7/11/2014 CMS Developer Meeting Notes

1. Updated XML Schema and Reference Items:
   - Reinstate the postSubmission method and associated data structures in arm.xsd and arm.wsdl.
   - Revised text if item id=3 in group 39 Limited English Proficiency Types and group 40 Rural Area Types from "Choose not to respond" to "Chose not to respond".
   - Will notify CMS when the latest version of the XML Schema posted to: http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/sfh/hcc/OHC_CMS1415a.
     The page shows a July 8 update but the link is currently pointing to the previous version. When this is resolved a notice will be sent to the CMS POCs.
   - The zip file contains a PDF called arm5_change_log.pdf. The file highlights the changes that have been made.

2. ARM 5.0 ICD will be posted to the same link above. It was sent to the meeting attendees. When it is posted a notice will go out to all CMS.

3. ARM 5.0 Pilot Environment: Later today the ARM Reference Web Service will be launched. It will not require authentication and will allow you to retrieve reference items. Will broadcast the ARM 5 URL to CMS POCs when it is available. The ARM service is expected to be available mid-July between the 15th – 18th.

4. HCS 9902 User Interface: The two 9902 screens were displayed during the call.

   Screen 1 – 9902 for an agency with 1 grant
   The Activity Types will be used to identify the number of All Activities and the number of activities specific to a HUD grant the agency has received.
   Activity Type 4 will remain the reference value for All Activities
   Currently there is only one other activity type for the 2014 Comprehensive Grant. As HUD awards more grants, new values for activity types will be added. For example, when the 2015 grants are awarded a new activity type will be added to identify activities for that grant.

1. Counseling Agency Name	2. Reporting Period and Budget	
Agency Name	**Reporting Period:**	Quarter 2
MON VALLEY INITIATIVE	**Fiscal Year:**	2015
Agency ID: 90004	**From:**	10/01/2014
Agency Type: National Intermediary	**To:**	03/31/2015
303-305 E. 8th Avenue	**Submission Date:**	
HOMESTEAD, PA	**Update Date:**	
15120-1517	**Total budget, all sources:**	$0.00
Reporting 0 of 25 total sub-agencies	**Total HUD Funding, all grants:**	$375,000.00

HUD Funding Sources Budget not entered
2014-1 COMP 10/01/2013 - 03/31/2015
Notice of Funding Availability (NOFA) for the Department's Fiscal
Year 2014-2015 Comprehensive Housing Counseling program
Funding: $1,200,000.00
Projection: HUD Approved: 4/04/2014

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	TOTAL		
	All Activities	All HUD Funded Activities	Projected HUD Housing Counseling Activities
3. Ethnicity of Household (select only one)			
a. Hispanic	0	0	
b. Not Hispanic	0	0	
c. Chose not to respond	0	0	
Section 3 Total:	0	0	
4. Race of Households			
Single Race			
a. American Indian/Alaskan Native	0	0	
b. Asian	0	0	
c. Black or African American	0	0	
d. Native Hawaiian or Other Pacific Islander	0	0	
e. White	0	0	
Multi-Race			
f. American Indian or Alaska Native and White	0	0	
g. Asian and White	0	0	
h. Black or African American and White	0	0	
i. American Indian or Alaska Native and Black or African American	0	0	
j. Other multiple race	0	0	
k. Chose not to respond	0	0	
Section 4 Total:	0	0	
5. Income Levels			
a. < 30% of Area Median Income (AMI)	0	0	
b. 30 - 49% of AMI	0	0	
c. 50 - 79% of AMI	0	0	
d. 80 - 100% of AMI	0	0	
e. > 100% AMI	0	0	
f. Chose not to respond	0	0	
Section 5 Total:	0	0	
6. Rural Area Status			
a. Household lives in a rural area	0	0	
b. Household does not live in a rural area	0	0	
c. Chose not to respond	0	0	
Section 6 Total:	0	0	
7. Limited English Proficiency Status			
a. Household is Limited English Proficient	0	0	
b. Household is not Limited English Proficient	0	0	
c. Chose not to respond	0	0	
Section 7 Total:	0	0	
8. Households Receiving Group Education, by Purpose			
a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	0	0	6
b. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	0	0	5
c. Completed fair housing workshop	0	0	7
d. Completed homelessness prevention workshop	0	0	4
e. Completed rental workshop	0	0	8
f. Completed pre-purchase homebuyer education workshop	0	0	3
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0	9
h. Completed resolving or preventing mortgage delinquency workshop	0	0	6
i. Completed other workshop	0	0	8
Section 8 Total:	0	0	56
9. Households Receiving One-on-One Counseling, by Purpose			
a. Homeless Assistance	0	0	10
b. Rental Topics	0	0	9
c. Prepurchase/Homebuying	0	0	11
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	0	0	13
e. Reverse Mortgage	0	0	12
f. Resolving or Preventing Mortgage Delinquency or Default	0	0	10
Section 9 Total:	0	0	65
Households Served Sections 8 and 9 Total:	0	0	121
10. Households Receiving One-on-One Counseling Services			
a. Households that received one-on-one counseling that also received group education services	0	0	
b. Households that received information on fair housing, fair lending and/or accessibility rights.	0	0	
c. Households for whom counselor developed a sustainable household budget through the provision of financial management and/or budget services.	0	0	
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	0	0	
e. Households that a 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.	0	0	
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.	0	0	
g. Homeless or potentially homeless households that obtained temporary or permanent housing after receiving Housing Counseling Services.	0	0	
h. Households that received rental counseling and avoided eviction after receiving Housing Counseling Services.	0	0	
i. Households that received rental counseling and improved living conditions after receiving Housing Counseling Services.	0	0	
j. Households that received prepurchase/homebuying counseling and purchased housing after receiving Housing Counseling Services.	0	0	
k. Households that received reverse mortgage counseling and obtained a Home Equity Conversion Mortgage (HECM) after receiving Housing Counseling Services.	0	0	
l. Households that received non-delinquency post-purchase counseling that were able to improve home conditions or home affordability after receiving Housing Counseling Services.	0	0	
m. Households that prevented or resolved a mortgage default after receiving Housing Counseling Services.	0	0	
Section 10 Total:	0	0	

Screen 2 – 9902 for an agency with 2 grants
This scenario shows an agency that had a 2014 Comprehensive Grant for which the funding period ended on 3/31/2015. The agency then received a 2015 Comprehensive Grant that started on 10/01/2014. The agency will need to submit the HUD Funded Activities for both grants. Each grant will have its own Activity Type.

Housing Counseling Agency Activity Report	U.S. Department of Housing and Urban Development Office of Housing Federal Housing Commissioner

1. Counseling Agency Name

Agency Name
BETTER NEIGHBORHOODS, INCORPORATED
Agency ID: 80024
Agency Type: LHCA

986 Albany St
Schenectady, NY
12307-1513

Parent Agency Name (if applicable)

2. Reporting Period and Budget

Reporting Period:	Quarter 1 ▾
Fiscal Year:	2015
From:	10/01/2014
To:	12/31/2014
Submission Date:	
Update Date:	
Total budget, all sources:	$0.00
Total HUD Funding, all grants:	$41,435.00

HUD Funding Sources Budget not entered
2014-1 COMP 10/01/2013 - 03/31/2015
Notice of Funding Availability (NOFA) for the Department's Fiscal Year 2014-2015 Comprehensive Housing Counseling program
Funding: $12,566.00
Projection: Submitted to HUD: Not Approved

2015-1 COMP 10/01/2014 - 03/31/2016
Notice of Funding Availability (NOFA) for the Department's Fiscal Year 2015-2016 Comprehensive Housing Counseling program
Funding: $28,869.00
Projection: Not Entered

Validated: Not Validated
Only reports completed by 01/31/2014 will be credited for on time submission.

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Hide HUD Grant Activity

	TOTAL			2014-1 COMP		2015-1 COMP	
	All Activities	All HUD Funded Activities	Projected HUD Housing Counseling Activities	HUD Funded	HUD Projected	HUD Funded	HUD Projected
3. Ethnicity of Households (select only one)							
a. Hispanic	0	0		0		0	
b. Not Hispanic	0	0		0		0	
c. Chose Not to Respond	0	0		0		0	
Section 3 Total	0	0		0		0	
4. Race of Households							
Single Race							
a. American Indian/Alaskan Native	0	0		0		0	
b. Asian	0	0		0		0	
c. Black or African American	0	0		0		0	
d. Native Hawaiian or Other Pacific Islander	0	0		0		0	
e. White	0	0		0		0	
Multi-Race							
f. American Indian or Alaska Native and White	0	0		0		0	
g. Asian and White	0	0		0		0	
h. Black or African American and White	0	0		0		0	
i. American Indian or Alaska Native and Black or African American	0	0		0		0	
j. Other multiple race	0	0		0		0	
k. Chose not to respond	0	0		0		0	
Section 4 Total	0	0		0		0	
5. Income Levels							
a. < 30% of Area Median Income (AMI)	0	0		0		0	
b. 30 - 49% of AMI	0	0		0		0	
c. 50 - 79% of AMI	0	0		0		0	
d. 80 - 100% of AMI	0	0		0		0	
e. > 100% AMI	0	0		0		0	
f. Chose not to respond	0	0		0		0	
Section 5 Total	0	0		0		0	
6. Rural Area Status							
a. Household lives in a rural area	0	0		0		0	
b. Household does not live in a rural area	0	0		0		0	
c. Chose not to respond	0	0		0		0	
Section 6 Total	0	0		0		0	
7. Limited English Proficiency Status							
a. Household is Limited English Proficient	0	0		0		0	
b. Household is not Limited English Proficient	0	0		0		0	
c. Chose not to respond	0	0		0		0	
Section 7 Total	0	0		0		0	
8. Households Receiving Group Education by Purpose							
a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	0	0	75	0	25	0	50
b. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	0	0	0	0	0	0	0
c. Completed fair housing workshop	0	0	0	0	0	0	0
d. Completed homelessness prevention workshop	0	0	100	0	25	0	75
e. Completed rental workshop	0	0	0	0	0	0	0
f. Completed pre-purchase homebuyer education workshop	0	0	0	0	0	0	0
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0	0	0	0	0	0
h. Completed resolving or preventing mortgage delinquency workshop	0	0	0	0	0	0	0
i. Completed other workshop	0	0	0	0	0	0	0
Section 8 Total	0	0	175	0	50	0	125
9. Households Receiving One-on-One Counseling by Purpose							
a. Homeless Assistance	0	0	256	0	98	0	158
b. Rental Topics	0	0	243	0	61	0	182
c. Prepurchase/Homebuying	0	0	49	0	14	0	35
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	0	0	419	0	124	0	295
e. Reverse Mortgage	0	0	137	0	43	0	94
f. Resolving or Preventing Mortgage Delinquency or Default	0	0	214	0	78	0	136
Section 9 Total:	0	0	1318	0	418	0	900
Households Served Sections 8 and 9 Total:	0	0	1493	0	468	0	1025
10. Impact and Scope of One-on-One Counseling Services							
a. Households that received one-on-one counseling that also received group education services.	0	0		0		0	
b. Households that received information on fair housing, fair lending and/or accessibility rights.	0	0		0		0	
c. Households for whom counselor developed a sustainable household budget through the provision of financial management and/or budget services.	0	0		0		0	
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase).	0	0		0		0	
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.	0	0		0		0	
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.	0	0		0		0	
g. Homeless or potentially homeless households that obtained temporary or permanent housing after receiving Housing Counseling Services.	0	0		0		0	
h. Households that received rental counseling and avoided eviction after receiving Housing Counseling Services.	0	0		0		0	
i. Households that received rental counseling and improved living conditions after receiving Housing Counseling Services.	0	0		0		0	
j. Households that received prepurchase/homebuying counseling and purchased housing after receiving Housing Counseling Services.	0	0		0		0	
k. Households that received reverse mortgage counseling and obtained a Home Equity Conversion Mortgage (HECM) after receiving Housing Counseling Services.	0	0		0		0	
l. Households that received non-delinquency post-purchase counseling that were able to improve home conditions or home affordability after receiving Housing Counseling Services.	0	0		0		0	
m. Households that prevented or resolved a mortgage default after receiving Housing Counseling Services.	0	0		0		0	
Section 10 Total	0	0		0		0	

5. CMS Readiness: CMS were asked to provide feedback on their readiness, and whether or not they feel they will be able to make the 10/01/2014 deadline for capturing data from the counselors and the 1st quarter 2015 (01/01/2015) deadline for reporting using the new version of ARM.

   - HCO responded that they did not feel CMS would tell us that they would not be ready. They asked to delve further into the discussion items from the last call related to Household vs individual clients. Theresa suggested that we schedule a call with HCO and HUD to go over their questions. Theresa will try to schedule that next week.

6. Activity Type Questions: Many questions came up regarding the use of Activity types. Many of those were business questions. Theresa will schedule a CMS call with HUD representatives to review those questions.

   Q: How do you report HUD funded activities if 1 activity has multiple funding sources and is partially HUD Funded?

   A: To be discussed further with HUD.

   Q: How do agencies retroactively report HUD funded activities for awards they receive mid-year. If they resubmit will the 9902 be marked as late?

   A: To be discussed further with HUD.

   Q: Will HCS be checking client submissions with the 9902 submissions.

   A: Not at this time, but will be planned for the future.

   Q: If an agency updates a client record from a previous quarter, should it be resubmitted.

   A: Yes.

   Q: Follow-up question: In the 4th quarter I should then submit client records for the whole year?

   A: For the fourth quarter you should submit new client records for the 4th quarter and any records from earlier in the fiscal year that have been updated.

   Q: Will there be a follow-up CMS call to review the business process questions?

   A: Yes