

HCS 14.17.0.0 Release

Changes to HUD User Interface for HCS V14.17.0.0

An update to HCS is planned for release on February 26, 2019 and includes the following user interface changes:

- Agency Profile – Agency Summary – 9902 Reporting Status:
 - Display NOT REPORTED instead of N/A if an agency has not reported a 9902.
 - Change the date used to determine if a 9902 report has been submitted on-time from the last updated date to the original submission date.
- Submission History – Display error message for failed submissions.
- Agency Profile – HUD Affiliation – Update to interface to allow entry of multiple state and zip code affiliations.
- Grant Budget Allocation – Display calculated client projections based on budget, grant, and previous 9902 reporting.
- CMS List – Update CMS list to no longer display CMS that are in-progress, but have been inactive.

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

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Agency Profile – Agency Summary – HUD-9902 Submission Summary – 9902 Reporting Status

- The HUD-9902 Submission Summary will display NOT REPORTED instead of N/A if:
 - ✓ the current date is after the due date for a fiscal year and Qtr 9902 reporting period, and
 - ✓ an agency has not reported a 9902 for that fiscal year and Qtr.

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

Agency Summary Agency Information Personnel Contact Information HUD Affiliation Counselor/Client

TEST AGENCY CF11 UPDATE

Acknowledgment Agency ID: 84489 Agency Type: LHCA Agency Services Begin: CMS: HCO	Performance Review Fiscal Year: 2019 Status: Approved Last Review Date: Last Review Result: Next Scheduled Review Date:																																																												
Data Input and Validation Last Data Input By: CS7569 Last Data Input Date: 02/08/2019 Last Validated By: CS7569 Last Validated Date: 12/15/2015 Next Validation NLT Date: (03/14/2016)	HUD Comments Comments: Add New <table border="1"> <thead> <tr> <th>Subject</th> <th>Author</th> <th>Date</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td colspan="4">HUD-9902 Submission Summary - FY 2018</td> </tr> <tr> <td colspan="4">View Submission History</td> </tr> <tr> <td>2018 - Quarter 1</td> <td>01/08/2018</td> <td>✓</td> <td></td> </tr> <tr> <td>2018 - Quarter 2</td> <td>04/10/2018</td> <td>✓</td> <td></td> </tr> <tr> <td>2018 - Quarter 3</td> <td>08/20/2018</td> <td>✓</td> <td></td> </tr> <tr> <td>2018 - Quarter 4</td> <td>access 9902</td> <td>NOT REPORTED</td> <td></td> </tr> <tr> <td colspan="4">HUD-9902 Submission Summary - FY 2019</td> </tr> <tr> <td colspan="4">View Submission History</td> </tr> <tr> <td>2019 - Quarter 1</td> <td>access 9902</td> <td>N/A</td> <td></td> </tr> <tr> <td>2019 - Quarter 2</td> <td>access 9902</td> <td>N/A</td> <td></td> </tr> <tr> <td>2019 - Quarter 3</td> <td>access 9902</td> <td>N/A</td> <td></td> </tr> <tr> <td>2019 - Quarter 4</td> <td>access 9902</td> <td>N/A</td> <td></td> </tr> <tr> <td colspan="4">HUD Grant Award - No grant application submitted for this FY</td> </tr> <tr> <td colspan="4">No HUD Sub Allocation Grant Funded last FY</td> </tr> </tbody> </table>	Subject	Author	Date	Action	HUD-9902 Submission Summary - FY 2018				View Submission History				2018 - Quarter 1	01/08/2018	✓		2018 - Quarter 2	04/10/2018	✓		2018 - Quarter 3	08/20/2018	✓		2018 - Quarter 4	access 9902	NOT REPORTED		HUD-9902 Submission Summary - FY 2019				View Submission History				2019 - Quarter 1	access 9902	N/A		2019 - Quarter 2	access 9902	N/A		2019 - Quarter 3	access 9902	N/A		2019 - Quarter 4	access 9902	N/A		HUD Grant Award - No grant application submitted for this FY				No HUD Sub Allocation Grant Funded last FY			
Subject	Author	Date	Action																																																										
HUD-9902 Submission Summary - FY 2018																																																													
View Submission History																																																													
2018 - Quarter 1	01/08/2018	✓																																																											
2018 - Quarter 2	04/10/2018	✓																																																											
2018 - Quarter 3	08/20/2018	✓																																																											
2018 - Quarter 4	access 9902	NOT REPORTED																																																											
HUD-9902 Submission Summary - FY 2019																																																													
View Submission History																																																													
2019 - Quarter 1	access 9902	N/A																																																											
2019 - Quarter 2	access 9902	N/A																																																											
2019 - Quarter 3	access 9902	N/A																																																											
2019 - Quarter 4	access 9902	N/A																																																											
HUD Grant Award - No grant application submitted for this FY																																																													
No HUD Sub Allocation Grant Funded last FY																																																													
Essential Contacts HUD Agency Contact: ✓ HUD POC Phone: ✓ HUD POC Email: ✓ POC Assigned:	Clients & Counselors Clients <table border="1"> <tr> <td>Total</td> <td>0</td> <td>Projected for FY:</td> <td>0</td> </tr> <tr> <td>Trained</td> <td>0</td> <td>YTD Declared in 9902:</td> <td>0</td> </tr> <tr> <td></td> <td></td> <td>Total YTD Reported :</td> <td>0</td> </tr> </table>	Total	0	Projected for FY:	0	Trained	0	YTD Declared in 9902:	0			Total YTD Reported :	0																																																
Total	0	Projected for FY:	0																																																										
Trained	0	YTD Declared in 9902:	0																																																										
		Total YTD Reported :	0																																																										
Public Access Selection HUD Web Site X HUD IVR X																																																													

Example:

The agency has not reported a 2018 Qtr 4 9902 report. Since the current date is after the due date for FY 2018 Qtr 4, **Not Reported** displays as the submission status.

HUD-9902 Submission Summary - FY 2018		
View Submission History		
2018 - Quarter 1	01/08/2018	✓
2018 - Quarter 2	04/10/2018	✓
2018 - Quarter 3	08/20/2018	✓
2018 - Quarter 4	access 9902	NOT REPORTED

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Agency Profile – Agency Summary – HUD-9902 Submission Summary – 9902 Reporting Status

- A HUD 9902 Submission will be identified as on-time or late using the original submission date, instead of the last updated date.
- If an agency originally submits the 9902 report before the due date for that FY and Qtr, but then updates the 9902 after the due date, the 9902 will continue to show as on-time.
- A HUD 9902 Submission will only be considered late if the original submission date was after the due date.

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Agency Profile – Agency Summary – HUD-9902 Submission Summary – 9902 Reporting Status

Example:

The agency originally reported the 2018 Qtr 3 9902 on-time (08/20/2018), but later updated it after the due date (02/08/2019). The status of the 2018 Qtr 3 9902 displays a green check mark indicating it was on-time.

February 08, 2019 CS7569/1

Housing Counseling Agency Activity Report		U.S. Department of Housing and Urban Development		OMB Approval No: 2502-0261
		Office of Housing Counseling		Exp. 07/31/2019
		Federal Housing Commissioner		
1. Counseling Agency Name			2. Reporting Period and Budget	
Agency Name			Reporting Period: Quarter 3 ▾	
TEST AGENCY CF11 UPDATE			Fiscal Year: 2018	
Agency ID: 84489			From: 10/01/2017	
Agency Type: LHCA			To: 06/30/2018	
38505 Country Club Dr Suite 210			Submission Date: 08/20/2018	
Farmington Hills, MI			Update Date: 02/08/2019	
48331-3457			Total budget, all sources: \$25,000.00	
Parent Agency Name (if applicable)			Total HUD Funding, all grants: \$0.00	
HUD Funding Sources Passed @ 0%				
Validated: Validated			Only reports completed by 12/31/2018 will be credited for on time submission.	
Last Validated: 02/08/2019				
Validated hv: System				

Agency Summary | Agency Information | Personnel | Contact Information | HUD Affiliation | Counselor/Client

TEST AGENCY CF11 UPDATE

Acknowledgment		Performance Review																																																													
Agency ID: 84489	Agency Type: LHCA	Fiscal Year: 2019	Status: Approved																																																												
Agency Services Begin: CMS: HCO		Last Review Date:																																																													
		Last Review Result:																																																													
		Next Scheduled Review Date:																																																													
Data Input and Validation		HUD Comments																																																													
Last Data Input By: CS7569		Comments: Add New																																																													
Last Data Input Date: 02/08/2019		<table border="1"><thead><tr><th>Subject</th><th>Author</th><th>Date</th><th>Action</th></tr></thead><tbody><tr><td colspan="4">HUD-9902 Submission Summary - FY 2018</td></tr><tr><td colspan="4">View Submission History</td></tr><tr><td>2018 - Quarter 1</td><td>01/08/2018</td><td>✓</td><td></td></tr><tr><td>2018 - Quarter 2</td><td>04/10/2018</td><td>✓</td><td></td></tr><tr><td>2018 - Quarter 3</td><td>08/20/2018</td><td>✓</td><td></td></tr><tr><td>2018 - Quarter 4</td><td>access 9902</td><td>NOT REPORTED</td><td></td></tr><tr><td colspan="4">HUD-9902 Submission Summary - FY 2019</td></tr><tr><td colspan="4">View Submission History</td></tr><tr><td>2019 - Quarter 1</td><td>access 9902</td><td>N/A</td><td></td></tr><tr><td>2019 - Quarter 2</td><td>access 9902</td><td>N/A</td><td></td></tr><tr><td>2019 - Quarter 3</td><td>access 9902</td><td>N/A</td><td></td></tr><tr><td>2019 - Quarter 4</td><td>access 9902</td><td>N/A</td><td></td></tr><tr><td colspan="4">HUD Grant Award - No grant application submitted for this FY</td></tr><tr><td colspan="4">No HUD Sub Allocation Grant Funded last FY</td></tr></tbody></table>		Subject	Author	Date	Action	HUD-9902 Submission Summary - FY 2018				View Submission History				2018 - Quarter 1	01/08/2018	✓		2018 - Quarter 2	04/10/2018	✓		2018 - Quarter 3	08/20/2018	✓		2018 - Quarter 4	access 9902	NOT REPORTED		HUD-9902 Submission Summary - FY 2019				View Submission History				2019 - Quarter 1	access 9902	N/A		2019 - Quarter 2	access 9902	N/A		2019 - Quarter 3	access 9902	N/A		2019 - Quarter 4	access 9902	N/A		HUD Grant Award - No grant application submitted for this FY				No HUD Sub Allocation Grant Funded last FY			
Subject	Author	Date	Action																																																												
HUD-9902 Submission Summary - FY 2018																																																															
View Submission History																																																															
2018 - Quarter 1	01/08/2018	✓																																																													
2018 - Quarter 2	04/10/2018	✓																																																													
2018 - Quarter 3	08/20/2018	✓																																																													
2018 - Quarter 4	access 9902	NOT REPORTED																																																													
HUD-9902 Submission Summary - FY 2019																																																															
View Submission History																																																															
2019 - Quarter 1	access 9902	N/A																																																													
2019 - Quarter 2	access 9902	N/A																																																													
2019 - Quarter 3	access 9902	N/A																																																													
2019 - Quarter 4	access 9902	N/A																																																													
HUD Grant Award - No grant application submitted for this FY																																																															
No HUD Sub Allocation Grant Funded last FY																																																															
Last Validated By: CS7569																																																															
Last Validated Date: 12/15/2015																																																															
Next Validation NLT Date: (03/14/2016)																																																															
Essential Contacts																																																															
HUD Agency Contact: ✓																																																															
HUD POC Phone: ✓																																																															
HUD POC Email: ✓																																																															
POC Assigned: ⚠																																																															
Counselors																																																															
Clients & Counselors																																																															
Clients																																																															
Total	0	Projected for FY:	0																																																												
Trained	0	YTD Declared in 9902:	0																																																												
		Total YTD Reported :	0																																																												
Public Access Selection																																																															
HUD Web Site	✗	HUD IVR	✗																																																												

TOTAL	
All Activities	Calculated HUD Housing Counseling Activities
1	0.00
0	0.00

Close

Data

ds (select only one)

HUD-9902 Submission Summary - FY 2018

View Submission History

2018 - Quarter 1	01/08/2018	✓
2018 - Quarter 2	04/10/2018	✓
2018 - Quarter 3	08/20/2018	✓
2018 - Quarter 4	access 9902	NOT REPORTED

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Submission History – Display error message for failed submissions.

- The Submission History page now displays the error message of failed submissions.

Example:

To access
history page
History link
Submission
Agency Pr

TEST AGENCY CF11 UPDATE

Acknowledgment Agency ID: 84489 Agency Type: LHCA Agency Services Begin: CMS: HCO		Performance Review Fiscal Year: 2019 Status: Approved Last Review Date: Last Review Result: Next Scheduled Review Date:																																																					
Data Input and Validation Last Data Input By: C57569 Last Data Input Date: 02/08/2019 Last Validated By: C57569 Last Validated Date: 12/15/2015 Next Validation NLT Date: (03/14/2016)		HUD Comments Comments: Add New																																																					
Essential Contacts HUD Agency Contact: ✓ HUD POC Phone: ✓ HUD POC Email: ✓ POC Assigned: !		<table border="1"> <thead> <tr> <th>Subject</th> <th>Author</th> <th>Date</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td colspan="4">HUD-9902 Submission Summary - FY 2018</td> </tr> <tr> <td colspan="4">View Submission History</td> </tr> <tr> <td>2018 - Quarter 1</td> <td>01/08/2018</td> <td>✓</td> <td></td> </tr> <tr> <td>2018 - Quarter 2</td> <td>04/10/2018</td> <td>✓</td> <td></td> </tr> <tr> <td>2018 - Quarter 3</td> <td>08/20/2018</td> <td>✓</td> <td></td> </tr> <tr> <td>2018 - Quarter 4</td> <td>access 9902</td> <td></td> <td>NOT REPORTED</td> </tr> <tr> <td colspan="4">HUD-9902 Submission Summary - FY 2019</td> </tr> <tr> <td colspan="4">View Submission History</td> </tr> <tr> <td>2019 - Quarter 1</td> <td>access 9902</td> <td></td> <td>N/A</td> </tr> <tr> <td>2019 - Quarter 2</td> <td>access 9902</td> <td></td> <td>N/A</td> </tr> <tr> <td>2019 - Quarter 3</td> <td>access 9902</td> <td></td> <td>N/A</td> </tr> <tr> <td>2019 - Quarter 4</td> <td>access 9902</td> <td></td> <td>N/A</td> </tr> </tbody> </table>		Subject	Author	Date	Action	HUD-9902 Submission Summary - FY 2018				View Submission History				2018 - Quarter 1	01/08/2018	✓		2018 - Quarter 2	04/10/2018	✓		2018 - Quarter 3	08/20/2018	✓		2018 - Quarter 4	access 9902		NOT REPORTED	HUD-9902 Submission Summary - FY 2019				View Submission History				2019 - Quarter 1	access 9902		N/A	2019 - Quarter 2	access 9902		N/A	2019 - Quarter 3	access 9902		N/A	2019 - Quarter 4	access 9902		N/A
Subject	Author	Date	Action																																																				
HUD-9902 Submission Summary - FY 2018																																																							
View Submission History																																																							
2018 - Quarter 1	01/08/2018	✓																																																					
2018 - Quarter 2	04/10/2018	✓																																																					
2018 - Quarter 3	08/20/2018	✓																																																					
2018 - Quarter 4	access 9902		NOT REPORTED																																																				
HUD-9902 Submission Summary - FY 2019																																																							
View Submission History																																																							
2019 - Quarter 1	access 9902		N/A																																																				
2019 - Quarter 2	access 9902		N/A																																																				
2019 - Quarter 3	access 9902		N/A																																																				
2019 - Quarter 4	access 9902		N/A																																																				
Clients & Counselors <table border="1"> <thead> <tr> <th>Counselors</th> <th>Clients</th> </tr> </thead> <tbody> <tr> <td>Total</td> <td>0 Projected for FY:</td> </tr> <tr> <td>Trained</td> <td>0 YTD Declared in 9902:</td> </tr> <tr> <td></td> <td>Total YTD Reported :</td> </tr> </tbody> </table>		Counselors	Clients	Total	0 Projected for FY:	Trained	0 YTD Declared in 9902:		Total YTD Reported :	HUD Grant Award - No grant application submitted for this FY																																													
Counselors	Clients																																																						
Total	0 Projected for FY:																																																						
Trained	0 YTD Declared in 9902:																																																						
	Total YTD Reported :																																																						
Public Access Selection HUD Web Site ✗ HUD IVR ✗		No HUD Sub Allocation Grant Funded last FY																																																					
Public Services Information Agency Address: ✓																																																							

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Submission History – Display error message for failed submissions.

Example:

The **CMS Submission History** page will open in a new browser window or tab. Click the **Failed** link to view the error details of a failed submission

CMS Submission History - Fiscal Year 2019 UNITED WAY OF CENTRAL ALABAMA, INC. (83803)

Agency Profile					
Submission ID	Submission Type	Date Received	Date Processed	CMS	Submission Status
780140440	Agency Profile	2019-01-17 21:14:03.616	2019-01-17 21:14:59.753	XYZ Client Management System	Failed
780137936	Agency Profile	2018-12-11 10:33:30.566	2018-12-11 10:34:38.903	XYZ Client Management System	Failed
780137916	Agency Profile	2018-12-10 16:52:09.53	2018-12-10 16:52:37.436	XYZ Client Management System	Failed
Show More					
Counselor Profiles					
Submission ID	Submission Type	Date Received	Date Processed	CMS	Submission Status
780140441	Counselor Profiles	2019-01-17 21:14:03.653	2019-01-17 21:15:09.313	XYZ Client Management System	Successful
780137937	Counselor Profiles	2018-12-11 10:33:34.566	2018-12-11 10:34:46.61	XYZ Client Management System	Successful
780137917	Counselor Profiles	2018-12-10 16:52:10.2	2018-12-10 16:52:46.596	XYZ Client Management System	Successful
Show More					

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Submission History – Display error message for failed submissions.

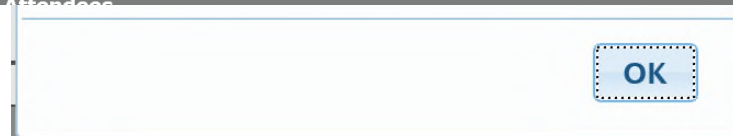
Example:

A smaller window will display that provides the submission information and the specific error message for that submission.

CMS Submission History - Fiscal Year 2019 UNITED WAY OF CENTRAL ALABAMA, INC. (83803)

Agency Profile					
Submission ID	Submission Type	Date Received	Date Processed	CMS	Submission Status
780140440	Agency Profile	2019-01-17 21:14:03.616	2019-01-17 21:14:59.753	XYZ Client Management System	Failed
780137936	Agency Profile	2018-12-11 10:33:30.566	2018-12-11 10:34:38.903	XYZ Client Management System	Failed
780137916	Agency Profile	2018-12-10 16:52:09.53	2018-12-10 16:52:37.436	XYZ Client Management System	Failed
Show More					
Counselor Profiles					
Submission ID	Submission Type	Date Received	Date Processed	CMS	Submission Status
780140441	Counselor Profiles	2019-01-17 21:14:03.653	2019-01-17 21:15:09.313	XYZ Client Management System	Successful
780137937	Counselor Profiles	2018-12-11 10:33:34.566	2018-12-11 10:34:46.61	XYZ Client Management System	Successful
780137917	Counselor Profiles	2018-12-10 16:52:10.2	2018-12-10 16:52:46.596	XYZ Client Management System	Successful
Show More					

Form 0002 and Group Session Attendance



HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Update to interface to allow entry of multiple state and zip code affiliations.

- The Agency Profile – HUD Affiliation tab has been updated to allow multiple affiliated zip codes and states.
- When a new agency is added the zip code and state used in the agency's physical address are used by default as a affiliated zip and affiliated state.
- HUD POCs can add multiple affiliated zip codes and states for those agencies that service multiple localities.

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Update to interface to allow entry of multiple state and zip code affiliations.

Agency ID: 84489 ☐ Validated? Last Validated on 12/15/2015 (Next Validation Required by 03/14/2016)

Agency Name: TEST AGENCY CF11 UPDATE

Type of Agency: LHCA Parent Org: ☐ Temporary Affiliate

HUD Office Agency Assigned to: Philadelphia (HOC) Joined HUD Program as of: 10/20/2011

HUD POC:

Agency Review: [Create New Review](#)

Agency Status:
Status: Approved As Of: 06/15/2014 Up To: 07/02/2019 [Change Status](#) | [View Status History](#)

Types of Counseling Services:

<input type="checkbox"/> FBC - Financial Management/Budget Counseling	<input type="checkbox"/> FHW - Fair Housing Pre-Purchase Education Workshops
<input type="checkbox"/> HIC - Home Improvement and Rehabilitation Counseling	<input type="checkbox"/> FBW - Financial, Budgeting, and Credit Workshops
<input type="checkbox"/> DFC - Mortgage Delinquency and Default Resolution Counseling	<input type="checkbox"/> NDW - Non-Delinquency Post Purchase Workshops
<input type="checkbox"/> PPC - Pre-purchase Counseling	<input type="checkbox"/> PLW - Predatory Lending Education Workshops
<input type="checkbox"/> RHC - Rental Housing Counseling	<input type="checkbox"/> PPW - Pre-purchase Homebuyer Education Workshops
<input type="checkbox"/> RMC - Reverse Mortgage Counseling (From FHAC, read-only)	<input type="checkbox"/> RHW - Rental Housing Workshops
<input type="checkbox"/> HMC - Services for Homeless Counseling	<input type="checkbox"/> DFW - Resolving/Preventing Mortgage Delinquency Workshops

Zip Code Affiliations:
Default Affiliation: 48331 [Add Another Zip Code](#)

State Affiliations:
Default Affiliation: Michigan
State List: Michigan

* Hold the CTRL key and click each state(s) to be added. Once selected, click a state again to deselect it.

Alaska
Alabama
Arkansas
American Samoa
Arizona
California
Colorado
Connecticut
District of Columbia
Delaware
Florida

[Clear State Selection](#) Clear all state selections, even those previously saved. The Default State cannot be removed.
[Revert State Selection](#) Restore to the last saved state list.

Example: Add Affiliated Zip Codes

The zip code in the agency's address is listed as an affiliated zip code by default.

1. Click the **Add Another Zip Code** button and a blank text box will display.
2. Enter the 5 digit zip code in the blank text box.
3. Repeat the first two steps to add additional zip codes.
4. Click the **OK** button at the bottom of the screen.

Zip Code Affiliations:
Default Affiliation: 48331 [Add Another Zip Code](#)

Zip Code Affiliations:
Default Affiliation: 48331 [Add Another Zip Code](#)

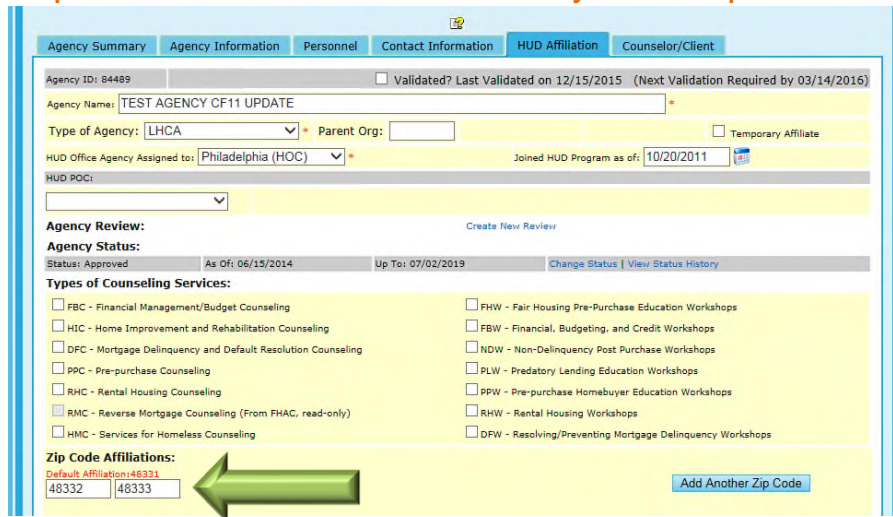
48332

☐ Allow public access through Zip Code Affiliations?
☐ Allow public access through State Affiliations?

[OK](#) [Cancel](#) [Sub-Agency\(s\)](#)

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Update to interface to allow entry of multiple state and zip code affiliations.



Agency ID: 84489 ☐ Validated? Last Validated on 12/15/2015 (Next Validation Required by 03/14/2016)

Agency Name: TEST AGENCY CF11 UPDATE

Type of Agency: LHCA Parent Org: Temporary Affiliate ☐

HUD Office Agency Assigned to: Philadelphia (HOC) Joined HUD Program as of: 10/20/2011

HUD POC:

Agency Review: [Create New Review](#)

Agency Status:
Status: Approved As Of: 06/15/2014 Up To: 07/02/2019 [Change Status](#) | [View Status History](#)

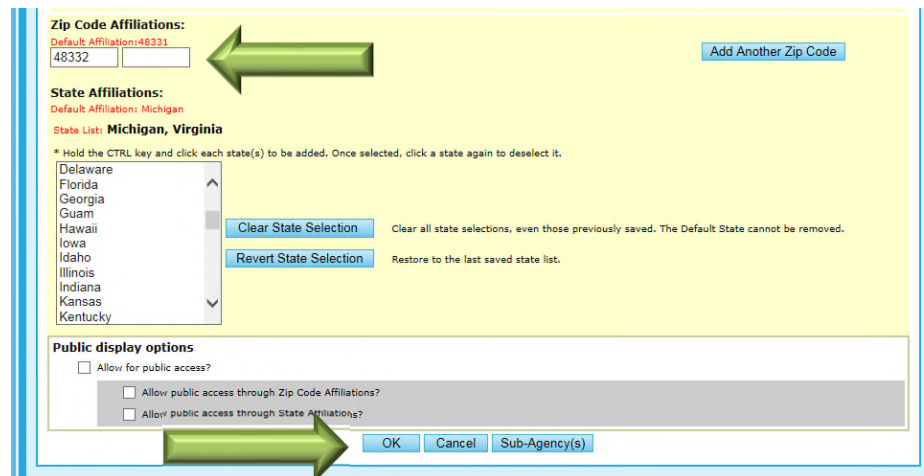
Types of Counseling Services:

<input type="checkbox"/> FBC - Financial Management/Budget Counseling	<input type="checkbox"/> FHW - Fair Housing Pre-Purchase Education Workshops
<input type="checkbox"/> HIC - Home Improvement and Rehabilitation Counseling	<input type="checkbox"/> FBW - Financial, Budgeting, and Credit Workshops
<input type="checkbox"/> DFC - Mortgage Delinquency and Default Resolution Counseling	<input type="checkbox"/> NDW - Non-Delinquency Post Purchase Workshops
<input type="checkbox"/> PPC - Pre-purchase Counseling	<input type="checkbox"/> PLW - Predatory Lending Education Workshops
<input type="checkbox"/> RHC - Rental Housing Counseling	<input type="checkbox"/> PPW - Pre-purchase Homebuyer Education Workshops
<input type="checkbox"/> RMC - Reverse Mortgage Counseling (From FHAC, read-only)	<input type="checkbox"/> RHW - Rental Housing Workshops
<input type="checkbox"/> HMC - Services for Homeless Counseling	<input type="checkbox"/> DFV - Resolving/Preventing Mortgage Delinquency Workshops

Zip Code Affiliations:
Default Affiliation: 48331
48332 48333 [Add Another Zip Code](#)

Example: Remove Affiliated Zip Codes

1. Remove the zip code text from the text box.
2. Click the **OK** button at the bottom of the screen.



Zip Code Affiliations:
Default Affiliation: 48331
48332 [Add Another Zip Code](#)

State Affiliations:
Default Affiliation: Michigan
State List: Michigan, Virginia

* Hold the CTRL key and click each state(s) to be added. Once selected, click a state again to deselect it.

Delaware
Florida
Georgia
Guam
Hawaii
Idaho
Illinois
Indiana
Kansas
Kentucky

[Clear State Selection](#) Clear all state selections, even those previously saved. The Default State cannot be removed.
[Revert State Selection](#) Restore to the last saved state list.

Public display options
☐ Allow for public access?
☐ Allow public access through Zip Code Affiliations?
☐ Allow public access through State Affiliations?

[OK](#) [Cancel](#) [Sub-Agency\(s\)](#)

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Update to interface to allow entry of multiple state and zip code affiliations.

Agency ID: 84489 ☐ Validated? Last Validated on 12/15/2015 (Next Validation Required by 03/14/2016)

Agency Name: TEST AGENCY CF11 UPDATE

Type of Agency: LHCA Parent Org: ☐ Temporary Affiliate

HUD Office Agency Assigned to: Philadelphia (HOC) Joined HUD Program as of: 10/20/2011

HUD POC:

Agency Review: [Create New Review](#)

Agency Status:
Status: Approved As Of: 06/15/2014 Up To: 07/02/2019 [Change Status](#) | [View Status History](#)

Types of Counseling Services:

<input type="checkbox"/> FBC - Financial Management/Budget Counseling	<input type="checkbox"/> FHW - Fair Housing Pre-Purchase Education Workshops
<input type="checkbox"/> HIC - Home Improvement and Rehabilitation Counseling	<input type="checkbox"/> FBW - Financial, Budgeting, and Credit Workshops
<input type="checkbox"/> DFC - Mortgage Delinquency and Default Resolution Counseling	<input type="checkbox"/> NDW - Non-Delinquency Post Purchase Workshops
<input type="checkbox"/> PPC - Pre-purchase Counseling	<input type="checkbox"/> PLW - Predatory Lending Education Workshops
<input type="checkbox"/> RHC - Rental Housing Counseling	<input type="checkbox"/> RPW - Pre-purchase Homebuyer Education Workshops
<input type="checkbox"/> RMC - Reverse Mortgage Counseling (From FHAC, read-only)	<input type="checkbox"/> RHW - Rental Housing Workshops
<input type="checkbox"/> HMC - Services for Homeless Counseling	<input type="checkbox"/> DFW - Resolving/Preventing Mortgage Delinquency Workshops

Zip Code Affiliations:
Default Affiliation: 48331 [Add Another Zip Code](#)

State Affiliations:
Default Affiliation: Michigan
State List: Michigan

* Hold the CTRL key and click each state(s) to be added. Once selected, click a state again to deselect it.

Alaska
Alabama
Arkansas
American Samoa
Arizona
California
Colorado
Connecticut
District of Columbia
Delaware
Florida

[Clear State Selection](#) Clear all state selections, even those previously saved. The Default State cannot be removed.

[Revert State Selection](#) Restore to the last saved state list.

Example: Add Affiliated State

The state in the agency's address is listed as an affiliated state by default. To add multiple affiliated states:

1. While holding down the **CTRL** key on your keyboard, select the desired states from the select list. As a state is selected, it will display in the **state list**.
2. Click the **OK** button at the bottom of the screen.

State List: Michigan, Illinois, Indiana

* Hold the CTRL key and click each state(s) to be added. Once selected, click a state again to deselect it.

Hawaii
Iowa
Idaho
Illinois
Indiana
Kansas
Kentucky
Louisiana
Massachusetts
Maryland
Maine

[Clear State Selection](#) Clear all state selections, even those previously saved. The Default State cannot be removed.

[Revert State Selection](#) Restore to the last saved state list.

Public display options

☐ Allow for public access?

☐ Allow public access through Zip Code Affiliations?

☐ Allow public access through State Affiliations?

[OK](#) [Cancel](#) [Sub-Agency\(s\)](#)

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Update to interface to allow entry of multiple state and zip code affiliations.

Example: Remove All Affiliated States

1. Click the **Clear State Selection** button. This button will remove all but the default state from the state list.
2. Click the **OK** button at the bottom of the screen.

State Affiliations:
Default Affiliation: Michigan
State List: Michigan, Illinois, Indiana

* Hold the CTRL key and click each state(s) to be added. Once selected, click a state again to deselect it.

Alaska
Alabama
Arkansas
American Samoa
Arizona
California
Colorado
Connecticut
District of Columbia
Delaware
Florida

Clear State Selection
Revert State Selection

Restore to the last saved state list.

State Affiliations:
Default Affiliation: Michigan
State List: Michigan

* Hold the CTRL key and click each state(s) to be added. Once selected, click a state again to deselect it.

Alaska
Alabama
Arkansas
American Samoa
Arizona
California
Colorado
Connecticut
District of Columbia
Delaware
Florida

Clear State Selection
Revert State Selection

Clear all state selections, even those previously saved. The Default State cannot be removed.
Restore to the last saved state list.

Public display options

☐ Allow for public access?

☐ Allow public access through Zip Code Affiliations?

☐ Allow public access through State Affiliations?

OK Cancel Sub-Agency(s)

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Update to interface to allow entry of multiple state and zip code affiliations.

Example: Revert State Selection

The **Revert State Selection** button can be used to return the state selection to the last saved list.

1. Click the **Clear State Selection** button to remove all states, except the default state, from the state list.
2. Click the **Revert State Selection** button to returned to the last list of saved states.

State Affiliations:

Default Affiliation: Michigan

State List: Michigan, Illinois, Indiana

* Hold the CTRL key and click each state(s) to be added. Once selected, click a state again to deselect it.

Alaska
Alabama
Arkansas
American Samoa
Arizona
California
Colorado
Connecticut
District of Columbia
Delaware
Florida

Clear State Selection

Revert State Selection

Clear all state selections, even those previously saved. The Default State cannot be removed.

Restore to the last saved state list.

State Affiliations:

Default Affiliation: Michigan

State List: Michigan

* Hold the CTRL key and click each state(s) to be added. Once selected, click a state again to deselect it.

Connecticut
District of Columbia
Delaware
Florida
Georgia
Guam
Hawaii
Iowa
Idaho
Illinois
Indiana

Clear State Selection

Revert State Selection

Clear all state selections, even those previously saved. The Default State cannot be removed.

Restore to the last saved state list.

Public display options

State Affiliations:

Default Affiliation: Michigan

State List: Michigan, Illinois, Indiana

* Hold the CTRL key and click each state(s) to be added. Once selected, click a state again to deselect it.

Connecticut
District of Columbia
Delaware
Florida
Georgia
Guam
Hawaii
Iowa
Idaho
Illinois
Indiana

Clear State Selection

Revert State Selection

Clear all state selections, even those previously saved. The Default State cannot be removed.

Restore to the last saved state list.

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Update to interface to allow entry of multiple state and zip code affiliations.

Example: Remove Individual States

1. While holding down the **CTRL** key on your keyboard, select the desired state from the select list to remove. As a state is de-selected, it will be removed from the **state list**.
2. Click the **OK** button at the bottom of the screen.

State Affiliations:
Default Affiliation: Michigan
State List: Michigan, Illinois, Indiana

* Hold the CTRL key and click each state(s) to be added. Once selected, click a state again to deselect it.

Hawaii
Iowa
Idaho
Illinois
Indiana
Kansas
Kentucky
Louisiana
Massachusetts
Maryland
Maine

Clear State Selection Clear all state selections, even those previously saved. The Default State cannot be removed.
Revert State Selection Restore to the last saved state list.

Public display options
☐ Allow for public access?
☐ Allow public access through Zip Code Affiliations?
☐ Allow public access through State Affiliations?

OK Cancel Sub-Agency(s)

State Affiliations:
Default Affiliation: Michigan
State List: Michigan, Indiana

* Hold the CTRL key and click each state(s) to be added. Once selected, click a state again to deselect it.

Hawaii
Iowa
Idaho
Illinois
Indiana
Kansas
Kentucky
Louisiana
Massachusetts
Maryland
Maine

Clear State Selection Clear all state selections, even those previously saved. The Default State cannot be removed.
Revert State Selection Restore to the last saved state list.

Public display options
☐ Allow for public access?
☐ Allow public access through Zip Code Affiliations?
☐ Allow public access through State Affiliations?

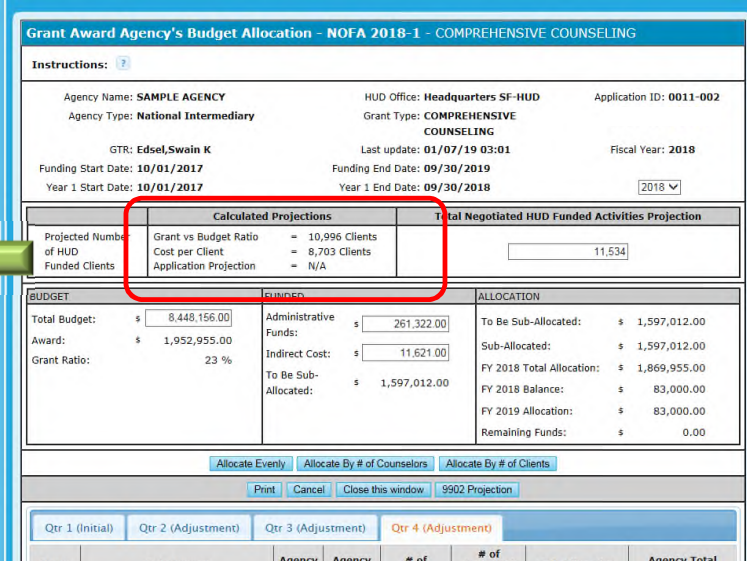
OK Cancel Sub-Agency(s)

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Grant Budget Allocation – Display calculated client projections based on budget, grant, and previous 9902 reporting

- Calculated Projections have been added to the Grant Award Agency Budget Allocation screen
- Calculated Projections are based on the agency's budget information, grant award amount, and previous year's 9902 reporting.
- Calculated Projections are provided as a guide for determining how many counseling activities the agency may be able to conduct with the HUD grant.

Calculated Projections		
Grant vs Budget Ratio	=	10,996 Clients
Cost per Client	=	8,703 Clients
Application Projection	=	N/A



Grant Award Agency's Budget Allocation - NOFA 2018-1 - COMPREHENSIVE COUNSELING

Instructions: ?

Agency Name: **SAMPLE AGENCY** HUD Office: **Headquarters SF-HUD** Application ID: **0011-002**
 Agency Type: **National Intermediary** Grant Type: **COMPREHENSIVE COUNSELING**
 GTR: **Edsel,Swain K** Last update: **01/07/19 03:01** Fiscal Year: **2018**
 Funding Start Date: **10/01/2017** Funding End Date: **09/30/2019**
 Year 1 Start Date: **10/01/2017** Year 1 End Date: **09/30/2018** [2018 v]

Calculated Projections		Total Negotiated HUD Funded Activities Projection
Projected Number of HUD Funded Clients	Grant vs Budget Ratio = 10,996 Clients Cost per Client = 8,703 Clients Application Projection = N/A	11,534

BUDGET

Total Budget:	\$ 8,448,156.00
Award:	\$ 1,952,955.00
Grant Ratio:	23 %

EXPENSE

Administrative Funds:	\$ 261,322.00
Indirect Cost:	\$ 11,621.00
To Be Sub-Allocated:	\$ 1,597,012.00

ALLOCATION

To Be Sub-Allocated:	\$ 1,597,012.00
Sub-Allocated:	\$ 1,597,012.00
FY 2018 Total Allocation:	\$ 1,869,955.00
FY 2018 Balance:	\$ 83,000.00
FY 2019 Allocation:	\$ 83,000.00
Remaining Funds:	\$ 0.00

Allocate Evenly | Allocate By # of Counselors | Allocate By # of Clients

Print | Cancel | Close this window | 9902 Projection

Qtr 1 (Initial) | Qtr 2 (Adjustment) | Qtr 3 (Adjustment) | Qtr 4 (Adjustment)

Status	Sub-Agency	Agency	Agency	# of	# of	Sub-Allocation	Agency Total
--------	------------	--------	--------	------	------	----------------	--------------

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Grant Budget Allocation – Display calculated client projections based on budget, grant, and previous 9902 reporting

- Grant vs Budget Ratio: Uses the grant ratio* and the previous year's 4th quarter 9902 total to identify a projected number of clients.

Example:

In this example the Grant vs Budget Ratio is **10,996** clients. The grant ratio is **23%**. The total counseling activities reported in the previous year's 4th qtr 9902 is **47,807**.

$$47,807 \times .23 = 10,995.61$$

(rounded up = **10,996**)

* The grant ratio is the grant award amount of the agency's total budget. (Award amount/Agency Budget)

$$1,952,955.00 / 8,448,156.00 = .2311$$

(rounded down to .23).

Grant Award Agency's Budget Allocation - NOFA 2018-1 - COMPREHENSIVE COUNSELING

Instructions: ?

Agency Name: **SAMPLE AGENCY** HUD Office: **Headquarters SF-HUD** Application ID: **0011-002**
 Agency Type: **National Intermediary** Grant Type: **COMPREHENSIVE COUNSELING** Agency ID: **80816**
 GTR: **Edsel, Swain K** Last update: **01/07/19 03:01** Fiscal Year: **2018**
 Funding Start Date: **10/01/2017** Funding End Date: **09/30/2019**
 Year 1 Start Date: **10/01/2017** Year 1 End Date: **09/30/2018**

Calculated Projections		Total Negotiated HUD Funded
Projected Number of HUD Funded Clients	Grant vs Budget Ratio = 10,996 Clients Cost per Client = 8,703 Clients Application Projection = N/A	

BUDGET	FUNDED	ALLOCATION
Total Budget: \$ 8,448,156.00	Administrative Funds: \$ 261,322.00	To Be Sub-Allocated:
Award: \$ 1,952,955.00	Indirect Cost: \$ 11,621.00	Sub-Allocated:
Grant Ratio: 23 %	To Be Sub-Allocated: \$ 1,597,012.00	FY 2018 Total Allocation
		FY 2018 Balance:
		FY 2019 Allocation:
		Remaining Funds:

Allocate Evenly | Allocate By # of Counselors | Allocate By # of Clients

Print | Cancel | Close this window | 9902 Projection

8. Households Receiving Group Education by Purpose

a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	1330
b. Completed predatory lending, loan scam or other fraud prevention workshop	53
c. Completed fair housing workshop	39
d. Completed homelessness prevention workshop	95
e. Completed rental workshop	394
f. Completed pre-purchase homebuyer education workshop	12868
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	294
h. Completed resolving or preventing mortgage delinquency workshop	2469
i. Completed other workshop	112
Section 8 Total	17654

9. Households Receiving One-on-One Counseling by Purpose

a. Homeless Assistance	65
b. Rental Topics	725
c. Prepurchase/Homebuying	13186
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	432
e. Reverse Mortgage	
f. Resolving or Preventing Mortgage Delinquency or Default	
Section 9 Total	35103
Households Served Sections 8 and 9 Total:	47807

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Grant Budget Allocation – Display calculated client projections based on budget, grant, and previous 9902 reporting

- Cost Per Client: Identifies the cost per client based on the previous year's total budget and 4th quarter 9902 total to identify how many counseling activities can be conducted with the award amount.

Grant Award Agency's Budget Allocation - NOFA 2018-1 - COMPREHENSIVE COUNSELING

Instructions: ?

Agency Name: **SAMPLE AGENCY** HUD Office: **Headquarters SF-HUD** Application ID: **0011-002**
 Agency Type: **National Intermediary** Grant Type: **COMPREHENSIVE COUNSELING** Agency ID: **80816**
 GTR: **Edsel, Swain K** Last update: **01/07/19 03:01** Fiscal Year: **2018**
 Funding Start Date: **10/01/2017** Funding End Date: **09/30/2019**
 Year 1 Start Date: **10/01/2017** Year 1 End Date: **09/30/2018** 2018 ▼

Calculated Projections		Total Negotiated HUD Funded Activities Projection
Projected Number of HUD Funded Clients	Grant vs Budget Ratio = 10,995 Clients Cost per Client = 8,703 Clients Application Projection = N/A	<input type="text" value="11,534"/>

BUDGET **FUNDED**

Total Budget: \$ Administrative Funds:
 Award: \$ Indirect Cost:
 Grant Ratio: To Be Sub-Allocated:

8. Households Receiving Group Education by Purpose

a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	1330	.00
b. Completed predatory lending, loan scam or other fraud prevention workshop	53	.00
c. Completed fair housing workshop	39	.00
d. Completed homelessness prevention workshop	95	.00
e. Completed rental workshop	394	.00
f. Completed pre-purchase homebuyer education workshop	12868	.00
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	294	.00
h. Completed resolving or preventing mortgage delinquency workshop	2469	.00
i. Completed other workshop	112	.00
Section 8 Total	17654	

9. Households Receiving One-on-One Counseling by Purpose

a. Homeless Assistance	65	.00
b. Rental Topics	725	.00
c. Prepurchase/Homebuying	13186	.00
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	2	.00
e. Reverse Mortgage	6	.00
f. Resolving or Preventing Mortgage Delinquency or Default	3053	.00
Section 9 Total	3053	
Households Served Sections 8 and 9 Total:	47807	

Housing Counseling Agency Activity Report U.S. Department of Housing and Urban Development Office of Housing Counseling Federal Housing Commissioner OMB Approval No: 2502-0261 Exp. 07/31/2019

1. Counseling Agency Name
 Agency Name: **SAMPLE AGENCY**
 Agency ID: **80816**
 Agency Type: **National Intermediary**
 123 Main St.
 Anytown, VA
 22180

2. Reporting Period and Budget
 Reporting Period: **Quarter 4**
 Fiscal Year: **2017**
 From: **10/01/2016**
 To: **09/30/2017**
 Total budget, all sources: **\$10,727,435.00**
 Total HUD Funding, all grants: **\$2,207,859.00**

Reporting 45 of 46 total sub-agencies

HUD Funding Sources Passed @ 21%
 2016-1 COMP
 10/01/2015 - 03/31/2017
 Notice of Funding Availability (NOFA) for the Department's Fiscal Years 2016 and 2017 Comprehensive Housing Counseling Grant Program, FR-6000-N-33 - FY 2016 Awards
 Funding: \$0.00
 Projection: HUD Approved: 08-29-2016

Example:

In this example the Cost per Client projection is **8,703** clients. The cost per client for the previous fiscal year is the total budget divided by the total households served (**10,727,435 / 47,807 = 224.39**)

The grant award (**1,952,955.00**) is then divided by the previous year's cost per client (**224.39**):

1,952,955.00 / 224.39 = 8703.39 (rounded down to 8703)

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

Grant Budget Allocation – Display calculated client projections based on budget, grant, and previous 9902 reporting

- Application Projection: If a projection is requested on the grant application, that projection amount will display as the Application projection. N/A will display if there is no Application Projection.

Note:

N/A will display for a projection if any value needed to calculate a projection is not available.

Grant Award Agency's Budget Allocation - NOFA 2018-1 - COMPREHENSIVE COUNSELING			
Instructions: ?			
Agency Name: SAMPLE AGENCY		HUD Office: Headquarters SF-HUD	Application ID: 0011-002
Agency Type: National Intermediary		Grant Type: COMPREHENSIVE COUNSELING	Agency ID: 80816
GTR: Edsel, Swain K		Last update: 01/07/19 03:01	Fiscal Year: 2018
Funding Start Date: 10/01/2017		Funding End Date: 09/30/2019	
Year 1 Start Date: 10/01/2017		Year 1 End Date: 09/30/2018	2018 ▼
	Calculated Projections	Total Negotiated HUD Funded Activities Projection	
Projected Number of HUD Funded Clients	Grant vs Budget Ratio = 10,996 Clients Cost per Client = 8,703 Clients Application Projection = N/A	11,534	
BUDGET		FUNDED	ALLOCATION
Total Budget:	\$ 8,448,156.00	Administrative Funds:	\$ 261,322.00
Award:	\$ 1,952,955.00	Indirect Cost:	\$ 11,621.00
Grant Ratio:	23 %	To Be Sub-Allocated:	\$ 1,597,012.00
			\$ 1,597,012.00
			FY 2018 Total Allocation: \$ 1,869,955.00
			FY 2018 Balance: \$ 83,000.00
			FY 2019 Allocation: \$ 83,000.00
			Remaining Funds: \$ 0.00
<input type="button" value="Allocate Evenly"/> <input type="button" value="Allocate By # of Counselors"/> <input type="button" value="Allocate By # of Clients"/>			
<input type="button" value="Print"/> <input type="button" value="Cancel"/> <input type="button" value="Close this window"/> <input type="button" value="9902 Projection"/>			

HCS 14.17.0.0 Release - Changes to HUD User Interface for HCS V14.17.0.0

CMS List – Update CMS list to no longer display CMS that are in-progress, but have been inactive.

HUD CMS LIST

CMS	Dataset Version	Vendor	POC	Email	Website	Availability	CMS Help Contact
SPOnlineARM	5.0	Greenfield Institute	Randall Lowell	randy@gfins.org	https://greenfieldinstitute.sharepoint.com/sites/h	Exclusive	

Approved CMS

In-progress CMS

- The CMS list has been updated to no longer display in-progress CMS that are considered inactive.
- Inactive CMS are those CMS that are in-progress to become a HUD-Approved CMS but have not shown any recent development activity.

Listed below are CMS products that were either previously approved for ARM 3.1, 3.2 or 4.0, or are new CMS, and are in the process of meeting HUD standards and testing for ARM 5.0. Agencies using these products are not able to transmit their data to HUD at this time. CMS will only be approved for dataset version 5.0.

CMS	DATASET VERSION	VENDOR	POC	EMAIL	WEB SITE	AVAILABILITY	CMS HELP CONTACT
SPOnlineARM	5.0	Greenfield Institute	Randall Lowell	randy@gfins.org	https://greenfieldinstitute.sharepoint.com/sites/h	Exclusive	