

HCS 14.25.0.0 Release

Changes to HUD User Interface for HCS V14.25.0.0

An update to HCS is planned for release on September 17, 2020 and includes the following functional and user interface changes:

All Users:

- Legal Notice/Privacy Act screen display upon log in and on 9902.
- Session termination after inactivity
- 9902 reporting status display on parent agency 9902 and automated emails when agency has not reported.
- Agency certificate for MSO and LHCA type agencies
- Print function for agency profile
- Agency Spreadsheet updates to add fields
- Log in landing page for inactive agencies

HUD Users:

- HUD POC Dashboard – New Alerts for assigned active agencies, performance reviews, and agency profile validation.
- Agency Profile – HUD Affiliation tab HUD Office and Date Joined HUD fields moved
- HUD POC Assignment History
- Auto-population of HUD POC
- Agency Review minor revisions to screen for scheduling and editing
- Agency Status addition of 180 days option for Conditional and Inactive status
- Funding Report update to include grant ID
- Tracking changes to 9902 on-time and closing dates
- Management of performance review risk levels

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

Legal Notice/Privacy Act screen display upon log in

Upon logging into HCS, all users will receive a pop-up window displaying the Legal Notice and Privacy Act Statement.

The screenshot shows a pop-up window titled "HOUSING COUNSELING SYSTEM" with a sub-header "MANAGEMENT REPORTS". The main content is "Legal Notice & Privacy Act Statement". The text includes sections for Legal Notice, Authorities, Principal Purpose, Routine Use, and SORN ID/URL. An "OK" button is located at the bottom right of the window.

HOUSING COUNSELING SYSTEM

MANAGEMENT REPORTS

Legal Notice & Privacy Act Statement

Legal Notice: U.S. Department of Housing and Urban Development: This computer system, including all related equipment, networks, and network devices (specifically including Internet access) contains data belonging to the U.S. Government, and is provided for authorized U.S. Government use only. Access requires the use of one or more Multi-factor Authentication methods, which ties the account to an authorized user, validated by either account number and password or PIV ID card and PIN that must never be shared with anyone at any time. Doing so increases the risk of access by an unauthorized person posing as you. Authorized personnel will treat information about HUD computing resources (i.e., system names, technologies employed, etc.) as sensitive and will not reveal it to unauthorized personnel. This computer may be monitored for all lawful purposes, including ensuring that its use is authorized, to facilitate protection against unauthorized access, and to verify operational security. During monitoring, information may be examined, recorded, copied and used for authorized purposes. All activities and information, including personal information, associated with the use of this system may be monitored. Use of this computer system, authorized or unauthorized, constitutes consent to monitoring. Misuse or unauthorized use may subject you to criminal prosecution. Evidence of unauthorized use collected during monitoring may be used for administrative, criminal, or other adverse action. Use of this system implies understanding of these terms and conditions. Authority: U.S. Federal Criminal Code (18 USC 1030. Fraud and Related Activity with Computers) and HUD Information Technology Security Policy 2400.25.

Authorities: The Office of Housing Counseling was established as a standing office within HUD's Office of Housing by the Dodd-Frank Wall Street Reform and Consumer Protection Act of 2008, and is fully described in 42 U.S.C. § 3533(g); Section 106(a) of the 1968 Housing Act; 12 U.S.C. § 1701x. The Housing and Community Development Act of 1987, 42 U.S.C. § 3543(a), and Debt Collection Improvement Act of 1996, 31 U.S.C. § 7701 (c), authorize the submission of the SSN. HUD is authorized to collect this information by Title 1, Section 1 of the National Housing Act (Pub. L. 479, 48 Stat. 1246, 12 U.S.C. § 1701 et seq.)

Principal Purpose: The mission of the Office of Housing Counseling (OHC) is to manage and oversee the HUD Housing Counseling Program to provide individuals and families with the knowledge they need to obtain, sustain, and improve their housing. OHC will accomplish this mission by supporting and overseeing the counseling services administered by a strong national network of HUD approved housing counseling agencies and counselors.

Routine Use: The information collected by the Housing Counseling Agencies will be used by OHC to generate required reports to the Secretary and Congress and to conduct analysis to monitor and provide guidance to program participants. The information collected by the Agencies and transmitted to HUD will not be disclosed to any third-party outside of the Agency and HUD. All measures will be taken to safeguard the client data collected and appropriate protocols will be followed when transmitting data to HUD.

Agencies will post updated information as needed and at a minimum post their activity reports using HUD-9902 format every 90 days. Client data will be reported with their HUD-9902 reports for the purpose to conduct analysis and to generate the HUD-9902 report directly from the client data.

The Application for Approval as a Housing Counseling Agency uses the Form HUD-9900 to collect agency information. This is manually entered into HCS, and thus creates the agency profile.

Disclosure: Information required for new Agency application is mandatory. Failure to provide complete application data as described by HUD-9900 will affect application from approval denying Agency to participate in the HUD's Housing Counseling program.

Information reported such as HUD-9902, client and Agency profile by Housing Counseling agencies is required on a continuous basis. Failure to submit required information in a timely manner to the Housing Counseling System will negatively affect NOFA grant awards and jeopardize agency's status in the HUD's Housing Counseling program.

SORN ID/URL: Currently published in the Federal Register at: https://www.hud.gov/sites/documents/DOC_15184.PDF

OK

Click the **OK** button to accept and continue to HCS.

Legal Notice/Privacy Act displays on 9902

The display of the 9902 has been updated to include the Legal Notice and Privacy Act Statement.

Disclosure Statement:

Authorities: The Office of Housing Counseling was established as a standing office within HUD's Office of Housing by the Dodd-Frank Wall Street Reform and Consumer Protection Act of 2008, and is fully described in 42 U.S.C. § 3533(g); Section 106(a) of the 1968 Housing Act; 12 U.S.C. § 1701x. The Housing and Community Development Act of 1987, 42 U.S.C. § 3543(a), and Debt Collection Improvement Act of 1996, 31 U.S.C. § 7701(c), authorize the submission of the SSN. HUD is authorized to collect this information by Title 1, Section 1 of the National Housing Act (Pub. L. 479, 48 Stat. 1246, 12 U.S.C. § 1701 et seq.)

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Disclosure: Information reported such as HUD-9902, client and Agency profile by Housing Counseling agencies is required on a continuous basis. Failure to submit required information in a timely manner to the Housing Counseling System will negatively affect NOFA grant awards and jeopardize agency's status in the HUD's Housing Counseling program.

SORN ID/URL: Currently published in the Federal Register at:

https://www.hud.gov/sites/documents/DOC_15184.PDF

Public reporting burden for this collection of information is estimated to average .03 hours per response. With universal CMS use, the HUD-9902 will be populated automatically based on electronic client files. Consequently, the estimated burden hour per response includes only the time necessary to send the document electronically (estimated time: 2 minutes). This agency may not conduct, sponsor, and a person is not required to, an information collection unless that collection displays a valid OMB control number.

This information is collected in connection with HUD's Housing Counseling Program and will be used by HUD to measure the performance and effectiveness of HUD's Housing Counseling Program. In addition, the data will help to determine that the grant applicant meets the requirements of the Notice of Fund Availability (NOFA) and to assign points for awarding grant funds on a competitive and equitable basis. The information is required to obtain funding under Section 106 of the Housing and Community Development Act of 1974. The information is considered sensitive and is protected by the Privacy Act which requires the records to be maintained with appropriate administrative, technical, and physical safeguards to ensure their security and confidentiality.

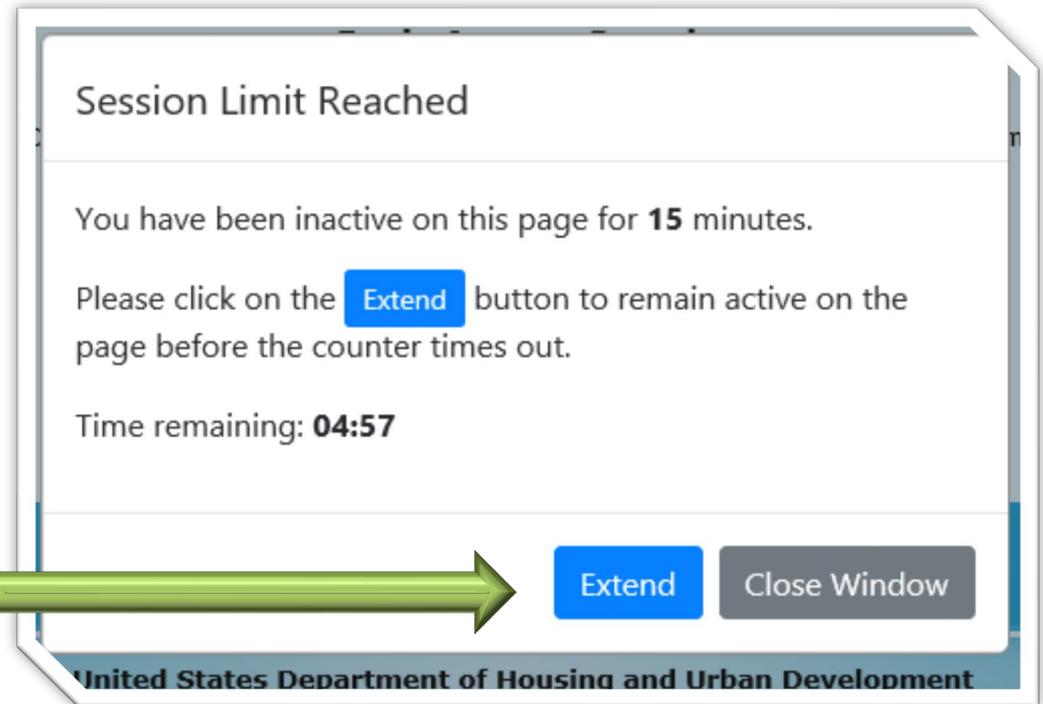
Session Termination After Inactivity

If a user is logged into HCS but is inactive for 15 minutes, the user will receive an alert that they are inactive and must take action to remain logged in.

The alert will indicate the user has been inactive and provides a 5-minute timeframe for the user to opt to remain logged in.

If the user does not respond to the alert they will automatically be logged out after 5-minutes. The user will have to log back into access HCS.

Click the **Extend** button to remain logged into HCS.



9902 – Subagency Reporting Status Display on Parent 9902

A parent agency with a consolidated 9902 of their sub-agency reporting will now display information on the sub-agencies and their reporting status.

The text that indicates the number of agencies reporting of the total sub-agencies is now a link.

Click the link to view the reporting status of all the sub-agencies.



September 09, 2020

Housing Counseling Agency Activity Report U.S. Department of Housing and Urban Development OMB Approval No: 2502-0261
Office of Housing Counseling Federal Housing Commissioner Exp. 01/31/2020

1. Counseling Agency Name	2. Reporting Period and Budget
Agency Name ACME AGENCY Agency ID: Agency Type: National Intermediary 123 Main St. WASHINGTON, DC 20002-4684	Reporting Period: Quarter 1 Fiscal Year: 2020 From: 10/01/2019 To: 12/31/2019 Total budget, all sources: \$0.00 Total HUD Funding, all grants: \$3,000,000.00
Reporting 6 of 98 total sub-agencies	
HUD Funding Sources Budget not entered 2019-1 COMP 10/01/2018 - 03/31/2020 Notice of Funding Availability (NOFA) for the Department's Fiscal Year 2019 Comprehensive Housing Counseling Grant Program FR-6300-N-33 Funding: \$0.00 Projection: HUD Approved; 12-17-2019	
2020-1 COMP 10/01/2019 - 03/31/2021 Extended to 06/30/2021 Two Phase Comprehensive grant Funding: \$3,000,000.00 Projection: Not Entered	

PDF Version Close Show HUD Grant Activity

3. Ethnicity of Households (select only one)				
	TOTAL All Activities	All HUD Funded Activities	Calculated HUD Housing Counseling Activities	Projected HUD Housing Counseling Activities
a. Hispanic	111	7	0.00	
b. Not Hispanic	150	00	0.00	

9902 – Subagency Reporting Status Display on Parent 9902

The Sub-Agency Reporting Status screen will then display. The screen:

- 1. Lists all the sub-agencies associated with the parent.
- 2. Identifies the 9902 reporting status for each sub-agency.
- 3. Links to an excel file to download the data.

Agency ID	Agency Name	Agency Type	Reporting Status
80003	ACME SUBGRANTEE	LHCA	Late
80004	ACME SUBGRANTEE	LHCA	Late
80017	ACME SUBGRANTEE	LHCA	Late
80020	ACME SUBGRANTEE	LHCA	Not Reported
80173	ACME SUBGRANTEE	Sub Grantee	Not Reported
80207	ACME SUBGRANTEE	Sub Grantee	Not Reported
80229	ACME SUBGRANTEE	LHCA	Not Reported
80548	ACME SUBGRANTEE	Sub Grantee	Not Reported
80553	ACME SUBGRANTEE	Sub Grantee	Not Reported
80597	ACME SUBGRANTEE	LHCA	Not Reported

9902 – Subagency Reporting Status Display on Parent 9902

1. Click the agency ID link to open the agency’s profile in a new window.
2. Each column can be sorted by clicking the column heading. Click the Reporting Status heading to see the list in order of the agency’s 9902 reporting status. Reporting status may display as:

- **On-Time** – reported by the due date
- **Late** – reported after the due date
- **Not Reported** – agency has not reported
- **Not Required** – agency status indicates that the agency was not active during the reporting period and are not required to report a 9902.

Agency ID	Agency Name	Agency Type	Reporting Status
80890	ACME SUBGRANTEE	LHCA	On Time
81022	ACME SUBGRANTEE	Sub Grantee	On Time
82774	ACME SUBGRANTEE	Sub Grantee	On Time
84827	ACME SUBGRANTEE	LHCA	Not Required
80020	ACME SUBGRANTEE	LHCA	Not Reported
80173	ACME SUBGRANTEE	Sub Grantee	Not Reported
80207	ACME SUBGRANTEE	Sub Grantee	Not Reported
80229	ACME SUBGRANTEE	LHCA	Not Reported
80548	ACME SUBGRANTEE	Sub Grantee	Not Reported
80553	ACME SUBGRANTEE	Sub Grantee	Not Reported

3. Click the Excel icon download the data.



9902 Reporting Automated Email Notifications

HCS will send an automated email when an agency has not reported their 9902 when:

- It is 7 days prior to the due date and the agency has not reported
- It is 1 day after the due date and the agency has not reported.

Emails will be sent to the email addresses of the three contacts listed on the Personnel tab on the agency profile and the agency's HUD POC.



Agency Profile Sub-Agency(s)

Personnel **Contact Information** HUD Affiliation Counselor/Client

Agency ID: 80754 Validate Agency Profile
ACME AGENCY Last Validated on 10/03/2019 (Next Validation Required by 01/01/2020)

Agency Manager

Salutation: Mrs User ID: MX0754 Business Title: HUD Contact

First Name: * Jenny Middle Init: Last Name: * Calendar

Agency Manager Phone Number: 555-555-1234 Ext:

Agency Manager Cell Phone Number:

Agency Manager Email: * jcalendar@acmeagency.org

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 Email Address for the Agency Manager.

Agency Senior Executive

Salutation: Ms Business Title: HUD Contact

First Name: Susan Last Name: Grimes

Agency Senior Executive Phone Number: 555-555-9876 Ext:

Agency Senior Executive Cell Phone Number:

Agency Senior Executive Email: * sgrimes@acmeagency.org

After entering email address, click the button to validate.

Agency Contact for HUD Use

Salutation: Mr Business Title: HUD Contact

First Name: John Last Name: Torrance

Agency POC Phone Number: 555-555-8765 Ext:

Agency POC Cell Phone Number:

Agency POC Email: * jtorrance@acmeagency.org

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

9902 Reporting Automated Email Notifications – Agency Contact Sample Emails

7 days prior to due date and the agency has not reported:

From: hcs@hud.gov <hcs@hud.gov>
Sent: Thursday, July 23, 2020 11:04 AM
To: jcalendar@acmeagency.org; sgrimes@acmeagency.org; Jtorrance@acmeagency.org
Subject: HUD-9902 Reporting Notification

HUD-9902 - Reminder to Agency Not Reported [ACME SUBGRANTEE] [899999]

LYDIA'S HOUSE [899999],

This is a reminder that the HUD-9902 report is due on: 07/31/2020. FY[2020] / Qtr[3].

Review HUD's Housing Counseling 9902 Online Toolkit for more information on accurately completing and submitting form HUD-9902 or contact the HUD POC if you have any questions: [HUD POC Name] (Phone: 555-555-8888 / Email: HUD-POC-Name@hud.gov).

Note: This email was sent from a notification-only email address that cannot accept incoming e-mail. Please do not reply to this message.

1 day after due date and the agency has not reported:

From: hcs@hud.gov <hcs@hud.gov>
Sent: Saturday, August 1, 2020 3:58 PM
To: jcalendar@acmeagency.org; sgrimes@acmeagency.org; Jtorrance@acmeagency.org
Subject: HUD-9902 Reporting Notification

HUD-9902 Agency Not Reported Notification [ACME SUBGRANTEE] [899999]

ACME SUBGRANTEE [899999],

The HUD-9902 report due date 07/30/2020 has past and agency should immediately report: FY[2020] / Qtr[3].

Review HUD's Housing Counseling 9902 Online Toolkit for more information on accurately completing and submitting form HUD-9902 or contact the HUD POC if you have any questions: [HUD POC Name] (Phone: 555-555-8888 / Email: HUD-POC-Name@hud.gov).

Note: This email was sent from a notification-only email address that cannot accept incoming e-mail. Please do not reply to this message.

9902 Reporting Automated Email Notifications – HUD POC Sample Emails

7 days prior to due date and the agency has not reported:

HUD POCs will get one email listing all assigned agencies that have not reported.

From: hcs@hud.gov <hcs@hud.gov>
Sent: Friday, July 24, 2020 3:58 PM
To: HUD-POC-NAME@hud.gov
Subject: HUD-9902 Reporting Notification

Not Reported 9902 Agencies											
HUD-9902 Agency Not Reported - Reminder - One Week to Deadline											
The report is due on: 07/30/2020. FY[2020] / Qtr[3]											
Agency ID:	89999	Agency Name:	ACME SUBGRANTEE	Agency Type	LHCA	Manager Name:	Tara MaClay	Manager Email:	tmaclay@acmeagency.org	Manager Phone:	555-555-7445
Agency ID:	89998	Agency Name:	ACME SUBGRANTEE	Agency Type	Affiliate	Manager Name:	Jenny Calendar	Manager Email:	jcalendar@acmeagency.org	Manager Phone:	555-555-7486
Agency ID:	89997	Agency Name:	ACME SUBGRANTEE.	Agency Type	Sub Grantee	Manager Name:	Susan Grimes	Manager Email:	sgrimes@acmeagency.org	Manager Phone:	555-555-1598

1 day after due date and the agency has not reported:

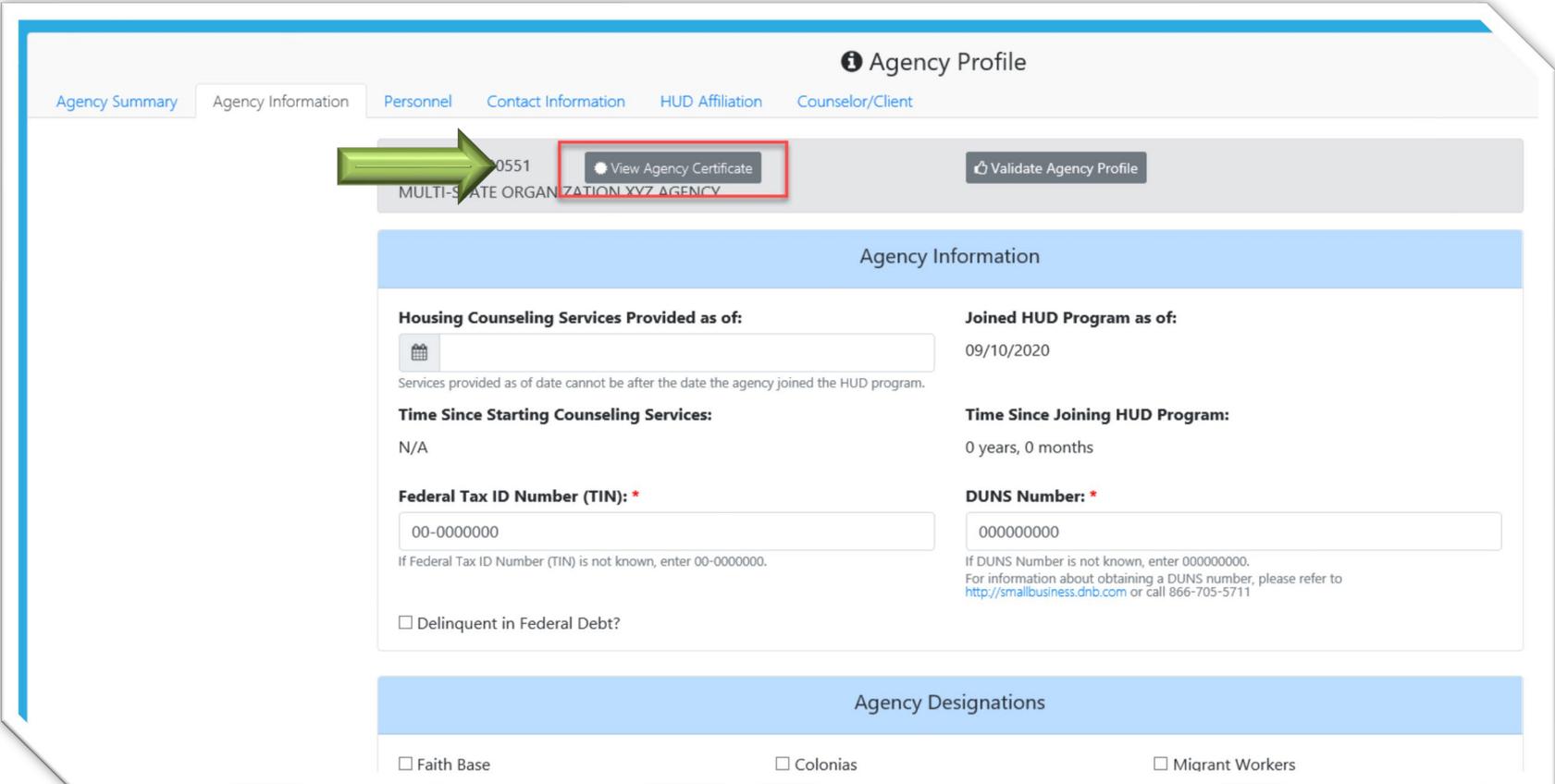
From: hcs@hud.gov <hcs@hud.gov>
Sent: Saturday, August 1, 2020 3:58 PM
To: HUD-POC-NAME@hud.gov
Subject: HUD-9902 Reporting Notification

Not Reported 9902 Agencies											
HUD-9902 Agency Not Reported Notification											
The due date: 07/31/2020 has past and agency should immediately report. FY[2020] / Qtr[3]											
Agency ID:	89999	Agency Name:	ACME SUBGRANTEE	Agency Type	LHCA	Manager Name:	Tara MaClay	Manager Email:	tmaclay@acmeagency.org	Manager Phone:	555-555-7445
Agency ID:	89998	Agency Name:	ACME SUBGRANTEE	Agency Type	Affiliate	Manager Name:	Jenny Calendar	Manager Email:	jcalendar@acmeagency.org	Manager Phone:	555-555-7486
Agency ID:	89997	Agency Name:	ACME SUBGRANTEE.	Agency Type	Sub Grantee	Manager Name:	Susan Grimes	Manager Email:	sgrimes@acmeagency.org	Manager Phone:	555-555-1598

Agency Certificate Available for Download

For MSO and LHCA type agencies, the agency’s certificate can be downloaded from the agency’s profile screen.

On the agency profile, at the top of the Agency Information, Personnel, Contact Information, and HUD Affiliation tabs the **View Agency Certificate** button displays. Click the button to download the agency’s certificate in PDF.



Agency Certificate Available for Download – Sample Certificate

After clicking the **View Agency Certificate** button, follow the browser prompts to download the PDF file.

Certificates are available for active MSO and LHCA type agencies only. Any MSO or LHCA that has an Inactive or Terminated status will not have a certificate.



HUD CERTIFICATE

APPROVED HOUSING COUNSELING AGENCY

The U. S. Department of Housing and Urban Development approves the following entity as a Multi-State Organization.

MULTI-STATE ORGANIZATION XYZ AGENCY (90551)
123 Main St.
Anytown, FL 33101

The agency has:

- (1) met the Department's initial approval criteria
- (2) submitted an acceptable housing counseling work plan to serve its target community
- (3) satisfied sustain operations in compliance with HUD's program requirements

The Department approved this housing counseling agency to provide the following types of housing counseling in accordance with their counseling work plan:

Counseling:

- Financial Management/Budget Counseling
- Home Improvement and Rehabilitation Counseling
- Mortgage Delinquency and Default Resolution Counseling
- Pre-purchase Counseling

Workshop:

- Financial, Budgeting, and Credit Workshops
- Non-Delinquency Post Purchase Workshops
- Predatory Lending Education Workshops

Approval Start Date: **October 1, 2019**

Approval End Date: **October 1, 2021**

Kisha J Wright

Kisha J. Wright
Director, Oversight and Accountability
Office of Housing Counseling

Agency Profile Print Function

All 6 tabs of the agency profile can be printed by clicking the print icon that displays on the Agency Summary tab.



HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

➔
🖨️

Agency Profile

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

MULTI-STATE ORGANIZATION XYZ AGENCY (Fiscal Year 2020)

Acknowledgment

Agency ID:	90551	Agency Type:	Multi-State Organization
Agency Services Begin:	N/A	Agency Status:	Approved
		CMS:	HCS

Performance Review

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

➕ Add New
☰ View All

Subject	Author	Date	Fiscal Year	Edit	Delete
No Comments available.					

HUD-9902 Submission Summary

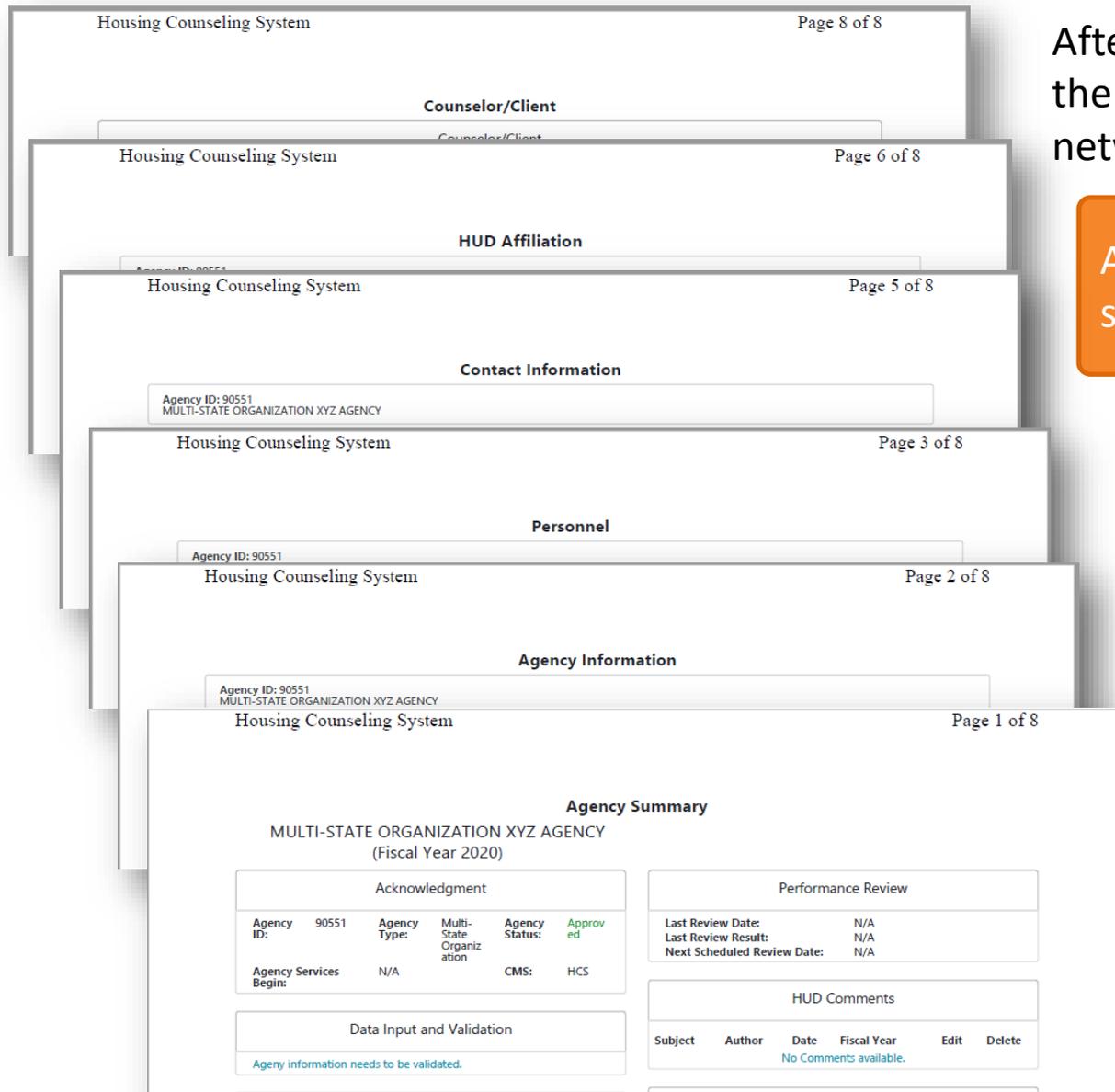
Fiscal Year - 2020
[View Submission History](#)

2020 - Quarter 1	access 9902	NOT REPORTED
2020 - Quarter 2	access 9902	NOT REPORTED
2020 - Quarter 3	access 9902	NOT REPORTED
2020 - Quarter 4	access 9902	NOT REPORTED

HUD Grant Award

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

Agency Profile Print Function



After clicking the **Print** button, follow the browser prompts to print to a network printer.

All 6 tabs will print. Each tab starts on a new page.

Advanced Agency Search – Agency Spreadsheets

The **Basic Agency Spreadsheet** has been updated to include:

- Date agency began providing housing counseling services
- Date agency joined HUD
- Previous HUD POC assigned to agency

The **Agency Review Spreadsheet** has been updated to include the agency type.

The Agency Spreadsheets are available on the results screen after entering search criteria in the **Advanced Agency Search**. Click the button for the desired spreadsheet and follow the browser prompts to download the file.

Agency List
130 Agency(s) Found

Search Criteria: • Fiscal Year: 2020
• Agency Name: ACME

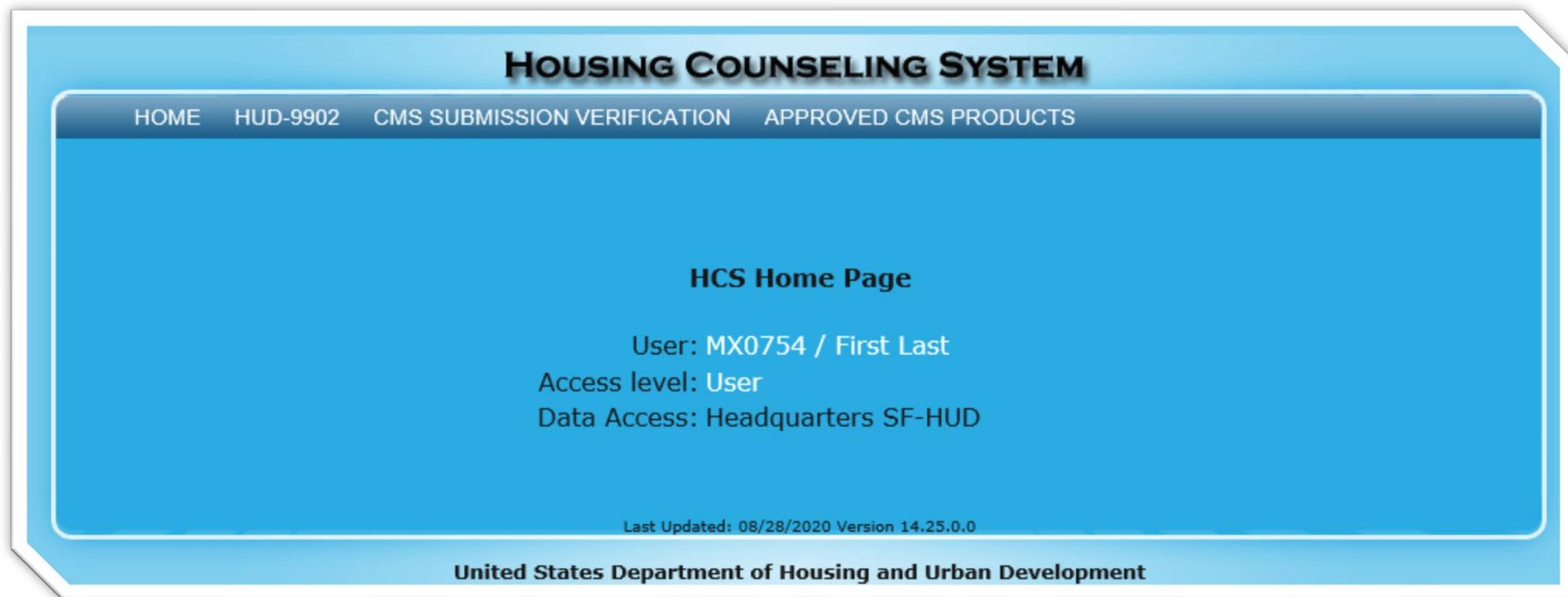
[New Agency](#) | [Agency List](#) | [Invalid Emails](#) | [Valid Emails](#)

[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
80754	ACME AGENCY	123 Main St. WASHINGTON	DC	National Intermediary	Approved	09/09/2020	H18798	Y
82170	ACME Agency	6700 N May Ave Oklahoma City	OK	LHCA	Approved	02/27/2020	C57569	N
81639	ACME INTERMEDIARY	9 Great Jones St New York	NY	National Intermediary	Conditional	06/01/2020	C57569	Y
80057	ACME LOCAL AGENCY	9800 Normandy Blvd Jacksonville	FL	LHCA	Approved	06/01/2020	C57569	Y

Log in landing page for inactive agencies

When an agency user of an active agency logs into HCS, the agency's profile screen is displayed. If the agency is in Inactive status, the user has limited functionality and can only access functions to submit the 9902 report. In this case the user will receive the home page for an inactive agency. Use the main navigation links to access the HUD-9902 module.



HUD POC Dashboard Updates (HUD Users Only)

Additional features have been added to the HUD POC Dashboard:

1. Assigned Active Agencies
2. Agency Profile Never Validated
3. Agency PR Due within 90 Days & Overdue
4. Upcoming & Incomplete Scheduled Reviews

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

User Information

User Name: **George Smith**
User ID: **H18798**
Access Level: **Program Manager**
Data Access: **All Offices**

Assigned Agencies: [View 38](#)

1 Assigned Active Agencies: [View 37](#)

POC Alerts - Require Immediate Action

9902 Not Reported - FY 2020 Qtr 4 : [View 30](#)

Approved/Participating Status Expiring in 30 Days : [View 15](#)

Agencies With Conditional Status : [View 7](#)

Inactive Agencies : [View 1](#)

2 Agency Profile Never Validated : [View 4](#)

3 Agency Profile Validation Overdue : [View 33](#)

Client Data Missing - FY 2020 : [View 27](#)

Agency PR Due within 90 Days & Overdue : [View 2](#)

4 Upcoming & Incomplete Scheduled Reviews : N/A

HUD POC Dashboard Updates (HUD Users Only)

- Assigned Active Agencies** lists all agencies assigned to the HUD POC that have an active status. This list is different from the Assigned Agencies list in that it will not list the Inactive or Terminated agencies that are assigned to the HUD POC.

The screenshot displays the 'HOUSING COUNSELING SYSTEM' dashboard. At the top, a navigation bar includes links for HOME, AGENCY, HUD-9902, NOFA, USER, MANAGEMENT, and REPORTS. The main content is divided into two panels. The left panel, titled 'User Information', shows details for George Smith (User ID: H18798, Access Level: Program Manager, Data Access: All Offices). It lists 'Assigned Agencies' (38) and 'Assigned Active Agencies' (37), with a green circle containing the number '1' next to the latter. The right panel, titled 'POC Alerts - Require Immediate Action', lists several alert categories with corresponding 'View' buttons: 9902 Not Reported - FY 2020 Qtr 4 (30), Approved/Participating Status Expiring in 30 Days (15), Agencies With Conditional Status (7), Inactive Agencies (1), Agency Profile Never Validated (4), Agency Profile Validation Overdue (33), Client Data Missing - FY 2020 (27), Agency PR Due within 90 Days & Overdue (2), and Upcoming & Incomplete Scheduled Reviews (N/A).

HUD POC Dashboard Updates (HUD Users Only)

- Agency Profile Never Validated** lists any active agency assigned to the HUD POC that has never validated their agency profile information. This will typically be new agencies that have not yet accessed HCS.

The screenshot displays the 'HOUSING COUNSELING SYSTEM' dashboard. At the top, a navigation bar includes links for HOME, AGENCY, HUD-9902, NOFA, USER, MANAGEMENT, and REPORTS. The main content is divided into two panels. The left panel, titled 'User Information', shows details for George Smith (User ID: H18798, Access Level: Program Manager, Data Access: All Offices). It includes buttons to view assigned agencies (38) and assigned active agencies (37). The right panel, titled 'POC Alerts - Require Immediate Action', lists several alert categories with corresponding 'View' buttons: 9902 Not Reported - FY 2020 Qtr 4 (30), Approved/Participating Status Expiring in 30 Days (15), Agencies With Conditional Status (7), Inactive Agencies (1), Agency Profile Never Validated (4), Agency Profile Validation Overdue (33), Client Data Missing - FY 2020 (27), Agency PR Due within 90 Days & Overdue (2), and Upcoming & Incomplete Scheduled Reviews (N/A). A green circle with the number '2' is overlaid on the 'Agency Profile Never Validated' alert.

Alert Category	Count
9902 Not Reported - FY 2020 Qtr 4	30
Approved/Participating Status Expiring in 30 Days	15
Agencies With Conditional Status	7
Inactive Agencies	1
Agency Profile Never Validated	4
Agency Profile Validation Overdue	33
Client Data Missing - FY 2020	27
Agency PR Due within 90 Days & Overdue	2
Upcoming & Incomplete Scheduled Reviews	N/A

HUD POC Dashboard Updates (HUD Users Only)

3. Agency PR Due within 90 Days & Overdue lists agencies whose next review deadline is due within 90 days or is overdue.

POC Alerts – Require Immediate Action

- 9902 Not Reported - FY 2020 Qtr 4 : [View 30](#)
- Approved/Participating Status Expiring in 30 Days : [View 15](#)
- Agencies With Conditional Status : [View 7](#)
- Inactive Agencies : [View 1](#)
- Agency Profile Never Validated : [View 4](#)
- Agency Profile Validation Overdue : [View 33](#)
- 3** Client Data Missing - FY 2020 : [View 27](#)
- 3** Agency PR Due within 90 Days & Overdue : [View 2](#)
- Upcoming & Incomplete Scheduled Reviews : N/A

The list of agencies provides the date of the last review and the date the next review is due. The next review date is determined by the risk level assigned to the agency during the last review.

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

Agency PR Due within 90 Days & Overdue

Show 15 entries Search:

Agency ID	Agency Name	Agency Type	Current Status	Last Review Date	Next PR Due Date	Due Days
82153	SILVER LAMP AGENCY	LHCA	Approved	07/01/2019	07/01/2020	18
84492	SUNNY DAYS, INC.	LHCA	Approved	09/30/2019	09/30/2020	-39

Showing 1 to 2 of 2 entries Previous 1 Next

HUD POC Dashboard Updates (HUD Users Only)

4. **Upcoming & Incomplete Scheduled Reviews** lists agencies whose next review is scheduled to occur within the next 30 days or whose next review is scheduled for a date in the past and has not been completed in HCS.

POC Alerts – Require Immediate Action

9902 Not Reported - FY 2020 Qtr 4 [View 30](#)

Approved/Participating Status Expiring in 30 Days [View 15](#)

Agencies With Conditional Status [View 7](#)

Inactive Agencies [View 1](#)

Agency Profile Never Validated [View 4](#)

Agency Profile Validation Overdue [View 33](#)

Client Data Missing - FY 2020 [View 27](#)

Agency PR Due within 90 Days & Overdue [View 2](#)

4

Upcoming & Incomplete Scheduled Reviews [View 2](#)

The list of agencies provides the date the upcoming review was scheduled and how many days there are from the current date to the review schedule date. A negative due days indicate the scheduled date is in the past.

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

Upcoming & Incomplete Scheduled Reviews

Show 15 entries

Agency ID	Agency Name	Agency Type	Current Status	Scheduled Review Date	Due Days
82153	SILVER LAMP AGENCY	LHCA	Approved	09/29/2020	18
84492	SUNNY DAYS, INC.	LHCA	Approved	08/03/2020	-39

Showing 1 to 2 of 2 entries

Previous 1 Next

Agency Profile – HUD Affiliation tab HUD Office and Date Joined HUD fields moved

The **HUD Office Agency Assigned To** and **Joined HUD Program As Of** fields have been moved from the Agency Information section to the HUD Information section on the HUD Affiliation tab.

New Screen

Agency Profile Sub-Agency(s)

Personnel Contact Information HUD Affiliation Counselor/Client

Agency ID: 80754 Validate Agency Profile
Last Validated on 10/03/2019 (Next Validation Required by 01/01/2020)

Agency Information

Agency Name: *
ACME AGENCY

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

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

HUD Information

HUD POC Name: Humphrey, Kelly **POC Phone:** 555-456-6541 **POC Email:** hcs@salientcrgt.com POC User Profile View HUD POC Assignment History

Change HUD POC to: Humphrey, Kelly **HUD Office Agency Assigned to:** Headquarters SF-HUD **Joined HUD Program as of:** * 04/01/2012

Old Screen

Agency Profile

Contact Information HUD Affiliation Counselor/Client

Agency ID: 80081 Validate Agency Profile

Agency Information

Agency Name: *
TEST AGENCY

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

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

HUD Office Agency Assigned to: Headquarters SF-HUD **Joined HUD Program as of:** * 06/14/2012

HUD POC Assignment History (HUD Users Only)

The Agency Profile – HUD Affiliation tab has been updated to display the history of the HUD POCs that have been assigned to the agency.

Click the **View HUD POC Assignment History** button found in the **HUD Information** section of the screen.

The screenshot shows the 'Agency Profile' interface for 'Sub-Agency(s)'. It features several tabs: 'Personnel', 'Contact Information', 'HUD Affiliation' (selected), and 'Counselor/Client'. The 'Agency ID' is 80754, and the profile was last validated on 10/03/2019. The 'Agency Information' section includes the 'Agency Name' (ACME AGENCY), 'Type of Agency' (National Intermediary), and 'Parent Org' (N/A). The 'HUD Information' section displays the 'HUD POC Name' (Adams, Mary), 'POC Phone' (777-555-0808), and 'POC Email' (hcs@salientcrgt.com). A red box highlights the 'View HUD POC Assignment History' button, which is pointed to by a green arrow.

HUD POC Assignment History (HUD Users Only)

After clicking the **View HUD POC Assignment History** button a screen displays showing the history of the agency’s HUD POC for each fiscal year since the agency was entered in HCS.

The HUD POC Assignment History can be used to identify previous HUD POCs assigned to the agency in the even the current HUD POC has questions.

HUD POC Assignment History - Agency 80754

Show entries Search:

Fiscal Year	HUD POC Name	HUD POC Email	HUD POC Phone
2020	Mary Adams	hcs@salientcrgt.com	777-555-0808
2019	Michael Jones	hcs@salientcrgt.com	777-999-1234
2018	Michael Jones	hcs@salientcrgt.com	777-999-1234
2017	Michael Jones	hcs@salientcrgt.com	777-999-1234
2016	Michael Jones	hcs@salientcrgt.com	777-999-1234
2015	Michael Mann	hcs@salientcrgt.com	777-523-2185
2014	Michael Mann	hcs@salientcrgt.com	777-523-2185
2013	Michael Mann	hcs@salientcrgt.com	777-523-2185
2012	Elizabeth Bennett	hcs@salientcrgt.com	202-444-2222
2011	Elizabeth Bennett	hcs@salientcrgt.com	202-444-2222

Showing 1 to 10 of 11 entries Previous 2 Next

Auto-populate Change to HUD POC Assignment (HUD Users Only)

An agency's HUD POC will be auto-populated in the following scenarios:

1. When changing the HUD POC of a parent agency, the HUD POC of the organizations Affiliates, Sub Grantees, and Branches will also be updated to the new HUD POC.
2. When changing the parent agency of an Affiliate, Sub Grantee, or Branch the HUD POC of the agency will automatically be populated with the HUD POC of the new parent agency. If the Affiliate or Sub Grantee also has Branches, the HUD POC of those Branches will also be updated.
3. When adding a new Affiliate, Sub Grantee, or Branch the HUD POC will default to the HUD POC of the parent agency that is entered on the Add New Agency screen.

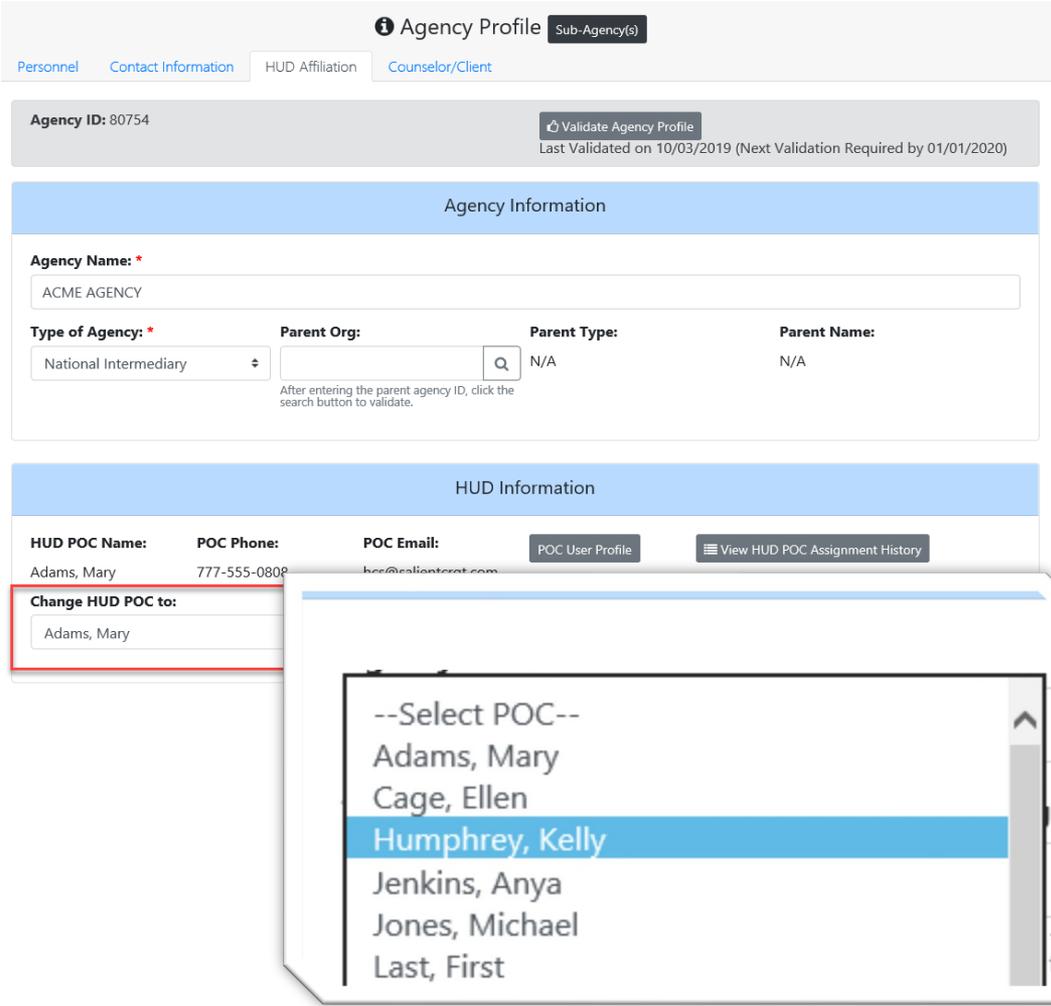
If an LHCA is a sub agency to an Intermediary, MSO, or SHFA the HUD POC of the LHCA will not be changed.

Auto-populate Change to HUD POC Assignment (HUD Users Only)

- 1. When changing the HUD POC of a parent agency, the HUD POC of the organizations Affiliates, Sub Grantees, and Branches will also be updated to the new HUD POC.

A HUD POC is changed on the Agency Profile HUD Affiliation tab.

In this example the HUD POC is being changed from Adams, Mary to Humphrey, Kelly.



Auto-populate Change to HUD POC Assignment (HUD Users Only)

After the HUD POC is changed on the parent agency, the same HUD POC will also be assigned to any Affiliate, Sub Grantee, or Branch in the parent agency's organization.

Parent Agency

Agency Information

Agency Name: *
ACME AGENCY

Type of Agency: *
National Intermediary

Parent Org: **Parent Type:** N/A **Parent Name:** N/A

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

HUD Information

HUD POC Name: Humphrey, Kelly **POC Phone:** 555-456-6541 **POC Email:** hcs@salientcrgt.com [POC User Profile](#)

Change HUD POC to: Humphrey, Kelly **HUD Office Agency Assigned to:** Headquarters SF-HUD

When the Intermediary's HUD POC was changed to Humphrey, Kelly, the HUD POC for the Sub Grantee was automatically changed to Humphrey, Kelly.

Sub Grantee

Agency Information

Agency Name: *
ACME SUBGRANTEE

Type of Agency: *
Sub Grantee

Parent Org: 80754 **Parent Type:** National Intermediary **Parent Name:** ACME AGENCY

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

HUD Information

HUD POC Name: Humphrey, Kelly **POC Phone:** 555-456-6541 **POC Email:** hcs@salientcrgt.com [POC User Profile](#) [View HUD POC Assignment History](#)

Change HUD POC to: Humphrey, Kelly **HUD Office Agency Assigned to:** Atlanta (HOC) **Joined HUD Program as of:** * 04/01/2004

Auto-populate Change to HUD POC Assignment (HUD Users Only)

- When changing the parent agency of an Affiliate, Sub Grantee, or Branch the HUD POC of the agency will automatically be populated with the HUD POC of the new parent agency.

Parent agency is changed on the Agency Profile HUD Affiliation tab.

In this example the Sub Grantee's parent agency is being changed from ACME AGENCY to XYZ PARENT AGENCY.

This screenshot shows the 'Agency Profile' page for Agency ID: 80173. The 'HUD Affiliation' tab is active. Under 'Agency Information', the 'Agency Name' is 'ACME SUBGRANTEE' and the 'Type of Agency' is 'Sub Grantee'. The 'Parent Org' field contains '80754', the 'Parent Type' is 'National Intermediary', and the 'Parent Name' is 'ACME AGENCY'. A red box highlights the parent information fields. A 'Validate Agency Profile' button is visible at the top right, with a note that the last validation was on 12/30/2019 and the next is required by 03/29/2020.

This screenshot shows the same 'Agency Profile' page, but the 'Parent Org' field now contains '90537' and the 'Parent Name' is 'XYZ PARENT AGENCY'. The 'Agency Name' remains 'ACME SUBGRANTEE' and the 'Type of Agency' is still 'Sub Grantee'. A red box highlights the updated parent information fields. The 'Validate Agency Profile' button and validation note are also present.

Auto-populate Change to HUD POC Assignment (HUD Users Only)

After the Parent Agency is changed, the HUD POC that is currently assigned to the new parent agency, will be assigned to the Affiliate, Sub Grantee, or Branch.

New Parent Agency

Agency ID: 90537 [Validate Agency Profile](#)

Agency Information

Agency Name: XYZ PARENT AGENCY

Type of Agency: National Intermediary

Parent Org: **Parent Type:** N/A **Parent Name:** N/A

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

HUD Information

HUD POC Name: Smith, George **POC Phone:** 202-2294 **POC Email:** hcs@salientcrgt.com [POC User Profile](#) [View HUD POC Assignment History](#)

Change HUD POC to: Smith, George **HUD Office Agency Assigned to:** Headquarters SF-HUD **Joined HUD Program as of:** 04/01/2004

If the sub agency has branches, the HUD POC of the branches will also be updated to the HUD POC of the new parent agency.

Sub Grantee Whose Parent Agency Changed

Agency ID: 80173 [Validate Agency Profile](#)
Last Validated on 12/30/2019 (Next Validation Required by 03/29/2020)

Agency Information

Agency Name: ACME SUBGRANTEE

Type of Agency: Sub Grantee

Parent Org: 90537 **Parent Type:** National Intermediary **Parent Name:** XYZ PARENT AGENCY

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

HUD Information

HUD POC Name: Smith, George **POC Phone:** 202-402-2294 **POC Email:** hcs@salientcrgt.com [POC User Profile](#) [View HUD POC Assignment History](#)

Change HUD POC to: Smith, George **HUD Office Agency Assigned to:** Atlanta (HOC) **Joined HUD Program as of:** 04/01/2004

If the sub agency is an LHCA, the HUD POC will not be changed.

Auto-populate Change to HUD POC Assignment (HUD Users Only)

- When adding a new Affiliate, Sub Grantee, or Branch the HUD POC will default to the HUD POC of the parent agency that is entered on the Add New Agency screen.

A new agency is added by going to AGENCY > ADD NEW AGENCY.

In this example a new Branch Inter Agency is being added to HCS. When the parent agency is entered, the HUD Office POC field automatically defaults to the HUD POC of the parent agency that was entered.

New Agency Profile

Agency Name: *
NEW ACME AGENCY

Type of Agency: *
Branch Inter Agency

Parent Org:
80754

Parent Type:
National Intermediary

Parent Name:
ACME AGENCY

HUD Office POC:
Humphrey, Kelly

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

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

Agency Review Minor Revisions to Screen for Scheduling and Editing (HUD Users Only)

Minor changes have been made to the **Agency Review** section of the Agency Profile – HUD Affiliation tab:

1. The name of the **Schedule Next Review** button has been changed to **Add/Schedule Next Review**.
2. For an upcoming review, the **Edit Scheduled Review** button has been changed to **Edit Upcoming Review**.
3. To edit a completed review, the user must first click the **See All Completed Reviews** button.

Agency Review Minor Revisions to Screen for Scheduling and Editing (HUD Users Only)

1. The name of the **Schedule Next Review** button has been changed to **Add/Schedule Next Review**.

Old Screen

Agency Review(s)

Next Review Deadline: 07/08/2023

+ Schedule Next Review

New Screen

Agency Review(s)

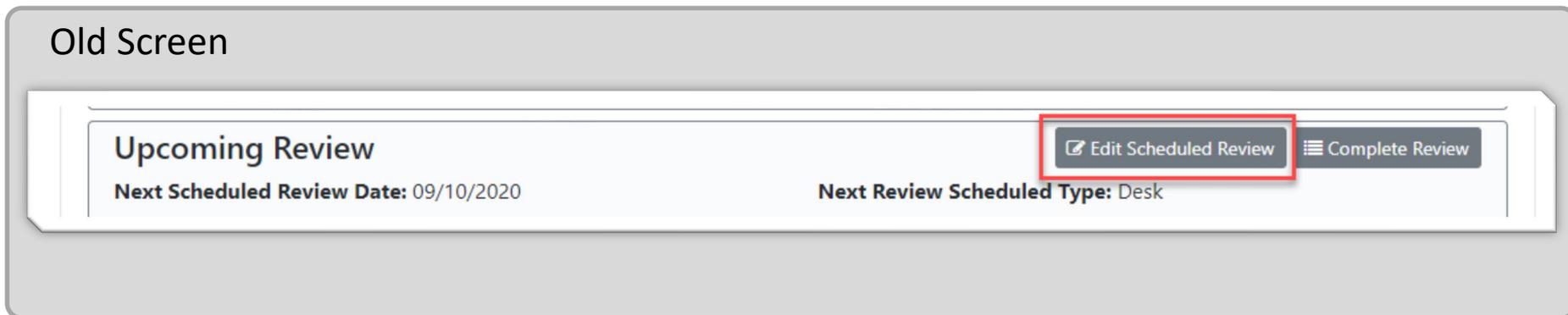
Next Review Deadline: N/A

+ Add/Schedule Next Review

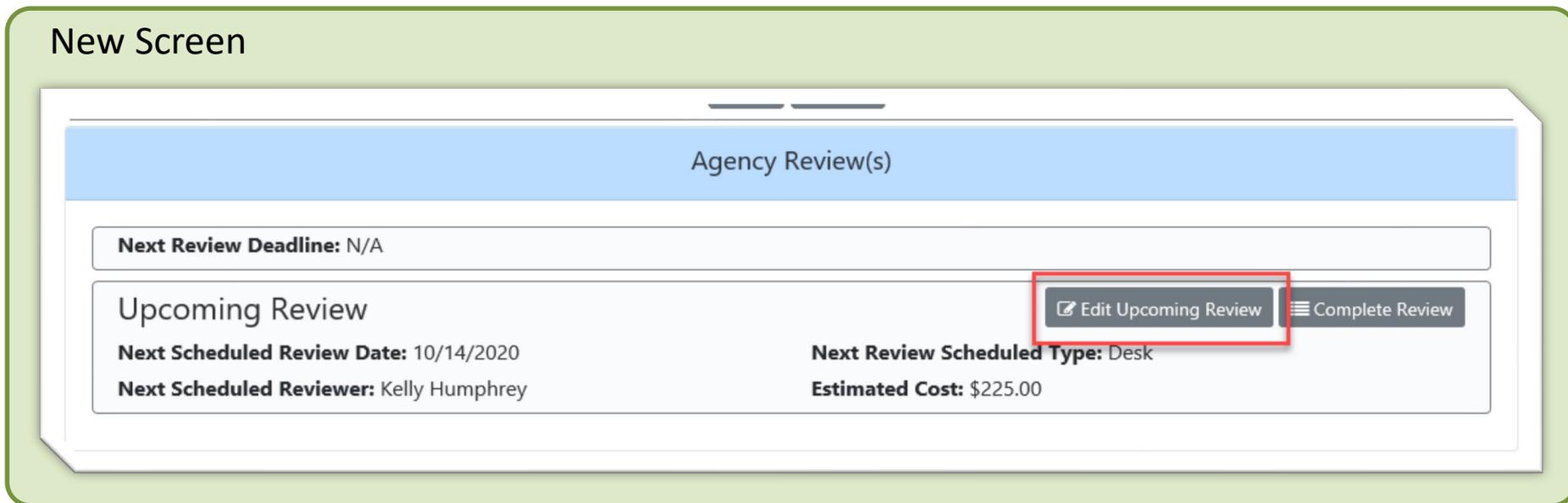
Agency Review Minor Revisions to Screen for Scheduling and Editing (HUD Users Only)

- For an upcoming review, the **Edit Scheduled Review** button has been changed to **Edit Upcoming Review**.

Old Screen



New Screen



Agency Review Minor Revisions to Screen for Scheduling and Editing (HUD Users Only)

3. To edit a completed review, the user must first click the **See All Completed Reviews** button.

Old Screen

Agency Review(s)

Next Review Deadline: 07/08/2023 Schedule Next Review

Completed Review Edit Completed Review See All Completed Reviews

Last Review Completed: 07/08/2020 Risk: Tier 1 (3 Year Approval - Low - 15 pts or less)

The Edit Completed Review button no longer displays on the main screen.

New Screens

Agency Review(s)

Next Review Deadline: 09/15/2023 Add/Schedule Next Review

Completed Review See All Completed Reviews

Last Review Completed: 09/15/2020
Date Review Conducted: 09/14/2020
Reviewer: Kelly Humphrey
Review Type: Desk

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

Agency Review History

Show 10 entries Search:

Last Review Completed	Date Review Conducted	Reviewer	Review Type	Review Result	Risk	Estimated Cost	Edit Review
09/15/2020	09/14/2020	Kelly Humphrey	Desk	No Findings	Tier 1 (3 Year Approval - Low - 15 pts or less)	\$225.00	Edit Review

Showing 1 to 1 of 1 entries Previous 1 Next

Agency Status Addition of 180 Days Option for Conditional and Inactive Status (HUD Users Only)

When changing an agency's status to Conditional or Inactive, the user now has the option to select a time frame of 180 days.

The For field is not required. It can be used as tool to automatically set the **Up To Date** based on the number of days selected.

Agency Status Form

Status: *
Conditional

As Of: *
09/01/2020

For:
--Select Period--
15 Days
30 Days
45 Days
60 Days
90 Days
120 Days
180 Days
--Select Reason--

Comment:

Agency Status Form

Status: *
Conditional

As Of: *
09/01/2020

For:
180 Days

Up To: *
02/28/2021

Reason: *

Funding Report Update to Include Grant ID (HUD Users Only)

The Grant ID column has been added to the results screen for the Funding Report Search.

The screenshot displays the 'Funding Report Search' interface. At the top, there are three tabs: 'Search Criteria', 'Search Results Per Funding Record', and 'Search Results Per Agency'. The 'Search Criteria' tab is active, showing 'Criteria: NOFA: 2019-1 COMP'. Below this, there are two dropdown menus: 'NOFA: All' and 'AGENCY TYPE: All'. A 'Show 15 entries' dropdown is also present. The results section shows 'Showing 1 to 15 of 93 entries'. A table with the following columns is displayed: Agency ID, Agency Name, Grant Appl ID, City, and Count. The 'Grant Appl ID' column is highlighted with a red box. The table contains two rows of data.

Agency ID	Agency Name	Grant Appl ID	City	Count
89999	ACME SUBGRANTEE	HC190011002	Anytown	ULSTI
89998	ACME SUBGRANTEE	HC190011002	Anytown	[NO IN

System Control Panel - Track Changes to 9902 On-Time and Close dates (HUD Users Only)

The system control panel has been updated to require a comment be added whenever a 9902 on-time or close date has been changed. The **Show History** button will allow a user with the Program Administrator role to view the change history.

The screenshot shows the '9902 Suspense Dates' interface. It includes sections for 'Current FY - 2020' and 'Previous FY - 2019', each with 'On-Time Credit' and 'Close Date' fields for four quarters. A 'Show History' button is highlighted in the 2020 section. A red box highlights the 'Current FY - 2020 Comment:' field. A 'Save' button is at the bottom. A modal window titled 'Suspense 9902 History' is open, displaying a table of changes.

9902 Suspense Dates

On-Time Credit: As of this date, a submitted 9902 report is marked as ON-TIME. After this date, submitted 9902 report is marked as LATE.
Close Date: As of this date, a 9902 report can be entered. After this date, the system is closed to accepting any further 9902 reports.

Current FY - 2020	On-Time Credit	Close Date
2020 - 1st Quarter	01/30/2020	12/31/2020
2020 - 2nd Quarter	04/30/2020	12/31/2020
2020 - 3rd Quarter	07/30/2020	12/31/2020
2020 - 4th Quarter	09/13/2020	04/30/2021

Current FY - 2020 Comment:

Previous FY - 2019

Previous FY - 2019	On-Time Credit	Close Date
2019 - 1st Quarter	03/01/2019	12/31/2019
2019 - 2nd Quarter	04/30/2019	12/31/2019
2019 - 3rd Quarter	07/31/2019	12/31/2019
2019 - 4th Quarter	12/31/2019	

Previous FY - 2019 Comment:

Save

Suspense 9902 History

Show 5 entries

Fiscal Year	1st Quarter On-Time	1st Quarter Close	2nd Quarter On-Time	2nd Quarter Close	3rd Quarter On-Time	3rd Quarter Close	4th Quarter On-Time	4th Quarter Close	Comment	Author	Date
2019	03/01/2019	12/31/2019	04/30/2019	12/31/2019	07/31/2019	12/31/2019	12/31/2019	04/30/2020	test	George Smith	09/15/2020
2020	01/30/2020	12/31/2020	04/30/2020	12/31/2020	07/30/2020	12/31/2020	09/13/2020	04/30/2021	N/A	George Smith	09/15/2020
2019	03/01/2019	12/31/2019	04/30/2019	12/31/2019	07/31/2019	12/31/2019	12/31/2019	04/30/2020	N/A	First Last	09/15/2020
2020	01/30/2020	12/31/2020	04/30/2020	12/31/2020	07/30/2020	12/31/2020	09/13/2020	04/30/2021	Testing Releas...	First Last	09/15/2020
2019	03/01/2019	12/31/2019	04/30/2019	12/31/2019	07/31/2019	12/31/2019	12/31/2019	04/30/2020	N/A	First Last	09/15/2020

Showing 1 to 5 of 16 entries

Previous 1 2 3 4 Next

Click **Show History** to view the change history screen.

System Control Panel - Management of Performance Review Risk Levels (HUD Users Only)

A **Review** tab has been added to the system control panel to allow HUD to manage performance review risk level options. The screen allows HUD to:

- 1. Add a new Risk Level
- 2. Edit an existing Risk Level

System Control Panel

Access Approval Period Grant Process Control Review Version

Review Risk Levels

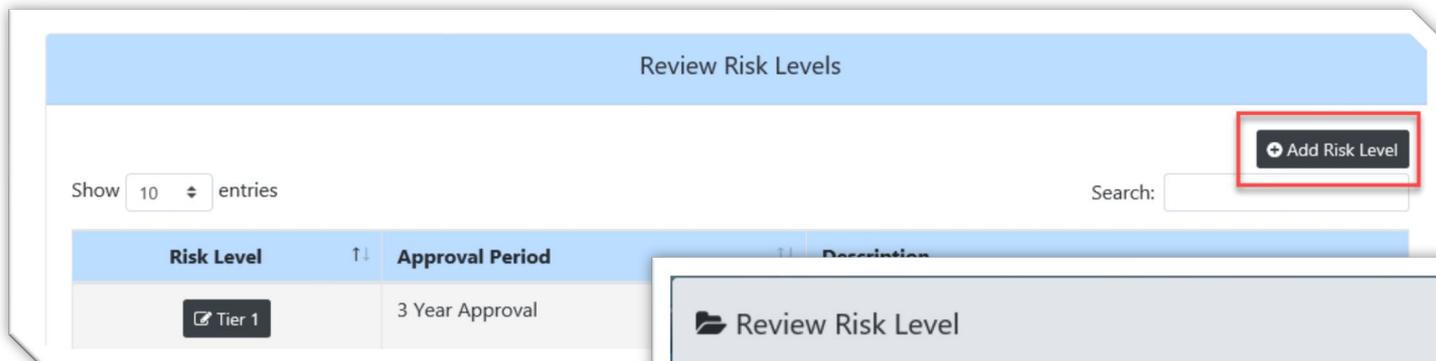
Show 10 entries Search:

Risk Level	Approval Period	Description
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

Showing 1 to 4 of 4 entries Previous 1 Next

System Control Panel - Management of Performance Review Risk Levels (HUD Users Only)

1. Add a new Risk Level – Click the Add Risk Level button.



The screenshot shows the 'Review Risk Level' modal form. It has a title bar with a close button. The form contains three required fields: 'Risk Level *', 'Approval Period *', and 'Risk Description *'. The 'Approval Period' field is a dropdown menu with the text '--Select Period--'. At the bottom right, there are 'Save' and 'Cancel' buttons.

The Review Risk Level screen will display.

Enter:

- The Risk Level Name (Tier #)
- Approval Period (1 – 5 years)
- Risk Description

Click the **Save** button.

System Control Panel - Management of Performance Review Risk Levels (HUD Users Only)

- 1. Add a new Risk Level** – The new risk level will then display as a **Risk** option when completing an agency review.

The screenshot shows a web form titled "Complete Agency Review" with a close button (X) in the top right corner. The form is divided into several sections:

- Agency Review Completion Requirements:** A list of six checkboxes, all of which are currently unchecked:
 - 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: ***: A date picker field showing 11/25/2020.
- Date Review Completed: ***: A date picker field showing 09/15/2020. Below this field is the text "Date All Agency Review Requirements Completed."
- Type of Review: ***: A dropdown menu with "On-Site" selected.
- Reviewer: ***: A dropdown menu with "Humphrey, Kelly" selected.
- Review Result: ***: A dropdown menu with "--Select Result--" selected.
- Risk: ***: A dropdown menu with a blue header "--Select Risk Level--" and four options:
 - 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)

At the bottom of the form, there are "Apply" and "Cancel" buttons. The bottom of the page shows a "Status" field and some navigation icons.

System Control Panel - Management of Performance Review Risk Levels (HUD Users Only)

1. Edit a Risk Level – Click the **Tier #** button to edit an existing Risk.

Review Risk Levels

Show 10 entries Search:

Risk Level	Approval Period	Description
<input type="button" value="Tier 1"/>	3 Year Approval	Low - 15 pts or less
<input type="button" value="Tier 2"/>	2 Year Approval	Medium/Moderate - 16 - 20 pts
<input type="button" value="Tier 3"/>	1 Year Approval	

Review Risk Level

Risk Level *

Approval Period *

Risk Description *

On the Review Risk Level screen make the desired changes and click the **Save** button.

System Control Panel - Management of Performance Review Risk Levels (HUD Users Only)

- 1. Edit a Risk Level** – The changes to the Risk level will then display in the **Risk** menu when completing an agency review.

If a Risk level is changed, the display of the risk will change for all reviews that previously had that risk tier level assigned.

If the Approval period is changed, it will not impact the approval period of any reviews that previously had that tier level assigned.

The screenshot displays the 'Complete Agency Review' form. The form includes several sections: 'Agency Review Completion Requirements' with six checkboxes, 'Date Review Conducted' (11/25/2020), 'Date Review Completed' (09/15/2020), 'Type of Review' (On-Site), 'Reviewer' (Humphrey, Kelly), and 'Review Result' (--Select Result--). A red box highlights the 'Risk' dropdown menu, which is open and shows the following 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). The 'Apply' and 'Cancel' buttons are visible at the bottom of the dropdown menu.