



Reporting Tips for HUD 9902

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September 25, 2015

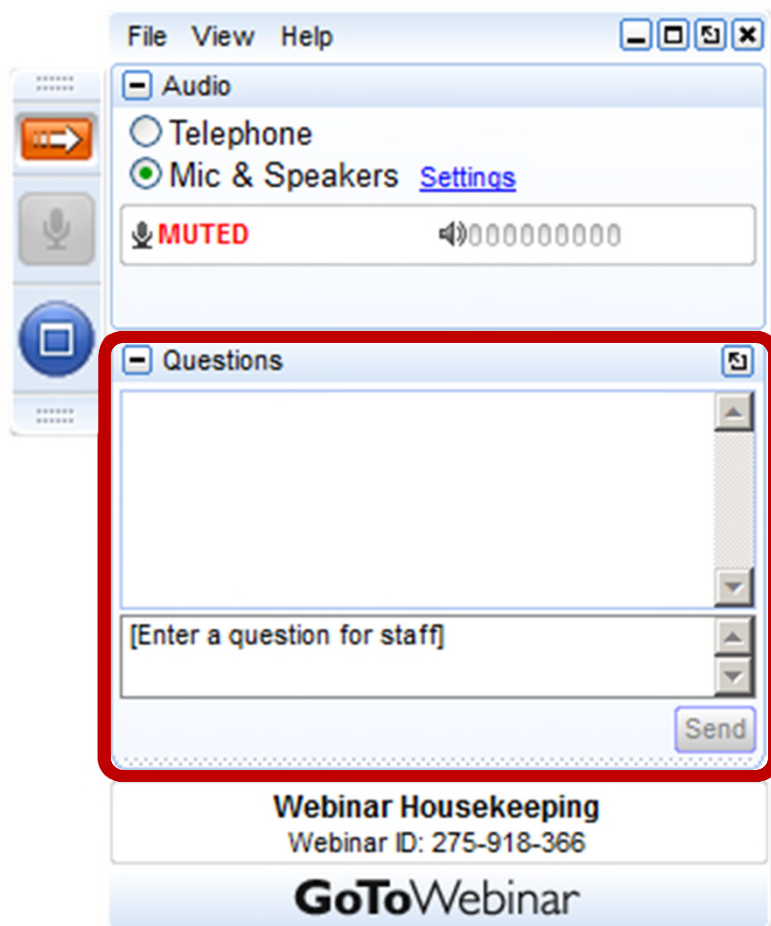


Office of Housing Counseling Speakers:
Lorraine Griscavage-Frisbee, Deputy Director, OCB
Dave Gallian, Housing Program Specialist, OPGA
Colleen Weiser, Sr. Housing Program Specialist, OPGA
Phyllis Ford, Division Director, OOA

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WELCOME

Lorraine Griscavage-Frisbee

Deputy Director

Office of Outreach and Capacity Building

AGENDA

- The form HUD 9902, Housing Counseling Agency Activity Report
- Importance of Accurate Reporting
- Understanding Section 10
- Other Goals and Tips for Reporting
 - Roles and responsibilities
 - HUD Point of Contact (POC) assistance
- Resources and Conclusion

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT



**9902 Review and Reporting
Challenges
Phyllis Ford
Division Director
Office of Oversight and Accountability**

Poll Question 1

What is the effective date for HUD's latest version of form HUD 9902?

- a. October 1, 2015
- b. October 1, 2014
- c. October 1, 2013

Latest Version of 9902

New 9902 form -Effective date was **October 1, 2014**

(also known as the start of the Federal Fiscal Year (FY) 2015)

- Added more demographic information – more income levels and sections to report Limited English Proficiency and Rural Area
- Added Section 10, “***Impact and Scope of One-on-One Counseling Services***”
- Added a column for HUD Grant Projections

**New Housing Counseling Agency Activity
 Report – FORM HUD 9902
 New change – 3 columns instead of 2 columns**

All Counseling and Education Activities	HUD Housing Counseling Program Grantees Only	
	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds – Actual, to date.	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds – Annual Projection



Form 9902

- **Section 3-Ethnicity & Section 4- Race** remain the same
- **Section 5-Income Levels**, HUD added income levels:
 - a. 30% of Area Median Income (AMI)
 - b. 30 - 49% of AMI
- **Section 6 – Rural Area Status**
- **Section 7 – Limited English Proficiency**
- **Section 8 – Education Workshops**

Form 9902

Section 9. Households Receiving One-on-One Counseling, by Purpose

- a. Homeless Assistance
- b. Rental Topics
- c. Prepurchase/Homebuying
- d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)
- e. Reverse Mortgage
- f. Resolving or Preventing Mortgage Delinquency or Default

Form 9902

- **Section 10** – report outcomes of one-on-one counseling
- Dave Gallian will cover this section

Reporting Periods and Due Dates

The 9902 report requires **cumulative** data from one quarter to the next quarter.

HUD FY QTR	MONTHS COVERED	CUMULATIVE TOTALS NEEDED
1 st Qtr.	October 1 st - December 31 st	Within 30 calendar days of end of quarter
2 nd Qtr.	October 1 st - March 30 th	Within 30 calendar days of end of quarter (include 1 st Qtr. totals)
3 rd Qtr.	October 1 st - June 30 th	Within 30 calendar days of end of quarter (include 1 st and 2 nd Qtr. totals)
4 th Qtr.	October 1 st - September 30 th	Within 90 calendar days of end of quarter (include 1 st , 2 nd , and 3 rd Qtr. totals)

Why Accurate Reporting?

It benefits HUD, stakeholders, and ultimately clients

- 9902 data quantifies results of HUD's Housing Counseling Program
- Documents results of housing counseling efforts
- Summarizes education activities
- Demographics – serving target populations
- **All agencies must report (regardless if grantee or not)**
- Data Reported to Congress = funding appropriations

HUD 9902 Challenges

- Only 85% of HUD-participating agencies report 9902 data quarterly.
- Some agencies are not reporting their quarterly data **cumulatively**; HUD's Housing Counseling System (HCS) does not verify totals
- Lower than expected reporting in Section 10

Statistics on the 9902 data through FY15, Quarter 3

Reporting on Section 10 – outcomes of 1-on-1 counseling:

- Agencies reported that the counseling resulted in a sustainable household budget for only 34% of the clients counseled. **Lower than expected.**
- Number of 1-1 households counseled that gained access to resources to improve their housing situation (e.g. down payment assistance) reported was only 17% of clients counseled. **Again lower than expected.**

Section 10 Reporting

- Total outcomes under **Section 10** reported approximately 1 outcome per counseling client.
- OHC expected this number to be higher since agencies are now allowed to select more than one outcome option.
- Goal of this training is to clarify the items in **Section 10** for more accurate outcomes reporting.

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT



Understanding Section 10

Impact and Scope of One-on-One Counseling Services

David Gallian

Housing Program Specialist

Office of Policy and Grant Administration

Poll Question 2

On the 9902 Section 3 (Ethnicity),
Section 4 (Race),
Section 5 (Income),
Section 6 (Rural), and
Section 7 (LEP) should always have the same
totals.

- a. True
- b. False

Poll Question 3

In Section 10 of the 9902, how many outcomes can be reported for each client?

- a. One outcome per client – can change each quarter.
- b. One per client per quarter for a maximum of 4 outcomes.
- c. As many outcomes as needed to reflect the results of 1- on - 1 counseling.

General Guidelines for Section 10

Impact and Scope of One-on-One Counseling Services

- In this section you should ***select as many impacts that apply to each of the households that you have counseled via one-on-one counseling.***
- Unlike Sections 3-7 of the 9902, the total number of impacts reported in Section 10 does not need to add up to the totals reported in any other sections of this form.
- The Section 10 total may be higher or lower than the totals in other sections based on the impact and scope of the counseling services provided.

General Guidelines for Section 10

- Some outcomes can be reported immediately as a result of counseling.
- Other outcomes require follow-up with the client.
- Some outcome numbers reported should not be greater than type of service reported in **Section 9**. For example HECM clients reported obtaining a HECM should not be greater in **Section 10** than in **Section 9**.

Section 9 of the 9902

		All Counseling and Education Activities	HUD Housing Counseling Program Grantees Only	
			Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds – Actual, to date.	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds – Annual Projection
9. Households Receiving One-on-One Counseling, by Purpose				
a.	Homeless Assistance			
b.	Rental Topics			
c.	Prepurchase/Homebuying			
d.	Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)			
e.	Reverse Mortgage			
f.	Resolving or Preventing Mortgage Delinquency or Default			
Section 9 Total:				
Households Served Sections 8 and 9 Total:				



Follow Up

HUD Handbook 7610.1 Rev. 5, Chapter 3, Paragraph 5 F

- **F.** Participating agencies must make a reasonable effort to have follow-up communication with the client, to assure that the client is progressing toward his or her housing goal, to modify or terminate housing counseling, and to learn and report outcomes.
- Client follow-up should be conducted via phone or in person by a qualified housing counselor **within the first 60 days of no client contact.**
- If unsuccessful, after two attempts to conduct a verbal follow-up session, the counselor must write a letter or send an e-mail to the client stating that such efforts have been made and inform the client that there is a need for follow-up communication. The letter or email must request that the client contact the housing counseling agency **no later than 30 days from the date of the letter or email.**

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

- a. **Households that received one-on-one counseling that also received group education services.**

This is self explanatory and is a simple count of households that receive both one-on-one counseling and group education.

Tip: This outcome can be reported immediately if the client attended a group education session prior to counseling. This # should be less than or equal to the total of Section 9.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

b. Households that received information on fair housing, fair lending and/or accessibility rights.

Examples of households who should be recorded in this category include but are not limited to those who:

- Were assisted with filing a fair housing complaint;
- Were counseled and referred to a legal aid agency for fair housing assistance;
- Received one-on-one counseling and also attend a fair housing workshop;
- Received information on discriminatory housing and mortgage lending practices and the rights and remedies available under federal, state and local laws;
- Received mobility counseling to help move to housing not located in areas of poverty concentration or minority concentration;
- Received information about housing opportunities in areas that provide community assets such as good schools, health care, transportation and retail opportunities.

Tip: # reported in this category should be less than or equal to total in Section 9

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

c. **Households for whom counselor developed a sustainable household budget through the provision of financial management and/or budget services.**

- This is a simple count of all households that received one on one counseling and for whom the counselor developed a budget.
- Counselors do not have to verify that the household actually implements and sustains the budget.
- By sustainable, HUD means a realistic and do-able budget for that household.
- HUD expects this impact will apply to nearly all one-on-one counseling clients because the HUD Housing Counseling Handbook requires establishment of a household budget that the client can afford.”

Tip: This outcome can be reported immediately as a result of counseling.

This # should be the same as or less than the total of Section 9.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

- d. **Households that improved their financial capacity (e.g. increased discretionary income, decreased debt load, increased savings, increased credit score) after receiving Housing Counseling Services.**

Examples of households who should be recorded in this category include but are not limited to those who:

- Increase their discretionary income by obtaining higher wage employment or decreasing housing payments to free up income for other expenses;
- Decrease debt load by paying down debts or consolidating them for lower payments;
- Increase savings by making changes to their budget or obtaining an individual development account;
- Increase credit score by making changes to credit habits or correcting errors on credit reports.

Tip: The Counselor will need to determine outcome through follow-up with the client. This # should be less than or equal to the total of Section 9.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

e. Households that gained access to resources to help them improve their housing situation (e.g. down payment assistance, rental assistance, utility assistance, etc.) after receiving Housing Counseling Services.

Examples of households who should be recorded in this category include but are not limited to those who:

- Receive down payment, rental, and/or utility assistance;
- Enter a lease purchase program;
- Obtain a non-FHA reverse mortgage;
- Receive a home equity or home improvement loan or other home repair assistance;
- Receive weatherization assistance;
- Were homeless and obtain emergency shelter, transitional housing, or permanent housing.

Tip: The Counselor will need to determine outcome through follow-up with the client. This # should be less than or equal to the total of Section 9.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

e. Households that gained access to resources to help them improve their housing situation (e.g. down payment assistance, rental assistance, utility assistance, etc.) after receiving Housing Counseling Services. (continued)

To record a household in this category, at a minimum the counselor must provide referral to a resource or assist with an application for a resource **AND** confirm the household applied for the resource. HCAs do not have to obtain proof that the household actually received the resource. Simply providing the household a flyer or referring them to another entity is not adequate.

Tip: The Counselor will need to determine outcome through follow-up with the client. This # should be less than or equal to the total of Section 9.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

- f. Households that gained access to non-housing resources (e.g. social service programs, legal services, public benefits such as Social Security or Medicaid, etc.) after receiving Housing Counseling Services.

Examples of clients who should be recorded in this category include but are not limited to clients who:

- Enter a debt management plan;
- Obtain an individual development account;
- Obtain Medicaid benefits;
- Are referred for legal assistance and receive legal services;
- Obtain non-housing emergency assistance such as food or clothing;
- Tip: The number in this category should be less than or equal to the Sec 9 total.

Tip: Counselor will need to determine outcome through follow-up with the client. This # should be less than or equal to the total of Section 9.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

- f. **Households that gained access to non-housing resources (e.g. social service programs, legal services, public benefits such as Social Security or Medicaid, etc.) after receiving Housing Counseling Services.**

To record a client in this category, at a minimum the counselor must provide referral to a resource or assist with an application for a resource AND confirm the client applied for the resource. HCAs do not have to obtain proof that the client actually received the resource. Simply providing the client a flyer or referring them to another entity is not adequate.

Tip: The Counselor will need to determine outcome through follow-up with the client. This # should be less than or equal to the total of Section 9.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

g. **Homeless or potentially homeless households that obtained temporary or permanent housing after receiving Housing Counseling Services.**

Examples of Homeless Assistance Counseling clients who should be recorded in this category include but are not limited to clients who:

- Occupy emergency shelter;
- Occupy transitional housing;
- Occupy permanent housing with rental assistance;
- Occupy permanent housing without rental assistance.

Tip: Counselor will need to determine outcome through follow-up with the client. This # should be less than or equal to the total of Section 9.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

h. Households that received rental counseling and avoided eviction after receiving Housing Counseling.

- Examples of Rental Counseling clients who should be recorded in this category include but are not limited to clients who:
- Obtain temporary rental relief;
- Are referred to a legal aid agency for assistance with eviction and successfully avoid eviction.

Tip: Counselor will need to determine outcome through follow-up with the client. This # should be less than or equal to the total of Section 9b.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

I. Households that received rental counseling and improved living conditions after receiving Housing Counseling Services

Examples of Rental Counseling clients who should be recorded in this category include but are not limited to clients who:

- Obtain HUD or other rental housing subsidy
- Find alternative rental housing
- Resolve issue in current tenancy
- Bring utilities current
- Resolve a security deposit dispute
- Have a disability and obtain housing with accessibility features

Tip: Counselor will need to determine outcome through follow-up with the client. This # should be less than or equal to the total of Section 9b.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

- j. Households that received prepurchase/homebuying counseling and purchased housing after receiving Housing Counseling Services.

This is a simple count of all Pre-Purchase Counseling clients that purchased housing after receiving counseling.

Tip: This # should be less than or equal to the total of Section 9c.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

k. **Households that received reverse mortgage counseling and obtained a Home Equity Conversion Mortgage (HECM) after receiving Housing Counseling Services.**

- This is a simple count of all reverse mortgage counseling clients that obtain a Home Equity Conversion Mortgage (HECM).

Tip: Counselor will need to determine outcome through follow-up with the client. This # should be less than or equal to the total of Section 9e.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

I. Households that received non-delinquency post-purchase counseling that were able to improve home conditions or home affordability after receiving Housing Counseling Services

Examples of Non-Delinquency Post Purchase Clients who should be recorded in this category include but are not limited to clients who:

- Receive a home equity or home improvement loan or other home repair assistance;
- Receive weatherization assistance;
- Brought utilities current;
- Refinance their mortgage to improve affordability;
- Sell house/ choose alternative housing solution.

Tip: The Counselor will need to determine outcome through follow-up with the client. This # should be less than or equal to Section 9d.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

m. Households that prevented or resolved a mortgage default after receiving Housing Counseling Services.

Examples of Resolving/Preventing Mortgage

Delinquency/Default Counseling clients who should be recorded in this category include but are not limited to clients who:

- Bring their mortgage current;
- Refinance their mortgage to prevent/resolve default;
- Receive a mortgage modification;
- Receive a second mortgage to prevent/resolve default;
- Enter a forbearance agreement or repayment plan;
- Execute a deed-in-lieu of foreclosure;
- Sell property/ choose alternative housing solution;
- Obtain a short sale or pre-foreclosure sale (FHA mortgage);
- Obtain partial claim loan from FHA lender.

Tip: Counselor will need to determine outcome through follow-up with the client. This # should be less than or equal to the total of Section 9f.

SECTION 10

Impact and Scope of One-on-One Counseling Services (continued)

Section 10 Total

Please Remember: The Section 10 total does not have to match any other totals on the form. It can be higher or lower depending on the impact and scope of the one-on-one counseling services provided.

Follow-Up

Remember: Follow-Up is mandatory.

Even though some outcomes are known upon the completion of the counseling session, most will require the Counselor to determine the outcomes through follow-up with the client.

Follow-up should be done in person or via the telephone within 60 days from the date of the last client contact.

Case Study

A husband and wife visits your agency for one-on-one pre-purchase counseling. Before attending one-on-one counseling, the clients already completed a homebuyer education workshop. During the counseling session, you work with the clients to establish a household budget. You also encourage the family to start saving part of each pay check to establish an emergency fund, and you provide information about down payment assistance programs that may help them achieve their homeownership goal.

Case Study Question

Under **demographics**, how many times will you report the clients?

- a. Once – they are counted as a household
- b. Twice – household for both counseling and education
- c. More than 2 times for husband and wife attending both education and counseling sessions

Answer

- Answer is b. Twice
- You will report the clients as a household (one client) and report them twice – once for homebuyer education and once for counseling.

What outcomes can you report in Section 10 immediately after the counseling session?

- **10.a.? YES.** You know the client received one-on-one counseling and also attended a group education workshop, so you can report this outcome immediately after the counseling session.
- **10.b.? NO.** You did not discuss any fair housing information with this client, so it would not be appropriate to report this outcome.
- **10.c.? YES.** You developed a budget during the counseling session, so you can report this outcome immediately.
- **10.d.? NO.** You encouraged the client to start saving for emergencies, but you will not know whether the client actually started saving until you have followed up with the client. ***When you follow up with the client, you will need to confirm the client started saving before reporting this outcome.***

10.e.? NO. You gave the client information about down payment assistance programs that may be helpful, but you will not know whether the client applied for that resource until you have followed up with the client. ***When you follow up with the client, you will need to confirm the client applied for the down payment assistance program before reporting this outcome.***

10.f.? NO. You did not discuss any non-housing resources with this client, so it would not be appropriate to report this outcome.

10.g.? NO. This is not a homeless counseling client, so it would not be appropriate to report this outcome.

10.h. and i? NO. This is not a rental counseling client, so it would not be appropriate to report this outcome.

10.j.? NO. You discussed steps the client can take toward achieving their homeownership goal, but you will not know whether the client purchased housing until you have followed up with the client. ***When you follow up with the client, you will need to confirm the client purchased housing before reporting this outcome.***

10.k.? NO. This is not a reverse mortgage counseling client, so it would not be appropriate to report this outcome.

10.l.? NO. This is not a non-delinquency post-purchase counseling client, so it would not be appropriate to report this outcome.

10.m.? NO. This is not a mortgage default/delinquency client, so it would not be appropriate to report this outcome.

Follow-up with the Clients

One month after the counseling session, you call the clients to follow up regarding their progress in meeting their homeownership goal. You ask whether the clients have started saving for an emergency fund, and the clients confirm they have. You also ask whether they applied for down payment assistance, and the clients explain they decided not to apply because they are not ready for homeownership at this time.

Can you report any additional outcomes after the following up with the client?

10.d.? YES. You learned that the client increased their savings after receiving counseling, so you should report this outcome after follow up.

10.e.? NO. You learned the client decided not to pursue down payment assistance.

10.j.? NO. You learned the client decided not to purchase housing after receiving counseling.

Note: Make sure your counseling file supports all the outcomes you report.



Other Reporting Tips and Tools How Your OHC Point of Contact Can Help Colleen Weiser

Sr. Housing Program Specialist
Office of Policy and Grant Administration

Poll Question 4

Who at your agency prepares the 9902 report and submits the report quarterly to HUD? Select all that apply.

- a. Housing Counselor
- b. Housing Counseling Manager
- c. Administrative Staff
- d. Other Staff Member

Who is Involved in the Reporting Process?

- Intake Staff/Housing Counselors
- Manager/Supervisor staff
- Reporting Staff
- Intermediaries/State Housing Finance Agencies/ Multi State Organizations/LHCAs
- Grantees, subgrantees, affiliates, branches
- Client Management System Vendors
- HUD POC staff

Who is involved in process?

- **Administrative Staff-** Who does 9902 report for your agency?
– do they understand HUD's requirements?
- **Counselor Level-training-**Is all information being captured in CMS? Or is some being written in client files?
- **Manager Level** – review report before its submitted, and sign 9902– Quality Control component;
- **CMS system:** Is it capturing same data fields as HUD's 9902?
– Would it better to manually submit the 9902 using HUD's HCS?
- **Due diligence/quality control:** Periodically, agencies may need independent internal reports to verify data being reported.

Who files form HUD-9902?

Each HUD-approved **Local HCAs** must submit an electronic form HUD-9902 quarterly, reflecting main office and branch location activities, if applicable, in the target areas described in its latest housing counseling plan, regardless of whether or not a HUD Housing Counseling Grant was received.

Branch offices of LHCAs do not file an independent form HUD-9902, however the LHCA must capture any branch client data on their HUD-9902 report.

Who files form HUD-9902?

An individual electronic form HUD-9902 must be submitted quarterly on behalf of each HUD Housing Counseling Program

- **Affiliate,**
 - **Sub-grantee,**
 - **and/or Branch office(s), if applicable,**
- of an
- **HUD-approved Intermediary,**
 - **HUD-approved Multi-state Organization (MSO),**
 - **or State Housing Finance Agency (SHFA)**

participating in HUD's Housing Counseling Program, regardless of whether or not a HUD Housing Counseling Grant was received.

Branch offices of MSOs need to file an independent HUD-9902 for their respective target area(s).

Reporting Tips

- Agencies need to input all demographic information required by HUD/CMS in order for client to be reported on HUD 9902;
- Indicate if client chooses not to respond;
- Accuracy of Report not verified –In HCS the green checkmark (✓) next to 9902 submission does not indicate that numbers are cumulative by quarter, as required. The green check mark only indicates a successful transmission.

Reporting Tips

Are you reporting “clients” accurately?

Homebuyer education clients (GROUP) are not housing counseling clients (INDIVIDUAL)

- “Housing Counseling Clients” have
 - ✓ an action plan (except for HECM/reverse mortgage)
 - ✓ financial analysis/ or a budget
 - ✓ referred to services and follow-up has occurred.

Reporting Tips

- HUD recommends counseling agencies transmit the the Quarterly HUD-9902 data early so the HUD Point of Contact (POC) has time to review the data (POC validates the report); POCs will contact the agency for corrections.
- Submission delays due to system technical difficulties may be avoided when transmitting your report early.
- Submitting manually entered reports via HUD's Housing Counseling System (HCS) is also an option.

Reporting Tips

- During performance reviews- the number of clients files need to match the number of clients reported for a reporting period.
- I.E. If 100 total clients are reported on the HUD-9902, the HCA should have 100 client files to reflect what has been reported to HUD.)

How Your OHC “POC” Can Help!

- Can reset agency HSC password ;
- **9902 projections** (POC compares grantees’ projections against actual 9902 report and reviews against the quarterly report narrative);
- **If merited, can modify 9902s submitted late** (i.e. transmission problems; or if agency revisions to 9902 changes original submission date when report is retransmitted.);
- Can provide manual instructions for inputting 9902 data;
- Validates 9902 report;
- Can assist with training and provide resources.

Poll Question 6

What additional training would you like OHC to provide on 9902? Select all that you are interested in attending.

- a. Grantee Reporting
- b. 9902 reporting and HUD Housing Counseling System
- c. CMS System specific training (CounselorMax, Home Counselor On-line)
- d. Case study training

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT



Resources and Next Steps

Where to get Help: OHC Resources for 9902

- The current version of HUD-9902 form with instructions and examples:

<http://portal.hud.gov/hudportal/documents/huddoc?id=9902.pdf>

From OHC's Webinar Archive:

http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/sfh/hcc/OHC_TRAINARC

- **September 16, 2014 - Webinar: A review of the NEW Form HUD-9902 Housing Counseling Agency Activity Report:** This webinar was for Housing Counselors and Client Management System (CMS) vendors. This webinar was a reprise of the August 19, 2014 webinar on the same topic and gave housing counselors an opportunity to ask additional questions as well as providing an introduction to the new Form HUD-9902 which will be implemented in FY2015. Audio Replay number: (800) 475-6701 Access Code: 335203. [View the Presentation.](#)
- Read the Form HUD-9902 [FAQS](#). (Frequently Asked Questions)

OHC Resources for 9902

- **January 30, 2014 - Webinar: A first look at the NEW Form HUD-9902 Housing Counseling Agency Activity Report:** This webinar is for Housing Counselors and Client Management System (CMS) vendors. This webinar will give housing counselors an introduction to the new Form HUD-9902 which will be implemented in FY2015. Audio Replay number: 800-475-6701, access code 315782. View the [Presentation](#).
- **Instructions to Manually Input Data into 9902 Form in HCS.**
PAGE 8 of “HCS INSTRUCTIONS-QUICK REFERENCE GUIDE”
http://portal.hud.gov/hudportal/documents/huddoc?id=OHC_HCSINST111312.PDF
- **New HUD 9902 and Client Data Requirements for Client Management Systems (CMS) Starting FY2015**
http://portal.hud.gov/hudportal/documents/huddoc?id=ohc_npent080112.pdf

OHC Resources for 9902

A “9902 Desk Guide” has been posted on the OHC Housing Counseling Resource Webpage!

- http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/sfh/hcc/hcc_home
- http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/sfh/hcc/ohc_hcs

Conclusion

For housing counseling program information, grant information, training and events, counselor resources and to sign up for our listserv.

www.hud.gov/housingcounseling

Questions or comments:

housing.counseling@hud.gov

In subject line type: **“9902 reporting”**