HCS 14.12.0.0 Release

Changes to HUD User Interface for HCS V14.12.0.0

An update to HCS was released on September 26, 2017 included the following changes:

• Add New Agency – allow new agency profile to be added to the current fiscal year and the next fiscal year.

• Advanced Agency Search – Searcy by Grant updated to search in current fiscal year.

• Agency Profile – Agency Summary tab provides a detailed report of counseling activities submitted from the agency’s CMS.

• Advanced Agency Search and Agency Profile – Indicates if an agency has a certified counselor.

• Agency Profile – HUD Affiliation allows for new status change reasons for Inactive and Terminated Status types.

• 9902 Data Reporting Status Inquiry – 9902 form will open in a new browser window.

• Funding Report Search allows searching by funding fiscal year.

• Budget Allocation changes that include identifying funds allocated to all fiscal years and a balance on the first year page and allowing LHCAs with branches to allocate to branches or allocate directly to the LHCA.

Note: data displayed in screens is for example purposes only and does not reflect actual data
Add New Agency – allow new agency profile to be added to the current fiscal year and the next fiscal year.

- Previously when entering a new agency, the agency profile could only be added to the current fiscal year.

- This would cause a problem for HUD POCs when entering a new agency after the end of the fiscal year (9/30) that actually started in the program prior to that date.

- Scenario, a new agency starts in the program in fiscal year 2017 on 9/15/2017. It is now 10/05/2017 (fiscal year 2018) and the agency profile is entered into the system. The FY 2018 profile record is created, but there is no profile record for FY 2017. The agency needs to submit a form 9902 for FY 2017. This scenario would previously require a database modification to add the agency profile to FY 2017. HUD POCs can now choose to do this on the Add New Agency screen.

- Steps:
  1. Hover your mouse Over the Agency menu.
  2. Click on Add New Agency
Add New Agency – allow new agency profile to be added to the current fiscal year and the next fiscal year.

- **Steps:**
  3. Enter the required Agency Profile data

  4. **Fiscal Year:**
     - Select “**Add to Fiscal Year 2018 only**” to only add the agency to just 2018 (the current fiscal year).
     - Select “**Add to Fiscal Years 2018 and 2017**” to add the agency to 2018 and 2017 (the current fiscal year and the previous fiscal year).

  5. Click the **OK** button.
Advanced Agency Search – Searcy by Grant updated to search in current fiscal year.

- Previously the Search by Agency Grant module of the Advanced Agency Search, searched grant records based on awards from the previous fiscal year from the year selected.

- Now that grants are awarded in the same fiscal year that the agencies use the funding, the search was updated to search grant award and funding records for the selected fiscal year.

- Steps:
  1. Hover your mouse Over the **Agency** menu.
  2. Click on **Advanced Agency Search**.
Advanced Agency Search – Searcy by Grant updated to search in current fiscal year.

• Steps:
  1. Select the Fiscal Year to search.
  2. Click the plus sign icon next to Search by Agency Grant.
  3. Select the Funding type for the desired search:
     • Awarded – agencies that received a direct award during the fiscal year selected.
     • Not Awarded – agencies that applied for a grant but did not receive an award during the fiscal year selected.
     • Funded – Agencies that have funding applicable to the fiscal year selected. This would include agencies with a sub allocation and their parent agency.
Advanced Agency Search – Searcy by Grant updated to search in current fiscal year.

- **Steps:**
  4. Select a **Grant Type** if desired.
  5. Click the **Search** button.
  6. The **Agency List** page will display with the search results.
Agency Profile – Agency Summary tab provides a detailed report of counseling activities submitted from the agency’s CMS.

- The Agency Profile – Agency Summary tab displays the total number of counseling activities based upon the detailed one-on-one counseling and group education data submitted by the agency’s CMS.

- The total number links to a detailed report of the individual counseling activities.

- Steps:
  1. On the Agency Profile – Agency Summary tab, click the link for the number of Total YTD Reported.
Agency Profile – Agency Summary tab provides a detailed report of counseling activities submitted from the agency’s CMS.

- A new browser window or tab opens displaying the **Housing Counseling Activities Detailed Report** for that agency and fiscal year.
- The One-on-One Counseling activities display at the top.

```
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<thead>
<tr>
<th>Client ID</th>
<th>Case Number</th>
<th>CMS Counselor ID</th>
<th>Counseling Purpose</th>
<th>Start Date</th>
<th>End Date</th>
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<th>Grant</th>
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<th>Race</th>
<th>Income Level</th>
<th>Rural Area Status</th>
<th>Limited English Proficiency Status</th>
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<td>H/H that improved their financial capacity (e.g., increased discretionary income, decreased debt load, increased savings, increased credit score) after receiving Housing Counseling Services.</td>
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<td>H/H that prevented or resolved a mortgage default after receiving Housing Counseling Services.</td>
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```
Agency Profile – Agency Summary tab provides a detailed report of counseling activities submitted from the agency’s CMS.

- The Group Education counseling activities display below the One-on-One counseling activities.

<table>
<thead>
<tr>
<th>ID</th>
<th>Reference Type</th>
<th>Title</th>
<th>Date</th>
<th>Qtr</th>
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<th>Race</th>
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<th>Limited English Proficiency Status</th>
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HCS v14.12.0.0 Release - Changes to HUD User Interface for HCS V14.12.0.0
HCS 14.12.0.0 Release - Changes to HUD User Interface for HCS V14.12.0.0

Agency Profile – Agency Summary tab provides a detailed report of counseling activities submitted from the agency’s CMS.

- The data can be downloaded in excel format by clicking the Excel icon at the top of the screen.

- Steps:
  1. Click the Excel icon.
  2. Follow the browser prompts to download the file. Click Open to view the excel file right away. Click Save to save the file to a local or network drive.
Agency Profile – Agency Summary tab provides a detailed report of counseling activities submitted from the agency’s CMS.

- When the file opens in Excel, there will be two worksheets – one for the One-on-One Counseling activities and one for the Group Education activities.

- One-on-One Counseling activities display on the first worksheet/tab.
Agency Profile – Agency Summary tab provides a detailed report of counseling activities submitted from the agency’s CMS.

- Group Education activities display on the second worksheet/tab.
Agency Profile – Agency Summary tab provides a detailed report of counseling activities submitted from the agency’s CMS.

If the total number is not the same as the number reported on the agency’s most recent 9902 for that fiscal year (YTD Declared in 9902), an alert will display.

This indicates that the agency is not submitting the same number of detailed counseling activity data from their CMS as they are reporting on their 9902.
Advanced Agency Search and Agency Profile – Indicates if an agency has a certified counselor.

HCS is receiving nightly data imports from FHAC to identify those agencies with a certified counselor. The certified counselor indicator displays on the Agency Profile – Agency Summary tab. The Advanced Agency Search provides a means for searching for agencies with or without a certified counselor.

- **Steps:**
  1. Hover your mouse over the **Agency** menu.
  2. Click on **Advanced Agency Search**.
  3. Select the **Fiscal Year** to search, if not searching the current fiscal year.
  4. Click the plus sign icon next to **Search by Agency Information**.
  5. Select the **Meets Certified Counselor Requirement** for the desired search:
     - **Yes** indicates the agency has at least one certified counselor
     - **No** indicates that the agency does not have a certified counselor
     - **Not Applicable** indicates that the agency is not applicable to the certified counselor requirement
  6. Click the **Search** button.
Advanced Agency Search and Agency Profile – Indicates if an agency has a certified counselor.
Advanced Agency Search and Agency Profile – Indicates if an agency has a certified counselor.

The certified counselor indicator displays as the last column in the search results.

It also displays as the last column in the Basic Agency Spreadsheet.
Advanced Agency Search and Agency Profile – Indicates if an agency has a certified counselor.

The certified counselor indicator displays on the Agency Profile – Agency Summary tab under Public Services Information.
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Agency Profile – HUD Affiliation allows for new status change reasons for Inactive and Terminated Status types. The following status change reasons are now available when changing an agency’s status on the Agency Profile – HUD Affiliation page.

Inactive:
- Lack of Funding
- No Counselor

Terminated (Non Participating):
- No Counselor

Terminated (Disapproved):
- No Counselor
9902 Data Reporting Status Inquiry – 9902 form will open in a new browser window.

When viewing 9902 forms from the HUD 9902 Data Reporting Status Inquiry, the forms will open in a new browser window so that when the form is closed, HCS is still open in the original window.

- **Steps:**
  1. Click on the **9902** icon on the results page. The 9902 form will open in a new browser window or tab, depending on your browser set up.
  
  2. Clicking the **Close** button will close the new window or tab that opened for the 9902.
  
  3. A message will display asking if you want to close the window. Click the **Yes** button.
  
  4. The original HCS window will still be open.
HCS 14.12.0.0 Release - Changes to HUD User Interface for HCS V14.12.0.0

Funding Report Search allows searching by funding fiscal year.

The Funding Report Search has been updated to search and display funding records by funding fiscal year – the year the grant funds were used by the agency.

• Steps:
  1. Select the desired **NOFA** to report on.

  2. Click the **Search** button.
Funding Report Search allows searching by funding fiscal year. The search results return with a new column for **Funding Fiscal Year (FFY)**. Depending on how the grant funds are allocated for each fiscal year of a grant performance period, an agency may have more than one result (one for each year that funding has been allocated to).
Funding Report Search allows searching by funding fiscal year. The report can be downloaded in Excel format by clicking the **Excel Format** button. Follow the browser prompts to download the file. Click **Open** to view the excel file right away. Click **Save** to save the file to a local or network drive.
Funding Report Search allows searching by funding fiscal year.

The excel version shows one row per agency, per NOFA. Each funding fiscal year has individual columns. The following data elements display in the excel version:

<table>
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<th>Agency Data:</th>
<th>Grant Data:</th>
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<td>• NOFA</td>
</tr>
<tr>
<td>• Agency Name</td>
<td>• Grant Type</td>
</tr>
<tr>
<td>• City</td>
<td>• Direct Award</td>
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<td>• State</td>
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<td>• Zip</td>
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<tr>
<td>• HOC</td>
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The table below shows an example of the data displayed in the excel version:

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<th>Direct Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>80084</td>
<td>MON VALLEY INITIATIVE</td>
<td>HOMESTEAD</td>
<td>PA</td>
<td>15120</td>
<td>National Intermediary</td>
<td>Headquarters SF-HUD</td>
<td>DFC, PPC, PPW, RHC, DFC, PPC, PW, RHC</td>
<td>2016-1</td>
<td>INTERMEDIARY - COMP</td>
<td>$676,333.00</td>
</tr>
</tbody>
</table>
Funding Report Search allows searching by funding fiscal year.

Funding Data:

- Sub Allocation for each Funding Fiscal Year
- Total Sub Allocation

- Indirect Cost for each Funding Fiscal Year
- Total Indirect Cost

<table>
<thead>
<tr>
<th>FY16 Admin Allocation</th>
<th>FY17 Admin Allocation</th>
<th>Total Admin Allocation</th>
<th>FY16 Indirect Cost</th>
<th>FY17 Indirect Cost</th>
<th>Total Indirect Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>$56,023.95</td>
<td>$7,680.29</td>
<td>$63,704.24</td>
<td>$9,899.94</td>
<td>$0.00</td>
<td>$9,899.94</td>
</tr>
</tbody>
</table>
Funding Report Search allows searching by funding fiscal year.

Funding Data:

- Admin Allocation for each Funding Fiscal Year
- Total Admin Allocation

- Allocation for each Funding Fiscal Year (the amount received from a parent; or allocated by LHCA to each year of the grant).
- Total Allocation

<table>
<thead>
<tr>
<th>R</th>
<th>S</th>
<th>T</th>
<th>U</th>
<th>V</th>
<th>W</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY16 Sub Allocation</td>
<td>FY17 Sub Allocation</td>
<td>Total Sub Allocation</td>
<td>FY16 Allocation</td>
<td>FY17 Allocation</td>
<td>Total Allocation</td>
</tr>
<tr>
<td>$575,410.48</td>
<td>$17,318.34</td>
<td>$592,728.82</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
Funding Report Search allows searching by funding fiscal year.

**Funding Data:**

- Total Funding for each Funding Fiscal Year
- Total Funding
- Remaining Funds

<table>
<thead>
<tr>
<th></th>
<th>FY16 Total Funding</th>
<th>FY17 Total Funding</th>
<th>Total Funding</th>
<th>Remaining Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>$641,334.37</td>
<td>$24,998.63</td>
<td>$666,333.00</td>
<td>$10,000.00</td>
</tr>
</tbody>
</table>
Funding Report Search allows searching by funding fiscal year.

Example – NOFA 2016-1 COMP; FFY 2016

- **Steps:**
  1. Select **2016-1** from **NOFA**.
  2. Select **2016** from **Funding Fiscal Year**.
  3. Click the **Search** button
Budget Allocation - Identify funds allocated to all fiscal years and balance on the first year page

Previously the Budget Allocation screen indicated the balance left over just for that fiscal year. The first year of the budget allocation screen now indicates the amounts allocated to each fiscal year and displays the balance remaining. A negative balance is also identified.

Example from NOFA 2016-1 COMP – FY 2016 screen (first year of the grant)

To Be Sub-Allocated: The amount remaining after Administrative Funds and Indirect Cost

Sub-Allocated: The amount sub-allocated to sub-agencies for 2016.

FY 2016 Total Allocation: The total of the Administrative Funds, Indirect Cost, and sub-allocations made for FY 2016.
Example from NOFA 2016-1 COMP – FY 2016 screen (first year of the grant) continued:

FY 2016 Balance: The amount remaining from the original award after the total FY 2016 Allocation.

FY 2017 Allocation: The total amount sub-allocated to sub-agencies for 2017.

Remaining Funds: The amount remaining from the direct award after allocations from all fiscal years.
Budget Allocation - Identify funds allocated to all fiscal years and balance on the first year page

Example from NOFA 2016-1
COMP – FY 2017 screen (second year of the grant):

To Be Sub-Allocated: The amount remaining from the FY 2016 balance after Administrative Funds and Indirect Cost

Sub-Allocated: The amount sub-allocated to sub-agencies for 2017

FY 2017 Total Allocation: The total of the Administrative Funds, Indirect Cost, and sub-allocations made for FY 2017.

Remaining Funds: The amount remaining from the direct award after allocations from all fiscal years.
Budget Allocation - Identify funds allocated to all fiscal years and balance on the first year page

Example from NOFA 2016-1 COMP – Negative Balance:

Remaining Funds: A negative balance will display if allocation amounts are entered that exceed the grant award.

Exp: The sub-allocations for FY 2016 were increased and exceeded the available funds, when including the amount already allocated to FY 2017. Remaining Funds shows a negative balance. If the user tries to save, a message displays indicating that available funds have been exceeded. If the agency now wants to use all funding in FY 2016, they must first zero out the funds previously allocated to FY 2017.
Budget Allocation - Allow LHCAs with branches to allocate to branches or allocate directly to the LHCA

LHCAs with branches can now choose to allocate their grant award to their branches, or to allocate directly to the LHCA that received the award.

By default the budget allocation page for LHCAs with branches will display without the branches listed.

If the agency chooses not to enter sub-allocations for each branch, they should identify how much of the award will be used in each fiscal year of the grant performance period.
Budget Allocation - Allow LHCAs with branches to allocate to branches or allocate directly to the LHCA

Steps:
On the budget allocation screen for the first year of the grant award (FY 2017 in the case of NOFA 2017-1 COMP):

1. Enter the amount the agency intends to use for **Administrative Funds** in FY 2017.

2. Enter the amount the agency intends to use for **Indirect Cost** in FY 2017.

3. Enter the amount the agency intends to use directly for funding counseling activities in FY 2017 in the **This Year’s Allocation** box.

4. Click the **Save** button.

5. Click the **OK** button.

In this example, there is a balance left over of $10,900 that can be used in the second fiscal year of the grant performance period (FY 2018).
HCS 14.12.0.0 Release - Changes to HUD User Interface for HCS V14.12.0.0

Budget Allocation - Allow LHCAs with branches to allocate to branches or allocate directly to the LHCA

Steps:

If the agency intends to use the remaining funds in FY 2018:

1. Select 2018 from the fiscal year select list.

2. On the FY 2018 Budget Allocation page, enter the amount the agency intends to use for Administrative Funds in FY 2018.

3. Enter the amount the agency intends to use for Indirect Cost in FY 2018.

4. Enter the amount the agency intends to use directly for funding counseling activities in FY 2018 in the This Year’s Allocation box.

5. Click the Save button.

6. Click the OK button.
Budget Allocation - Allow LHCAs with branches to allocate to branches or allocate directly to the LHCA

If the agency would like to track sub-allocations made to branches:

Steps:
1. On the budget allocation screen for the first year of the grant award (FY 2017 in the case of NOFA 2017-1 COMP), click the Allocate to Branches button.

2. An alert displays asking if you are sure you want to allocate to branches. Click the OK button.
HCS 14.12.0.0 Release - Changes to HUD User Interface for HCS V14.12.0.0

Budget Allocation - Allow LHCAs with branches to allocate to branches or allocate directly to the LHCA

The Budget Allocation screen will then refresh. The branch agencies now display. The original amounts entered in Administrative Funds and Indirect Cost remain. The amount previously entered in **This Year’s Allocation** no longer displays. The agency can now sub-allocate to the branches.
Budget Allocation - Allow LHCAs with branches to allocate to branches or allocate directly to the LHCA

**Steps:** To sub-allocate to branches:

1. Select the Qtr tab that the agency intends to start using the grant funding in that fiscal year (FY 2017 in this example). If the agency intends to start using the grant starting with Qtr 1, click the Qtr 1 tab. If the agency intends to start using the grant later in the year select the appropriate Qtr tab. In this example, the agency intends to start using the grant funds in June of 2017. Qtr 3 is selected.

2. Enter the # of Counselors and # of Projected Clients for each branch.

3. Enter the amount the agency intends to sub-allocate to each of the branches.

4. Enter the Agency Total Budget for each branch.

5. Click the **Save** button.

6. Click the **OK** button.
HCS 14.12.0.0 Release - Changes to HUD User Interface for HCS V14.12.0.0

Budget Allocation - Allow LHCAs with branches to allocate to branches or allocate directly to the LHCA

The amount Sub-Allocated for FY 2017 is updated based upon the sum of the sub-allocations entered for each branch. Remaining Funds is also updated to display any balance that remains after the sub-allocations were entered.
Budget Allocation - Allow LHCAs with branches to allocate to branches or allocate directly to the LHCA

Steps: If the agency intends to use the remaining funds in FY 2018:

1. Select **2018** from the fiscal year select list.

2. Enter the # of Counselors and # of Projected Clients for each branch in FY 2018.

3. Enter the amount the agency intends to sub-allocate to each of the branches for FY 2018.

4. Enter the Agency Total Budget for each branch.

5. Click the **Save** button.

6. Click the **OK** button.

Note: agency budget can only be entered once the fiscal year has started. If the fiscal year has not started, the Agency Total Budget fields will be disabled.
Budget Allocation - Allow LHCAs with branches to allocate to branches or allocate directly to the LHCA

If the agency then decides that they do not want to track sub-allocations made to branches, and would prefer to enter the allocation directly to the LHCA, they can do so by clicking the Remove Branch Allocations button.

An alert displays asking if you are sure you want to remove the branch allocations. Click the OK button.
HCS 14.12.0.0 Release - Changes to HUD User Interface for HCS V14.12.0.0

Budget Allocation - Allow LHCAs with branches to allocate to branches or allocate directly to the LHCA

The Budget Allocation screen will then refresh. The branch agencies and their sub-allocations have been removed. The LHCA can then enter the total amount of the grant that they intend to use for counseling activities for each fiscal year of the grant period in the This Year’s Allocation box. (See slides 32 – 24).