Changes to Agency User Interface for HCS V13.0.0.0

An update to HCS was released on July 2, 2013 to allow for the following functionality for agency users:

- **NOFA 2013 Grant Awards** to display on Agency Summary, Budget Allocation, and 9902 screens
- **Budget Allocation process** that allows for agencies to adjust their yearly sub-allocations on a quarterly basis.
- **9902 forms** that provide grant-specific HUD funded columns.

**Note:** data displayed in screens is for example purposes only and does not reflect actual data

**Agency Summary:**

NOFA 2013 awards display on the agency summary page.

![Agency Summary Page showing award from the 2013 Comprehensive Grant](image)

**Budget Allocation:**

Agencies with an award can allocate their grants from the **Budget Allocation** menu. Click the **Budget Allocation** link in the main navigation.

![Agency User Main Navigation showing Budget Allocation menu item](image)
The most recent award from the 2013 NOFA displays at the top of the Budget Allocation menu page. Click the link for the funding period to access the budget allocation page for that award.

![Figure 3 - Agency User Budget Allocation menu page](image)

The Budget Allocation page for that award displays.

![Figure 4 - Budget Allocation page](image)
Budget Allocation for Parent Agencies:

Agencies can enter their yearly budget, administrative funds, indirect costs, and sub-allocations to sub-agencies.

![Budget Allocation Page](image)

**Figure 5 - Budget Allocation Page showing Budget, Administrative Funds, Indirect Cost, and Sub-Allocation fields.**

Sub-Allocation and Quarterly Adjustments:

Sub-allocations to sub-agencies can now be adjusted quarterly, but continue to represent the yearly sub-allocation. Agencies must first enter their initial yearly sub-allocation in the quarter that the agency planned to start using their award to fund sub-agencies. For example, if a parent agency received their 2013 award in July 2013, but planned to use it as of October 2012, the initial yearly sub-allocation should be entered in the **Qtr 1** tab. The page will always default to the current quarter. To switch to **Qtr 1**, click the **Qtr 1** tab.
Enter the sub-allocations and Save. After saving, a message indicating that the budget allocation changes have been updated will display. Click OK.

The quarter that the yearly sub-allocation was entered on will now be labeled as the “Initial” Quarter.
The sub-allocation is saved to the remaining quarters for the funding period. The remaining quarters will be labeled as possible “Adjustment” quarters. If the yearly sub-allocation changes during the funding period, an adjustment can be entered in the appropriate quarter and saved for the remainder of the funding period. For example, if it is determined later in the funding period that a sub-agency is not able to utilize all of their yearly allocation, an adjustment can be entered. Click on the quarter that the adjustment is identified. For this example it will be Qtr 3.

Qtr 3 will initially show the same sub-allocations entered for Qtr 1.

![Figure 9 - Budget Allocation page showing Qtr 3 Adjustment](image)

Figure 9 - Budget Allocation page showing Qtr 3 Adjustment

Revise the sub-allocations as needed in Qtr 3.

![Figure 10 - Budget Allocation page showing sub-allocation changes.](image)

Figure 10 - Budget Allocation page showing sub-allocation changes.

Click Save.

The revised yearly sub-allocation is now saved to the remainder of the quarters in the funding period.
Any previous quarters will maintain the original sub-allocations. In this case, since the sub-allocations were revised in Qtr 3, Qtr 2 reflects the original sub-allocation.

**Budget Allocation for Non-Parent Agencies:**

Non-parent agencies will also be able to manage their awards on the budget allocation pages by entering their total budget, administrative funds, indirect costs, and the remaining amount that is allocated to the fiscal year identified on the budget allocation page.
9902:

9902 reports have changed to allow for:

- Data display version
- Data entry version
- Display of grant funding applicable to the reporting period
- Grant Specific HUD Funded Columns

Data Display Version

The initial view of the 9902 form will be the data display version. **Section 2 – Reporting Period and Budget** now displays any HUD funding applicable to the agency and reporting period. In the example below, the agency has one funding source from the 2013 NOFA Comprehensive grant (2013-1 COMP). If the agency had HUD Funding Sources from multiple grants each would be listed here.

Note: If a parent agency has not yet sub-allocated HUD funding to the sub-agencies, the funding amount shown will be $0.00.
The default view of the 9902 shows **All Activities** and **All HUD Funded Activities**. The **All Activities** column represents what the agency submitted in the 9902 report for all counseling and education activities conducted by the agency during the reporting period. The **All HUD Funded Activities** column represents a total calculation of what the agency submitted for their grant specific HUD funded counseling and education activities. Click **Show Grants** to view the individual grant specific HUD Funded columns.

![Figure 15 - 9902 form with Show Grants highlighted](image)

The 9902 form expands to show the grant specific HUD Funded Columns. These columns represent the data the agency submitted for their HUD funded activities specific to that grant's funding. If they received multiple HUD grants, each grant would have a column.

![Figure 16 - 9902 with the 2013-1 COMP Funded column highlighted](image)

For agencies that submit 9902 forms, click the **Update** button to access the version of the 9902 for data entry.
Data Entry Version

For agencies that submit 9902 reports directly, click the **Update** button to access the data entry version of the 9902 form. The 9902 will open in a form in which the agency’s budget and counseling activities can be entered.
Similar to the display version, the active grants that the agency is funded with during the reporting period display.
A data-entry column displays for All Housing Counseling and Education Activities.

A data-entry column for each grant that the agency is funded with will also display. The column label for the grant specific columns reflects the grants listed in section 2.
Agencies should enter the housing counseling and education activities that were funded by the specific HUD grant identified in the label. If the agency was funded with multiple grants during the reporting period, multiple columns will display.

The **All HUD Funded Activities** column will display the total number entered in the grant specific columns. It is a system generated calculation. If the agency is funded with one grant during the reporting period, the **All HUD Funded Activities** value will be the same as the grant specific value entered by the agency. Please note that the total in the **All HUD Funded Activities** column cannot be greater than what was entered in the **All Activities** column for each row in the 9902 form.

**Note:** For previously submitted fiscal year 2013 9902 forms, any data entered in the **HUD Housing Counseling Activities** column in the old version of the 9902 form will not display in the grant specific HUD funded columns or be reflected in the **All HUD Funded Activities** column. This is because the new form is tied to specific grants. Some agencies may have multiple grants depending on their HUD funding for that year. The data entered in the previous column was a generic value for all HUD funding.
Figure 22 - 9902 data entry form with the ALL HUD Funded Activities column highlighted.

The form will also calculate and display the section totals.

Figure 23 - 9902 data entry form showing the section 3 Total highlighted

Please note that the section totals must be equal using the formula:

Section 3 Total = Section 4 Total = Section 5 Total = (Section 6 Total + Section 7 Total)
Click the **Save** button at the bottom of the page to submit the 9902 form. Click the **Cancel** button to cancel any changes made and return to the 9902 Display version.

![Figure 24 - 9902 data entry form showing the Save and Cancel buttons highlighted.](image)

After saving, the 9902 will appear in the display version showing the data submitted.
Figure 25 - 9902 display after submitting a 9902

The default view shows the system calculated total of the All HUD Funded Activities. Click Show Grants to see the data entered in the grant specific columns.
**Data Display Version – Consolidated 9902**

Parent agencies that do not submit 9902s continue to have a consolidated 9902 based on the total of all their sub-agency 9902 reports. The display of the consolidated 9902 has also been updated. It displays the HUD Funding Sources and the total number of sub-agencies that the report reflects.
There is not an **Update** button on the consolidated 9902. Clicking **Show Grants** will expand the columns to show the data entered in the grant specific HUD funded columns.
Figure 28 - Consolidated 9902 showing the grant specific column.