



HOUSING COUNSELING SYSTEM (HCS-F11) AGENCY REPORTING MODULE (ARM-F11M)

QUICK INTERFACE REFERENCE GUIDE FOR CLIENT MANAGEMENT SYSTEMS (CMS)

***U.S. Department of Housing and Urban Development
December 4, 2014***

Release HCS V14.0.0.0

Document Version 2.0.0.0

This document is a high-level checklist of the activities that each CMS vendor or agency shall complete in order to successfully submit Agency Profile, Form 9902, Counselor and Client data through Agency Reporting Module (ARM) automated interface.

STEP	ACTION	CHECK
1	<p>Obtain the latest version of ARM ICD document. This document contains appropriate technical information needed to build an interface between each CMS and the Housing Counseling System Agency Reporting Module (ARM).</p> <p><i>Reference:</i> HUD Web Site, Client Management System Requirement Guidance for Housing Counseling Agencies: http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/sfh/hcc/cms – Resources for CMS developers link on the right side of the page.</p>	<input type="checkbox"/>
2	<p>ARM SDK. The Software Development Kit (SDK) was created to supplement CMS development process. The SDK contains several JUnit (testing software) tests that demonstrate how to connect to and invoke methods on the ARM Service. The SDK also contains the ARM WSDL and XSD, and the ARM Databag XSDs.</p> <p>It is not mandatory but highly recommended for CMS developers to take advantage of tools and supplemental materials of the SDK to establish ARM data transactions.</p> <p>The latest version of SDK can be downloaded from HUD Web Site, Client Management System Requirement Guidance for Housing Counseling Agencies: http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/sfh/hcc/cms – Resources for CMS developers link on the right side of the page. Instructions on how to use the SDK are provided in the readme.txt file inside the SDK archive.</p>	<input type="checkbox"/>
3.	<p>Self testing with ARM SDK for Java and .NET clients. Vendors who are using Java or .NET technology to create their CMS clients may complete software self testing using mock of the ARM service included in the SDK. Instructions on how to test against ARM mock service are available in the SDK package.</p> <p>Vendors who are not using Java and .NET technology should skip this step and move to step 4.</p>	<input type="checkbox"/>
4	<p style="text-align: center;">PILOT TESTING</p> <p>Obtain connection information to the HCS ARM pilot system.</p> <ol style="list-style-type: none"> a. The HCS Agency ID, Login ID and password shall be acquired from the Housing Counseling Agency participating in the HUD Housing Counseling Program. b. Open a ticket with the HUD National Help Desk (at 1-888-297-8689 or 202-708-3300 - option 9). Inform Help Desk specialist that you need assistance with the application ARM (F11M) - Agency Reporting Module and need to register your CMS. You will then be contacted by the support team. c. Be ready to answer following questions: <ul style="list-style-type: none"> ▪ Your company's name ▪ Name, phone and email of contact person in your company ▪ Name of your CMS system and CMS short name (no more than 15 characters) which you will be using in XML header to identify your system and which will be recorded in our data tables 	<input type="checkbox"/>

STEP	ACTION	CHECK
	<ul style="list-style-type: none"> ▪ Name of the Housing Counseling Agency whose information you will be using for testing your CMS system ▪ Housing Counseling Agency HCS Agency ID and Login ID (as described in paragraph 'a' of this step) ▪ Brief description of technology and tools you will be using to access ARM system ▪ Will your CMS be used privately for one agency or will it be available for other agencies? ▪ CMS end-user Help Desk Information <p>d. The URL and CMS ID/Password needed to connect to HCS ARM Pilot environment will be provided once all necessary information is collected and CMS will be ready to test.</p>	
5	<p>Utilize and build SOAP submission methods for the HCS ARM using arm.wsdl file.</p>	<input type="checkbox"/>
6	<p>Pilot system connection and Security Test. Verify that you have connection to the HCS ARM Pilot system.</p> <ol style="list-style-type: none"> a. Open a browser window (ex. Internet Explorer) b. Enter the following URL: https://{ARM Pilot URL}/ARM/ARM/?WSDL c. When prompted, enter the HCS Agency Login ID and Password obtained in Step 4 d. Successful connection to the service is an expected result. The ARM WSDL will be displayed 	<input type="checkbox"/>
7	<p>Develop and construct the set of required HCS ARM submission files. For ARM 5.0, the list of expected schema files includes: agency_profile_databag_5_0.xsd, client_profile_databag_5_0.xsd, counselor_profile_databag_5_0.xsd and form_9902_databag_5_0.xsd.</p> <p><i>Important:</i> All new CMS development shall be conducted only against dataset ARM XSD 5.0.</p> <p>Starting with fiscal year 2015 submissions, the HCS ARM interface will not accept data that validates against previous datasets ARM XSD 3.0, ARM XSD 3.1, and ARM XSD 4.0.</p> <p><i>Note:</i> Make sure you are reporting for the correct Fiscal Year for all transactions and the Quarter when 9902 data is included in submission.</p>	<input type="checkbox"/>
8	<p>Create test data set for just the Agency Profile Submission Test. Create the ARM XML dataset file with CMS extracted test data for agency profile only.</p>	<input type="checkbox"/>

STEP	ACTION	CHECK
9	<p>Conduct the Agency Profile Submission Test. Send the test dataset (step 8) through the HCS ARM interface, and utilize the “postAgencyData” method.</p>	<input type="checkbox"/>
10	<p>View test submission results through “GetSubmissionInfo” SOAP method available in HCS ARM. Verify test results.</p> <p><i>Suggestion:</i> If it is taking some time for the HCS ARM system to process information you have submitted. Please wait a minimum of 15 minutes before attempting to receive the transaction confirmation. You may also create a timer to automate this delay in execution.</p> <p><i>Technical support:</i> If assistance is required during the development process, or you want to report technical issue, please contact HUD National Help Desk at 1-888-297-8689 or 202-708-3300 and choose option 9.</p> <p>Inform Help Desk specialist that you need assistance with application <i>ARM (F11M) - Agency Reporting Module.</i></p> <p>Provide the following information:</p> <ul style="list-style-type: none"> ▪ Your name ▪ Phone number ▪ E-mail address ▪ Name of your Client Management System (CMS) ▪ Login ID - If you do not have Login ID, or it is not registered with ServiceDesk, they shall use the general contact record "<i>HCS-ARM Customer</i>" ▪ Description of the issue <p>Please ensure that the ticket is routed to the "<i>HSGN - HCS - ARM</i>" group.</p>	<input type="checkbox"/>
11	<p>Create test dataset for multiple Counselors Data, Form 9902 and multiple Client Data Submission Tests. Create the Counselor Profile ARM XML dataset file with the actual counselors’ data; create the Form 9902 ARM XML dataset file with the actual HCS 9902 data; and create the Client Profile ARM XML dataset file with the actual clients’ extracted data. Use data of more than three clients to achieve a good test baseline and viable results.</p> <p>If agencies using the CMS are expected to report their HUD Attributed counseling activities in their 9902 submission, create multiple Form 9902 datasets that allow for multiple activity types to report All Counseling and Education Activities and HUD Attributed Counseling and Education Activities.</p>	<input type="checkbox"/>
12	<p>Submit the Counselors Data, Form 9902 Client Data Submission Tests. Send the test dataset (step 11) through the HCS ARM interface, and utilize the “postCounselorData”, ‘postForm9902Data’, and postClientData’ methods respectively.</p>	<input type="checkbox"/>

STEP	ACTION	CHECK
13	View test submission results through “getSubmissionInfo” SOAP method available in HCS ARM. Verify test results.	<input type="checkbox"/>
14	<p style="text-align: center;">PRODUCTION SUBMISSIONS</p> <p>Obtain authorization for CMS system to interface with the HCS ARM production system.</p> <ol style="list-style-type: none"> a. Open a ticket with the HUD National Help Desk to report successful tests to HUD ARM Support Team. See details above for contacting the Help Desk. Provide submission IDs for each of the submission tests: <ul style="list-style-type: none"> ▪ Agency Profile Data Submission Test (Step 8-10) ▪ Counselors Data, Form 9902 and Clients Data Submission Test (Steps 11-13) b. Upon successful review, obtain authorization to connect to the HCS ARM production system from the HUD ARM Support Team. The URL for the production ARM system will be delivered to you via email. Once you have this authorization, you will be able to conduct security test on production system. c. The HCS Login ID and password shall be acquired from the Housing Counseling Agency for which the production data submission will be conducted. <p><i>Note:</i> Please note that CMS ID and password assigned to your CMS system on production environment will be different from one on the pilot. Make sure to use correct CMS system ID and password to ensure that production submissions are credited to your system.</p>	<input type="checkbox"/>
15	<p>Production system connection and Security Test.</p> <p>Verify that you have connection to the HCS ARM Production System.</p> <ol style="list-style-type: none"> a. Open a browser window (ex. Internet Explorer) b. Enter the following URL: <code>https://{ARM Production URL}/ARM/ARM/?WSDL</code> c. When prompted, enter production HCS Agency Logon ID and Password d. Successful connection to the service is an expected result. The ARM WSDL will be displayed <p><i>Note:</i> Please note the difference between production and pilot HCS ARM URL.</p>	<input type="checkbox"/>
16	<p>Create production data set for the Counselor Data, Form 9902 and Client Data Submission. Create the respective ARM XML dataset files with CMS extracted counselor, 9902 and client data.</p>	<input type="checkbox"/>
17	<p>Conduct the Counselor, Form 9902 and Client Data Submission. Send the dataset (step 16) through the HCS ARM interface and utilize the ‘postCounselorData’ ‘postForm9902Data’, and ‘postClientData’ methods respectively.</p> <p><i>Suggestion:</i> If it is taking some time for the HCS ARM system to process information you have submitted. Please wait a minimum of 15 minutes before attempting to receive the transaction confirmation. You may also create a timer to automate this delay in execution.</p>	<input type="checkbox"/>

STEP	ACTION	CHECK
18	View submission results through “getSubmissionInfo” SOAP method. Verify results. In case of error report to HUD ARM Support Team and repeat steps 16 and 17.	<input type="checkbox"/>

REVISION SHEET

DOCUMENT VERSION NO.	DATE	REVISION DESCRIPTION
1.0.0.0	01/13/2009	Initial version
1.1.0.0	01/29/2009	Corrections to address new testing requirements
1.2.0.1	04/12/2009	Added technical support information and minor corrections.
1.2.0.2	05/14/2009	Updated technical support information
1.2.0.3	06/03/2009	Updated technical support information
1.2.0.4	05/05/2011	Updated dataset requirements information
2.0.0.0	12/04/2014	Updated to address testing requirements for ARM5.