Transcripts you can certainly go and get credit. It's not a

requirement though. It really depends on if you want it to show up in your HUD Exchange specific user transcript.

Shawna Can I just say, because this is not intuitive I don't think, but I always try to remind myself that the learner transcript is about you, an individual. It's your controlling your destiny. Which is classes you take online, which webinars you want to receive credit for is part of this learner transcript. It's really about you. There isn't sort of an auto credit component.

Heypin Got it. Thank you.

Shawna Of course. Any questions that have been written in, Jane, that we should take? Lots of great questions.

Jane Yes. Lots of good questions today. We really appreciate everyone. We've run out of time unfortunately. If we weren't able to get to your question I apologize for that. Please feel free to send it to our housing.counseling@HUD.gov mailbox or if you have any comments or ideas for future webinars or training that would be helpful, too. Thank you.

Shawna

Sure. No problem. We have a Resources page right here to go back to. Then we have a slide about getting your certificate. You can print that for your records. That's an added feature for this particular webinar that housing counseling offers for that certificate so that's a great resource and a reminder to get credit. Thanks, Rachael.

This page, the third link down is what Jane just said. Any questions or feedback housing.counseling@HUD.gov; that's managed by the HUD team.

Thanks, everyone. I appreciate your time. Look forward to hearing from you on another webinar. Have a great afternoon.

Moderator

With that that does conclude our conference for today. We thank you for your participation and for using AT&T Teleconference. You may now disconnect.