MTW Expansion Cohort 1 Onboarding Webinar Series

Supplement, Part 2

Marianne Nazzaro: Wonderful, thank you, John, and good afternoon, everybody. Again, my name is Marianne Nazzaro. I'm the director of the MTW program here at HUD and we are thrilled to be with you again this afternoon to continue the onboarding process for the Cohort One MTW expansion agencies. We hope that you were able to join us for the first webinar which was on March 10th. And for those of you that were not able to join, or if you wanted to [inaudible], all of these trainings are being recorded, and that training is posted to the HUD exchange website.

And so you can watch it there. As you know, this MTW supplement is a multipart training series. The first part of the training, this is really how to get started, a reminder [inaudible] the process. We recorded that part on March 10th. Today we are delving a little bit more into [inaudible] around your process and the process that your agency is doing to get ready to implement the activities. Think through what you want to implement [inaudible]. And then we are also going to be delving a little bit more into the system and how you would access the system.

Once you receive access to the system [inform ?], we will also hold an optional office hours session so that you'll be able to get your questions answered to any questions that you have as you dig into the system. And I am pleased to announce that we do have the OMB approval of the MTW supplement plan, so know that we are good to go. So, for those of you that [inaudible], we will be getting back into the system very soon.

So, next slide please, Lara. And I think I actually just did that; so, the next one. What are we doing today? So, today we are going to do a quick reminder as to what we talked about during the first supplement webinar, the 10th. Crystal will do a reminder for that. And then we will break into smaller groups. So, once again -- I'm getting notification that I'm breaking up [inaudible]. Hopefully that's better. And then we will break into our small groups.

And then we will discuss accessing the supplement. And as always, we will reserve some time towards the end for Q&A. And with that, I would like to turn it over to Crystal Mills who is going to spend some time reminding -- going over what we talked about last time. And with that, Crystal?

Crystal Mills: Hi, yes, thank you, Marianne. I'm Crystal Mills. And as Marianne mentioned, [inaudible]. What is MTW? [Inaudible] supplement to those web-based forms [inaudible] supplement attached to [inaudible]. And it's been developed with the purpose of collecting information about policy being implemented at [your AC?]. You want to use it [inaudible] future plan -- your resident and community stakeholders. And we [inaudible] programs so that we can learn from it.

As a reminder, you can submit your MTW supplement with your next regularly scheduled PHA plan or you may submit it as an amendment once you sign the ACP amendment [inaudible].

There's a thought process -- next slide, please. There's a thought process that you're going to want to go through as you prepare to complete your supplement. A great place to start in figuring out what to do with your agency is by identifying what is your desired outcome, or the effect or impact that you want to see for your housing authority.

A great starting point is to determine which is the statutory objectives you would like your agency to concentrate on. Is it housing choice, cost efficiency, self-sufficiency, or, in many cases, a blend of more than one. So, by starting at the end goals and working your way back, that will help you to begin to identify the activity needed to accomplish those desired results. In doing so, you may also find that you'll need waivers in order to implement the activity.

You'll want to keep your new best friend, the operations notice, handy to determine when an agency-specific or safe harbor waiver will be needed, and/or if your proposed activity has the waiver authority. Once you determine what waivers, if any, are needed, you want to plug all that into the supplement via the online web-based form that we'll dive more into later during the webinar. And [excitedly ?], I'll have the opportunity to discuss hands-on with you guys. Have you gone through your thought process with the homework assignment? Next slide, please.

All right, we want to reiterate the importance of public engagement. A famous quote that comes to mind when I think of public engagement is, "Alone, we can do so little; but together, we can do so much." By becoming an MTW agency, you will see the change that you guys are now able to implement with your housing authority and the innovative ways you are able to serve your community and your residents.

I'm certain that you all are experienced with doing public hearings, and we just want to make sure that you understand for your MTW efforts to be successful, you're going to want to focus on engaging your communities and your residents. In previous webinars, we've given an overview of the public process requirements that are in the operations notice. But I want to say that the operations notice really is, as I mentioned before, just the bare minimum. Yes, following these requirements is outlined in the operations notice.

But don't allow that to be your driving factor when it comes to determining the need. It may take several public hearings. It may take different levels of engagement over some time in order to truly determine the best steps forward. And other MTW agencies can attest that really engaging residents and getting their buying in is a critical piece in achieving successful results. As mentioned in our last session, while there isn't one right way to engage residents, we have found that successful strategies include establishing trust, educating your residents about MTW, being inclusive, and of course, coming prepared is a great plan for success.

Experienced MTW agencies will tell you that exercising those four practices is what truly makes a difference. And as we stated before, be sure to build on the successes you've learned from, that you had already, and learn from any pitfalls that you encounter along the way. We recognize that these efforts can sometimes be made challenging, so please also visit the resourceful training materials that Marianne mentioned earlier we have on the HUD Exchange site for you guys.

There you can find the online manual and other interactive trainings, including about empowering residents in your community. And with that, I'll pass it back to you, Marianne.

Marianne Nazzaro: Fantastic, thank you, Crystal; and great reminders of some of the key points and how to get started and working with your community. So, Lara, next slide, please. So, now we are going to get into the part where you guys are going to be doing the talking and we're going to break out into the groups, similar to how we did during the ACC amendments. Your agency will be placed into small groups with agencies from around your same part of the country. Your field office representatives will be in the group.

The MTW office staff will be facilitating a guided conversation. So, I'd like you to just take a look at the slide here to see who's in your group. Lucky group Red, your group will be facilitated by Eva Fontheim and Chris Golden will be in that group as well. So, there's a number of great agencies that are going to be in lucky group Red. Yellow group, you just met Crystal. And so, Crystal and Alison will be facilitating the Yellow group. And so, I'll look forward to a great engaging conversation there.

The Green group, we have Jenny Rainwater and Pravin Krishnan will be facilitating those conversations. I look forward to having and hearing a really great conversation there with the Green group. And then Blue, go -- I don't know if they say "Go blue." I'm not from Michigan, but go blue. The Blue group will be facilitated by Adam and Jeree, and I'll probably start off in that group as well. So, take a look to see who you're going to be joining in your breakout groups. And if we could go to the next slide, please, Lara.

As a reminder, once we go into your breakout group, if you think that you're in the wrong group, or if you need to talk to John P., the IT person, for anything, and just click that red button on the bottom that looks like a door. You will be asked if you really want to leave the session. And you will say yes. Click "leave session" and then you'll move back into the main group where you can send the chat to the ICF event producer and they can answer any questions that you might have.

Next slide. And I know that you were all very busy working on your homework assignment the last couple of weeks. And so I'm just pulling this up here as a reminder to remember what everybody was working on during this time. We will be discussing your experience that you had and the homework assignment. We hope that you did some thinking on this. But even if you didn't, I think that you're still going to have a lot to learn from your fellow agencies within your group. We want to hear from you. How was this process?

You used this tool to start mapping out how you're going to get started with a MTW supplement. You've jotted down what you want to do, thinking through some things. You thought about the impact that it might have. Then you determined whether you need a waiver or the waivers to implement that. Then, as Crystal noted, you're using the MTW operations notice as your guide. All the requirements are in there. And we gave you some tips, and maybe a checklist to use as you approach completing the supplement.

So, in just a couple minutes, we're going to break up into the smaller groups. And we really want to hear from you, how was this process? We've heard a lot of questions about where do we go, how do we get started? So, we just want to hear from you about how this process was. And your facilitator will lead that process, that discussion, hearing your thoughts, your questions. And then after the breakout, we will have a report out just so we can hear from the various groups. And I see a question here.

Does the MTW plan submitted as the application process take place as the annual PHA plan? Can the public hearing for the PHA plan consist of the same public hearing for the plan? So, I'm going to -- Deborah, I'm going to get back to that question later on in the webinar. But for right now, I just want to focus on the actual process of thinking through your MTW activities and focusing in on how this process was for you.

So, with that, we will have 30 minutes for this discussion. So, it is now, in Eastern Time, it is 2:14 Eastern. So at 2:45, you've got 30 minutes to have this discussion as a group. We'll go from there into break, and then we will move into the next session. So John, if you could put us into our small groups?

All right, everybody, I hope everybody had a wonderful breakout discussion and is ready to move into the second half of today's webinar. I know that Team Blue rocked it. We had some really good conversations, some really good information sharing. And so, what I would like to do now is to hear from the facilitator and note takers in each of the four groups, and if you could let us know some of the key takeaways from your discussions.

So with that, I'd like to hear from Team Blue, Jeree, and if you wanted to let us know and fill us in on the conversation, a couple of key takeaways from Team Blue, Jeree.

Jeree Turlington: Sure. Thanks, Marianne. Like Marianne said, some good conversation from our agencies. A lot of them experiencing similar challenges, even though they might be in different areas such as a high per unit cost, they're getting landlord participation. Some key takeaways that we got from that group was getting staffed buy in which is new to us. But it was good to hear some of the agencies had expressed some worry about going MTW. Others needed some more persuasion. So, that was one of the key takeaways. And another was the public process, especially with COVID, having a hard time reaching tenants; in our case, the elderly tenants. So, one of the key takeaways for this group was there is no one size fits all model for getting participation. So, it might take multiple ways, via Zoom, Skype calls, or conference calls of those natures, and multiple times in doing those.

Marianne Nazzaro: Awesome, thank you, Jeree, and thank you, Team Blue. That was a great conversation that we had. Green, Pravin. Pravin or Jenny on Team Green?

Pravin Krishnan: Yes, hi.

Marianne Nazzaro: There you are.

Pravin Krishnan: It went well. We had a good conversation. You can tell people have a lot to think about initially. You're starting from scratch and we're throwing a lot of information at them. But I think we had a good discussion about hardship policies. Some people are thinking about certain safe harbor waivers, and how to have to craft their justification for safe harbor waiver. We got questions like that.

Also, a couple of general questions which we'll figure out, just a way of disseminating to the group a good way of summarizing what current agencies are doing. It's just a good way to get your juices flowing and think about what activities they want to implement. There's a lot of good information out there. But overall, we had a great conversation.

Marianne Nazzaro: Awesome, thanks so much, Pravin. Sounds like the Green team had some really good conversations. Thank you. And yellow, Alison.

Alison Christensen: Sure. Yeah, thanks, Marianne. We had a great conversation as well. We started very basic with how to even get things off the ground. So, we talked about timing and how to time your MTW supplement submission; whether to do that as a part of a planned submission or as an amendment to the PHA plan. And I think there's different reasons for doing that, so, definitely something to consider on just timing there.

And we had some agencies that were looking to put off the submission of the supplement to really get everything in order at the agency; you know, hire an MTW staff person and really do all the due diligence before they submitted the supplement. So, we had some feedback on that. We also had a question on -- everybody submitted their MTW plan and application as a part of the competition process for Cohort One. And how does that MTW plan and application that they submitted relate to the MTW supplement?

So, we discussed that the MTW supplement is the actual document that's going to serve as the approval for their MTW waivers and activities, and that the plan was just their initial submission of the application. So, you know, the plan -- the work on the MTW plan and application is finished now that they are officially designated through Cohort One.

But the ideas contained within that MTW planning application, that's a great place to start to look for some MTW activities and waivers that might match up in the MTW operations notice that you can then move forward to with the supplement. So, explained that the supplement is going to be the document that they use going forward, but they can use a lot of that great information that they've already went over with their community in the MTW planning application.

Marianne Nazzaro: Thanks so much, Alison and Yellow group. And yeah, I think that was one of the question that was -- I had mentioned earlier was in the chat box. So, thank you for bringing that back to everybody. And finally, Red Team, Chris.

Chris Golden: Yeah, so, we got pretty into the weeds with a few of our agencies that gave examples of their thought process and some of the activities they've been considering. One interesting, more generalized comment we got was that one agency felt that they were getting even more participation from their public, from Zoom meetings, than they used to do in person, which is interesting. But it is easier to get on Zoom, so that could certainly be part of the reason.

As far as more specifics, we've got two very different perspectives and focuses. One of our agencies discussed their concerns around utilization and access to housing, and, as a primarily HCV program, what they wanted to do to change that. And their focuses so far were on utilizing some of the PV flexibilities to create more housing in their area as well as make changes to the FSS program and to some of the grant calculation stuff to free up staff time, to hopefully allow staff to have the time.

When you convert over to try tri-annular recertification, to provide more assistance to residents directly. Another agency discussed focus that was much more geared toward self-sufficiency, talking about how they feel that, in their area, they have a strong job market and a decent amount of higher income earners that are still eligible for their program, but seem like they could, with a little help, potentially make it to the next step and have one of those successful self-sufficiency exits from the program. And so, their focus was around things that could sort of augment the self-sufficiency of the residents.

Marianne Nazzaro: Great, fantastic. Thank you, Chris and Red group. And it sounds like, from all of the readouts, it sounds like it was really good conversation, that it was helpful to think through the process, and thinking about what you want to do with MTW, how you want to do it. And it sounds like we had some really good dialogue. So, thank you guys so much for your participation, for taking part in those breakouts, getting to know each other and sharing amongst yourselves. I think that's a really great way to get started.

And with that, we would now like to -- Lara, if you could flip it over to the next slide, please. We're going to dig in a little bit more specifically to the web-based form. So, for the rest of this afternoon's session, Wendalyn Hovendick, the MTW management information specialist, is going to talk with you about accessing the system, giving you some tips in working in the new system.

And again, I'm sure she'll cover this, but once we have received your signed ACC amendments, Wendalyn, after this training, will now be able to go forward and provide you access to that training. And on April 14th, we'll have an office hours for those of you that have been able to access the training to make sure that you answer any specific questions on the web-based tool that you may have. And so with that, Wendalyn, I turn it over to you. Wendalyn? And next slide, please, Lara.

Wendalyn Hovendick: Thank you, Marianne. My name is Wendalyn Hovendick and I've been working for the past several months here with a contractor on developing a web-based form for the MTW expansion agencies to be able to submit their MTW supplement into, which is a great thing. Because as you know, with the PHA plan, you usually have to do it in a Word or PDF and submit that in a documents or attachments to that to your local field office.

So, this will be a great way for you to be able to automate this process. But also it'll let both the field office and the MTW office, amongst others, be able to access what you submit in real time. And so we're looking forward to everybody being able to get access to it. So, about a week ago, my coworker Jennifer and I sent you an e-mail from the Cohort One mailbox that basically introduced the system, and added an Excel file that was attached, that asked for a few pieces of information so that we could determine who the users from your agency are going to be for the web-based tool.

We've gotten about half of those back. Some of those we've been able to process, some of those, because we haven't received your signed ACC amendment yet, I'm holding those. And once Jenny tells me that we have your signed ACC Amendment, I'll forward that information to the contractor so that you can get access. One thing I do want to mention about getting access is that, because of some licensing restrictions with one of the big features of the online system, which is the ability to generate a neat-looking PDF that takes the entire form and puts it into one file for you, there's only five users allowed per housing authority right now.

That could increase in the future. We're trying to see what we hear from agencies, keeping in mind this isn't like IMS/PIC where you may have site managers or other people spread out that need to use this. There's usually going to be a smaller group of people that need to do this work. So, hopefully the five will suffice for the time being. So, the next thing I want to mention is, we actually have updated that Excel file slightly and we'll send it out in the near future so that you have it on hand in case you need to remove users that maybe leave the employment of your agency, or add new users.

I'm manually keeping track of the number of users right now, but look for that in the near future. If you haven't submitted your information yet, you can use either file. It doesn't matter. It's just we're trying to be proactive. And so, one question I had received from a couple of folks is, do we have to have each user acknowledge the rules of behavior that's on that file? And the answer is no, because the rules of behavior will be on the log in page every time a user logs in.

So, you won't need to worry about acknowledging it on the access request document. Now, once you get access, the e-mail will come from the Salesforce system. So, you'll probably see some reference to Salesforce either in the e-mail address and/or in the subject line. You have 24 hours from the time that e-mail drops into your inbox to click the link and activate your account. However, if you decided to take the day off to go watch Netflix, fear not. It can be fixed.

What you'll need to do is contact the REAC Technical Assistance Center and they will be able to help get that reactivated. And we'll go more into how to get technical assistance here in a few minutes. Next slide, please. So, this is just a picture of what the log in page looks like, and for your future reference, after you activate your account initially, the website address you'll use to be able to access the system. Next slide, please. So, this is the first page you'll see when you go into this new system, the Salesforce people call this the communities page.

I call it the main page, but everybody will have these three tiles initially. The account profile is -- you're really not going to use that much because that's about your account. You may have to use that maybe if your e-mail address changes. But other than that, won't really need to use that. Your very first stop is going to be the Create New MTW Supplement Form tile. And you're going to use that tile to start your MTW supplement. Next slide.

Now, once you've started your MTW supplement and because you're looking around, and you have to go out and come back in, the way you will access a form that you've already started, possibly even since many of the agencies have multiple users; one user may start a form and then another user needs to go in and work on it. You will use this Open Existing MTW Supplement Forms tile or button to be able to access those existing forms. Next slide.

So, this page is pretty streamlined. It will tell you the status of the form, whether it's in drafts, submitted, returned for revision or approved. It will also tell you the date it was created, who created the form, and the last modified date. So, this should help you find the form that you want to work on. If, by accident, you have more than one user create a new form, it's not the end of the world. This information here should help you find the one that you actually want to continue.

You don't have to worry about deleting a form. If you create one by accident, it'll sit there for perpetuity. But, you know, you don't need to worry about needing that request to be deleted. Next slide. So, the next thing about previously created forms would be, if a form is in submitted status, you can't make any changes. So, before you hit that little submit button, you'll want to make sure that everything is there. You can use the Generate PDF function to be able to look at what you've input and make sure that everything is there.

If corrections are needed, meaning HUD has looked at your supplement and has deemed that something needs to be corrected, much like when we say that your PHA plan has something that needs to be corrected, the status will be set to return for revision. And at that point, you will be able to make modifications again to your MTW supplement. And you'll go into that Open Existing MTW Supplement Form button to be able to find that supplement form that has that status. So, you can go in, and make those edits, and resubmit it.

Agencies are only allowed to create amendments for forms that are in approved status. Now, obviously, you all are doing your very first supplement. So, this isn't a big deal right now. But it's something I wanted to mention for down the road. And we'll be working on here in one of the next releases is the functionality to do amendments. And so, I just wanted to mention that about you can only do them on a form in approved status. Next slide.

Marianne Nazzaro: Ok, thank you, Wendalyn. And so, just pause for a break for questions. And our first question is for you guys. How closely were you paying attention? So, I'm going to ask a question and ask that you type the response in the chat box. The question is, what status must your agency's form be in to create amendments? Is it, A, approved status, B, returned for revision status, or C, this can be done when the form is in any status.

Again, what status must your agency's form be in to create amendments? A, approved; B, returned; or C -- oh, there's some noise out there. And then I think, John, I think we can close this when you're ready. And the answer was -- and the responses are -- John, are we going to get it? All right. Majority of you who answered got it right, which is A, approved status.

So, once you've submitted an MTW supplement, get it approved and implement, and you want to create an amendment to that approved supplement, it needs to be in that approved status in order to be able to do an amendment. So, thank you guys so much. Good job. There is a question here, a couple questions, just logistical but I'll take. One is what if you didn't get the e-mail that Wendalyn was referring to that Wendalyn and Jenny sent out, I think it was earlier this week?

They sent the ACC amendment but they didn't get the e-mail. Or was the e-mail sent to the executive director regarding the MTW supplement for the web-based tool? So, if you did not receive that e-mail from us asking for the names of your people, Wendalyn, I would think that they would e-mail that MTW Cohort One mailbox?

Wendalyn Hovendick: Yeah, they can e-mail the MTW Cohort One mailbox and we can forward that original e-mail to them.

Marianne Nazzaro: Great, thank you. And all of the e-mails were sent to your executive director and your MTW point of contact that you've provided. So, if you haven't yet provided your MTW point of contact, please ping your executive director to do that and we'll make sure that you get that as well. There's another question here that I'm going to hold until later in the webinar. So, with that, I'm going to ask Lara if you could put it to the next slide and Wendalyn, back to you.

Wendalyn Hovendick: All right, thank you, Marianne. All right, so now we've covered some of the initial nitty gritty of getting access and how to access the form in the system, now we'll get into some tips and tricks for how to use the system. And I know this is going to be a lot of information, but you'll have this presentation along with the slides to reference later when you're actually using the system. So, fear not. If you can't write fast enough, you'll have it later to reference. And I put this together with that in mind.

So, there's two main types of fields in this web-based form. I'll start off by saying when I say web-based form, if you've done a Survey Monkey type of survey, then this will have a lot of familiarity to you because it is very much like that. So, the two main fields are text boxes and what we call pick lists. Now, a lot of times people call pick lists, dropdown lists, but actually there's a couple of different types of pick lists that you can have for surveys. So, one of them is like your standard dropdown list that you click on it and you select one option.

And when you do that, it closes and you go to your next question. The other type that is a little less familiar to people, and so I want to address that here, is where you can select multiple items. And so that's the one you see here on the slide. And you can distinguish which one you're in because there's actually a search filter in the top of that pick list. And so, if there was a whole bunch of choices, you would be able to type a few letters and it would filter the options so you could more easily find what you were looking for.

And so, the way you will choose things in this pick list are, you'll click on -- and it's best to single click on one option, and then you'll single click on the next option. And then to get out of the pick list, you need to click somewhere else, a blank area on your page. That's how the list will close and you can go to the next question that you want to answer. Next slide.

So, one of the really important things, and as we were testing the tool, I keep having to remind staff of this as well, and some of them are probably chuckling off camera right now, is that because there is so much information feeding into this, so many choices in these pick lists, you need to -- when you click the next button to go to the next page, you need to just pause and let the page finish loading.

What I've taught myself in my head is, you click next, you take your hand off the mouse and you just relax. You take a deep cleansing breath, let a few seconds go by. And then, by that time, the all the pick list options on that page should have loaded. If you don't do that, it is possible that either they won't load or you could get an error message. It's really important to pause and let the page load after making a selection.

If you're accessing a form that was previously created and you're navigating through it to continue making inputs, same thing. You just need to wait for that information to be pulled from the backend and be populated again in the form. And if, as you're sitting there watching it, you'll see it appear. Like if you had said planning to implement one of the activities in the screener in in section C, all of a sudden you'll see the words planning to implement populate in that particular dropdown box.

So, that's the one of the biggest tips I can give you that'll help save you some frustration. Because of how we had to do the development, and we're doing it in chunks, we're having releases about every three months for new functionality, there are some things we're still working on. And so, from time to time, you'll see a question. For instance, one of the core questions that asks about what you did in the previous fiscal year on your supplement and how it compares to this year.

A question like that, because this is your first supplement, is not going to be applicable. So, you can go ahead and put not applicable or N/A in that text box and that's fine. And so for navigation, you'll use the next button and the previous button. Both buttons will actually save information. One thing I'll mention about the previous button is that you will not see the previous button on every single page because of how section C is structured with all the waivers and activities. It couldn't be put on every single page. So, you'll notice that you have to get to the end of a specific activity before you see it.

But you'll want to make sure that, before you get out, in order for a page to be saved, that you click next and go to the next page so that page is saved before you exit the form. Next slide. So, if there's text that doesn't fit in a text box that you're typing in, we're working on this right now, most of them have been fixed so they'll show about five lines if it's a text box that will take a large amount of text. If you can't see all the text, you'll be able to use your arrow keys on your keyboard as well as a scroll bar, if there's one for that text box, to be able to see all the text you've entered.

But hopefully here in the next release in June, we should be able to fix the last of the text boxes that take a large quantity of text that need to be made a little bigger. Another thing we're also looking at is putting a character count below the text boxes. So, if it allows for 5,000 characters, it'll say you've filled in 1,000 of 5,000. So, that's another thing we're working on. If you want to log out of the system, which is always a great idea; if you're done working for that session and want to log out, you can do that by going to the upper right hand corner and finding the little circle that has a picture of a person in it.

Click on that and click on the logout link that's in that menu. What you see here was from one of our test environments. Don't be alarmed if you don't see all those options in your little menu.

That's why there are some there that you may not see. Another thing I'll mention, too, because it's a common question is how long do you have before you're automatically logged out? You will have an hour. By default it was 15 minutes and I was getting logged out quite a bit, so I knew that would be frustration for you all. So, I had them change it to an hour.

If you go to lunch, you come back, and you're gone 30 minutes, chances are you already still be in there. But good security is that you always log out if you're leaving your computer for any length of time. Next slide. This is another thing I want to point out is about public housing and housing choice voucher implementation of waivers and activities. As you've seen in the operations notice, most of the time it'll say, like in section C, it'll say 1A and that is public housing, and 1B is HCV.

Well, because of different periods of time when maybe things were written in the ops notice, or other factors, there are few activities that did not get split out. And those are C8, C10, 11, and then in C14, B and C. Those are all in the ops notice and, on the supplement, all say PH and HCV in that one item. Now for C8, you're going to have to report that as a combined report, public housing and HCV information in that one item. But for the rest of those, we've actually broken those out. So, you'll see, for instance, C10A, and then you'll say PH; C.10.A.PH.

It makes it long, but this way -- same for HCV. So that way you'll be able to report for public housing or for housing choice voucher. One other thing I'll mention is, your program type for your agency automatically feeds in to what waivers and activities you'll see. And so, if you're housing choice voucher only, you're not going to see public housing items. If you're public housing only, you won't see the housing choice voucher items. Now for everybody, you'll see C8. I do want to mention that.

But if you're a combined agency, you'll see everything and will be able to select things accordingly. And I will also mention, because I mentioned the program type, section A, which is your housing authority information, that is, for the most part, pre-populated for you based on the information that we pulled in from IMS/PIC. And so, the only things in section A you'll need to fill in are the fiscal year for your supplement submission and the submission type. Next slide.

Marianne Nazzaro: Okay. Thank you, Wendalyn. At this point, again, we'd like to take a break to see if there are any questions. And while you are all thinking about your questions, I just want to say again, and Wendalyn said this, and I'll say it again, that yes, this is a lot of information. But all of these slides and the materials and the training will be available on our website for you to go back to.

So, we're trying to think through all of the tips and tricks you might need to know. They're all included here and you'll be able to go back and access those. And additionally, we will have that office hours in mid-April for answering any additional questions. So with that, I don't see any questions. I'm going to turn it back to Wendalyn for the last segment of this web-based specific training. Go ahead, Wendalyn.

Wendalyn Hovendick: All right. Thank you, Marianne. So, as you've probably noticed, if you looked at the MTW supplement that was the most recent version, [other than the OMB one ?] is what was in the 30-day federal register. There's several places where we ask you to upload a document, whether that be for an impact analysis, hardship policy, safe harbor waiver, agency-specific waiver, your public comments, all sorts of stuff.

And so, I just wanted to go over the details that you'll need to know for those. You can only upload word and PDF file. So, Excel files and other file types, image files, you won't be able to upload those. For the most part, you shouldn't need to have anything like an Excel file that you need to upload, because in places where there are tables in the form, the table is in the in the web-based form for you to fill out.

Now, if down the road, based on feedback from the agencies, it's determined there is a definite need for other file types, we can look at that. One thing to remember, too, is that files can't be over 25 megabytes in file size. That's a pretty big file, so we should be okay on that. And that is per file. I will say that things like your public comments, or your MTW certifications of compliance, where maybe you have to scan a hard copy document into the computer and make it into a PDF, the higher the resolution of the scan, the bigger the file size will end up to be.

So, you don't need to make it a really high resolution because while you’re going to submit really cool stuff, we don't need to print it into poster size. A lower resolution should be okay and will help keep the file size down. One thing that's going to be really important for the HUD staff that are reviewing your MTW supplement and the file attachments is the naming convention for your files. Now, a lot of you probably know that, for the PHA plan, there's always been a general naming convention that we asked folks to use.

In my experience, a lot of the time that doesn't happen. But it's going to be really important here because it's going to help staff know, when they pull these files out of the system, what file they're looking at. So, that naming convention is going to be your PHA code, the fiscal year, and a short name for that policy or item. So, I put some examples here. For instance, we're using a PHA code of CA789. The first one is a file for fiscal year 21, and it's a rent hardship policy. So we named it CA789 fiscal year 21 rent hardship.

It's good not to include spaces or punctuation marks in file names when you're uploading them, just so that there isn't any confusion between your system and the server, what you're trying to do with that file. Just remember with that short name, you want to be descriptive, but it doesn't need to be overly long; just something to help us key in. So, I've given a few suggestions here for you to look at. Next slide, please. Right now, and this is something we're going to be fixing in a future release, there is something called a content type that you'll see when you go to upload a file.

That content type helps the system know what is that file for. For instance, if you're saying that you have a hardship policy, that content type will say it's a hardship policy. You should not change that content type because then, possibly, there could be a little bit of a disconnect, or at least some confusion, between what that file that you're uploading is supposed to stand for. In the future, it will be read-only, but I wanted to mention for now, just basically ignore it. You don't need to do anything with that particular item. Another thing is, when you upload a file, you'll see that it says upload file or drag here.

And so, you have the option, if you know how, to drag a file from your desktop or another location into your web browser and drop it on top of those words that say drag here. And you'll see a little box that comes up and it says it's uploading the file. And then when it's done, you'll click okay. Or you can use what we're all used to, which is an upload button to upload your file. It's recommended that you only do one file at a time because that way the file description, which is where -- you can -- you don't have to for most things, but you can put a short description of the file you're uploading. You'll get that box for every single file.

Otherwise, if you upload multiple files at a time, you won't get multiple file description boxes. The one area where you must fill in the file description is in section E for E1, for the agency specific waivers. And that's because we need you to type -- that's where you're going to put in your short title that you see in the supplement that we ask for, because that title, in future years, will be used to help pre-populate a little bit of the form. So, in future years, when you fill out E2, that title will be pre-populated to help you be able to easily give us an update on that agency specific waiver. Next slide.

So, this is a really neat feature that we've been working hard on, and I think you'll really like, is the ability to download the MTW supplement into a single PDF form. Now, I will say it does not include any of the file attachments or file uploads that we just discussed. Those are saved separately. But if you've looked at the MTW supplement, it's a pretty big form. And so, to be able to, in one PDF, download this form, it's going to be a great thing. To do this, there's a Generate PDF button that you'll be able to click.

Now, you can download this PDF for forms in any status, whether it's still in draft, because you want to obviously print a copy of it for your public hearing. Or after you submit it, you can print a copy. Or after it's approved, you can download it and save it on your computer, or print it from the PDF, whatever you need to do. Next slide. This here is the actual steps to download that PDF. I just put them here for reference for you to use later. Also, the files I mentioned, your upload files, they're in a different place that I'll discuss here in a second.

If you have any trouble downloading the PDF, if you get an error message, you can let the TAC know -- the REAC TAC. But we've tested this pretty thoroughly and it should be working well for you at this time. And we're going to continue to improve upon it. Next slide. So, you should have any of your file uploads already on your local computer. So, this is more maybe something for HUD staff. But let's say somebody in your office uploaded a file, and it's on their computer, and you need it, and they're out sick that day.

These are the steps you would use to go into the system and actually download any file attachments that the users from your housing authority have uploaded to the system. Next slide. Another feature that we've built in that you'll see as things progress in the process is e-mail notifications when the status of your MTW supplement changes. So, when your form is submitted, you will be copied on e-mail that says the supplement has been submitted.

That goes to a few of us here in HUD. And the person in the housing authority that actually gets this e-mail is the person, the user, that submitted the form. So, I know in some other systems within PIH that it might be the executive director. But in this case, until we get this system built out further, the decision was made; the e-mail will go to the person in the housing authority that submitted the form.

If HUD has changed the status to return for revision because corrections are needed, an e-mail notification will be sent to the person that submitted the form in that case. And then finally, when the form is finally approved, you'll obviously get the letter from HUD like you always have for your PHA plan. But you also get an e-mail notification that, in the system, it's marked as approved. So, you can check the status at any time by going to the Open Existing MTW Supplement Forms button on the landing page. Next slide.

All right, so, with any great system, which I personally think that we've all done a really good job on this system, no system is perfect. There will be issues. And the system we have set up for addressing those issues is that the REAC Technical Assistance Center is going to be providing the technical assistance. All of you are used to them because of IMS/PIC, EIV, the REAC subsystems. So, this should not be a new thing to you.

The thing that we want folks to remember is, I know with IMS/PIC, from having used to been in a field office, that sometimes, because we love our field office point of contact and feel comfortable with them, we send them questions that are even technical in nature. In this case, you shouldn't do that because the field office point of contact, as well as the MTW office staff, are not equipped to answer technical questions. So, all technical questions will go to the REAC TAC.

So, you have two ways you can contact the REAC TAC. You can call them. And when you call them, make sure you push option nine. And when the representative comes on the phone, make sure you tell them you're calling about the MTW supplement. They are creating a whole little queue in their software for the MTW supplement. So, it's really important that they know to go to that specific area so they'll be able to pull up information on how to help you.

The other thing you can do that some of you may have done before is you can e-mail them at REAC_TAC@hud.gov. You must include MTW supplement in the subject line of your e-mail. E-mails can be great versus the phone because you can include screen prints if you have them, like if you get an error message. The best thing to do is take a screen print of that error message, and you can e-mail the TAC with that screen print and the details for what you did right before you got that error message so that that gives us as much information as possible to be able to figure out what's going on. So, with that, I will hand it back over to Marianne.

Marianne Nazzaro: Awesome, thank you, Wendalyn. And thank you, everybody. One last poll you should all have this. Wendalyn just mentioned it. John, if you can bring up the poll. The question is, on the MTW supplement, who should technical questions go to? Should they, A, go to the field office point of contact, or B, go to the REAC Technical Assistance Center? Go. She just covered this.

John Panetti: Poll will be closing at 20 seconds.

Marianne Nazzaro: Great. So, who should technical questions go to? Should they go to your favorite person in the field office, and we know there are many? Or do they go to the REAC TAC? Again, these are just the technical -- yes. Almost 100 percent got it right, to the REAC TAC. Well done. Good job, everybody. And then any other questions in the chat? There was one question that I didn't ask earlier, but I think this one goes to how excited people are to have this as a web-based system. Wendalyn, super quick question for you. Is HUD considering expanding the use of this web-based system to the five year and annual plan submission process?

Wendalyn Hovendick: So, that's a very good question. And I can't say for sure if they're going to do that. But I have heard rumblings that they are thinking about it, at least. So, send a few prayers up to the form gods.

Marianne Nazzaro: Thanks, Wendalyn, and thanks for those questions. Any other questions relating to today's training, or any other -- anything else relating to the MTW expansion? And with that, Lara, if you could take us to the next slide, please. As always, we just want to remind you guys of the really great resources that we have on our web page: your selection notice, the welcome letter, the pretty version of the operations notice of part six is up there.

There's a ton of information about MTW, what the initial 39 agencies have done on our regular MTW page. There's a lot of good information on the expansion page, the training on HUD Exchange. We've got a lot of good resources with the online manual. All of the webinars are there, lots of really good information. So, just as a reminder that we are here to support you. Your field office is here to support you. REAC TAC is here to support you. And there's a lot of really great resources on the website.

If you can go to the next slide, please. All right, and then on upcoming webinars, we will have the office hours for the supplement on the 14th. So, keep your eyes out for that. We will be sending that invitation to this group, but also the executive and the point of contact that they've identified. So, let us know. And then we will, at a later date, we will let you know when we'll have the webinar relating to transitioning your PHA to PIC NG. So with that, thank you for your time today.

Please, if you could, write into the chat how today's conversation went; any suggestions that you have for future that we can better make these even better for you, any other trainings, specific topics that you'd like us to address in future webinars. Just let us know and you can just type that into the chat here and we'll make sure to incorporate that going forward. So, thank you guys so much. Wendalyn, thank you so much for providing an overview of the online system. Our facilitators, note takers, thank you guys so much. And have a great day, everybody.

John Panetti: That concludes today's webinar. Thank you so much for joining.

(END)