

HCS 14.23.0.0 Release

Changes to HUD User Interface for HCS V14.23.0.0

An update to HCS is planned for release on March 10, 2020 and includes a major update to modernize the agency profile module. Changes include:

- New agency profile look with improved response time
- Validating agency physical address and agency POC emails
- View Previous Year's Comments (HUD User Only)
- Navigation to profiles for previous fiscal years
- One click to validate agency profile
- Save each tab individually
- New agency performance review module & updated search (HUD User Only)
- New options for the reason of a status change (HUD User Only)

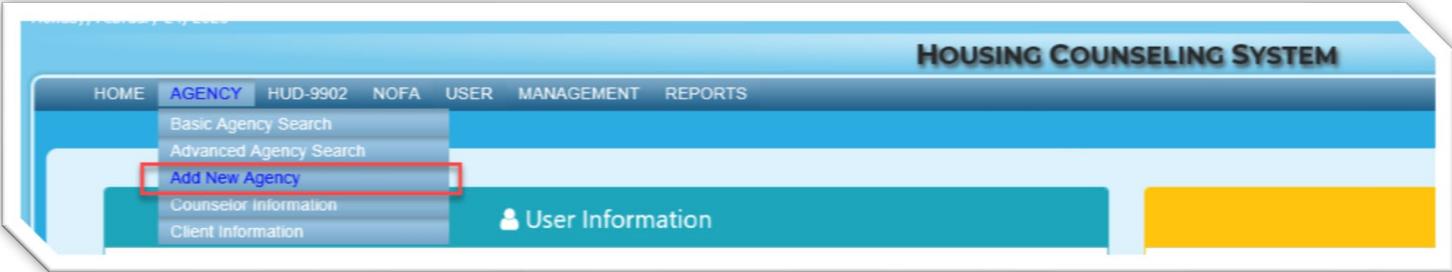
This user guide will review each of the agency profile tabs in the agency profile and highlight differences in:

- Adding a New Agency (HUD User Only)
- Agency Summary
- Agency Information
- Personnel
- Contact Information
- HUD Affiliation (HUD User Only)

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

Add New Agency Profile (HUD User Only)

To add a new agency profile go to the **Agency** menu and click **Add New Agency**



The module to add a new agency profile displays:

A screenshot of the "New Agency Profile" form. The form is titled "New Agency Profile" and contains several fields for entering agency information. The fields are organized into sections: "Agency Name" (text input), "Type of Agency" (dropdown), "Parent Org" (text input with search button), "Parent Type" (text input), "Parent Name" (text input), "HUD Office POC" (dropdown), "HUD Office Agency Assigned To" (dropdown), "Agency Manager" section with "Salutation" (dropdown) and "Business Title" (dropdown), "First Name" (text input), "Middle Init" (text input), "Last Name" (text input), "Email" (text input with "Validate" button), "Physical Address" and "Mailing Address" sections with "Address 1", "Address 2", "Address 3", "Address 4", "City", "State", and "Zip" fields, and "Federal Tax ID Number (TIN)" (text input) and "Add to Prior Fiscal Year" (dropdown). There are "Save" and "Cancel" buttons at the bottom. A note at the bottom states: "0 Number (TIN) is not known, enter 00-0000000." The form is displayed on a white background with a light blue header.

Add New Agency Profile – Differences (HUD User Only)

New Look

New Agency Profile

Agency Name: *

Type of Agency: * --Select Type--

Parent Org: [Search] Parent Type: N/A Parent Name: N/A

After entering the parent agency ID, click the search button to validate.

HUD Office POC: --Select HUD Office POC--

HUD Office Agency Assigned To: --Select a HUD Office--

Agency Manager

Salutation: --Select Salutation--

Business Title: --Select Title--

First Name: * Middle Init: Last Name: *

Email: * [Validate]

After entering email address, click the button to validate.

Physical Address Mailing Address same as physical address

Address 1: * Address 2: Address 3: Address 4: City: * State: * --Select State-- --Select State-- Zip: *

Federal Tax ID Number (TIN): * Add to Prior Fiscal Year: * --Select Item--

ID Number (TIN) is not known, enter 00-0000000.

Save Cancel

While the screen looks different, it contains mostly the same elements as the old version.

Old Look

Add New Agency Profile

Agency Name: *

Type of Agency: * Parent Org: Temporary Affiliate

HUD Office POC: *

HUD Office Agency Assigned To: * Select a HUD Office

Agency Manager:

(Salutation) --select--

(Business Title) --select--

(First Name) *

(Middle Init)

(Last Name) *

(Email) *

Physical Address:

City: * State: * Zip: * check this box if mailing address is the same of physical address

Fiscal Year: * Add to Fiscal Year 2020 only Add to Fiscal Years 2020 and 2019

Federal Tax ID Number (TIN): 00 - 0000000 *

Public display options:

Allow for public access?

Allow public access through Zip Code Affiliations?

Allow public access through State Affiliations?

OK Cancel

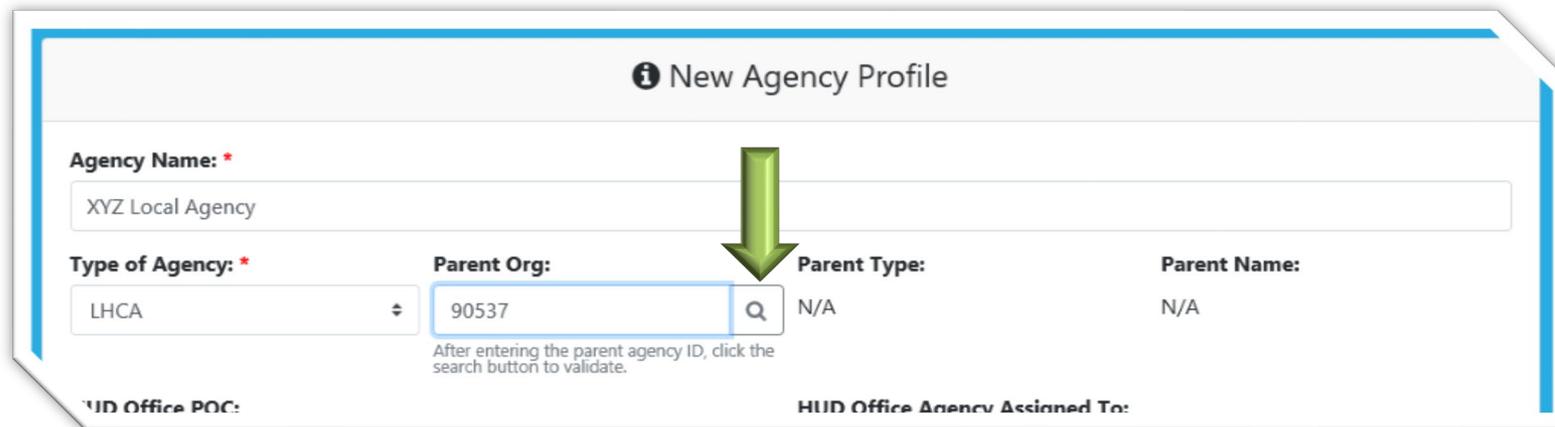
Add New Agency Profile – Differences (HUD User Only)

In addition to the differences in the look; you will find minor differences in:

- Entering a Parent Agency Organization
- Removal of Temporary Affiliation option
- Validating the Agency Manger's email
- Both Physical & Mailing Address Entry
- Add to Prior Fiscal Year option
- Public Display Options

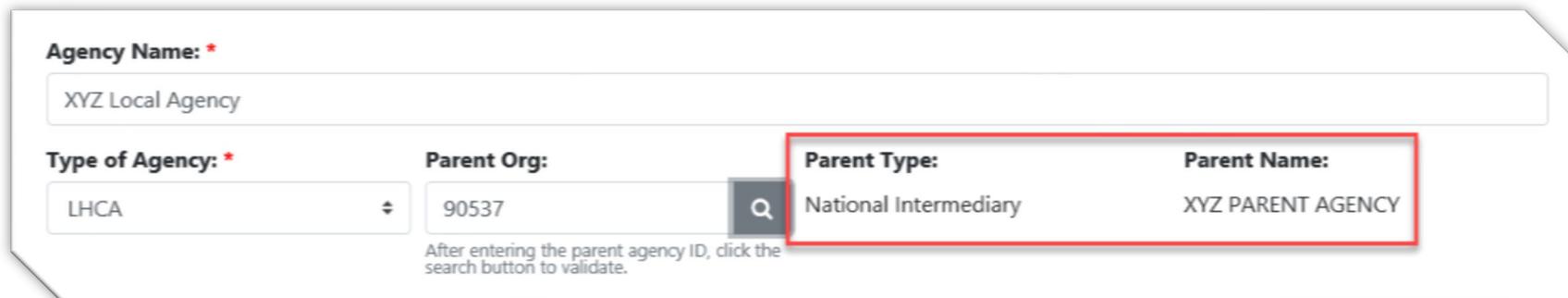
Add New Agency Profile – Differences – Entering a Parent Agency Organization (HUD User Only)

1. After entering the Agency Name and selecting the Type of Agency, if applicable - enter the parent organization's 5 digit HCS agency Id in the **Parent Org** text box.



The screenshot shows the 'New Agency Profile' form. The 'Agency Name' field contains 'XYZ Local Agency'. The 'Type of Agency' dropdown is set to 'LHCA'. The 'Parent Org' field contains '90537' and has a search icon to its right. A green arrow points to the search icon. Below the 'Parent Org' field, there is a note: 'After entering the parent agency ID, click the search button to validate.' The 'Parent Type' and 'Parent Name' fields are currently empty, showing 'N/A'.

2. Click the **Search icon** next to the **Parent Org** text box. The parent agency will be validated. If it is a valid parent agency Id, the parent type and parent name will be populated.



The screenshot shows the 'New Agency Profile' form after validation. The 'Agency Name' field contains 'XYZ Local Agency'. The 'Type of Agency' dropdown is set to 'LHCA'. The 'Parent Org' field contains '90537' and has a search icon to its right. The 'Parent Type' field is now populated with 'National Intermediary' and the 'Parent Name' field is populated with 'XYZ PARENT AGENCY'. A red box highlights the 'Parent Type' and 'Parent Name' fields. Below the 'Parent Org' field, there is a note: 'After entering the parent agency ID, click the search button to validate.'

Add New Agency Profile – Differences – Temporary Affiliate (HUD User Only)

The option to indicate an agency as a “Temporary Affiliate” has been removed.

Old Screen:

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

Add New Agency Profile

Agency Name:

Type of Agency: * Parent Org:

Temporary Affiliate

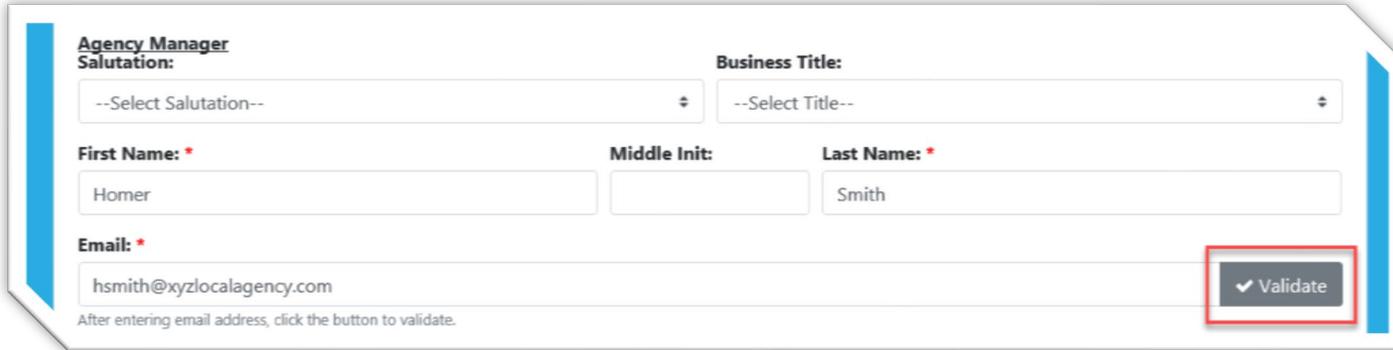
HUD Office POC:

HUD Office Agency Assigned To:

Agency Manager:

Add New Agency Profile – Differences – Validating Agency Manager’s Email (HUD User Only)

1. After entering the **Agency Manager’s Email**, click the **Validate** button. This will verify that the email address has a valid format and uses a valid domain.

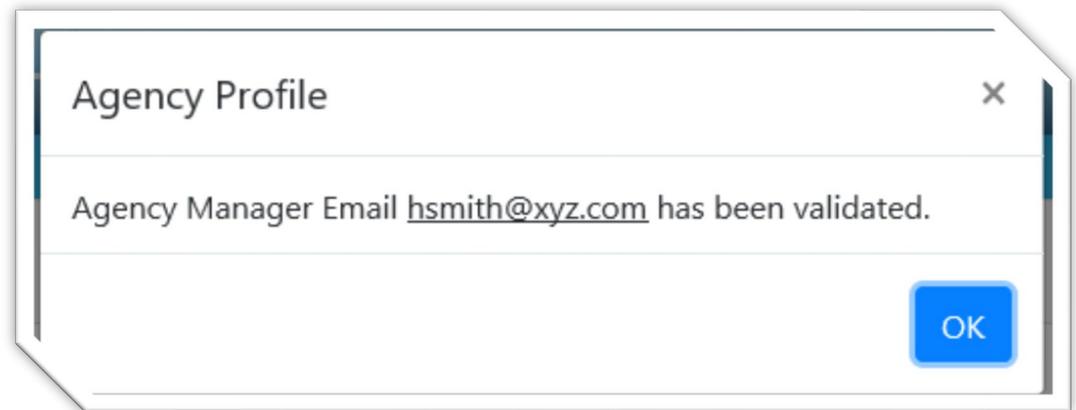


The screenshot shows a form titled "Agency Manager" with the following fields: "Salutation:" (dropdown menu with "--Select Salutation--"), "Business Title:" (dropdown menu with "--Select Title--"), "First Name:" (text input with "Homer"), "Middle Init:" (text input), and "Last Name:" (text input with "Smith"). The "Email:" field contains "hsmith@xyzlocalagency.com". A "Validate" button with a checkmark icon is highlighted with a red box. Below the email field, there is a small instruction: "After entering email address, click the button to validate."

Email validation is required before the agency profile can be saved.

If the email is valid, a message will display a successful validation.

2. Click the **OK** button to proceed.



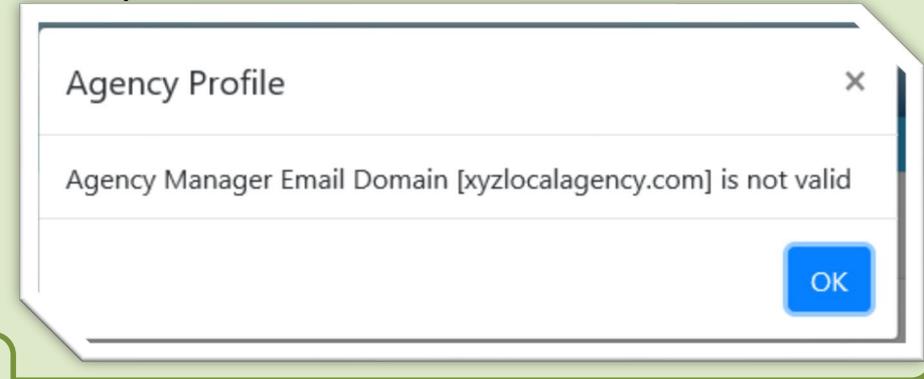
The screenshot shows a dialog box titled "Agency Profile" with a close button (X) in the top right corner. The message inside the dialog reads: "Agency Manager Email hsmith@xyz.com has been validated." At the bottom right of the dialog, there is a blue "OK" button.

Add New Agency Profile – Differences – Validating Agency Manager’s Email (HUD User Only)

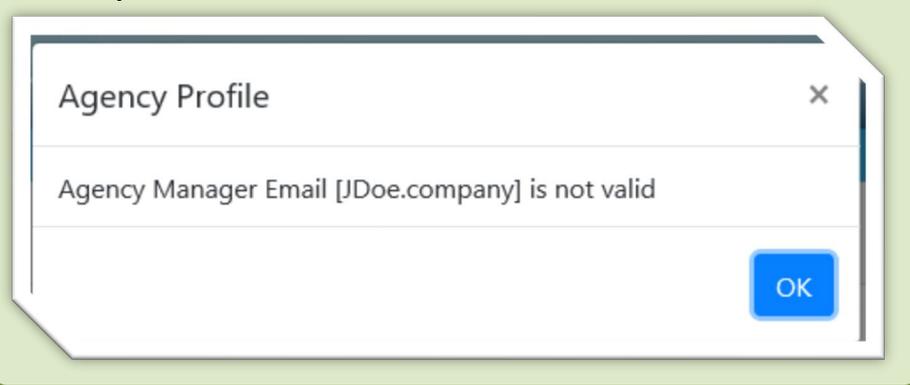
If the email is not valid, a message will display indicating the error in the email. Errors are due to invalid email format or an invalid domain. Click the **OK** button on the error message to return to the New Agency Profile screen, and enter a valid email address. Anytime a new email address is entered it must be validated before the profile can be saved.

The domain is the part of the email address that is after the “@” sign. For example, Jdoe@company.com – company.com is the email domain.

Example: Invalid Domain



Example: Invalid Format



Add New Agency Profile – Differences – Physical & Mailing Address (HUD User Only)

The New Agency Profile screen now allows you to enter both the Physical and Mailing Address for the agency.

The screenshot shows a form with two columns: 'Physical Address' and 'Mailing Address'. The 'Mailing Address' column has a checkbox labeled 'same as physical address' which is currently unchecked. The form includes fields for Address 1 through Address 4, City, State (dropdown), and Zip. A green arrow points from the checkbox to the right.

Check the **same as physical address** box if the agency uses the same physical address as their mailing address.

The screenshot shows the same form as above, but now the 'same as physical address' checkbox is checked. The 'Physical Address' fields contain the following data: Address 1: 123 Main St., City: Richmond, State: Virginia, Zip: 22222. The 'Mailing Address' fields are greyed out and contain the same data as the physical address fields. A green arrow points from the checkbox to the right.

The address entered into the physical address will automatically copy to the mailing address.

Add New Agency Profile – Differences – Add to Prior Fiscal Year (HUD User Only)

The selection to add an agency to both the current fiscal year and the previous fiscal year has changed slightly. It is now a drop-down selection.

- Select **Yes** to generate the agency profile for both the current and previous fiscal year.
- Select **No** to generate the agency profile for just the current fiscal year.

The screenshot shows a form with the following fields: City (Ricmond), State (Virginia), Zip (22222), and Federal Tax ID Number (TIN). A dropdown menu for 'Add to Prior Fiscal Year' is open, showing options: --Select Item--, Yes, and No. A 'Save' button is visible at the bottom left of the form area.

Yes is typically selected when a new agency is being added after the start of a new fiscal year (10/01), but was intended to be added for the fiscal year that just ended.

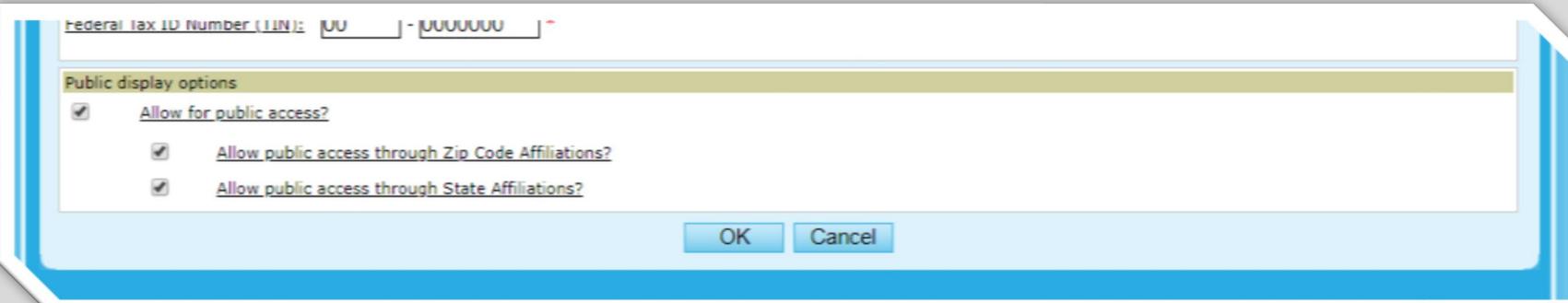
Old Screen:

The screenshot shows the 'Old Screen' with a 'Physical Address' section and a 'Fiscal Year' section. The 'Fiscal Year' section has two radio button options: 'Add to Fiscal Year 2020 only' (selected) and 'Add to Fiscal Years 2020 and 2019'. A red box highlights these options.

Add New Agency Profile – Differences – Public Display Options (HUD User Only)

The **Public Display Options** are no longer included on the **New Agency Profile** screen. Once the agency has been added, and all applicable data has been entered, the HUD POC can set the **Public Display Options** on the **HUD Affiliation** tab.

Old Screen:



The screenshot shows a dialog box titled "Public display options" with a light blue border. At the top, there is a field for "Federal tax ID Number (TIN):" with the value "00" in the first box and "000000" in the second box. Below this, the "Public display options" section is highlighted in light green and contains three checked checkboxes:

- Allow for public access?
- Allow public access through Zip Code Affiliations?
- Allow public access through State Affiliations?

At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

Agency Profile - New Look

Once a new agency profile is saved, the screen will display the agency profile for the new agency. This is the new look of the agency profile screen for all agencies.

Agency Profile

XYZ LOCAL AGENCY (Fiscal Year 2020) Fiscal Year: --Select Fiscal Year--

Acknowledgment

Agency ID:	90539	Agency Type:	LHCA	Agency Status:	Conditional
Parent Name:	XYZ PARENT AGENCY	Parent Type:	National Intermediary	CMS:	HCS
Agency Services Begin:	N/A				

Data Input and Validation

Agency information needs to be validated.

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
Certified Counselor:	▲	Total YTD Clients Reported:	0

Public Access Selection

- HUD Web Site: ✘
- HUD IVR: ✘

Public Services Information

- Agency Address: ✔
- Agency Web Site: ▲
- Agency Email: ✔
- IVR Postings: ▲
- Web List Postings: ▲
- Counseling Services: ▲
- Languages: ✔

Performance Review

Last Review Date:	N/A
Last Review Result:	N/A
Next Scheduled Review Date:	N/A

HUD Comments

[Add New](#) [View All](#)

Subject	Author	Date	Fiscal Year	Edit	Delete
No Comments available.					

HUD-9902 Submission Summary

Fiscal Year - 2019		View Submission History
2019 - Quarter 1	NOT REQUIRED	
2019 - Quarter 2	NOT REQUIRED	
2019 - Quarter 3	NOT REQUIRED	
2019 - Quarter 4	NOT REQUIRED	
Fiscal Year - 2020		View Submission History
2020 - Quarter 1	NOT REQUIRED	
2020 - Quarter 2	access 9902	N/A
2020 - Quarter 3	access 9902	N/A
2020 - Quarter 4	access 9902	N/A

HUD Grant Award

HUD Grant Award - No grant application submitted for this Fiscal Year.

Grant Allocations

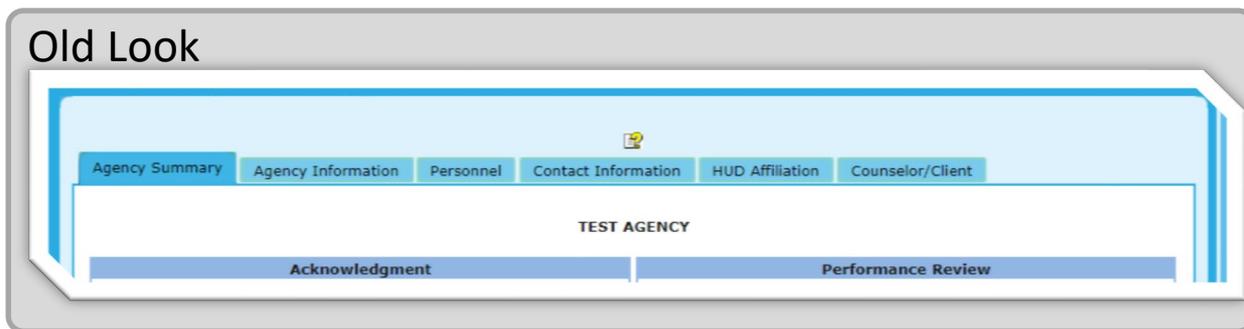
No HUD Grant Sub Allocation Funded this Fiscal Year.

Last Updated: 11/06/2019 Version: 14.23.0.0

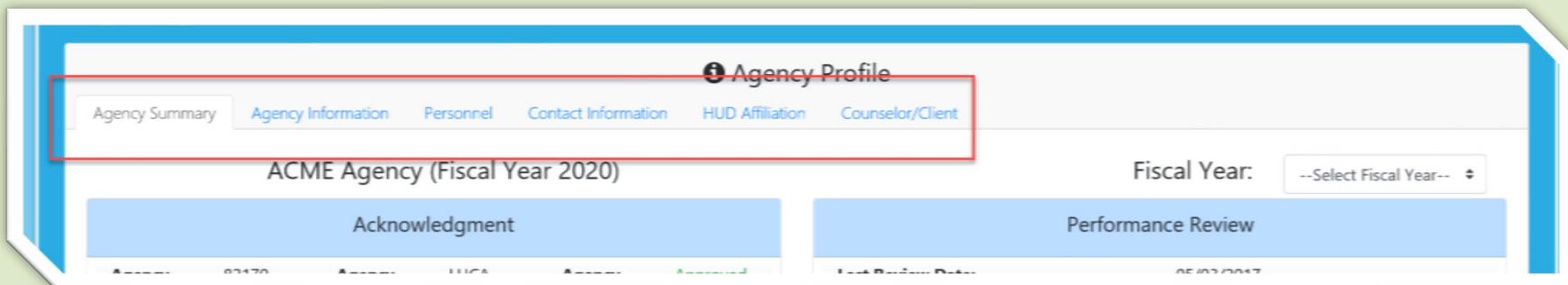
Agency Profile - New Look

The new look uses the same navigation tabs, and the various agency profile data elements are found on the same tab as in the previous version:

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



New Look



Agency Profile – Agency Summary - Differences

Minor differences on the **Agency Summary** tab:

1. Fiscal Year Indicator
2. View Previous Fiscal Year
3. Sub-Agency button
4. Certified Counselor Indicator
5. HUD Comments (HUD User Only)

Agency Profile (Sub-Agency) 2

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

ACME INTERMEDIARY (Fiscal Year 2020) 1 Fiscal Year: --Select Fiscal Year--

Acknowledgment

Agency ID: Agency Type: National Intermediary Agency Status: Approved
 Agency Services Begin: 09/30/2021 CMS: HCS

Data Input and Validation

Last Data Input By: C57569
 Last Data Input Date: 02/27/2020
 Last Validated By: MX1639
 Last Validated Date: 10/01/2019
 Next Validation NLT Date: (12/30/2019)

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
Certified Counselor: 4 ✓	Total YTD Clients Reported: 0

Public Access Selection

HUD Web Site: ✓
 HUD NVR: ✓

Public Services Information

Agency Address: ✓
 Agency Web Site: ✓
 Agency Email: ✓
 NVR Postings: ✓
 Web List Postings: ✓
 Counseling Services: ✓
 Languages: ✓

Performance Review

Last Review Date: 07/13/2018
 Last Review Result: IN COMPLIANCE
 Next Scheduled Review Date: N/A

HUD Comments 5

[Add New](#) [View All](#)

Subject	Author	Date	Fiscal Year	Edit	Delete
No Comments available.					

HUD-9902 Submission Summary

Fiscal Year	Quarter	Access	Status	View Submission History
Fiscal Year - 2019	2019 - Quarter 1	access 9902	✓	View Submission History
	2019 - Quarter 2	access 9902	✓	
	2019 - Quarter 3	access 9902	✓	
	2019 - Quarter 4	access 9902	✓	
Fiscal Year - 2020	2020 - Quarter 1	access 9902	NOT REPORTED	View Submission History
	2020 - Quarter 2	access 9902	N/A	
	2020 - Quarter 3	access 9902	N/A	
	2020 - Quarter 4	access 9902	N/A	

HUD Grant Award

HUD Funding for FY - 2020	FY 2020 Funding
Grant	
NOFA 2019-1 CDMF:	\$258,021.53
Award Amount: \$871,183.00	
Total Funding:	\$258,021.53

Total Annual Housing Counseling Program Budget, All Sources:

Total Amount of HUD Grants must not be greater than Total Annual Housing Program Budget.

Agency Profile – Agency Summary – Differences – Fiscal Year Indicator

There is a fiscal year profile record for each year since an agency was entered into HCS. The fiscal year of the profile is displayed next to the agency's name.

Agency Profile Sub-Agency(s)

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

ACME INTERMEDIARY (Fiscal Year 2020) ←

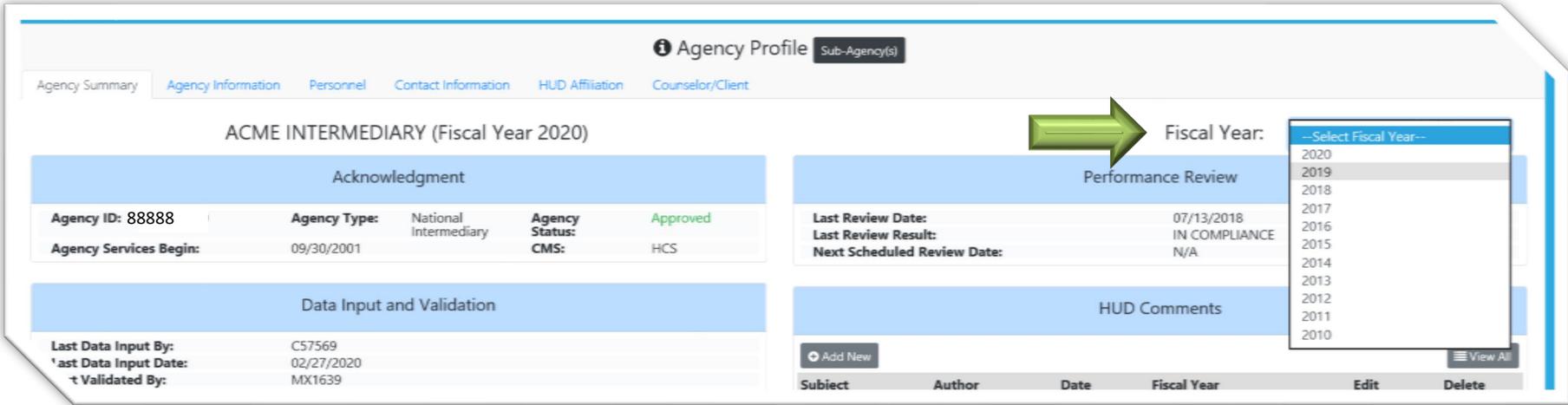
Fiscal Year: --Select Fiscal Year--

Acknowledgment		Performance Review	
Agency ID: 88888	Agency Type: National Intermediary	Last Review Date: 07/13/2018	Last Review Result: IN COMPLIANCE
Agency Services Begin: 09/30/2001	Agency Status: Approved	Next Scheduled Review Date: N/A	
CMS: HCS			

Data Input and Validation

Agency Profile – Agency Summary – Differences – View Previous Fiscal Year

Navigation to another fiscal year record of an agency’s profile can be done by selecting the year from the **Fiscal Year** select list.



Navigation to another fiscal year record of an agency’s profile can be done by selecting the year from the **Fiscal Year** select list. The profile for the fiscal year selected will open in a new browser's window or tab.

Agency Profile – Agency Summary – Differences – Sub-Agency(s) Button

Click the **Sub-Agency(s)** button to view a list of the associated sub-agencies. The list will open in a new browser window.

The screenshot shows the 'Agency Profile' page for 'ACME INTERMEDIARY (Fiscal Year 2020)'. The page has a navigation bar with tabs: Agency Summary, Agency Information, Personnel, Contact Information, HUD Affiliation, and Counselor/Client. The 'Sub-Agency(s)' button is highlighted with a green arrow. Below the navigation bar, there are two main sections: 'Acknowledgment' and 'Performance Review'. The 'Acknowledgment' section shows Agency ID: 88888, Agency Type: National Intermediary, Agency Status: Approved, and Agency Services Begin: 09/30/2001. The 'Performance Review' section shows Last Review Date: 07/13/2018, Last Review Result: IN COMPLIANCE, and Next Scheduled Review Date: N/A. There is also a 'Fiscal Year' dropdown menu set to '--Select Fiscal Year--'.

Sub-Agency List

29 Agency(s) Found

Search Criteria:

- Fiscal Year: 2020
- Parent Agency: 81639

[New Agency](#) | [Agency List](#) | [Invalid Emails](#) | [Valid Emails](#)

[Basic Agency Spreadsheet](#) | [Agency Contact Spreadsheet](#) | [Agency Review Spreadsheet](#)

Agency ID	Agency Name	Address	State	Agency Type	Agency Status	Last Updated	Last Edit user	Certified Counselor
Parent Agency								
88888	ACME INTERMEDIARY	9 Great Jones St New York	NY	National Intermediary	Approved	02/28/2020	C57569	Y
Sub Agencies								
88887	ACME LOCAL AGENCY	9800 Normandy Blvd Jacksonville	FL	LHCA	Approved	02/28/2020	C57569	Y
88886	ACME LOCAL AGENCY	180 W Girard Ave Philadelphia	PA	LHCA	Approved	02/28/2020	C57569	Y

Agency Profile – Agency Summary – Differences – Certified Counselor Indicator

The indicator that identifies if an agency has a certified counselor has been moved from the **Public Services Information** section to the **Counselors & Clients** section.

Agency Profile Sub-Agency(s)

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

ACME INTERMEDIARY (Fiscal Year 2020) Fiscal Year: --Select Fiscal Year--

Acknowledgment

Agency ID:	Agency Type:	National Intermediary	Agency Status:	Approved
Agency Services Begin:	09/30/2001		CMS:	HCS

Performance Review

Last Review Date:	07/13/2018
Last Review Result:	IN COMPLIANCE
Next Scheduled Review Date:	N/A

Data Input and Validation

Last Data Input By:	C57569
Last Data Input Date:	02/28/2020
Last Validated By:	MX1639
Last Validated Date:	10/01/2019
Next Validation NLT Data:	(12/30/2019)

HUD Comments

[Add New](#) [View All](#)

Subject	Author	Date	Fiscal Year	Edit	Delete
No Comments available.					

Essential Contacts

HUD Agency Contact:	✓
HUD POC Phone:	✓
HUD POC Email:	✓
POC Assigned:	✓

HUD-9902 Submission Summary

Fiscal Year - 2019	View Submission History	
2019 - Quarter 1	access 9902	✓
2019 - Quarter 2	access 9902	✓
2019 - Quarter 3	access 9902	✓
2019 - Quarter 4	access 9902	✓
Fiscal Year - 2020	View Submission History	
2020 - Quarter 1	access 9902	NOT REPORTED
2020 - Quarter 2	access 9902	N/A
2020 - Quarter 3	access 9902	N/A
2020 - Quarter 4	access 9902	N/A

Counselors & Clients

Counselors	Clients
Total: 0	Projected for FY: 0
Trained: 0	YTD Declared in 9902: 0
Certified Counselor: ✓	Total YTD Clients Reported: 0

Public Access Selection **HUD Grant Award**

✓ Green check mark indicates agency has at least one certified counselor.

⚠ Yellow alert icon indicates the agency does not have a certified counselor.

Agency Profile – Agency Summary – Differences – HUD Comments (HUD User Only)

The **HUD Comments** section now displays all comments entered for the fiscal year of the agency profile and the previous fiscal year.

Agency Profile Sub-Agency(s)

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

ACME INTERMEDIARY (Fiscal Year 2020) Fiscal Year: --Select Fiscal Year--

Acknowledgment

Agency ID: [redacted] Agency Type: National Intermediary Agency Status: Approved
 Agency Services Begin: 09/30/2001 CMS: HCS

Performance Review

Last Review Date: 07/13/2018
 Last Review Result: IN COMPLIANCE
 Next Scheduled Review Date: N/A

Data Input and Validation

Last Data Input By: C57569
 Last Data Input Date: 02/28/2020
 Last Validated By: MX1639
 Last Validated Date: 10/01/2019
 Next Validation NLT Data: (12/30/2019)

HUD Comments

[Add New](#) [View All](#)

Subject	Author	Date	Fiscal Year	Edit	Delete
Agency changed names	C57569	02/28/2020	2020		
New Sub-Agency List received from agency	C57569	02/28/2020	2019		

Essential Contacts

Click the **View All** button to view all comments entered for the agency.

HUD Comments - Agency 88888

Subject	Comment	Author	Date	Fiscal Year
Agency changed names	the agency has changed its name from...	C57569	02/28/2020	2020
New Sub-Agency List received from ag...	The agency sent a list of new sub-agen...	C57569	02/28/2020	2019
New address	Effective 10/1/17 ABC will be at a new...	C57569	02/28/2020	2018
updated profile affiliation tab info	Needed to included check marks to ap...	C57569	02/28/2020	2015
add GTR name in profile in order to set...	updated profile to include GTR name...	H00354	04/17/2013	2013
chg cond status to participating for on...	new FY13. convert from cond to partici...	H22413	10/09/2012	2013

Agency Profile – Agency Summary – Differences – HUD Comments (HUD User Only)

To Enter a new comment, click the **Add New** button.

The screenshot shows the 'Agency Profile' page for 'ACME INTERMEDIARY (Fiscal Year 2020)'. The 'HUD Comments' section is highlighted, showing a table with two entries. A green arrow points from the 'Add New' button to the table.

Subject	Author	Date	Fiscal Year	Edit	Delete
Agency changed names	C57569	02/28/2020	2020		
New Sub-Agency List received from agency	C57569	02/28/2020	2019		

The **HUD Comment Form** will display. Enter a Subject and Comment and click the **Save** button.

The new comment will then display on the Agency Summary tab in the **HUD Comments** section.

The screenshot shows the 'HUD Comment Form' modal. It has two text input fields: 'Subject: *' and 'Comment:'. At the bottom right, there are 'Save' and 'Cancel' buttons. A green arrow points from the text above to the form.

Agency Profile – Agency Information - Differences

Minor differences on the **Agency Information** tab:

1. Validate Agency Profile
2. Save Each Tab
3. Agency Designations

Agency ID 88888
ACME INTERMEDIARY

(1)
Last Validated on 10/01/2019 (Next Validation Required by 12/30/2019)

Agency Information

Housing Counseling Services Provided as of:
09/30/2001
Services provided as of date cannot be after the date the agency joined the HUD program.

Time Since Starting Counseling Services:
18 years, 5 months

Federal Tax ID Number (TIN): *
00-0000000
If Federal Tax ID Number (TIN) is not known, enter 00-0000000.

Delinquent in Federal Debt?

Joined HUD Program as of:
04/01/2004

Time Since Joining HUD Program:
15 years, 11 months

DUNS Number: *
000000000
If DUNS Number is not known, enter 000000000.
For information about obtaining a DUNS number, please refer to <http://smallbusiness.dnb.com> or call 866-705-5711

Agency Designations

Faith Base Colonias Migrant Workers (3)

Types of Counseling Method

Face to Face Counseling Phone Counseling Internet Counseling Group Counseling Video Conference
 Other Counseling Phone Counseling Only

Additional Languages Provided

<input type="checkbox"/> Arabic	<input type="checkbox"/> Czech	<input type="checkbox"/> Hindi	<input type="checkbox"/> Polish	<input type="checkbox"/> Turkish
<input type="checkbox"/> Cambodian	<input checked="" type="checkbox"/> English	<input type="checkbox"/> Hmong	<input type="checkbox"/> Portuguese	<input type="checkbox"/> Ukrainian
<input type="checkbox"/> Cantonese	<input type="checkbox"/> Farsi	<input type="checkbox"/> Indonesian	<input type="checkbox"/> Russian	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> Chinese Mandarin	<input type="checkbox"/> French	<input type="checkbox"/> Italian	<input type="checkbox"/> Spanish	<input type="checkbox"/> ASL
<input type="checkbox"/> Creole	<input type="checkbox"/> German	<input type="checkbox"/> Korean	<input type="checkbox"/> Swahili	<input type="checkbox"/> Other

(2)

Agency Profile – Agency Information – Validate Agency Profile

The function to validate an agency's profile information is still available at the top of the Agency Information, Personnel, Contact Information, and HUD Affiliation tabs.

The **Validate Agency Profile** button is made available at the top of each tab, but only needs to be clicked once. You do not need to click it on each tab.

The screenshot displays the 'Agency Profile' page for 'ACME INTERMEDIARY' (Agency ID: 88888). The page has tabs for 'Personnel', 'Contact Information', 'HUD Affiliation', and 'Counselor/Client'. A green arrow points to the 'Validate Agency Profile' button, which is located at the top right of the 'Agency Information' section. Below the button, it shows 'Last Validated on 10/01/2019 (Next Validation Required by 12/30/2019)'. The 'Agency Information' section contains several data fields:

Agency Information	
Housing Counseling Services Provided as of: 09/30/2001 <small>Services provided as of date cannot be after the date the agency joined the HUD program.</small>	Joined HUD Program as of: 04/01/2004
Time Since Starting Counseling Services: 18 years, 5 months	Time Since Joining HUD Program: 15 years, 11 months
Federal Tax ID Number (TIN): * 00-0000000	DUNS Number: * 000000000

To validate an agency profile:

1. Review all of the agency profile data on each tab to ensure accuracy.
2. Click the **Validate Agency Profile** button that is at the top of the Agency Information, Personnel, Contact Information, and HUD Affiliation tabs.

The validation information will update immediately after clicking the button. The profile does not need to be saved to complete the validation.

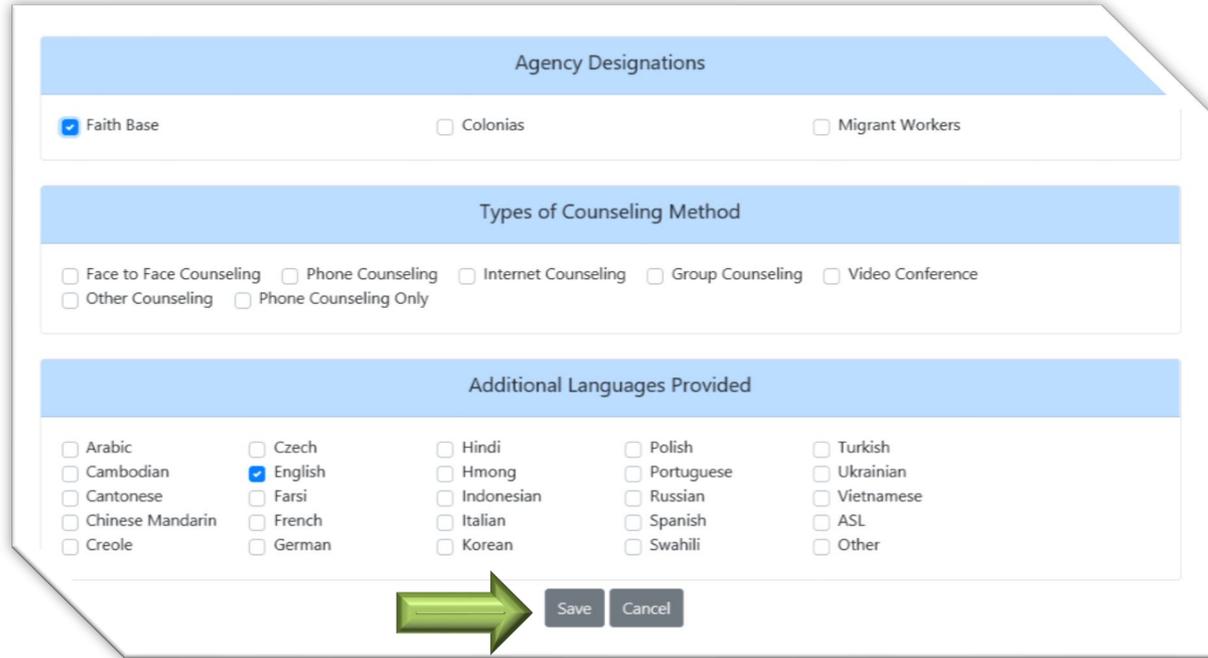
Agency Profile – Agency Information – Save Each Tab

Previously the **OK** button at the bottom of the profile saved the entire profile and exited out of the profile.

Now there is a **Save** button for each tab. If any change is made to a tab, the **Save** button on that tab must be clicked to save the change(s).

After clicking **Save** a message will display confirming a successful Save.

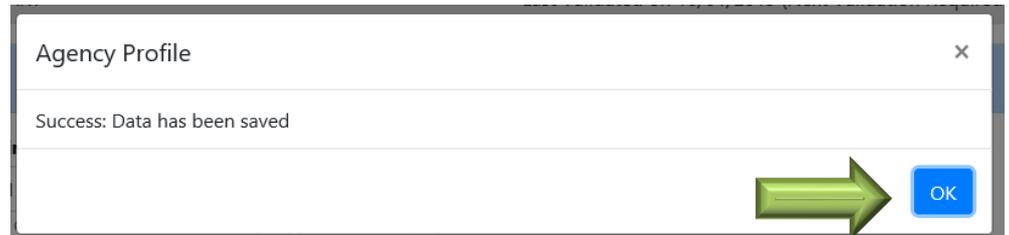
Click the **OK** button to proceed to your next task.



The screenshot shows a form titled "Agency Profile" with three sections:

- Agency Designations:** Includes checkboxes for "Faith Base" (checked), "Colonias", and "Migrant Workers".
- Types of Counseling Method:** Includes checkboxes for "Face to Face Counseling", "Phone Counseling", "Internet Counseling", "Group Counseling", "Video Conference", "Other Counseling", and "Phone Counseling Only".
- Additional Languages Provided:** Includes checkboxes for various languages: Arabic, Cambodian, Cantonese, Chinese Mandarin, Creole, Czech, English (checked), Farsi, French, German, Hindi, Hmong, Indonesian, Italian, Korean, Polish, Portuguese, Russian, Spanish, Swahili, Turkish, Ukrainian, Vietnamese, ASL, and Other.

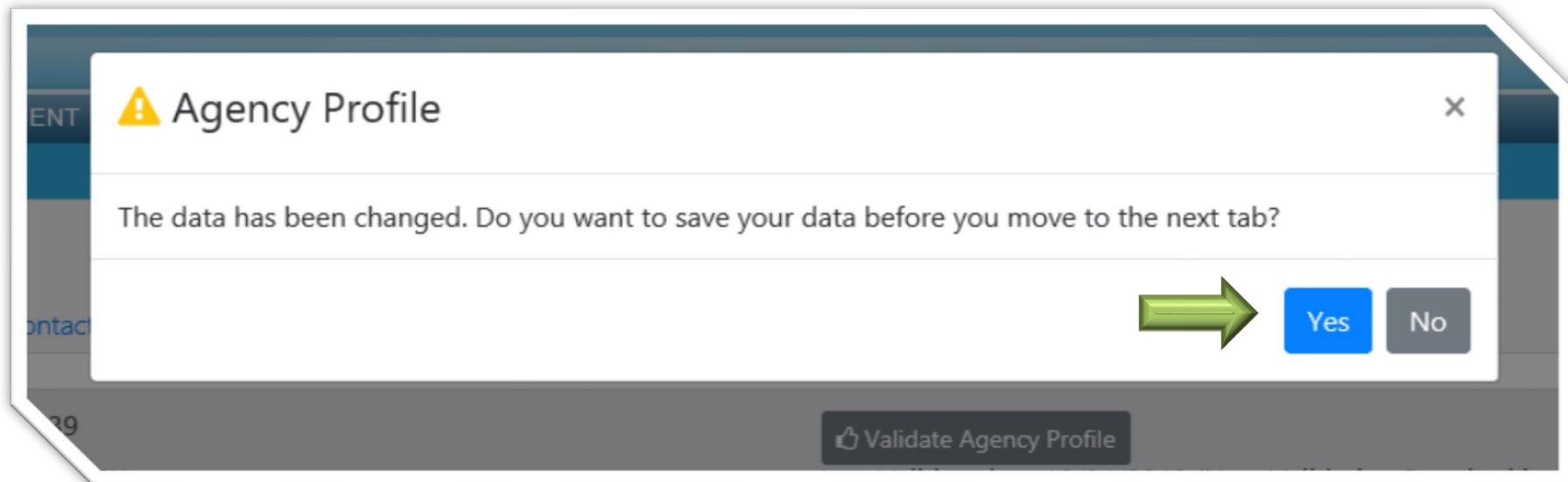
At the bottom right of the form, there are "Save" and "Cancel" buttons. A green arrow points to the "Save" button.



The screenshot shows a dialog box titled "Agency Profile" with a close button (X) in the top right corner. The message "Success: Data has been saved" is displayed in the center. At the bottom right, there is an "OK" button. A green arrow points to the "OK" button.

Agency Profile – Agency Information – Save Each Tab

If data is changed and not saved an alert will display if the user tries to navigate to a different tab on the agency profile.



 Click **Yes** to Save the change and continue

 Click **No** to proceed without saving.

Agency Profile – Agency Information – Agency Designations

The Agency Designations section has been moved slightly further down on the screen.

Agency ID: 88888
ACME INTERMEDIARY

Validate Agency Profile
Last Validated on 10/01/2019 (Next Validation Required by 12/31/2019)

Agency Information

Housing Counseling Services Provided as of: 09/30/2001
Services provided as of date cannot be after the date the agency joined the HUD program.

Joined HUD Program as of: 04/01/2004

Time Since Starting Counseling Services: 18 years, 5 months

Time Since Joining HUD Program: 15 years, 11 months

Federal Tax ID Number (TIN):* 00-0000000
If Federal Tax ID Number (TIN) is not known, enter 00-0000000.

DUNS Number:* 000000000
If DUNS Number is not known, enter 000000000. For information about obtaining a DUNS number, please refer to <http://smallbusiness.dnb.com> or call 866-705-5711

Delinquent in Federal Debt?

Agency Designations

Faith Base Colonias Migrant Workers

Types of Counseling Method

Face to Face Counseling Phone Counseling Internet Counseling Group Counseling Video Conference
 Other Counseling Phone Counseling Only

Additional Languages Provided

<input type="checkbox"/> Arabic	<input type="checkbox"/> Czech	<input type="checkbox"/> Hindi	<input type="checkbox"/> Polish	<input type="checkbox"/> Turkish
<input type="checkbox"/> Cambodian	<input checked="" type="checkbox"/> English	<input type="checkbox"/> Hmong	<input type="checkbox"/> Portuguese	<input type="checkbox"/> Ukrainian
<input type="checkbox"/> Cantonese	<input type="checkbox"/> Farsi	<input type="checkbox"/> Indonesian	<input type="checkbox"/> Russian	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> Chinese Mandarin	<input type="checkbox"/> French	<input type="checkbox"/> Italian	<input type="checkbox"/> Spanish	<input type="checkbox"/> ASL
<input type="checkbox"/> Creole	<input type="checkbox"/> German	<input type="checkbox"/> Korean	<input type="checkbox"/> Swahili	<input type="checkbox"/> Other

Save Cancel

Old Screen:

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

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

Agency Name: TEST AGENCY

Agency Designations Faith Base Colonias Migrant Workers

Housing Counseling Services Provided as of: **Joined HUD Program as of:** 10/20/2011

Services provided as of date cannot be after the date the agency joined the HUD program.

Time Since Starting Counseling Services: N/A **Time Since Joining HUD Program:** 8 years, 4 months

Delinquent in Federal Debt? Yes No **DUNS Number:**

Federal Tax ID Number (TIN): For information about obtaining a DUNS number, please refer to <http://smallbusiness.dnb.com> or call 866-705-5711

Types of Counseling Method:

Phone Counseling Only
 Face to Face Counseling Phone Counseling Internet Counseling Group Counseling Video Conference Other Counseling

Additional Languages Provided:

<input type="checkbox"/> Arabic	<input type="checkbox"/> Czech	<input type="checkbox"/> Hindi	<input type="checkbox"/> Polish	<input type="checkbox"/> Turkish
<input type="checkbox"/> Cambodian	<input checked="" type="checkbox"/> English	<input type="checkbox"/> Hmong	<input type="checkbox"/> Portuguese	<input type="checkbox"/> Ukrainian
<input type="checkbox"/> Cantonese	<input type="checkbox"/> Farsi	<input type="checkbox"/> Indonesian	<input type="checkbox"/> Russian	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> Chinese Mandarin	<input type="checkbox"/> French	<input type="checkbox"/> Italian	<input type="checkbox"/> Spanish	<input type="checkbox"/> ASL
<input type="checkbox"/> Creole	<input type="checkbox"/> German	<input type="checkbox"/> Korean	<input type="checkbox"/> Swahili	<input type="checkbox"/> Other

OK Cancel Sub-Agency(s) No Applications For FY 2020

Agency Profile – Personnel – Differences

Minor differences on the **Personnel** tab:

1. Validate Agency Profile (same as Agency Information tab)
2. Save Each Tab (same as Agency Information tab)
3. Validate Agency Personnel Emails

Agency Profile

Personnel Contact Information HUD Affiliation Counselor/Client

Agency ID 88888
ACME INTERMEDIARY

1 Validate Agency Profile
Last Validated on 10/01/2019 (Next Validation Required by 12/30/2019)

Agency Manager

Salutation: --Select Salutation-- User ID: MX1639 Business Title: Office Executive

First Name: Jack Middle Init: Last Name: Kelly

Agency Manager Phone Number: Ext:

Agency Manager Cell Phone Number:

Agency Manager Email: * hcs@salentcrgt.com 3 Validate

After entering email address, click the button to validate.
This Email Address is used by HUD to communicate Agency Coordinator access information for FHA Connection (PHAC). Please be sure that the EMAIL ADDRESS entered is an active and valid Email Address for the Agency Manager.

Agency Senior Executive

Salutation: --Select Salutation-- Business Title: Office Executive

First Name: Spot Last Name: Conlon

Agency Senior Executive Phone Number: Ext:

Agency Senior Executive Cell Phone Number:

Agency Senior Executive Email: * hcs@salentcrgt.com 3 Validate

After entering email address, click the button to validate.

Agency Contact for HUD Use

Salutation: --Select Salutation-- Business Title: HUD Contact

First Name: Les Last Name: Jacobs

Agency POC Phone Number: Ext:

Agency POC Cell Phone Number:

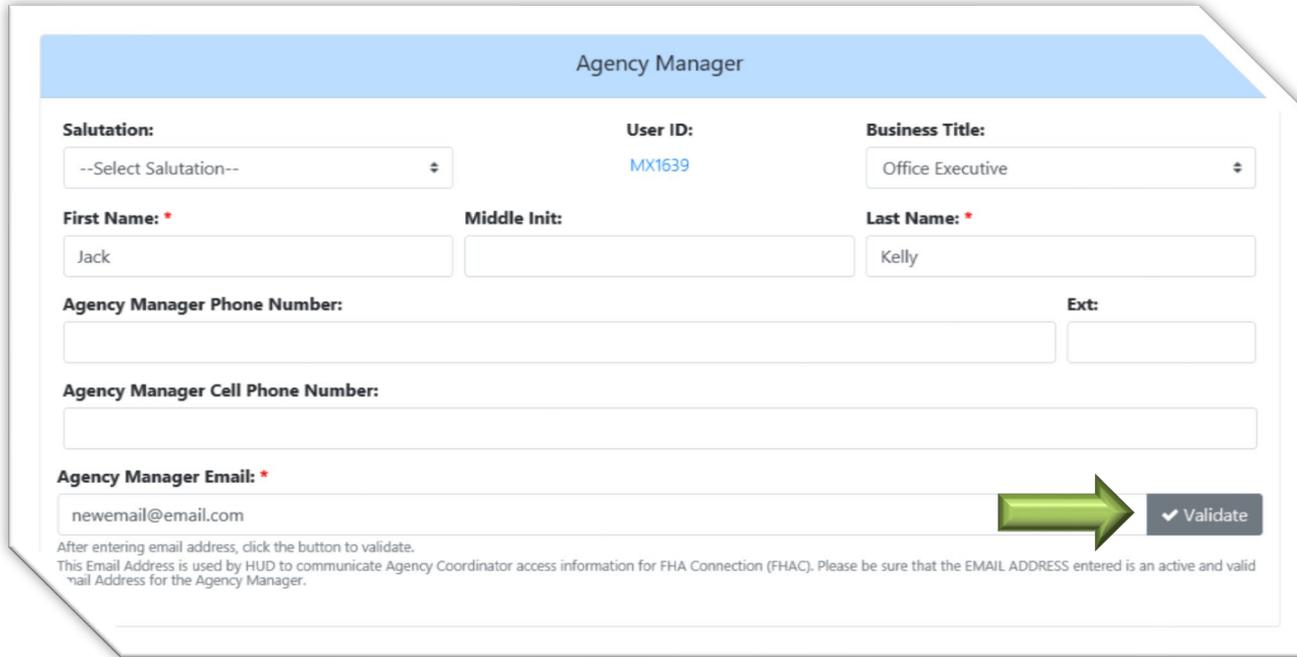
Agency POC Email: * hcs@salentcrgt.com 3 Validate

* After entering email address, click the button to validate.
** Email Address is used by HUD to mass disseminate messages. By placing Email Address here the Agency consents to receiving messages from HUD.

2 Save Cancel

Agency Profile – Personnel – Validate Agency Personnel Emails.

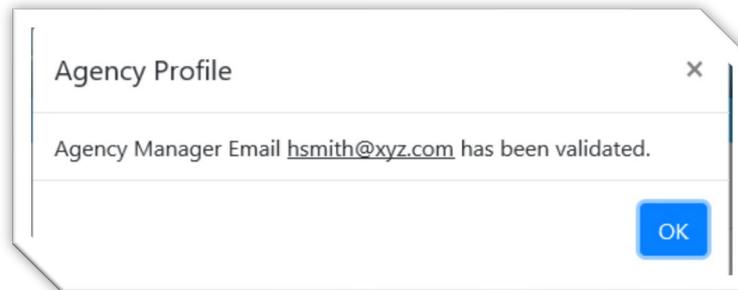
After entering the **Agency Manager, Agency Senior Executive, and/or Agency POC Email**, click the **Validate** button. This will verify that the email address has a valid format and uses a valid domain.



The screenshot shows the 'Agency Manager' form. It includes fields for Salutation (dropdown), User ID (text, value: MX1639), Business Title (dropdown), First Name (text, value: Jack), Middle Init (text), Last Name (text, value: Kelly), Agency Manager Phone Number, Ext, Agency Manager Cell Phone Number, and Agency Manager Email (text, value: newemail@email.com). A green arrow points to the 'Validate' button. Below the email field, there is a note: 'After entering email address, click the button to validate. This Email Address is used by HUD to communicate Agency Coordinator access information for FHA Connection (FHAC). Please be sure that the EMAIL ADDRESS entered is an active and valid mail Address for the Agency Manager.'

If an email is changed, validation is required before the agency profile can be saved.

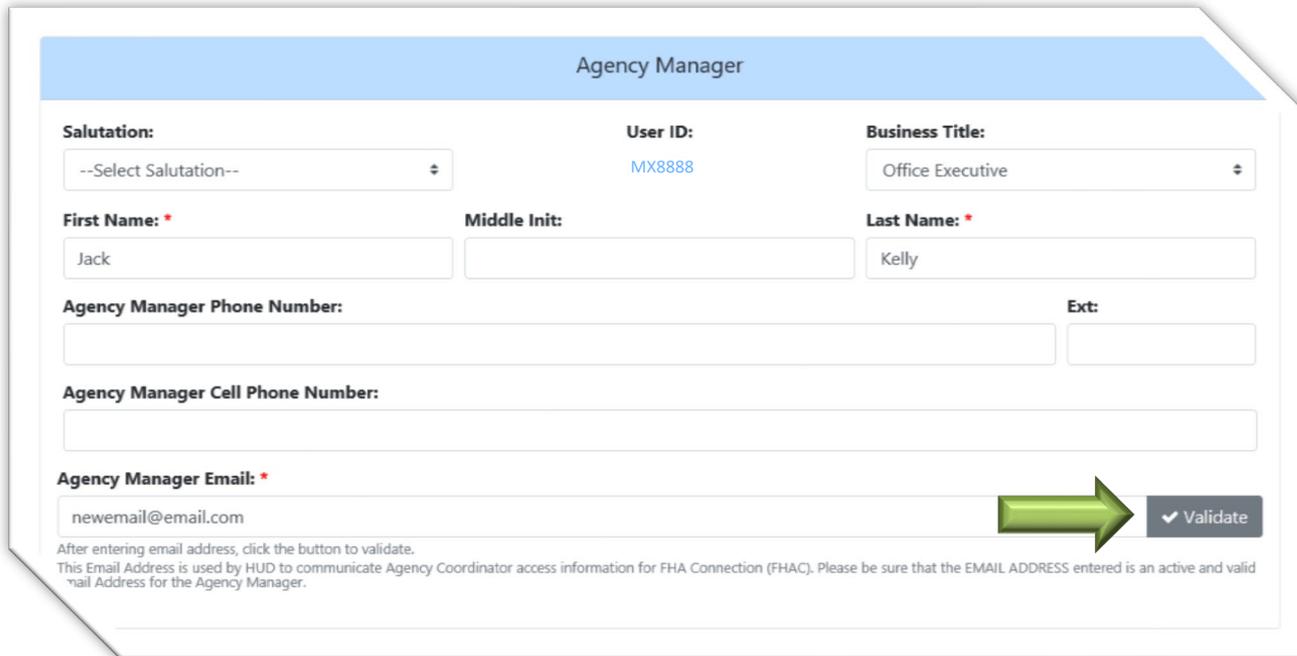
If the email is valid, a message will display a successful validation. Click the **OK** button to proceed.



The dialog box is titled 'Agency Profile' and contains the message: 'Agency Manager Email hsmith@xyz.com has been validated.' There is an 'OK' button at the bottom right.

Agency Profile – Personnel – Validate Agency Personnel Emails

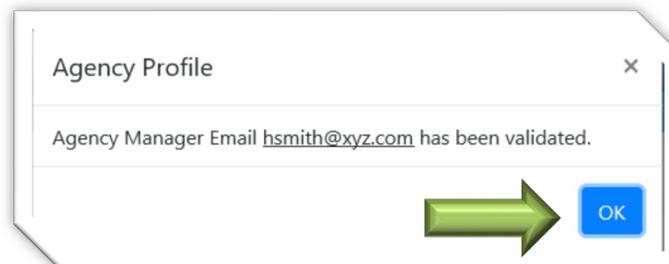
After entering the **Agency Manager, Agency Senior Executive, and/or Agency POC Email**, click the **Validate** button. This will verify that the email address has a valid format and uses a valid domain.



The screenshot shows the 'Agency Manager' form. It includes fields for Salutation (dropdown), User ID (text, value: MX8888), Business Title (dropdown), First Name (text, value: Jack), Middle Init (text), Last Name (text, value: Kelly), Agency Manager Phone Number (text), Ext (text), Agency Manager Cell Phone Number (text), and Agency Manager Email (text, value: newemail@email.com). A green arrow points to the 'Validate' button. Below the email field, there is a note: 'After entering email address, click the button to validate. This Email Address is used by HUD to communicate Agency Coordinator access information for FHA Connection (FHAC). Please be sure that the EMAIL ADDRESS entered is an active and valid mail Address for the Agency Manager.'

If an email is changed, validation is required before the agency profile can be saved.

If the email is valid, a message will display a successful validation. Click the **OK** button to proceed. After a successful validation, click the **Save** button at the bottom of the screen.



The screenshot shows a dialog box titled 'Agency Profile' with a close button (X). The message inside reads: 'Agency Manager Email hsmith@xyz.com has been validated.' A green arrow points to the 'OK' button.

Agency Profile – Contact Information – Differences

Minor differences on the **Contact Information** tab:

1. Validate Agency Profile (same as Agency Information tab)
2. Save Each Tab (same as Agency Information tab)
3. Same as Physical Address check box
4. Verify Agency Physical Address
5. Validate Agency Contact Email (Same as Personnel tab)

The screenshot shows the 'Contact Information' tab of an agency profile. The agency ID is 88888 and the name is ACME INTERMEDIARY. A 'Validate Agency Profile' button is present, with a callout '1' pointing to it. Below this is the 'Agency Address' section, which includes a 'Physical Address' and a 'Mailing Address' section. A checkbox labeled 'same as physical address' is next to the mailing address header, with callout '3' pointing to it. The physical address fields are: Address 1 (9 Great Jones St), Address 2, Address 3, Address 4, City (New York), State (New York), Zip (10012-1128), and County (NEW YORK). An 'Address Verified' field shows 'Yes' with a 'Verify Address' button, callout '4' pointing to the button. Below the address section is the 'Agency Public Information Contact' section, which includes fields for Phone (212-203-2121), Ext., Fax, Toll Free Phone, Contact Email (hcs@salientcrgt.com), and Web URL (http://www.acme.org). A 'Validate' button is next to the contact email field, with callout '5' pointing to it. At the bottom of the form are 'Save' and 'Cancel' buttons, with callout '2' pointing to the 'Save' button.

Agency Profile – Contact Information – Same as Physical Address Check Box

Check the **same as physical address** box if the agency uses the same physical address as their mailing address.

The screenshot shows a form titled "Agency Address" with two columns: "Physical Address" and "Mailing Address". A green arrow points to a checkbox labeled "same as physical address" which is checked. The Physical Address fields contain "9 Great Jones St", "New York", "New York", and "10012-1128". The Mailing Address fields contain the same information. A "Verify Address" button is at the bottom right.

Field	Physical Address	Mailing Address
Address 1: *	9 Great Jones St	9 Great Jones St
Address 2:		
Address 3:		
Address 4:		
City: *	New York	New York
State: *	New York	New York
Zip: *	10012-1128	10012-1128
County:	NEW YORK	
Address Verified:	Yes	

The address entered into the physical address will automatically copy to the mailing address.

Agency Profile – Contact Information – Verify Agency Physical Address

After entering or changing the agency’s physical address, the address must be verified. Click the **Verify Address** button. This will verify the address with the HUD Geocode Service Center.

If an email is changed, validation is required before the contact information tab can be saved.

The screenshot shows the 'Agency Address' form. It is divided into two columns: 'Physical Address' and 'Mailing Address'. The 'Mailing Address' column has a checked checkbox labeled 'same as physical address'. The 'Physical Address' column contains fields for Address 1, Address 2, Address 3, Address 4, City, State, Zip, and County. The 'Mailing Address' column contains corresponding fields for Address 1, Address 2, Address 3, Address 4, City, State, Zip, and County. The 'Address 1' field in the Physical Address column contains '10 Great Jones St'. The 'City' field contains 'New York', the 'State' field contains 'New York', and the 'Zip' field contains '10012-1128'. The 'County' field contains 'NEW YORK'. At the bottom of the form, there is a message: 'Address Verified: Please click on the 'Verify Address' button to verify physical address.' A green arrow points to the 'Verify Address' button.

If the address is verified, a message will display indicating that the address successfully verified. To continue click the **OK** button, then click **Save** on the Contact Information tab.

The screenshot shows a confirmation dialog box titled 'Agency Profile - Address Verification'. It has a green message bar that says 'Physical address has been verified. Click Save on the Contact Information tab.' At the bottom right of the dialog box, there is a blue 'OK' button. A green arrow points to the 'OK' button.

Agency Profile – HUD Affiliation – Differences

Major differences on the **HUD Affiliation** tab:

1. Validate Agency Profile (same as Agency Information tab)
2. Re-ordering of Sections and Saving
3. Validate Parent Agency
4. Agency Review
5. Agency Status
6. Zip Code Affiliations
7. State Affiliations

The screenshot displays the HUD Affiliation tab for Agency ID: 8888. The interface is organized into several sections, with key differences highlighted by numbered callouts:

- 1:** A "Validate Agency Profile" button is located at the top right of the page.
- 2:** "Save" and "Cancel" buttons are positioned at the bottom of the "Public Display Options" section.
- 3:** The "Parent Org:" field is highlighted, with a note below it stating: "After entering the parent agency ID, click the search button to validate."
- 4:** The "Agency Review(s)" section is highlighted, showing a "Next Review Deadline: N/A" and a "Schedule Next Review" button.
- 5:** The "Agency Status" section is highlighted, showing a "Current Agency Status" card with details like "Status: Approved", "As Of: 10/01/2019", "Date: 10/01/2019", "Author: H18798", "Reason: Recertified", "Up To: 09/30/2020", and "Fiscal Year: 2020".
- 6:** The "Zip Code Affiliations" section is highlighted, showing a "Default Affiliation: 10012" and an "Add Zip Code" button.
- 7:** The "State Affiliations" section is highlighted, showing a "Default Affiliation: New York" and an "Add State" button.

HCS 14.23.0.0 Release - Functional and User Interface Changes

Agency Profile – HUD Affiliation – Differences – Re-ordering of Sections and Saving (HUD User Only)

The same screen elements are present on the new HUD Affiliation tab, however they may be located in a different position.

The following sections are at the top:

- Agency Information
- HUD Information
- Types of Counseling Services
- Public Display Options

To save a change made to any of these sections, click the **Save** button that is below **Public Display Options**.

Agency ID: 88888 Validate Agency Profile
Last Validated on 10/01/2019 (Next Validation Required by 12/30/2019)

Agency Information

Agency Name: *
ACME INTERMEDIARY

Type of Agency: * Parent Org: Parent Type: Parent Name:
National Intermediary [dropdown] [search] N/A N/A

HUD Office Agency Assigned to: * Joined HUD Program as of: *
Headquarters SF-HUD [dropdown] 04/01/2004 [calendar]

HUD Information

HUD POC: POC Phone: POC Email: POC User Profile
Wormwood, Matilda [dropdown] 555-555-5555-5555 hcs@salientcrgt.com

Types of Counseling Services

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

Public Display Options

- Allow for public access?
- Allow public access through Zip Code Affiliations?
- Allow public access through State Affiliations?

Agency Review(s)

Next Review Deadline: N/A Schedule Next Review

Completed Review Edit Completed Review See All Completed Reviews

Last Review Completed: 07/13/2018 Risk: N/A
Date Review Conducted: N/A Review Result: IN COMPLIANCE
Reviewer: Matilda Wormwood Estimated Cost: \$0.00
Review Type: N/A

Agency Status

Current Agency Status Enter New Status See Agency Status History

Status: Approved Reason: Recertified
As Of: 10/01/2019 Up To: 09/30/2020
Date: 10/01/2019 Fiscal Year: 2020
Author: H18798

Zip Code Affiliations

Default Affiliation: 10012 Add Zip Code

State Affiliations

Default Affiliation: New York Add State

HCS 14.23.0.0 Release - Functional and User Interface Changes

Agency Profile – HUD Affiliation – Differences – Re-ordering of Sections and Saving (HUD User Only)

The following sections use pop-up windows to enter data and **do not** require the user to click the Save button on the HUD Affiliation tab:

- Agency Review
- Agency Status
- Zip Code Affiliation
- State Affiliation

Instructions on how to enter data in these sections will be addressed later.

Agency ID: 88888 Validate Agency Profile
Last Validated on 10/01/2019 (Next Validation Required by 12/30/2019)

Agency Information

Agency Name: *
ACME INTERMEDIARY

Type of Agency: * Parent Org: Parent Type: Parent Name:
National Intermediary [Search] N/A N/A

HUD Office Agency Assigned to: * Joined HUD Program as of: *
Headquarters SF-HUD 04/01/2004

HUD Information

HUD POC: POC Phone: POC Email: POC User Profile
Wormwood, Matilda 555-555-5555 hcs@salientcrgt.com

Types of Counseling Services

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

Public Display Options

- Allow for public access?
- Allow public access through Zip Code Affiliations?
- Allow public access through State Affiliations?

Save Cancel

Agency Review(s)

Next Review Deadline: [Date] Schedule Next Review

Completed Review Edit Completed Review See All Completed Reviews

Last Review Completed: 07/13/2018 Risk: N/A
Date Review Conducted: N/A Review Result: IN COMPLIANCE
Reviewer: Matilda Wormwood Estimated Cost: \$0.00
Review Type: N/A

Agency Status

Current Agency Status Enter New Status See Agency Status History

Status: Approved Reason: Recertified
As Of: 10/01/2019 Up To: 09/30/2020
Date: 10/01/2019 Fiscal Year: 2020
Author: H18798

Zip Code Affiliations

Default Affiliation: 10012 Add Zip Code

State Affiliations

Default Affiliation: New York Add State

Agency Profile – HUD Affiliation – Differences – Validate Parent Agency (HUD User Only)

After entering a parent organization's 5 digit HCS agency id in the **Parent Org** text box, click the **Search icon** next to the **Parent Org** text box.

The screenshot shows the 'Agency Information' section of the HUD Affiliation form. The 'Agency ID' is 88887. The 'Agency Name' is 'ACME LOCAL AGENCY'. The 'Type of Agency' is 'LHCA'. The 'Parent Org' field contains '88888' and has a search icon to its right. The 'Parent Type' is 'National Intermediary' and the 'Parent Name' is 'ACME INTERMEDIARY'. The 'HUD Office Agency Assigned to' is 'Atlanta (HOC)' and the 'Joined HUD Program as of' date is '04/01/2004'. A 'Validate Agency Profile' button is visible at the top right of the form, with a note indicating the last validation was on 10/18/2019 and the next is required by 01/16/2020. Two green arrows point to the 'Parent Org' field and the search icon.

The parent agency id must be validated before the change can be saved.

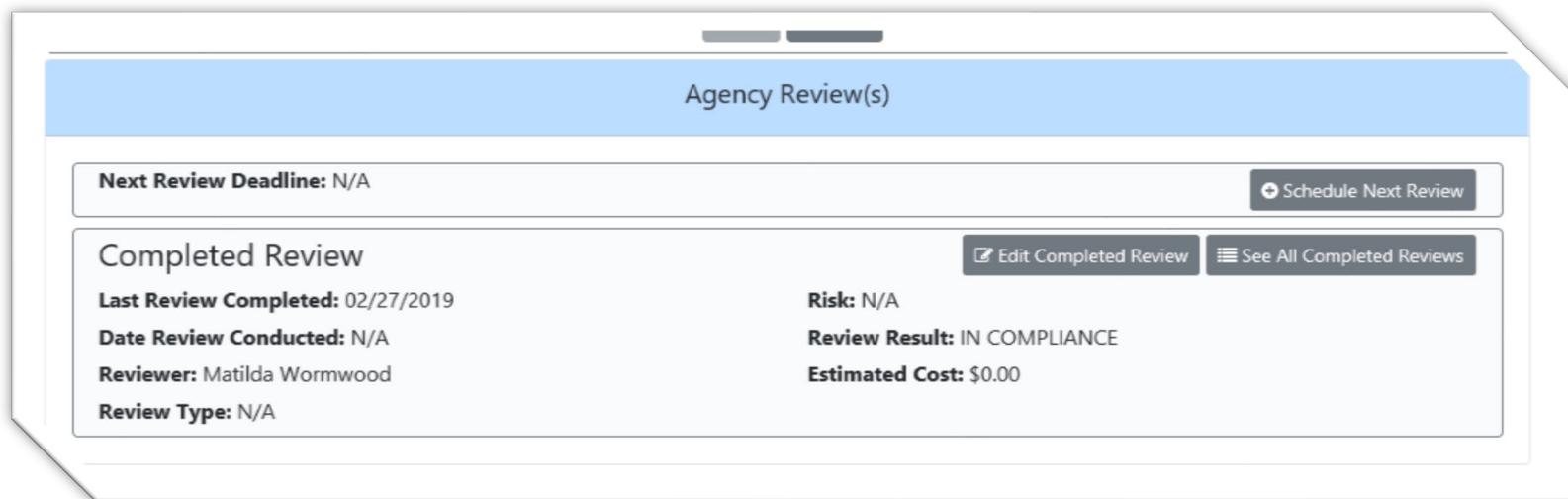
If it is a valid parent agency id, the parent type and parent name will be populated. Click the **Save** button.

If it is not a valid parent agency id, a message will display on the screen.

The screenshot shows the 'Agency Information' section of the HUD Affiliation form. The 'Agency Name' is 'ACME LOCAL AGENCY'. The 'Type of Agency' is 'LHCA'. The 'Parent Org' field contains '9999999' and has a search icon to its right. The 'Parent Type' is 'N/A' and the 'Parent Name' is 'N/A'. A red error message is displayed below the 'Parent Org' field: 'Parent Organization ID 9999999 is invalid. Please re-enter the value and search again. After entering the parent agency ID, click the search button to validate.' A green arrow points to the 'Parent Org' field.

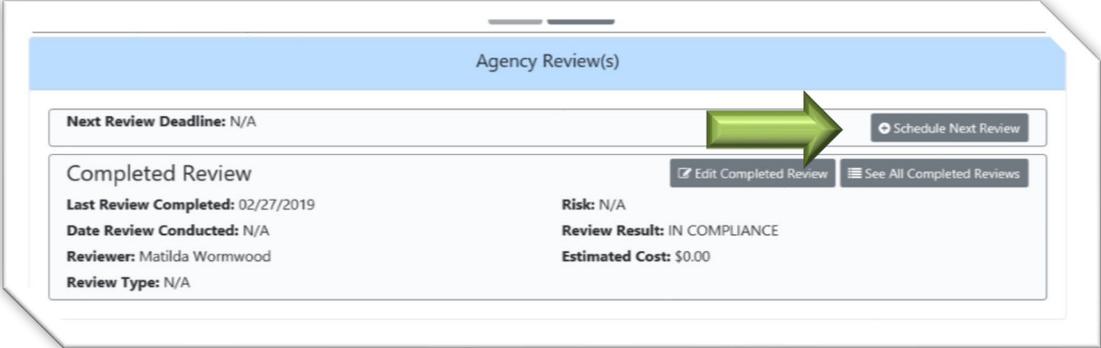
The Agency Review module has been updated to allow:

- Scheduling of a Performance Review
- Email notification of a scheduled review
- Entering of new Performance Review Required Fields:
 - Date Completed
 - Review Type
 - Review Result (new options)
 - Risk Level
 - Estimated Cost
- Completing a Review that has been conducted
- Display of Next Review Deadline

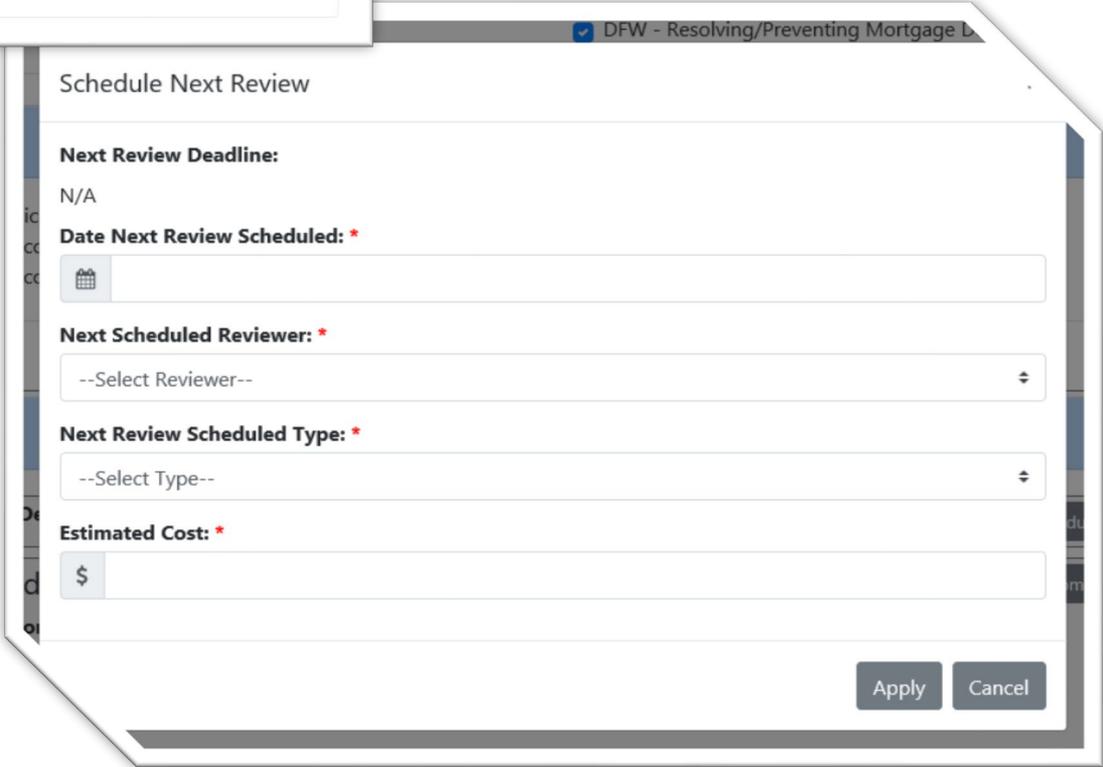


Agency Profile – HUD Affiliation – Differences – Agency Review (HUD User Only)

A review should be entered into HCS as soon as it is scheduled with the agency. To enter a review click the **Schedule Next Review** button.



A pop-up window will display the **Schedule Next Review** screen.



Agency Profile – HUD Affiliation – Differences – Schedule Next Review (HUD User Only)

To schedule a review, enter the required fields and click **Apply**:

- Date Next Review Scheduled – Enter the date that the review has been scheduled to be conducted with the agency.
- Next Scheduled Reviewer – Select the HUD personnel that will be conducting the review.
- Next Review Scheduled Type – Select if the review is to be conducted at the agency (On-Site) or via teleconference (Desk).
- Estimated Cost – Enter the estimated total amount of expenses to conduct the review. (format ###.##)

Schedule Next Review Screen Example:

The screenshot shows a 'Schedule Next Review' dialog box. At the top, there is a header bar with a checkmark and the text 'DFW - Resolving/Preventing Mortgage De'. Below the header, the title 'Schedule Next Review' is displayed. The form contains the following fields:

- Next Review Deadline:** N/A
- Date Next Review Scheduled: ***: 05/18/2020 (with a calendar icon)
- Next Scheduled Reviewer: ***: Smith, George (dropdown menu)
- Next Review Scheduled Type: ***: On-Site (dropdown menu)
- Estimated Cost: ***: \$ 352.63 (with a currency symbol and a clear 'X' button)

At the bottom right, there are two buttons: 'Apply' and 'Cancel'. A green arrow points to the 'Apply' button.

Agency Profile – HUD Affiliation – Differences – Schedule Next Review (HUD User Only)

After clicking **Apply** a message will display indicating the record has been saved. Click the **OK** button.



The review then displays under **Upcoming Review**.

A screenshot of the "Agency Review(s)" section in a software interface. At the top, there are "save" and "cancel" buttons. Below is a table of reviews. A green arrow points to the "Upcoming Review" section. The "Upcoming Review" section shows: "Next Scheduled Review Date: 05/18/2020", "Next Scheduled Reviewer: George Smith", "Next Review Scheduled Type: On-Site", and "Estimated Cost: \$352.63". There are "Edit Scheduled Review" and "Complete Review" buttons. The "Completed Review" section shows: "Last Review Completed: 02/27/2019", "Date Review Conducted: N/A", "Reviewer: Matilda Wormwood", "Review Type: N/A", "Risk: N/A", "Review Result: IN COMPLIANCE", and "Estimated Cost: \$0.00". There are "Edit Completed Review" and "See All Completed Reviews" buttons.

An email notification will be sent to the HUD reviewer and the emails listed for agency personnel.



Agency Profile – HUD Affiliation – Differences – Edit Scheduled Review (HUD User Only)

If a change needs to be made to an Upcoming Review, click the **Edit Scheduled Review** button.

The screenshot shows the 'Agency Review(s)' section. It contains three review cards. The first card is for an 'Upcoming Review' with the following details: 'Next Scheduled Review Date: 05/18/2020', 'Next Scheduled Reviewer: George Smith', 'Next Review Scheduled Type: On-Site', and 'Estimated Cost: \$352.63'. A green arrow points to the 'Edit Scheduled Review' button on this card. The second card is for a 'Completed Review' with details: 'Last Review Completed: 02/27/2019', 'Date Review Conducted: N/A', 'Reviewer: Matilda Wormwood', 'Review Type: N/A', 'Risk: N/A', 'Review Result: IN COMPLIANCE', and 'Estimated Cost: \$0.00'. The third card is partially visible and shows 'Next Review Deadline: N/A'.

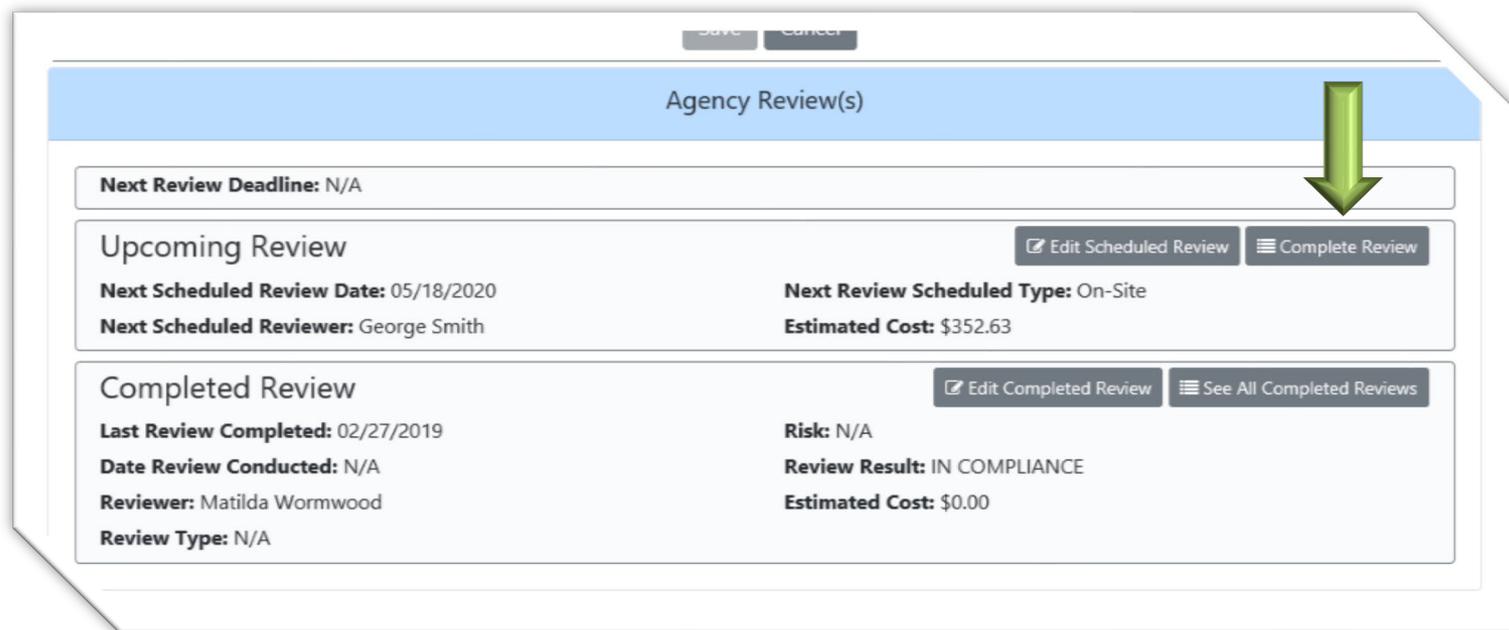
The **Schedule Next Review** screen will display allowing for any of the fields to be changed.

An upcoming review can be edited until it is marked as Complete.

The 'Schedule Next Review' dialog box is shown. It contains the following fields: 'Next Review Deadline:' with a value of 'N/A'; 'Date Next Review Scheduled: *' with a calendar icon and the date '05/18/2020'; 'Next Scheduled Reviewer: *' with a dropdown menu showing 'Smith, George'; 'Next Review Scheduled Type: *' with a dropdown menu showing 'On-Site'; and 'Estimated Cost: *' with a text input field containing '\$ 352.63' and a clear button (X). At the bottom right, there are 'Apply' and 'Cancel' buttons.

Agency Profile – HUD Affiliation – Differences – Complete Review (HUD User Only)

After an upcoming review has been conducted and the necessary documents created and stored on SharePoint, click the **Complete Review** button.



Completing a review will move the review from **Upcoming Review** to **Completed Review**.

Agency Profile – HUD Affiliation – Differences – Complete Review (HUD User Only)

After clicking **Complete Review**, the **Complete Agency Review** pop-up will display.

Complete Agency Review

Agency Review Completion Requirements

- Review Checklist/Risk Matrix completed in SharePoint
- Letter/Report was submitted in SharePoint for Management Approval
- 9910 uploaded to SharePoint
- Review Letter/Report/Certificate, if applicable, uploaded into Agency Virtual File/Share Point
- Agency Response Letter, if applicable, uploaded to SharePoint
- HUD Correction(s) Accepted Letter, if applicable, uploaded to SharePoint

Date Review Conducted: * 05/18/2020

Date Review Completed: * 03/02/2020
Date All Agency Review Requirements Completed.

Type of Review: * On-Site

Reviewer: * Smith, George

Review Result: * --Select Result--

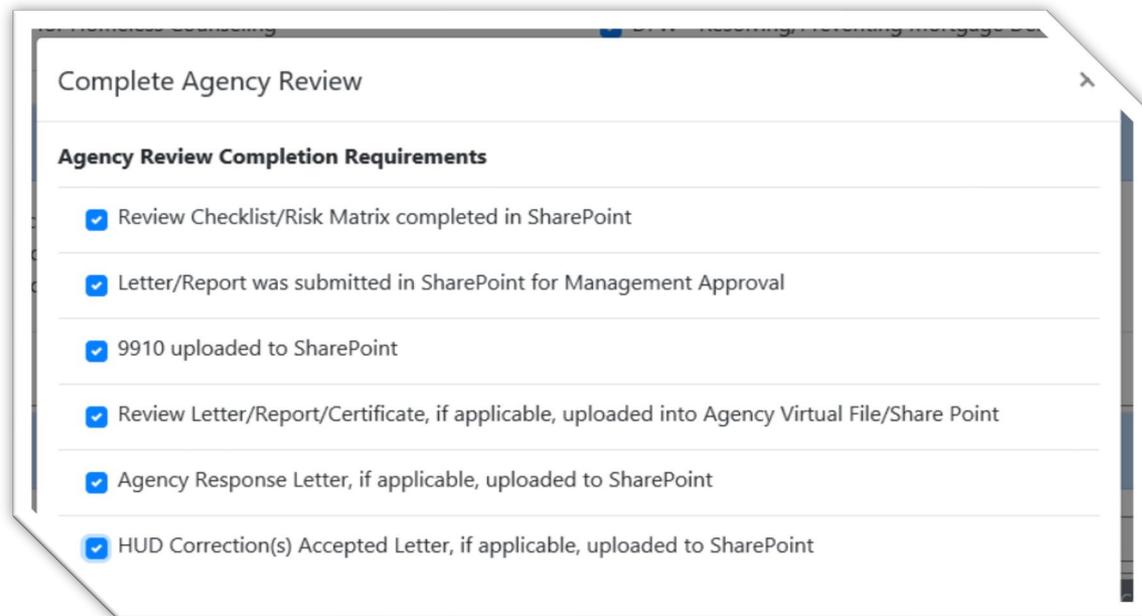
Risk: * --Select Risk Level--

Apply Cancel

Agency Profile – HUD Affiliation – Differences – Complete Review (HUD User Only)

1. To indicate that you have completed the performance review requirements, check the checkboxes for:

- ✓ Review Checklist/Risk Matrix completed in SharePoint
- ✓ Letter/Report was submitted in SharePoint for Management Approval
- ✓ 9910 uploaded to SharePoint
- ✓ Review Letter/Report/Certificate, if applicable, uploaded to Agency Virtual File/SharePoint
- ✓ Agency Response Letter, if applicable, uploaded to SharePoint
- ✓ HUD Correction(s) Acceptance Letter, if applicable, uploaded to SharePoint.



Even if a document is not applicable to the performance review, check the checkbox. The performance review requirements must all be selected before the review can be completed.

Agency Profile – HUD Affiliation – Differences – Complete Review (HUD User Only)

2. The **Date Review Conducted** is the actual date the HUD reviewer met with the agency. This date defaults to the date the review was **scheduled**. If the date was changed, enter the actual date the review was conducted with the agency.
3. The **Date Review Completed** is the date that all of the performance review requirements and documentation were completed. This will most likely be a date after the **Date Review Conducted**. The date will default to the current date. Change to the applicable date if necessary.

The screenshot shows a web form with the following elements:

- Two checked checkboxes: "Agency Response Letter, if applicable, uploaded to SharePoint" and "HUD Correction(s) Accepted Letter, if applicable, uploaded to SharePoint".
- Field 2: "Date Review Conducted: *" with a calendar icon and the date "05/18/2020". A green circle with the number "2" is next to the label.
- Field 3: "Date Review Completed: *" with a calendar icon and the date "05/25/2020". A green circle with the number "3" is next to the label. Below this field is the text "Date All Agency Review Requirements Completed."
- Field "Type of Review: *" with a dropdown menu.
- Field "Reviewer: *" with a dropdown menu.

Agency Profile – HUD Affiliation – Differences – Complete Review (HUD User Only)

- 4. The **Type of Review** will default to the type that was selected when the review was scheduled. If the Type changed, select the actual type (On-Site or Desk) of review that was conducted.
- 5. The **Reviewer** will default to the review that was selected when the review was scheduled. If the Reviewer changed, select the actual Reviewer that conducted the review with the agency.

HUD Correction(s) Accepted Letter, if applicable, uploaded to SharePoint

Date Review Conducted: *	Date Review Completed: *
<input type="text" value="05/18/2020"/>	<input type="text" value="03/02/2020"/>
Date All Agency Review Requirements Completed.	
Type of Review: * 4	Reviewer: * 5
<input type="text" value="On-Site"/>	<input type="text" value="Smith, George"/>
Review Result: *	Risk: *
<input type="text" value="--Select Result--"/>	<input type="text" value="--Select Risk Level--"/>

- 6. **Review Result** – Select the result of the review. The options are Findings or No Findings.
- 7. **Risk** – Select the **Risk** level that was determined as a result of the review. The options are:
 - Tier 1 (3 year Approval – Low – 15 pts or less)
 - Tier 2 (2 Year Approval – Medium/Moderate – 16 – 20 pts)
 - Tier 3 (1 Year Approval – Major – 21 – 29 pts)
 - Tier 4 (1 Year Approval – Critical/Extreme – 30 pts or more)

The screenshot shows a web form titled "Complete Review" with the following fields and options:

- Date Review Conducted:** 05/18/2020
- Date Review Completed:** 03/02/2020
- Type of Review:** On-Site
- Reviewer:** Smith, George
- Review Result:** A dropdown menu with options: --Select Result--, Findings, and No Findings. This field is circled with a green '6'.
- Risk:** A dropdown menu with options: --Select Risk Level--, Tier 1 (3 Year Approval - Low - 15 pts or less), Tier 2 (2 Year Approval - Medium/Moderate - 16 - 20 pts), Tier 3 (1 Year Approval - Major - 21 - 29 pts), and Tier 4 (1 Year Approval - Critical/Extreme - 30 pts or more). This field is circled with a green '7'.

Buttons for "Apply" and "Cancel" are visible at the bottom right of the form.

8. **Apply** – Click **Apply** when all the fields have been entered.

es for Homeless Counseling DFW - Resolving/Preventing Mortgage

Complete Agency Review

Agency Review Completion Requirements

- Review Checklist/Risk Matrix completed in SharePoint
- Letter/Report was submitted in SharePoint for Management Approval
- 9910 uploaded to SharePoint
- Review Letter/Report/Certificate, if applicable, uploaded into Agency Virtual File/Share Point
- Agency Response Letter, if applicable, uploaded to SharePoint
- HUD Correction(s) Accepted Letter, if applicable, uploaded to SharePoint

Date Review Conducted: * 05/18/2020 **Date Review Completed: *** 05/25/2020
Date All Agency Review Requirements Completed.

Type of Review: * On-Site **Reviewer: *** Smith, George

Review Result: * No Findings **Risk: *** Tier 1 (3 Year Approval - Low - 15 pts or less)

8 Apply Cancel

Agency Profile – HUD Affiliation – Differences – Complete Review (HUD User Only)

A message will display indicating the record has been saved. Click the **OK** button.

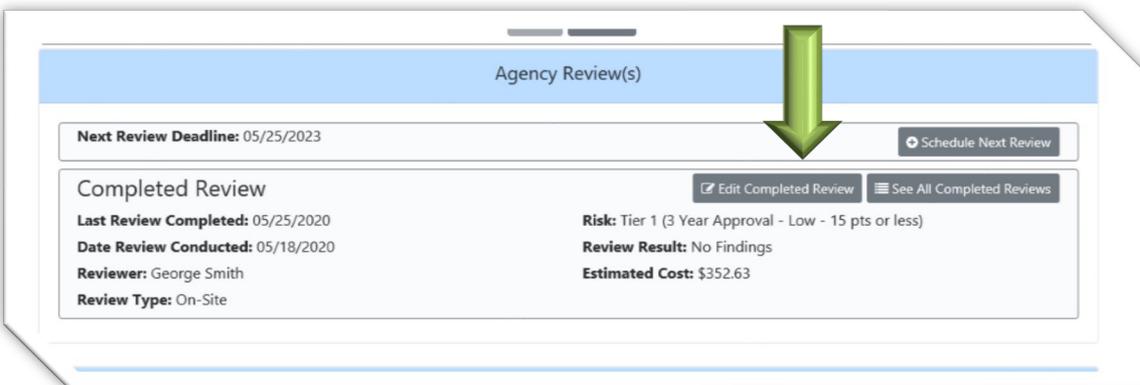
The review now displays on the HUD Affiliation tab under **Completed Review**, as it is the most recent review that has been completed.



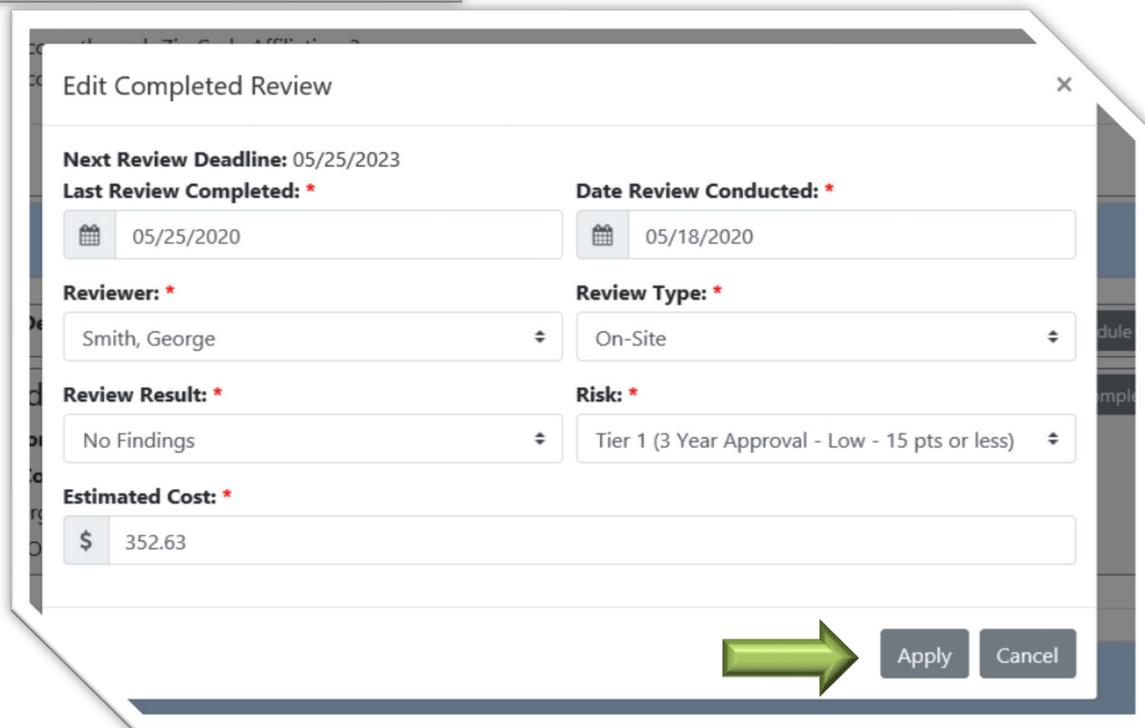
A screenshot of the "Agency Review(s)" section in a software interface. The section has a light blue header. Below the header, there is a box for "Next Review Deadline: 05/25/2023" with a "Schedule Next Review" button. Below that is a "Completed Review" section, which is highlighted by a green arrow from the left. This section contains two columns of information: the left column lists "Last Review Completed: 05/25/2020", "Date Review Conducted: 05/18/2020", "Reviewer: George Smith", and "Review Type: On-Site"; the right column lists "Risk: Tier 1 (3 Year Approval - Low - 15 pts or less)", "Review Result: No Findings", and "Estimated Cost: \$352.63". There are also "Edit Completed Review" and "See All Completed Reviews" buttons.

Next Review Deadline is calculated using the date a review was completed and the risk level that resulted from the last completed review. In this example, since the agency received a Tier 1 (3 year approval) Risk Level and the date the completed was 02/25/2020, the **Next Review Deadline** is 05/25/2023. If there is no completed review, or the last completed review was entered prior to being able to enter the Risk, the Next Review Deadline will display as N/A.

To edit a completed review, click the **Edit Completed Review** button.

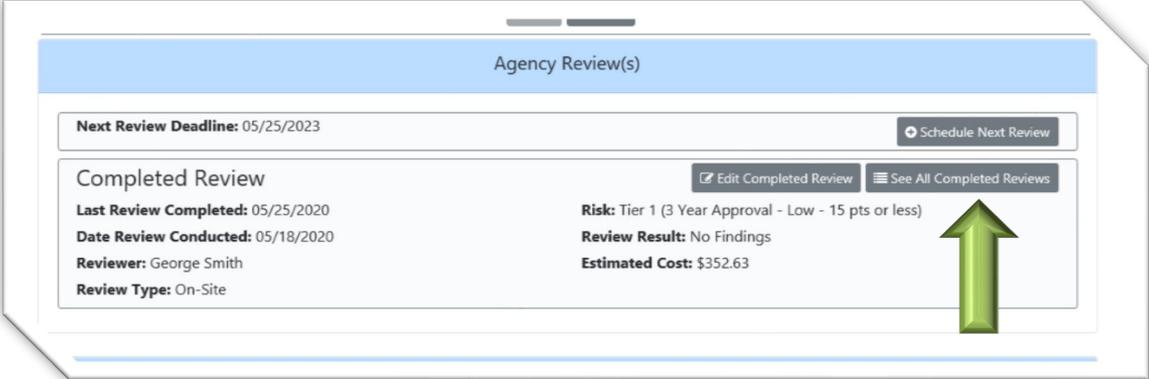


The **Edit Completed Review** pop-up will display. Make the necessary changes and click **Apply**.

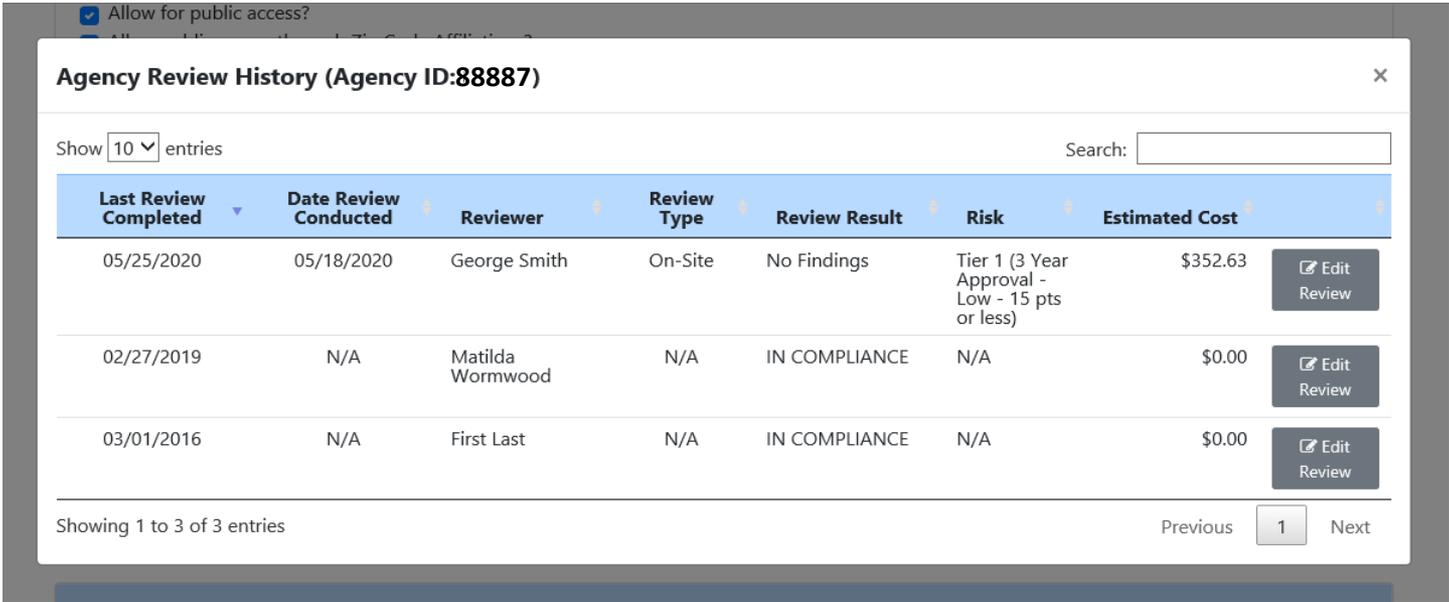


Agency Profile – HUD Affiliation – Differences – See All Completed Reviews (HUD User Only)

To view all of the previously completed reviews for the agency, click the **See All Completed Reviews** button.



The **Agency Review History** screen will display in a pop-up window.



Advanced Agency Search – Updated Search by Agency Review and Performance

The Search by Agency Review and Performance section of Advanced Agency Search has been updated to include the new options for review results and the new fields for risk level and review type.

Advanced Agency Search for FY: 2020

Search for Agencies using agency ID, or agency name. Multiple agency ID's may be provided when divided by comma. Full or partial agency name may be used for searches.

Basic Agency Search

Search Clear

Where do you want to search? Assigned Area Assigned Area - results are editable; HUD Wide - read only

- Search by Agency Information
- Search by HUD Office and POC
- Search by Agency Location
- Search by Agency Type and Services
- Search by Agency Status and Validation
- Search by 9902 Information
- Search by Agency Grant
- Search by Agency Review and Performance

Agency Reviewed: [dropdown]

Review Result: [dropdown]

Review Scheduled: [dropdown]

Review Date: Last Review Completed Date [dropdown] Between [calendar] and [calendar]

Risk Level: [dropdown]

Review Type: [dropdown]

Search Clear

Advanced Agency Search – Updated Search by Agency Review and Performance – Review Result

The new options of **Findings** and **No Findings** have been added to the **Review Result** select list.

The screenshot displays the 'Search by Agency Review and Performance' section of the software. The 'Review Result' dropdown menu is open, showing the following options: 'IN COMPLIANCE', 'COND COMPLIANCE', 'NON COMPLIANCE', 'Findings', and 'No Findings'. The 'Findings' and 'No Findings' options are highlighted with a red rectangular box. Other search criteria visible include 'Agency Reviewed' (set to 'Yes'), 'Review Scheduled', 'Review Date', 'Risk Level', and 'Review Type'. There are also date range selection fields and 'Search' and 'Clear' buttons at the bottom.

The old review result options of:

- In Compliance
- Conditional Compliance
- Non Compliance

are no longer available when entering a completed review, but are still available for searching older reviews.

Advanced Agency Search – Updated Search by Agency Review and Performance – Risk Level & Review Type

The new fields for **Risk Level** and **Review Type** have been added to the Advanced Agency Search options.

Search by Agency Grant

Search by Agency Review and Performance

Agency Reviewed: Yes ▾

Review Result: ▾

Review Scheduled: ▾

Review Date: Last Review Completed Date ▾ Between [] and []

Risk Level:
Low - 15 pts or less
Medium/Moderate - 16 - 20 pts
Major - 21 - 29 pts
Critical/Extreme - 30 pts or more

Review Type:

Search Clear

Search by Agency Grant

Search by Agency Review and Performance

Agency Reviewed: Yes ▾

Review Result: ▾

Review Scheduled: ▾

Review Date: Last Review Completed Date ▾ Between [] and []

Risk Level: ▾

Review Type:
Desk
On-Site

Search Clear

Advanced Agency Search – Agency Review Spreadsheet

The **Agency Review Spreadsheet** has been updated with the new performance review fields. The spreadsheet now includes the following fields regarding agency review:

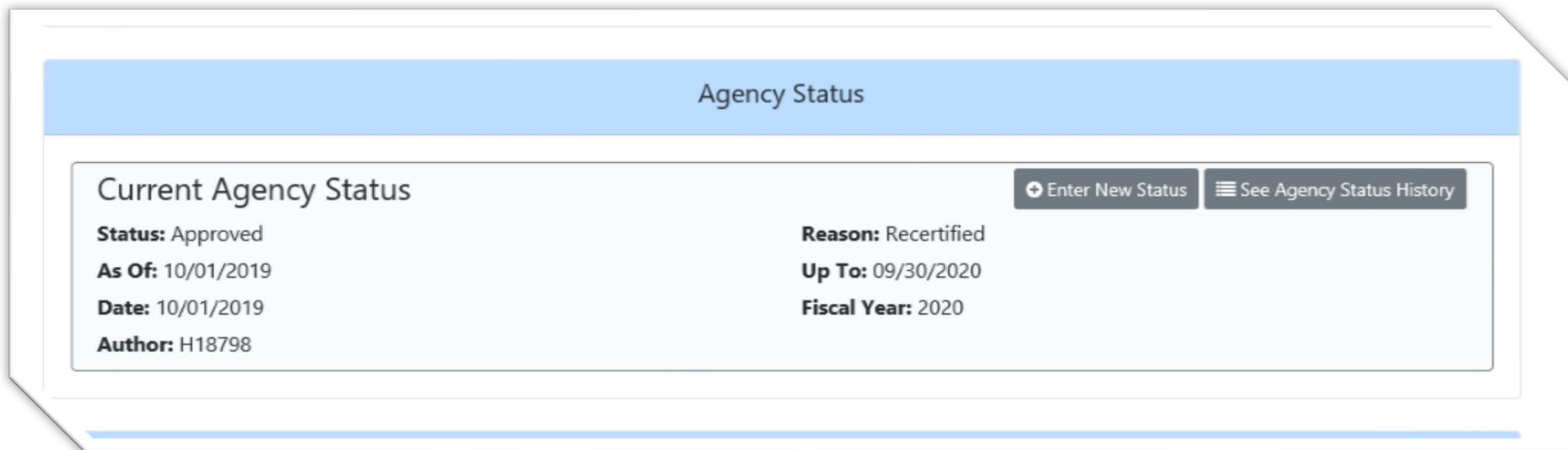
- Last Review Date
- Last Review Result
- Last Review Risk
- Last Review Type
- Last Review Estimated Cost (HUD User Only)
- Last Reviewer First Name
- Last Reviewer Last Name
- Next Scheduled Review Date
- Next Scheduled Reviewer First Name
- Next Scheduled Reviewer Last Name
- Next Scheduled Review Type
- Next Scheduled Review Estimated Cost (HUD User Only)

The Agency Review Spreadsheet is available on the results screen after entering search criteria in the Advanced Agency Search.

Agency Profile – HUD Affiliation – Differences – Agency Status (HUD User Only)

The Agency Status module provides the same functionality with an updated screen and new options for the reason for changing an agency’s status. The Agency Status section of the HUD Affiliation tab displays information on the agency’s current status:

- Status – the current status of the agency
- Reason – the reason for the agency’s current status
- As Of Date – the date the current status started
- Up To Date – the date the current status expires
- Date – the date the current status was entered
- Author – the ID of the user that entered the current status



Agency Profile – HUD Affiliation – Differences – Agency Status – Change Status (HUD User Only)

To change the agency’s status to a different status or enter a new status period, click the **Enter New Status** button.

The screenshot displays the 'Agency Status' section of a user interface. At the top, a light blue header contains the text 'Agency Status'. Below this, a white box titled 'Current Agency Status' contains the following information:

Status: Approved	Reason: Recertified
As Of: 10/01/2019	Up To: 09/30/2020
Date: 10/01/2019	Fiscal Year: 2020
Author: H18798	

To the right of the status information are two buttons: a dark grey button with a plus icon and the text 'Enter New Status', and a dark grey button with a list icon and the text 'See Agency Status History'. A large green arrow points down from the 'Agency Status' header to the 'Enter New Status' button.

Agency Profile – HUD Affiliation – Differences – Agency Status – Change Status (HUD User Only)

After clicking the **Enter New Status** button, the **Agency Status Form** will display in a pop-up window. Enter the new status just like the previous version by selecting the applicable status, dates, reason, and entering a comment if needed.

The screenshot shows a pop-up window titled "Agency Status Form" with a close button (X) in the top right corner. The window contains the following fields:

- Status: ***: A dropdown menu with "--Select Status--" and a downward arrow.
- As Of: ***: A date selection field with a calendar icon on the left.
- Reason: ***: A dropdown menu with "--Select Reason--" and a downward arrow.
- Comment:**: A large text input area.

At the bottom right of the form, there are two buttons: "Apply" and "Cancel".

Agency Profile – HUD Affiliation – Differences – Agency Status – New Options for Reason – Approved (HUD User Only)

There are new options available for the reason for changing an agency’s status.

Status: Approved

Reason Options:

- Initial
- Recertified

The reason options for Approved status have not changed.

The screenshot shows a web form titled "Agency Status Form" within a "Review" window. The form includes the following fields:

- Status:** A dropdown menu currently showing "Approved".
- As Of:** A date selection field with a calendar icon.
- Up To:** A date selection field with a calendar icon.
- Reason:** A dropdown menu with the following options: "--Select Reason--", "Initial", and "Recertified".

Additional UI elements include a "Reset Default End Date" button and "Apply" and "Cancel" buttons at the bottom right.

Agency Profile – HUD Affiliation – Differences – Agency Status – New Options for Reason - Participating (HUD User Only)

There are new options available for the reason for changing an agency’s status.

Status: Participating

Reason Options:

- Initial
- Renewed

The screenshot shows a web form titled "Agency Status Form" with a "Review" header and an "Edit Completed Review" link. The form contains several fields: "Status:" with a dropdown menu showing "Participating"; "As Of:" and "Up To:" with calendar icons; a "Reason:" dropdown menu which is open, showing options "--Select Reason--", "Initial", and "Renewed"; and a "Reset Default End Date" button. At the bottom right, there are "Apply" and "Cancel" buttons.

Agency Profile – HUD Affiliation – Differences – Agency Status – New Options for Reason - Conditional (HUD User Only)

There are new options available for the reason for changing an agency's status.

Status: Conditional

Reason Options:

- PR Deficiency/Finding
- Client Compliant
- Agency Internal Finding
- Failure to Comply with Reporting
- Pending PR
- Insufficient Certified Counselor
- New Agency Default

The screenshot shows a web form titled "Agency Status Form" with a "Review" tab and an "Edit Completed Review" link. The form contains several fields: "Status:" with a dropdown menu set to "Conditional"; "As Of:" with a calendar icon; "For:" with a dropdown menu set to "--Select Period--"; and "Up To:" with a calendar icon. A "Reset Default End Date" button is located to the right of the "Up To:" field. The "Reason:" field is expanded, showing a list of options: "--Select Reason--", "PR Deficiency/Finding", "Client Complaint", "Agency Internal Finding", "Failure to Comply with Reporting", "Pending PR", "Insufficient Certified Counselors", and "New Agency Default". "Apply" and "Cancel" buttons are at the bottom right of the form.

Agency Profile – HUD Affiliation – Differences – Agency Status – New Options for Reason - Inactive (HUD User Only)

There are new options available for the reason for changing an agency’s status.

Status: Inactive

Reason Options:

- Waiting Termination
- Waiting Termination – Lack of Funding
- Waiting Termination – No Counselor
- Waiting Termination – No Certified Counselor
- Waiting Termination – Natural Disaster
- Waiting Reactivation – Pending Completion in HCS as New Agency

The screenshot shows a 'Review' window for an 'Agency Status Form'. The 'Status' field is set to 'Inactive'. The 'As Of' and 'Up To' fields are empty, each with a calendar icon. The 'For' field is set to '--Select Period--'. The 'Reason' field is open, showing a dropdown menu with the following options: '--Select Reason--', 'Waiting Termination', 'Waiting Termination - Lack of Funding', 'Waiting Termination - No Counselor', 'Waiting Termination - No Certified Counselor', 'Waiting Termination - Natural Disaster', and 'Waiting Reactivation - Pending Completion in HCS as New Agency'. There is a 'Reset Default End Date' button and 'Apply' and 'Cancel' buttons at the bottom right.

Agency Profile – HUD Affiliation – Differences – Agency Status – New Options for Reason - Terminated (HUD User Only)

There are new options available for the reason for changing an agency's status.

**Status: Terminated (Disapproved)
& Terminated (Non-Participating)**

Reason Options:

- Lack of Funding
- No Counselor
- No Certified Counselor
- Agency Withdrawn
- Parent Removed
- Noncompliance
- Mistake
- No Contact with Agency
- Natural Disaster
- Temporary ID as Shadow Agency
- Agency Type Change

The screenshot shows a web application window titled "Agency Status Form" with a "Review" header and an "Edit Completed Review" button. The form contains three required fields: "Status:" with a dropdown menu showing "Terminated (Disapproved)", "As Of:" with a calendar icon, and "Reason:" with a dropdown menu. The "Reason:" dropdown menu is open, displaying a list of options: "--Select Reason--", "Lack of Funding", "No Counselor", "No Certified Counselor", "Agency Withdrawn", "Parent Removed", "Noncompliance", "Mistake", "No Contact with Agency", "Natural Disaster", "Temporary ID as Shadow Agency", and "Agency Type Change".

Agency Profile – HUD Affiliation – Differences – Agency Status – Change Status (HUD User Only)

After entering the new status and clicking the **Apply** button, the new status will display on the HUD Affiliation tab.

Review Edit Completed Review

Agency Status Form

Status: *
Conditional

As Of: *
03/03/2020

For:
60 Days

Up To: *
05/02/2020

[Reset Default End Date](#)

Reason: *
Failure to Comply with Reporting

Comment:
Agency was given conditional status due to significant delays in reporting. Agency has 60 days to complete reporting.

[Apply](#) [Cancel](#)

Agency Status

Current Agency Status [Enter New Status](#) [See Agency Status History](#)

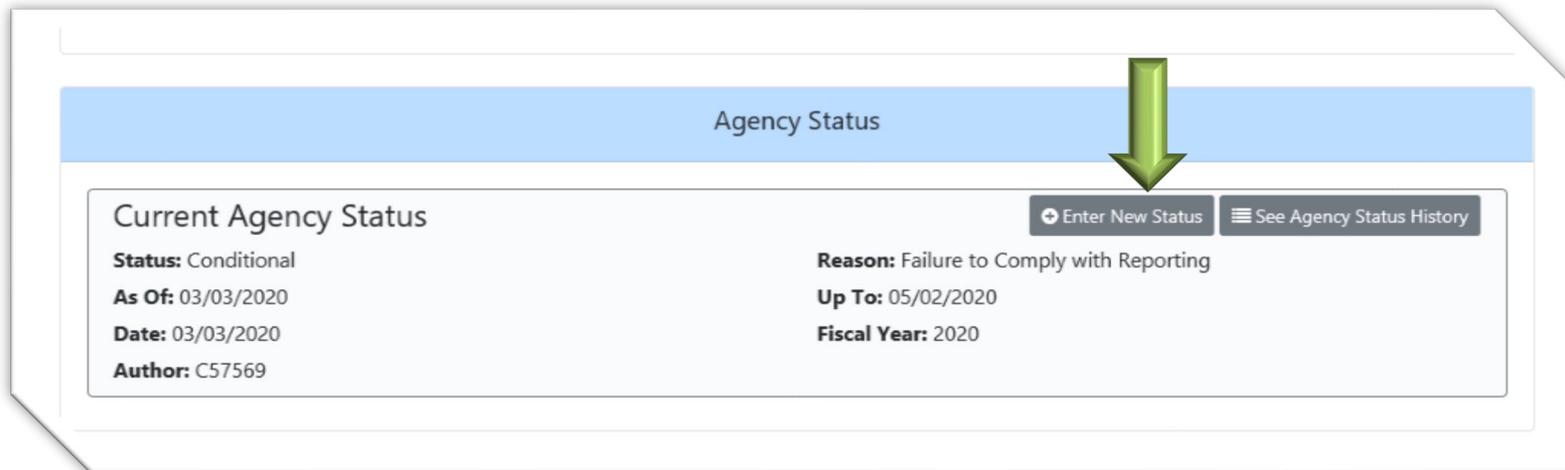
Status: Conditional **Reason:** Failure to Comply with Reporting

As Of: 03/03/2020 **Up To:** 05/02/2020

Date: 03/03/2020 **Fiscal Year:** 2020

Author: C57569

Click the **See Agency Status History** button to view the previous status records entered for the agency.



Agency Status

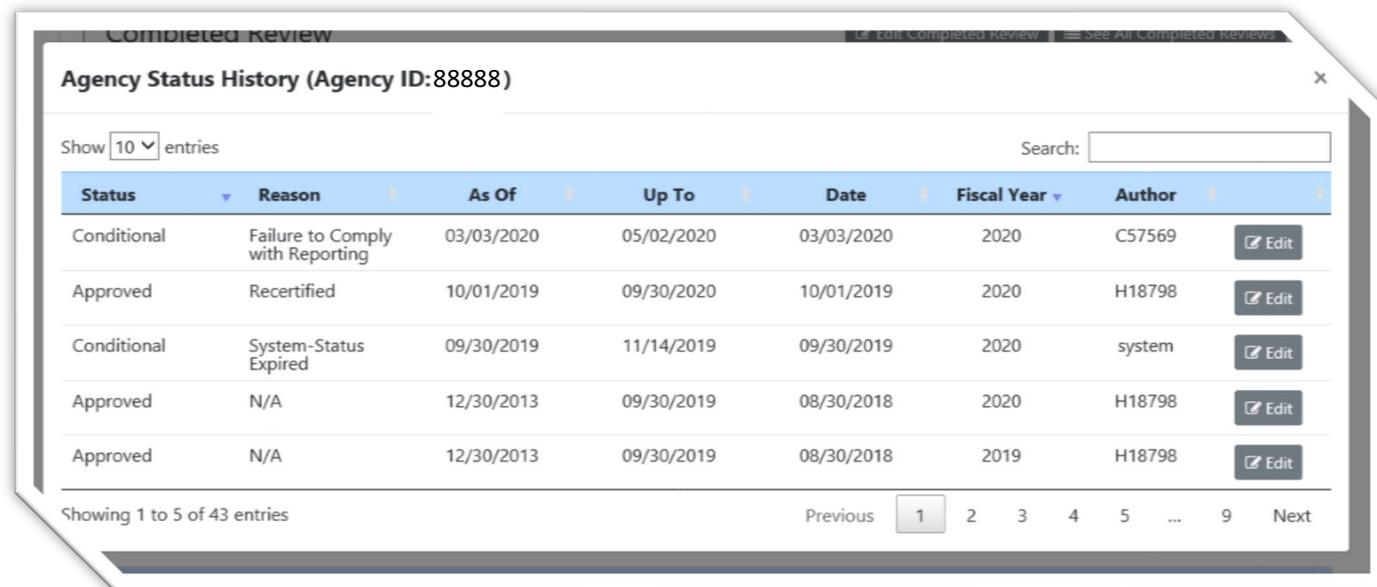
Current Agency Status

Status: Conditional
As Of: 03/03/2020
Date: 03/03/2020
Author: C57569

Reason: Failure to Comply with Reporting
Up To: 05/02/2020
Fiscal Year: 2020

[Enter New Status](#) [See Agency Status History](#)

Agency Status History screen displays



Completed Review

Agency Status History (Agency ID:88888)

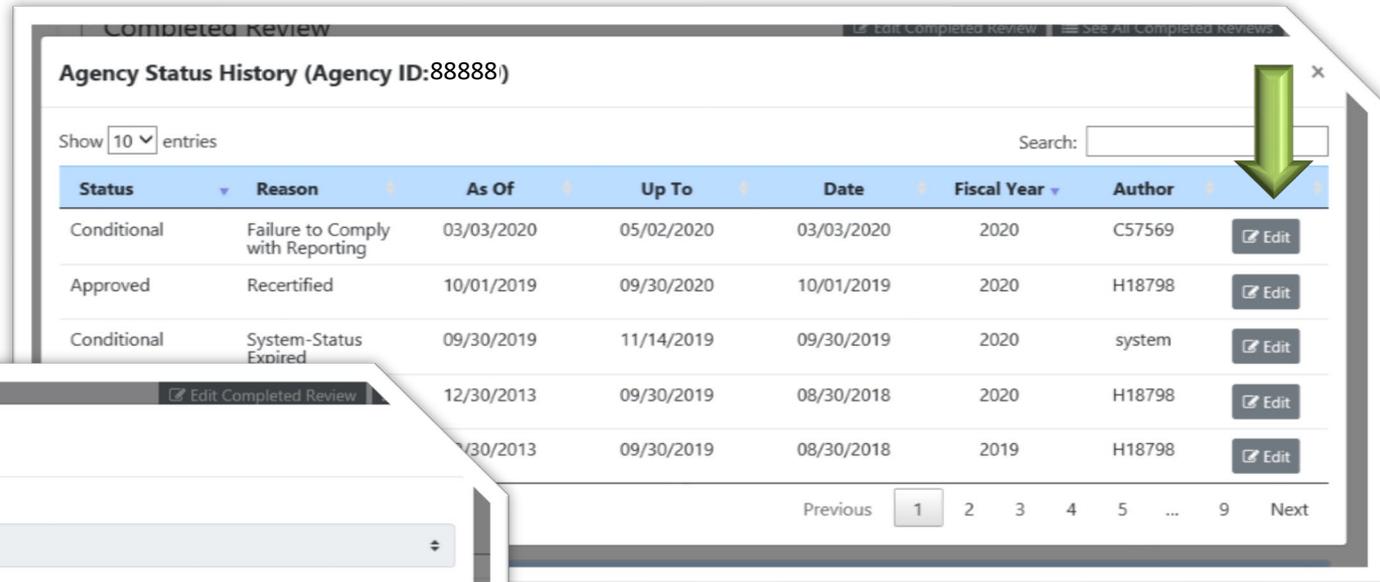
Show 10 entries Search:

Status	Reason	As Of	Up To	Date	Fiscal Year	Author	
Conditional	Failure to Comply with Reporting	03/03/2020	05/02/2020	03/03/2020	2020	C57569	Edit
Approved	Recertified	10/01/2019	09/30/2020	10/01/2019	2020	H18798	Edit
Conditional	System-Status Expired	09/30/2019	11/14/2019	09/30/2019	2020	system	Edit
Approved	N/A	12/30/2013	09/30/2019	08/30/2018	2020	H18798	Edit
Approved	N/A	12/30/2013	09/30/2019	08/30/2018	2019	H18798	Edit

Showing 1 to 5 of 43 entries Previous 1 2 3 4 5 ... 9 Next

Agency Profile – HUD Affiliation – Differences – Agency Status – Edit Status (HUD User Only)

The current and previous status records can be modified by clicking the **Edit** button for the appropriate status.

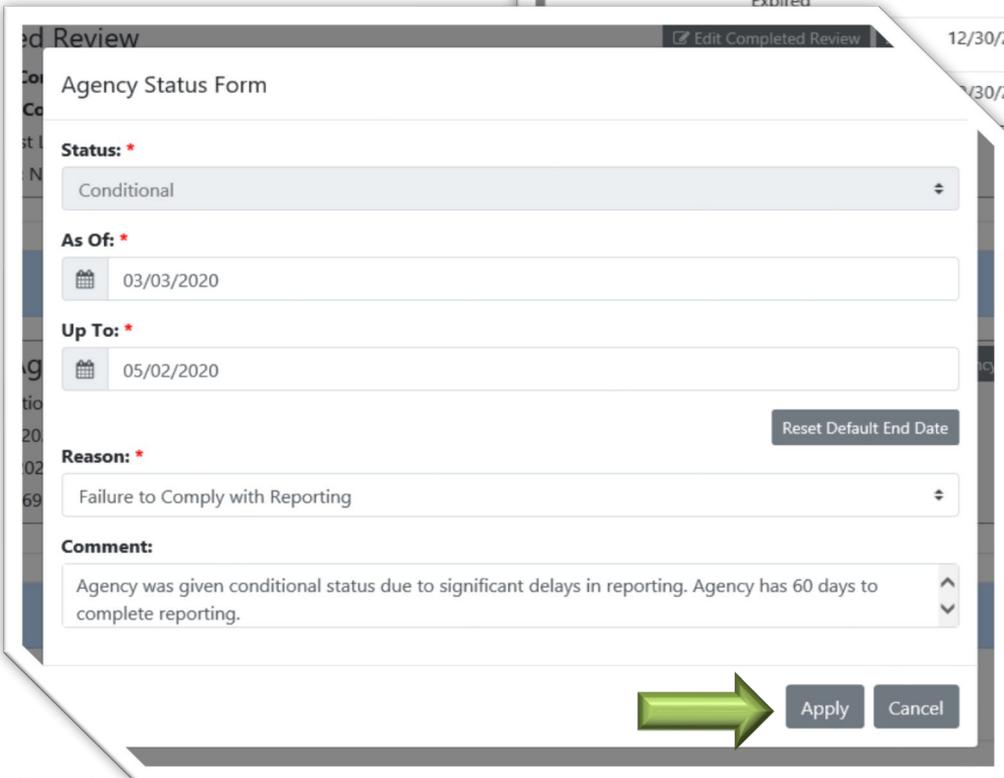


Completed Review Agency Status History (Agency ID:88888)

Show 10 entries Search:

Status	Reason	As Of	Up To	Date	Fiscal Year	Author	Edit
Conditional	Failure to Comply with Reporting	03/03/2020	05/02/2020	03/03/2020	2020	C57569	Edit
Approved	Recertified	10/01/2019	09/30/2020	10/01/2019	2020	H18798	Edit
Conditional	System-Status Expired	09/30/2019	11/14/2019	09/30/2019	2020	system	Edit
		12/30/2013	09/30/2019	08/30/2018	2020	H18798	Edit
		12/30/2013	09/30/2019	08/30/2018	2019	H18798	Edit

Previous 1 2 3 4 5 ... 9 Next



Completed Review Agency Status Form

Status: *
Conditional

As Of: *
03/03/2020

Up To: *
05/02/2020
Reset Default End Date

Reason: *
Failure to Comply with Reporting

Comment:
Agency was given conditional status due to significant delays in reporting. Agency has 60 days to complete reporting.

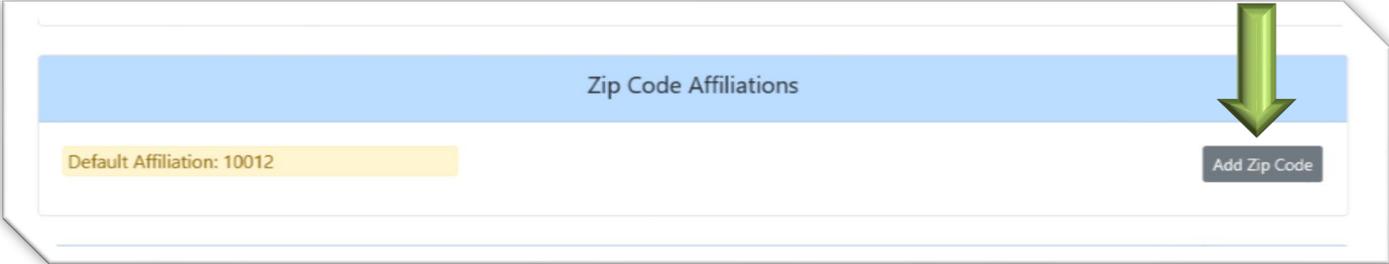
Apply Cancel

The **Agency Status Form** will open in a pop-up window. All fields can be edited except the Status. Click **Apply** to save the changes.

Agency Profile – HUD Affiliation – Differences – Zip Code Affiliations (HUD User Only)

To enter a zip code affiliation for an agency, click the **Add Zip Code** button in the **Zip Code Affiliations** section.

The **Zip Code Affiliation** screen will display in a pop-up window.

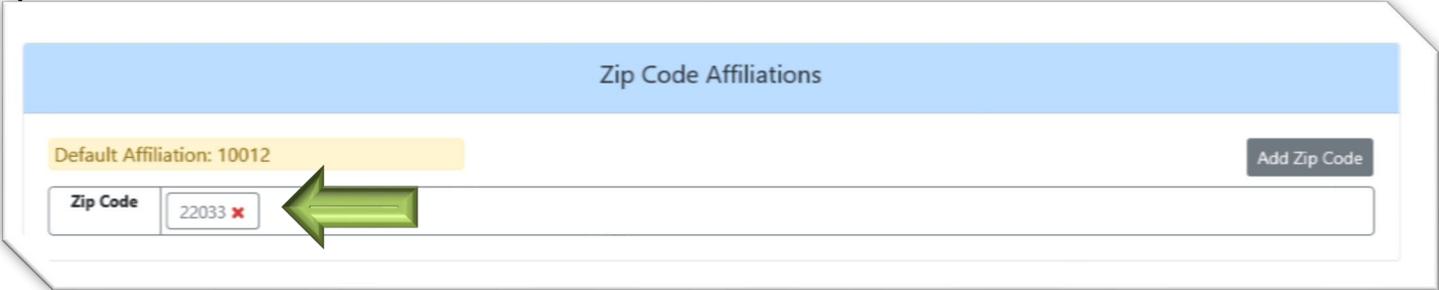


Enter the zip code and click **Add**.

The zip code will then display on the HUD Affiliation tab.



To remove a zip code, click the red X next to the zip code to be removed.



Agency Profile – HUD Affiliation – Differences – State Affiliations (HUD User Only)

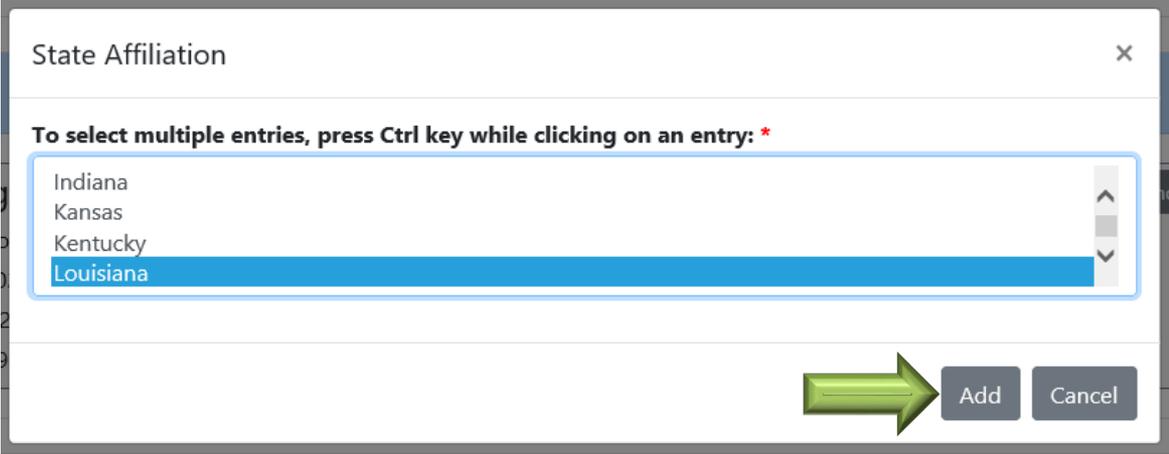
To enter a state affiliation for an agency, click the **Add State** button in the **State Affiliations** section.

The **State Affiliation** screen will display in a pop-up window.

Select a state and click **Add**.

The state will then display on the HUD Affiliation tab.

To remove a state, click the red X next to the state to be removed.



To select multiple states, use the CTRL key while selecting each state.

