

HCS 14.28.0.0 Release

Changes to HUD User Interface for HCS V14.28.0.0

An update to HCS is planned for release on June 26, 2021, and includes the following functional and user interface changes:

All Users:

- New Agency Designations for Rural Area and Urban Area
- Advanced Agency Search Spreadsheets – Counselor Certification Status and Funded Status added to all 3 Spreadsheets
- Agency Certified Counselor Status – Change Processing of Certified Counselor Indicator
- Add Navigation on the 9902 Projection screen to the Budget Allocation screen
- User Log-in Changes

HUD Users:

- Menu Item Name change from Projections to Projections and Budget Allocation
- User Profile - Add Designation of Office Supervisor and OHC Office for HUD Users
- Agency Non-Profit Status Verification
- Funding Report Search – Columns Added for Agency Budgets
- Automated Status Renewal Based on NOFA Performance Period
- Allow Agencies to be Unlinked from their Parent Agency for Status Updates
- New Reasons for Terminated Status
- Edge Chromium Compatibility - CMS Management

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

New Agency Designations for Rural Area and Urban Area

Two new agency designations have been added to identify agencies serving communities in rural and urban areas. The designations can be selected on the Agency Profile – Agency Information tab. The new designations will not be available in CMS until FY 2022.

Agency Profile

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

Agency ID: 80169 [View Agency Certificate](#) [Validate Agency Profile](#)
ACME LOCAL AGENCY Last Validated on 10/18/2019 (Next Validation Required by 01/16/2020)

Agency Information

Housing Counseling Services Provided as of:
06/15/1971
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:
49 years, 11 months

Time Since Joining HUD Program:
17 years, 2 months

Federal Tax ID Number (TIN): *
62-0797293
If Federal Tax ID Number (TIN) is not known, enter 00-0000000.

DUNS Number: *
095056594
If DUNS Number is not known, enter 000000000.
For information about obtaining a DUNS number, please refer to <http://smallbusiness.duns.com> or call 866-706-5711

☐ Delinquent in Federal Debt?

Agency Designations

☐ Faith Base ☐ Colonias ☐ Migrant Workers ☒ Rural Area ☒ Urban Area

Types of Counseling Method

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

Additional Languages Provided

☐ Arabic ☐ Czech ☐ Hindi ☐ Polish ☐ Turkish
☐ Cambodian ☒ English ☐ Hmong ☐ Portuguese ☐ Ukrainian
☐ Cantonese ☐ Farsi ☐ Indonesian ☐ Russian ☐ Vietnamese
☐ Chinese Mandarin ☐ French ☐ Italian ☐ Spanish ☐ Swahili ☐ ASL
☐ Creole ☐ German ☐ Korean ☐ Other

[Save](#) [Cancel](#)

If applicable select the appropriate designation for the agency and click **Save**.

HCS 14.28.0.0 Release - Functional and User Interface Changes

Advanced Agency Search Spreadsheets – Counselor Certification Status and Funded Status added to all 3 Spreadsheets

Columns for an agency's counselor certification status and an agency's funded status have been added to the three spreadsheets found on the Advanced Agency Search results screen.

- Basic Agency Spreadsheet
- Agency Contact Spreadsheet
- Agency Review Spreadsheet

Counselor Certification status indicates if an agency has at least one certified counselor.

Agency Funded status indicates an agency is funded by at least one HUD grant.

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

Agency List

130 Agency(s) Found

Search Criteria: Fiscal Year: 2021 Agency Name: ACME

New Agency | Agency List | Invalid Emails | Valid Emails

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	Conditional	06/09/2021	system	N/A
82170	ACME Agency	6700 N May Ave Oklahoma City	OK	LHCA	Conditional	06/09/2021	system	Y
81639	ACME INTERMEDIARY	9 Great Jones St New York	NV	National Intermediary	Conditional	06/09/2021	system	N/A
80057	ACME LOCAL AGENCY	9800 Normandy Blvd Jacksonville	FL	LHCA	Approved	09/29/2020	system	Y
80071	ACME LOCAL AGENCY	180 W Girard Ave Philadelphia	PA	LHCA	Conditional	09/29/2020	system	Y
80097	ACME LOCAL AGENCY	984 Hickory Dr. Farrell	PA	LHCA	Conditional	06/09/2021	system	Y
80103	ACME LOCAL AGENCY	268 Cucumber Tree Ln Chicago	IL	LHCA	Approved	09/29/2020	system	Y
80169	ACME LOCAL AGENCY	351 Sycamore St. Knoxville	TN	LHCA	Conditional	09/29/2020	system	Y
80196	ACME LOCAL AGENCY	751 Larch Ln Birmingham	AL	LHCA	Conditional	06/09/2021	system	Y
80249	ACME LOCAL AGENCY	357 Peachtree Ln Atlanta	GA	LHCA	Conditional	03/01/2021	C57569	Y
80283	ACME LOCAL AGENCY	258 Magnolia St. Greenville	SC	LHCA	Conditional	09/29/2020	system	Y
80339	ACME LOCAL AGENCY	634 Cherry Ave HOUSTON	TX	LHCA	Conditional	09/29/2020	system	Y

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD
Agency ID	Agency Name	Agency	Agency	Agency Funding Status	Start Date	End Date	Status	Agency	HUD POC	HUD POC	HUD POC	HUD POC	Previous	Previous	Previous	Previous	Parent A	Parent A	Parent A	Name of Faith	Bad	Colonias	Migrant	Rural Ar	Urban Ar	Service	Date	Id	Certified Counselor
80003	ACME SUBGRANTEE	LHCA	Conditions Y		06/29/2002	07/26/2002	System-S	NY	First	Last	215-861-7	hcs@salik Michael	Jones	777-999-1	hcs@salik	80754	ACME AG National In Counselor N	N	N	N	N	N	N	N	09/30/200	04/01/200	Yes		
80004	ACME SUBGRANTEE	LHCA	Approved Y		06/13/2001	06/12/2002	Recertifier	NY	First	Last	502-618-6	hcs@salik Michael	Jones	777-999-1	hcs@salik	80754	ACME AG National In Counselor N	N	N	N	N	N	N	N	04/01/200	04/01/200	Yes		
80017	ACME SUBGRANTEE	LHCA	Approved Y		03/28/2001	03/27/2002	Recertifier	AR	Mary	Adams	777-555-5	hcs@salik Michael	Jones	777-999-1	hcs@salik	80754	ACME AG National In HCS	N	N	N	N	N	N	N	06/28/197	04/01/200	Yes		
80020	ACME SUBGRANTEE	LHCA	Conditions Y		10/14/2001	07/26/2002	System-S	TX	Mary	Adams	777-555-5	hcs@salik First	Last	702-366-2	hcs@salik	80754	ACME AG National In Counselor N	N	N	N	N	N	N	N	05/17/200	05/17/200	Yes		

Agency Certified Counselor Status – Change Processing of Certified Counselor Indicator

The process that updates an agency's certified counselor status has been changed to:

- Always mark Intermediaries, MSO, and SHFA with sub-agencies as Not Applicable.
- Always mark Branch type agencies as N or Y based on the counselor data provided from FHAC.

This is a change from the previous version that always marked Intermediaries as N or Y and Branch type agencies as Not Applicable.

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

Agency Profile Sub-Agency

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

ACME AGENCY (Fiscal Year 2021)

Acknowledgment

Agency ID:	80754	Agency Type:	National Intermediary	Agency Status:	Conditional
Agency Services Begin:	01/01/1997	CMS:	CounselorMax		

Data Input and Validation

Last Data Input By:	system
Last Data Input Date:	06/09/2021
Last Validated By:	MX0754
Last Validated Date:	10/03/2019
Next Validation NLT Data:	(01/01/2020)

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:	Not Applicable	Total YTD Clients Reported:	0

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

Agency Profile

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

ACME BRANCH SUB GRANTEE (Fiscal Year 2021)

Acknowledgment

Agency ID:	90371	Agency Type:	Branch Sub Grantee	Agency Status:	Conditional
Parent Name:	ACME SUBGRANTEE	Parent Type:	Sub Grantee		
Parent ID:	83828	CMS:	HCS		
Agency Services Begin:	09/18/2017				

Data Input and Validation

Last Data Input By:	H18798
Last Data Input Date:	06/14/2021
Last Validated By:	M80371
Last Validated Date:	11/12/2019
Next Validation NLT Data:	(02/10/2020)

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

Add Navigation on the 9902 Projection screen to the Budget Allocation screen

The button has been added to the 9902 Projection screen that will navigate to the agency's budget allocation screen for the same grant.

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

Grant Award Agency's Budget Allocation - NOFA 2020-1 - COMPREHENSIVE COUNSELING

Instructions: ?

Agency Name: ACME INTERMEDIARY HUD Office: Headquarters SF-HUD Application ID: 0011-010
 Agency Type: National Intermediary Grant Type: COMPREHENSIVE COUNSELING Agency ID: 81639
 GTR: Matilda, Wormwood L Last update: 06/14/21 01:06 Fiscal Year: 2020
 Funding Start Date: 10/01/2019 Funding End Date: 03/31/2021
 Year 1 Start Date: 10/01/2019 Year 1 End Date: 09/30/2020

Calculated Projections		Total Negotiated HUD Funded Activities Projection
Projected Number of HUD Funded Clients	Grant vs Budget Ratio = N/A Cost per Client = 3,586 Clients Application Projection = N/A	0

BUDGET		FUNDS RETAINED BY GRANTEE	SUB-ALLOCATION COSTS
Total Budget:	\$ 0.00	Cost of Managing Network:	To Be Sub-Allocated: \$ 650,000.00
Award:	\$ 650,000.00	Indirect Costs:	Sub-Allocated: \$ 0.00
Grant Ratio:		Total Funds Retained by Grantee:	FY 2020 Total Allocation: \$ 0.00
Agency Total Budget < HUD Grant			FY 2020 Balance: \$ 650,000.00
			FY 2021 Allocation: \$ 0.00
			Remaining Funds: \$ 650,000.00

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

Print | Cancel | Close this window | 9902 Projection

Qtr 1	Qtr 2	Qtr 3	Qtr 4	Status	Sub-Agency	Agency ID	Agency Type	# of Counselors	# of Projected Clients	Sub-Allocation	Agency Total Budget
				Active	ACME LOCAL AGENCY	80196	LHCA	0	0	\$ 0.00	\$ 684,352.00
				Active	ACME LOCAL AGENCY	80197	LHCA	0	0	\$ 0.00	\$ 838,001.00

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

9902 Projection NOFA 2020-1 COMPREHENSIVE COUNSELING Grant

Agency Name: ACME INTERMEDIARY Agency ID: 81639 Agency Type: National Intermediary
 HUD Office: Headquarters SF-HUD Grant Type: COMPREHENSIVE COUNSELING Application ID: 0011-010
 Funding Start Date: 10/01/2019 Award Amount: \$650,000.00 FY 2020 Projection: 0
 Funding End Date: 03/31/2021 Total Negotiated HUD Funded Activities Projection: Not Entered FY 2021 Projection: 0
 Total Projection: 0

Status: NOT ENTERED Submitted to HUD: By: HUD Approved: By:

Add Comment: * Characters Remaining: 250

Save Comment Only

If there are unsaved changes to the projections, please use the 'Save as Draft' or 'Submit To HUD' buttons to save/submit the data and comment.

	Fiscal Year 2020: 10/01/2019 - 09/30/2020	Fiscal Year 2021: 10/01/2020 - 03/31/2021	Total
Save As Draft Submit To HUD Return To Budget Allocation			
* Comment required			
3. Households Receiving Group Education by Purpose			
a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	0	0	0
b. Completed predatory lending,			

User Log-in Changes

A new log in screen has been implemented.

Enter your HCS **User ID** and **Password** then click Sign On.



HOUSING COUNSELING SYSTEM

User ID Password **SIGN ON** [Forgot Your Password?](#) [Forgot Your User ID?](#)

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. § 1701i; 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.

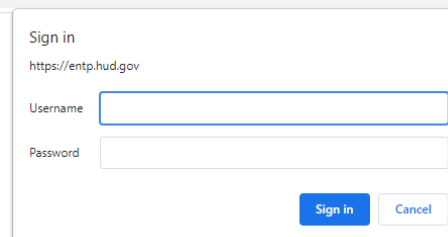
Information reported such as HUD-9902, client and Agency profile by Housing Counseling agencies is required on a continuous basis. Failure to submit required information in a timely manner to the Housing Counseling System will negatively affect NOFA grant awards and jeopardize agency's status in the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

SORN ID/URL: Currently published in the Federal Register at: <https://www.govinfo.gov/content/pkg/FR-2008-10-21/pdf/E8-24938.pdf>

Authority: Section 203, National Housing Act, Pub. L. 73-479; Section 255, National Housing Act, Pub. L. 100-242; 42 U.S.C. 3543 - Sec. 3543 - Preventing fraud and abuse in Department of Housing and Urban Development programs; U.S. Federal Criminal Code 18 USC 1030 - Fraud and Related Activity with Computers; and HUD Information Technology Security Policy 2400.25.

United States Department of Housing and Urban Development

Old Log-in



Sign in
https://entp.hud.gov

Username

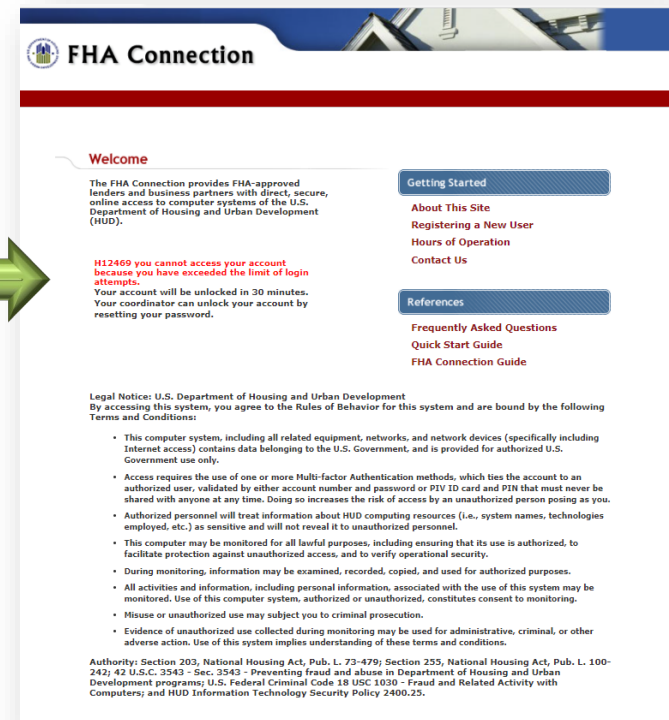
Password

Sign in **Cancel**

User Log-in Changes

If a user enters 3 unsuccessful log in attempts, the User ID will be locked for 30 minutes. The FHAC screen indicating the user's account has been locked will display. The user should submit a password reset request.

Click the **Forgot Your Password** link to go to the HUD Exchange for information on how to submit the password reset request.



HOUSING COUNSELING SYSTEM

Login Failed. Please Reenter User ID and Password.

SIGN ON

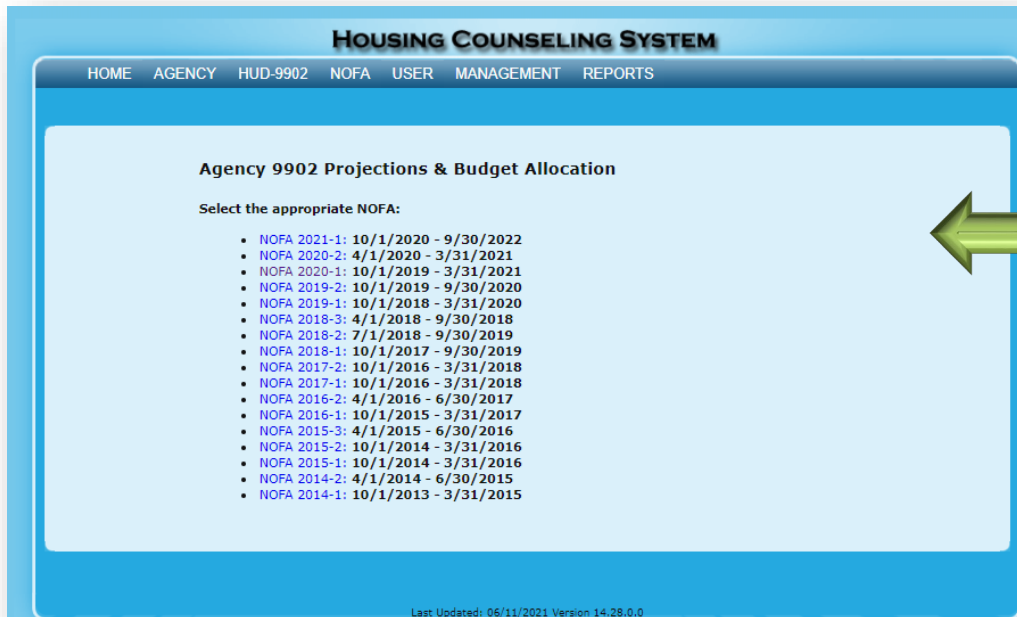
[Forgot Your Password?](#)
[Forgot Your User ID?](#)

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.

Authority: 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 2009, and is fully described in 42 U.S.C. 53532(c); Section 106(c) of the 1968

Menu Item Name change from Projections to Projections and Budget Allocation

The Projections link under the **HUD-9902** menu has been renamed to **Projections & Budget Allocation**.



The link navigates to the Agency 9902 Projections & Budget Allocation screen. Click the grant associated grant to access either the Budget Allocation or 9902 Projections for a particularly agency.

User Profile - Add Designation of Office Supervisor and OHC Office for HUD Users

The User Profile page for HUD and Contractor staff has been updated to include the user's **OHC Office** and designation as a **Supervisor/Manager**.

HOUSING COUNSELING SYSTEM

HOME AGENCY HUD-9902 NOFA USER MANAGEMENT REPORTS

User Profile

Instructions: Fill out the form below, review your information for accuracy, and click the OK button. * indicates required information.

User ID: C58896 Authorized for 2021

First Name: Joe *

Mid Init:

Last Name: Smith *

New Password: Password must:
• Contain exactly 8 characters.
• Contain at least one upper case letter.
• Contain at least one special character.
• Contain at least one number.
[Reset Password](#)

Phone: 888-888-8888 * Extension: Format: 999-999-9999 99999 (up to 5 digits)

Email Address: hcs@salientcrgt.com *

HUD Office: Headquarters SF-HUD *

OHC Office: Please select OHC office * ☐ Supervisor/Manager

Access Level: Please select OHC office *

Access Data: Contractor Specifies whether the user is able to access data from all offices or from a

DAS

Non-OHC

OCB

OOA

OPGA

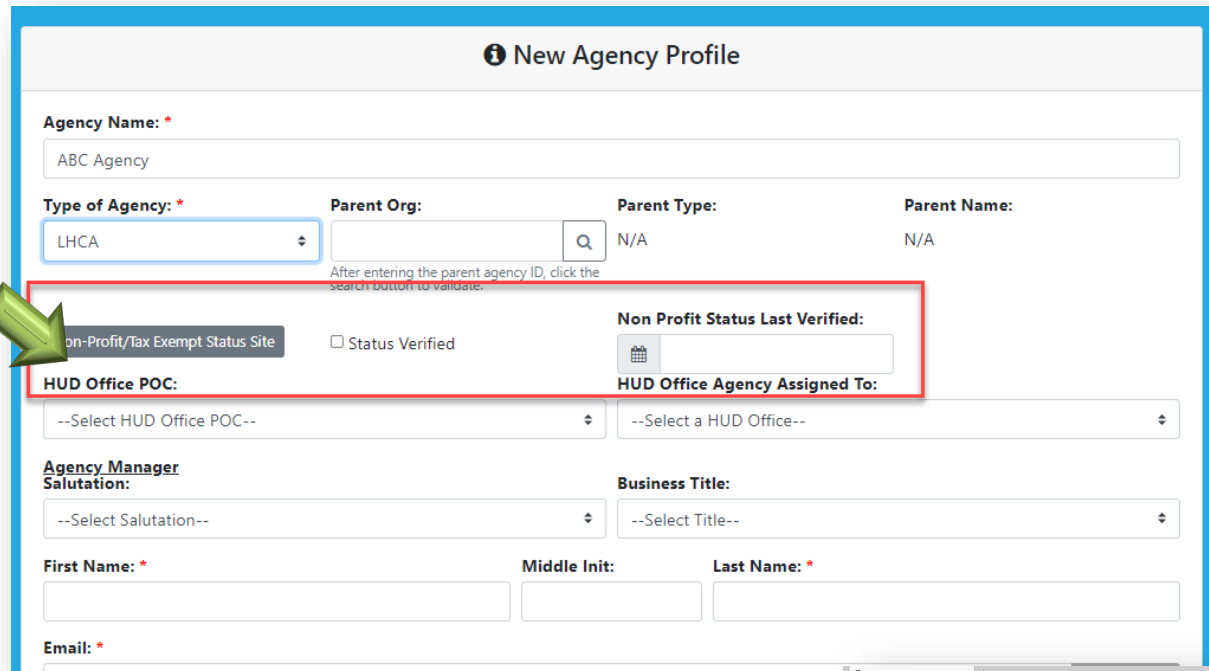
United States Department of Housing and Urban Development

Select the user's **OHC Office**. If the User has an ID that starts with a C, **Contractor** should be selected.

If the user is a supervisor or manager in their office, check the **Supervisor/Manager** check box.

Agency Non-Profit Status Verification

The **Add New Agency** screen and **Agency Profile – HUD Affiliation** tab have been updated to include the date that the agency's non-profit status has been verified, and the date by which it should be re-verified.



New Agency Profile

Agency Name: *
ABC Agency

Type of Agency: *
LHCA

Parent Org: N/A

Parent Type: N/A

Parent Name: N/A

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

☐ Status Verified

Non Profit Status Last Verified:

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

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

Agency Manager
Salutation: --Select Salutation--

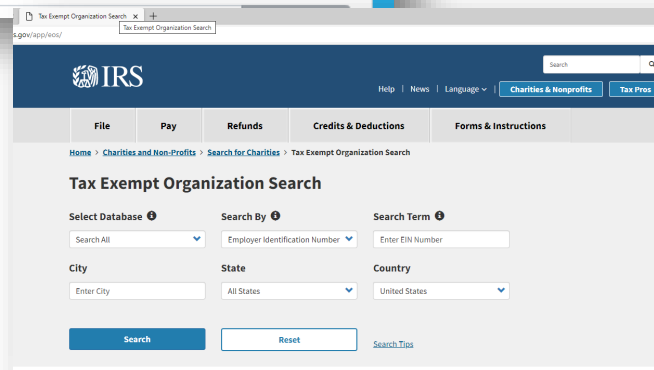
Business Title: --Select Title--

First Name: * Middle Init: Last Name: *

Email: *

When adding a new agency, click the **Non-Profit/Tax Exempt Status Site** button.

A new browser window will open showing the **IRS Tax Exempt Organization Search**. Use this search to verify an agency's Non-Profit status.



IRS

Home > Charities and Non-Profits > Search for Charities > Tax Exempt Organization Search

Tax Exempt Organization Search

Select Database: Search All

Search By: Employer Identification Number

Search Term: Enter EIN Number

City: Enter City

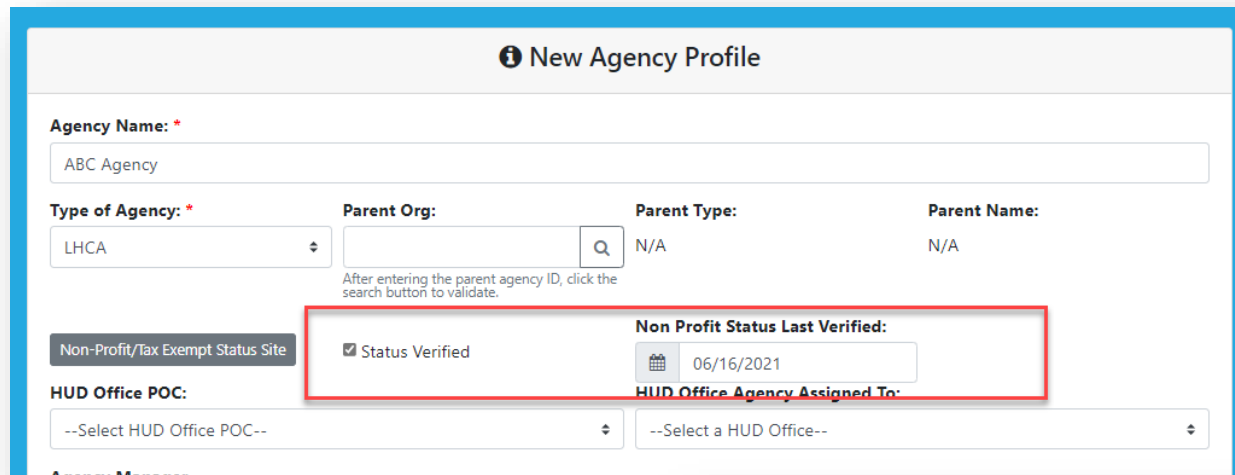
State: All States

Country: United States

[Search Tips](#)

Agency Non-Profit Status Verification (continued)

If the agency's Non-Profit status is verified, check the **Status Verified** check box. The **Non Profit Status Last Verified** date will auto-populate with the current date.



New Agency Profile

Agency Name: *
ABC Agency

Type of Agency: *
LHCA

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

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

Non-Profit/Tax Exempt Status Site

☒ Status Verified

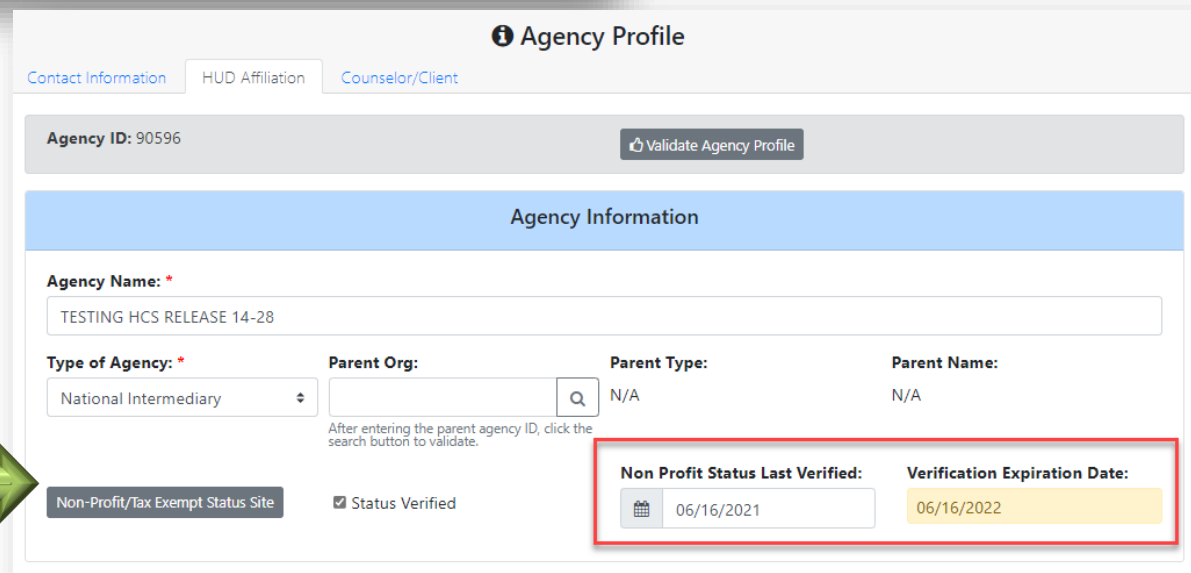
Non Profit Status Last Verified: 06/16/2021

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

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

Continue filling out the form to add the new agency and save.

After the agency is added, the date the non-profit status was last verified and the expiration date for re-verification displays on the HUD Affiliation tab – Agency Information section.

Agency Profile

Contact Information HUD Affiliation Counselor/Client

Agency ID: 90596 [Validate Agency Profile]

Agency Information

Agency Name: *
TESTING HCS RELEASE 14-28

Type of Agency: *
National Intermediary

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

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

Non-Profit/Tax Exempt Status Site

☒ Status Verified

Non Profit Status Last Verified: 06/16/2021

Verification Expiration Date: 06/16/2022

Agency Non-Profit Status Verification (continued)

After the new profile is added, or if the non-profit status verification has not been entered, it can be entered on the **Agency Profile – HUD Affiliation** tab.

Agency Profile

Contact Information HUD Affiliation Counselor/Client

Agency ID: 90596 [Validate Agency Profile](#)

Agency Information

Agency Name: *
TESTING HCS RELEASE 14-28

Type of Agency: *
National Intermediary

Parent Org: [Q](#) Parent Type: N/A Parent Name: N/A

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

[Non-Profit/Tax Exempt Status Site](#) ☒ Status Verified

Non Profit Status Last Verified: 06/16/2021 **Verification Expiration Date:** 06/16/2022

Click the **Non-Profit/Tax Exempt Status Site** button.

A new browser window will open showing the **IRS Tax Exempt Organization Search**. Use this search to verify an agency's Non-Profit

If the agency's Non-Profit status is verified, check the **Status Verified** check box. The **Non-Profit Status Last Verified** date is auto-populate with the current date. The **Verification Expiration Date** is auto-populated to the same date in the following year.

Click the **Save** button that displays under the **Public Display Options** section.

The Exempt Organization Search

IRS

Home Charities and Non-Profits Search for Charities Tax Exempt Organization Search

Tax Exempt Organization Search

Select Database: Search All Search By: Employer Identification Number Search Term: Enter EIN Number

City: Enter City State: All States Country: United States

[Search](#) [Reset](#) [Search Tips](#)

Public Display Options

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

[Save](#) [Cancel](#)

Funding Report Search – Columns Added for Agency Budgets

Additional columns have been added to the Funding Report Search to display an agency's total budget amount.

On the **Search Results Per Funding Record** the **Total Budget** for the agency for that **Funding Fiscal year (FFY)** displays in both the screen display and Excel File.

Funding Report Search

Search Criteria | Search Results Per Funding Record | Search Results Per Agency

Criteria: NOFA: 2019-1 COMP | Agency Name: ACME

You can further refine the search result by using the filters. Only filter(s) with more than one option will show.

FISCAL YEAR: [All] AGENCY TYPE: [All] HUD POC: [All] STATE: [All] COUNTY: [All] CITY: [All]

Show [15] entries

Showing 1 to 15 of 123 entries

Agency ID	Agency Name	Grant Appl ID	City	County	State	Agency Type	POC	Total Budget	NOFA	FFY	Grant Type	Direct Award	Admin Alloc	Indir Cost	Sub Alloc	Alloc	Total Fund
80003	ACME SUBGRANTEE	HC190011002	Anytown	ULSTER	NY	LHCA	Jones, Michael	\$616,000.00	2019-1	2019	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00
80004	ACME SUBGRANTEE	HC190011002	Anytown	[NO INFO]	NY	LHCA	Jones, Michael	\$134,900.00	2019-1	2019	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00
80017	ACME SUBGRANTEE	HC190011002	Anytown	SEBASTIAN	AR	LHCA	Jones, Michael	\$175,203.00	2019-1	2019	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00
80020	ACME SUBGRANTEE	HC190011002	Anytown	HIDALGO	TX	LHCA	Last, First	\$218,517.00	2019-1	2019	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00
80057	ACME LOCAL AGENCY	HC190011015	Jacksonville	DUVAL	FL	LHCA	Wormwood, Matilda	\$978,417.00	2019-1	2020	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83
80071	ACME LOCAL AGENCY	HC190011015	Philadelphia	PHILADELPHIA	PA	LHCA	Wormwood, Matilda	\$46,534,577.00	2019-1	2020	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$12,126.30	\$12,126.30
80085	ACME SUBGRANTEE AGENCY	HC190011015	PITTSBURGH	ALLEGHENY	PA	Sub Grantee	Wormwood, Matilda	\$7,374,656.00	2019-1	2020	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$12,126.30	\$12,126.30
80097	ACME LOCAL AGENCY	HC190011015	Farrell	MERCER	PA	LHCA	Wormwood, Matilda	\$1,026,173.00	2019-1	2020	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83
80103	ACME LOCAL AGENCY	HC190011015	Chicago	COOK	IL	LHCA	Wormwood, Matilda	\$7,917,645.00	2019-1	2020	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$12,126.30	\$12,126.30
80169	ACME LOCAL AGENCY	HC190011015	Knoxville	KNOX	TN	LHCA	Wormwood, Matilda	\$1,084,907.00	2019-1	2020	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83
80173	ACME SUBGRANTEE	HC190011002	Anytown	DAVIDSON	TN	Sub Grantee	Last, First	\$67,636.00	2019-1	2019	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00
80196	ACME LOCAL AGENCY	HC190011015	Birmingham	JEFFERSON	AL	LHCA	Wormwood, Matilda	\$684,352.00	2019-1	2020	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83
80207	ACME SUBGRANTEE	HC190011002	Anytown	ANCHORAGE	AK	Sub Grantee	Last, First	\$58,676.00	2019-1	2019	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00
80229	ACME SUBGRANTEE	HC190011002	Anytown	GRAY'S HARBOR	WA	LHCA	Jones, Michael	\$88,970.00	2019-1	2019	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00
80249	ACME LOCAL AGENCY	HC190011015	Atlanta	FULTON	GA	LHCA	Wormwood, Matilda	\$3,353,813.00	2019-1	2020	INTERMEDIARY - COMP	\$0.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83

Showing 1 to 15 of 123 entries

Previous 1 2 3 4 5 ... 9 Next

Excel File:

File Home Insert Draw Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number Styles Cells

Calibri 11 A- Wrap Text

B I U Bold Italic Underline Font Color Background Color Merge & Center

Conditional Formatting Table Styles

Normal Bad Good Neutral Calculation Check Cell Explanatory... Input

Insert Delete Format

A1 Housing Counseling System Funding Report Per Funding Record

Agency ID	Agency Name	Grant Appl ID	City	County	State	Agency Type	POC	Total Budget	NOFA	FFY	Grant Type
80003	ACME SUBGRANTEE	HC190011002	Anytown	ULSTER	NY	LHCA	Jones, Michael	616,000.00	2019-1	2019	INTERMEDIARY - COMP
80004	ACME SUBGRANTEE	HC190011002	Anytown	[NO INFO]	NY	LHCA	Jones, Michael	134,900.00	2019-1	2019	INTERMEDIARY - COMP
80017	ACME SUBGRANTEE	HC190011002	Anytown	SEBASTIAN	AR	LHCA	Jones, Michael	175,203.00	2019-1	2019	INTERMEDIARY - COMP
80020	ACME SUBGRANTEE	HC190011002	Anytown	HIDALGO	TX	LHCA	Last, First	218,517.00	2019-1	2019	INTERMEDIARY - COMP
80057	ACME LOCAL AGENCY	HC190011015	Jacksonville	DUVAL	FL	LHCA	Wormwood, Matilda	978,417.00	2019-1	2020	INTERMEDIARY - COMP
80071	ACME LOCAL AGENCY	HC190011015	Philadelphia	PHILADELPHIA	PA	LHCA	Wormwood, Matilda	46,534,577.00	2019-1	2020	INTERMEDIARY - COMP
80085	ACME SUBGRANTEE AGENCY	HC190011015	PITTSBURGH	ALLEGHENY	PA	Sub Grantee	Wormwood, Matilda	7,374,656.00	2019-1	2020	INTERMEDIARY - COMP
80097	ACME LOCAL AGENCY	HC190011015	Farrell	MERCER	PA	LHCA	Wormwood, Matilda	1,026,173.00	2019-1	2020	INTERMEDIARY - COMP
80103	ACME LOCAL AGENCY	HC190011015	Chicago	COOK	IL	LHCA	Wormwood, Matilda	7,917,645.00	2019-1	2020	INTERMEDIARY - COMP
80169	ACME LOCAL AGENCY	HC190011015	Knoxville	KNOX	TN	LHCA	Wormwood, Matilda	1,084,907.00	2019-1	2020	INTERMEDIARY - COMP

Funding Report Search – Columns Added for Agency Budgets (Continued)

On the **Search Results Per Agency** the **Total Budget** column displays. It represents the total budget for the agency for all fiscal years in the grant's performance period. The total budget for each of the fiscal years can also be displayed by checking the check box for those columns.

HOUSING COUNSELING SYSTEM

Funding Report Search

Search Criteria Search Results Per Funding Record Search Results Per Agency

Criteria: NOFA: 2019-1 COMP | Agency Name: ACME

Toggle Column Display:

☒ Agency Name ☒ Grant Appl ID ☐ City ☐ County ☐ State ☐ Zip ☒ Agency Type ☐ POC Name ☐ HOC

☐ Services ☐ Grant Type ☐ FY19 Budget ☐ FY20 Budget ☐ FY19 Admin Allocation ☐ FY20 Admin Allocation ☐ FY19 Indirect Cost ☐ FY20 Indirect Cost ☐ FY19 Sub Allocation ☐ FY20 Sub Allocation ☐ FY19 Total Funding ☐ FY20 Total Funding ☒ Total Funding ☒ Remaining Funds

Show 15 entries

Showing 1 to 15 of 122 entries

Agency ID	Agency Name	Grant Appl ID	Agency Type	NOFA	Grant Type	Direct Award	Total Budget	Total Admin Allocation	Total Indirect Cost	Total Sub Allocation	Total Allocation	Total Funding	Remaining Funds
80003	ACME SUBGRANTEE	HC18001002	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$618,000.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00	N/A
80004	ACME SUBGRANTEE	HC18001002	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$134,800.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00	N/A
80017	ACME SUBGRANTEE	HC18001002	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$175,200.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00	N/A
80020	ACME SUBGRANTEE	HC18001002	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$216,917.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00	N/A
80057	ACME LOCAL AGENCY	HC18001015	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$978,417.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83	N/A
80071	ACME LOCAL AGENCY	HC18001015	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$46,534,577.00	\$0.00	\$0.00	\$0.00	\$12,128.30	\$12,128.30	N/A
80085	ACME SUBGRANTEE AGENCY	HC18001015	Sub Grantee	2019-1	INTERMEDIARY - COMP	\$0.00	\$7,274,690.00	\$0.00	\$0.00	\$0.00	\$12,128.30	\$7,386,762.30	N/A
80097	ACME LOCAL AGENCY	HC18001015	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$1,026,173.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83	N/A
80103	ACME LOCAL AGENCY	HC18001015	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$7,917,845.00	\$0.00	\$0.00	\$0.00	\$12,128.30	\$12,128.30	N/A
80169	ACME LOCAL AGENCY	HC18001015	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$1,034,907.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83	N/A
80173	ACME SUBGRANTEE	HC18001002	Sub Grantee	2019-1	INTERMEDIARY - COMP	\$0.00	\$87,036.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$89,236.00	N/A
80166	ACME LOCAL AGENCY	HC18001015	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$964,362.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83	N/A
80207	ACME SUBGRANTEE	HC18001002	Sub Grantee	2019-1	INTERMEDIARY - COMP	\$0.00	\$50,876.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$88,276.00	N/A
80229	ACME SUBGRANTEE	HC18001002	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$88,870.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00	N/A
80249	ACME LOCAL AGENCY	HC18001015	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$3,393,813.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83	N/A
Totals:						\$3,871,166.00	\$214,705,137.93	\$498,838.30	\$20,379.00	\$3,340,894.70	\$2,624,821.83	\$90,100,852.93	\$30,529,891.00

Showing 1 to 15 of 122 entries

On the **Search Results Per Agency** the **Total Budget** column displays. It represents the total budget for the agency for all fiscal years in the grant's performance period. The total budget for each of the fiscal years can also be displayed by checking the check box for those columns.

Funding Report Search

Search Criteria Search Results Per Funding Record Search Results Per Agency

Criteria: NOFA: 2019-1 COMP | Agency Name: ACME

Toggle Column Display:

☒ Agency Name ☒ Grant Appl ID ☐ City ☐ County ☐ State ☐ Zip ☒ Agency Type ☐ POC Name ☐ HOC

☐ Services ☐ Grant Type ☒ FY19 Budget ☒ FY20 Budget ☐ FY19 Admin Allocation ☐ FY20 Admin Allocation ☐ FY19 Indirect Cost ☐ FY20 Indirect Cost ☐ FY19 Sub Allocation ☐ FY20 Sub Allocation ☐ FY19 Total Funding ☐ FY20 Total Funding ☒ Total Funding ☒ Remaining Funds

Show 15 entries

Showing 1 to 15 of 122 entries

Agency ID	Agency Name	Grant Appl ID	Agency Type	NOFA	Grant Type	Direct Award	FY19 Budget	FY20 Budget	Total Budget	Total Admin Allocation	Total Indirect Cost	Total Sub Allocation	Total Allocation	Total Funding	Remaining Funds
80003	ACME SUBGRANTEE	HC18001002	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$618,000.00	\$0.00	\$618,000.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00	N/A
80004	ACME SUBGRANTEE	HC18001002	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$134,800.00	\$0.00	\$134,800.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00	N/A
80017	ACME SUBGRANTEE	HC18001002	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$175,200.00	\$0.00	\$175,200.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00	N/A
80020	ACME SUBGRANTEE	HC18001002	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$216,917.00	\$0.00	\$216,917.00	\$0.00	\$0.00	\$0.00	\$27,600.00	\$27,600.00	N/A
80057	ACME LOCAL AGENCY	HC18001015	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$978,417.00	\$0.00	\$978,417.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83	N/A
80071	ACME LOCAL AGENCY	HC18001015	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$0.00	\$46,534,577.00	\$46,534,577.00	\$0.00	\$0.00	\$0.00	\$12,128.30	\$12,128.30	N/A
80085	ACME SUBGRANTEE AGENCY	HC18001015	Sub Grantee	2019-1	INTERMEDIARY - COMP	\$0.00	\$0.00	\$7,274,690.00	\$7,274,690.00	\$0.00	\$0.00	\$0.00	\$12,128.30	\$7,386,762.30	N/A
80097	ACME LOCAL AGENCY	HC18001015	LHCA	2019-1	INTERMEDIARY - COMP	\$0.00	\$0.00	\$1,026,173.00	\$1,026,173.00	\$0.00	\$0.00	\$0.00	\$8,911.83	\$8,911.83	N/A

Automated Status Renewal Based on NOFA Performance Period

The status of all approved Intermediaries and SHFAs will update after a new NOFA performance period has been initiated. The screens to process the status update are in the System Control Panel that can only be accessed by users with a Program Manager role.

To set up an agency to follow the NOFA performance period, navigate to the **Management > System Control Panel > Period tab.**

The screenshot shows the 'System Control Panel' with the 'Period' tab selected. The main heading is 'Agency Approval Periods'. Below this, there are two columns: 'Agency Type' and 'Default Approval Period'. The 'Agency Type' column lists various roles: LHCA, SHFA, National Intermediary, Regional Intermediary, Sub Grantee, Affiliate, Branch Local Agency, Branch Inter Agency, Branch Affiliate, Branch Sub Grantee, Multi-State Organization, Branch-MSO, and Branch-SHFA. The 'Default Approval Period' column shows a dropdown menu for each role. The dropdown for 'SHFA' is open, showing options: '--Select Item--', 'Manual', 'Fiscal Year', 'Two Years', 'Three Years', 'Five Years', 'Parent', and 'NOFA Performance Period'. The 'NOFA Performance Period' option is highlighted. At the bottom right of the form is a 'Save' button.

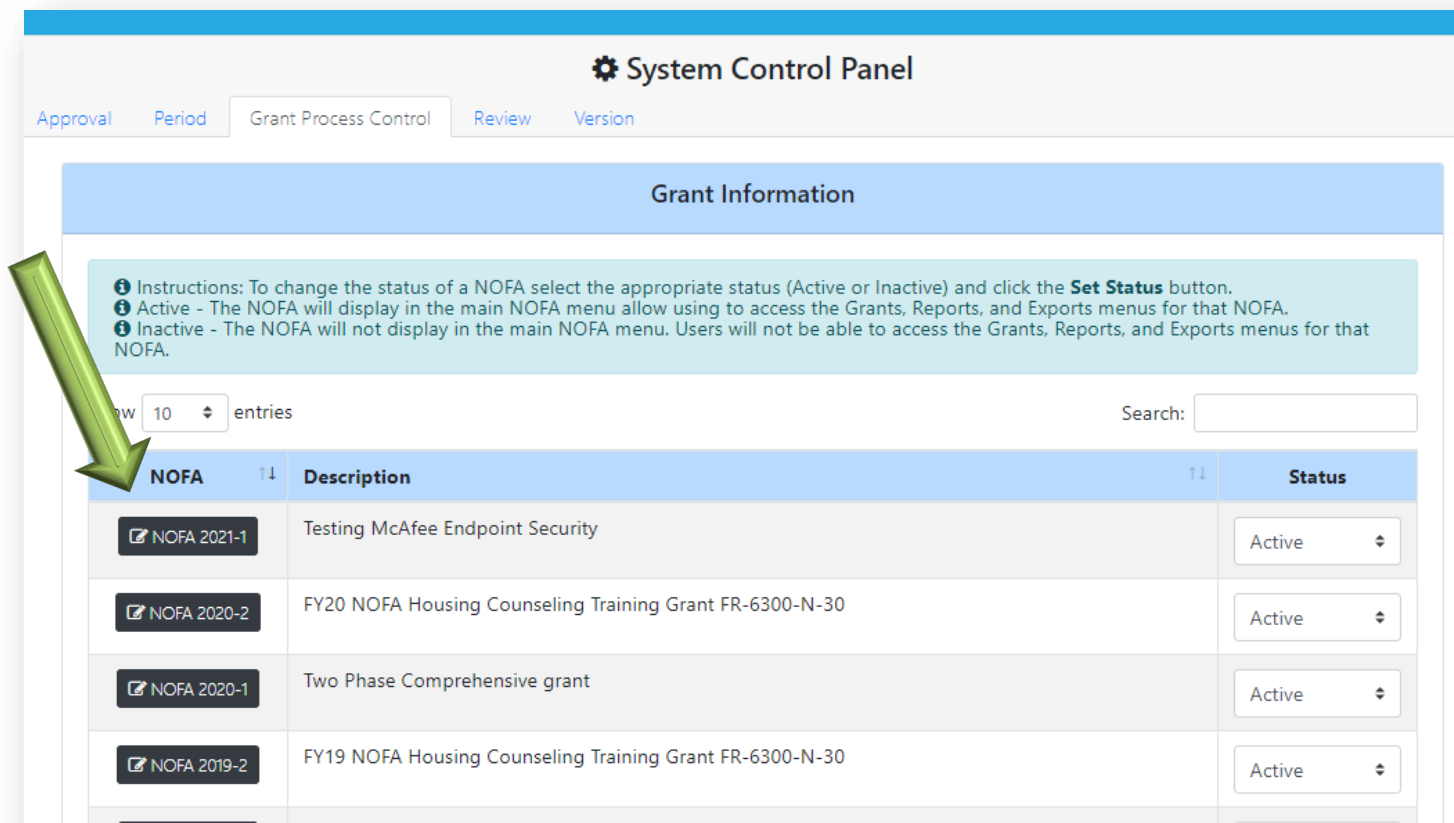
Agency Type	Default Approval Period
LHCA:	Three Years
SHFA:	NOFA Performance Period
National Intermediary:	--Select Item--
Regional Intermediary:	Manual
Sub Grantee:	Fiscal Year
Affiliate:	Two Years
Branch Local Agency:	Three Years
Branch Inter Agency:	Five Years
Branch Affiliate:	Parent
Branch Sub Grantee:	NOFA Performance Period
Multi-State Organization:	Parent
Branch-MSO:	Parent
Branch-SHFA:	Parent

Select **NOFA Performance Period** as the **Default Approval Period** for the agency types that should use the NOFA Performance Period as their approval status. Click **Save**.

Automated Status Renewal Based on NOFA Performance Period (Cont)

When a NOFA has been initiated, navigate to the **Management > System Control Panel > Grant Process Control** tab.

Click the button for the applicable NOFA.



The screenshot shows the 'System Control Panel' with the 'Grant Process Control' tab selected. The 'Grant Information' section contains instructions on how to change the status of a NOFA. Below the instructions is a table with columns for 'NOFA', 'Description', and 'Status'. A green arrow points to the 'NOFA 2021-1' button in the first row of the table.





System Control Panel

Approval Period **Grant Process Control** Review Version

Grant Information

Instructions: To change the status of a NOFA select the appropriate status (Active or Inactive) and click the **Set Status** button.
Active - The NOFA will display in the main NOFA menu allow using to access the Grants, Reports, and Exports menus for that NOFA.
Inactive - The NOFA will not display in the main NOFA menu. Users will not be able to access the Grants, Reports, and Exports menus for that NOFA.

Show 10 entries Search:

NOFA	Description	Status
 NOFA 2021-1	Testing McAfee Endpoint Security	Active
 NOFA 2020-2	FY20 NOFA Housing Counseling Training Grant FR-6300-N-30	Active
 NOFA 2020-1	Two Phase Comprehensive grant	Active
 NOFA 2019-2	FY19 NOFA Housing Counseling Training Grant FR-6300-N-30	Active

Automated Status Renewal Based on NOFA Performance Period (Cont)

The grant settings screen will display. Those agency types that had NOFA Performance Period selected as the default approval period will have a button to renew status.

Click the **Renew Status** button for the applicable agency type.

Nofa Information

NOFA 2021-1 Appropriated in 2021: Testing McAfee Endpoint Security

	Renew Agency Status	Funding Start	Funding End	Grant Application	Grant Scoring	9902 Reporting	Grant Display	Sub-Agency Allocation Close
Grant Type: 2021-1 - COMPREHENSIVE COUNSELING								
INTERMEDIARY	Renew INTERMEDIARY Status	10/01/2020	09/30/2022	Enabled	Enabled	Enabled	06/01/2021	09/30/2022
LHCA		10/01/2020	09/30/2022	Enabled	Enabled	Enabled	06/01/2021	09/30/2022
MSO		10/01/2020	09/30/2022	Enabled	Enabled	Enabled	06/01/2021	09/30/2022
SHFA	Renew SHFA Status	10/01/2020	09/30/2022	Enabled	Enabled	Enabled	06/01/2021	09/30/2022

Update Grant

Activity Codes for NOFA 2021-1

No Activity Codes Found / Grants Not Published

Publish Codes ARM

System Control Panel [Grant Control Tab]

Agency Status successfully renewed.

OK

A message will display indicating the agency status has been renewed.

Automated Status Renewal Based on NOFA Performance Period (Cont)

All approved agencies of that type will have a new approved status record entered indicating the reason of the NOFA performance period. A new participating status record will also be added to participating sub agencies that are affiliates, sub grantees, or branches.

Parent Intermediary Status:

Agency Status

Current Agency Status

Status: Approved

As Of: 10/01/2020

Date: 06/16/2021

Author: H18798

Reason: NOFA2021-1 Performance Period

Up To: 09/30/2022

Fiscal Year: 2021

Enter New Status

See Agency Status History

Sub Grantee Status:

Agency Status

Current Agency Status

Status: Participating

As Of: 10/01/2020

Date: 06/16/2021

Author: H18798

Reason: NOFA2021-1 Performance Period

Up To: 09/30/2022

Fiscal Year: 2021

✓ Linked to Parent Status

Enter New Status

See Agency Status History

Allow Agencies to be Unlinked from their Parent Agency for Status Updates

If an Affiliate, Sub Grantee, or Branch requires a Conditional, Inactive, or Terminated status separate from its parent agency's Approved status, the applicable sub agency will be flagged as unlinked from the parent for automated status updates.

This feature was needed to address an issue when a sub agency receives a Conditional, Inactive, or Terminated status but is then automatically changed back to Participating when the parent agency's status is updated. This change will allow the sub agency to retain their status.

When entering a status of Conditional, Inactive, or Terminated for an Affiliate, Sub Grantee, or Branch type agency, a flag will display indicating the agency is unlinked from the parent for status updates.

LHCAs that are also sub agencies do not follow the parent for status updates. LHCAs will not have a flag indicating if they are linked to the parent for status updates.

Allow Agencies to be Unlinked from their Parent Agency for Status Updates (Cont)

✔ Linked to Parent Status

Prior to making the status change to a sub agency, a green check mark will display indicating that the sub agency is linked to the parent agency for status updates.

Agency Status

Current Agency Status

Enter New Status

See Agency Status History

Status: Participating

As Of: 10/01/2020

Date: 06/17/2021

Author: H18798

Reason: Parent Agency: 80754 status was changed.

Up To: 09/30/2022

Fiscal Year: 2021

✔ Linked to Parent Status

Page 20

HCS v14.28.0.0 June 26, 2021

Allow Agencies to be Unlinked from their Parent Agency for Status Updates (Cont)

⚠ Unlinked from parent for status updates.

After entering the Conditional, Inactive, or Terminated status, the flag will change to a yellow alert indicating the agency is unlinked from the parent for status updates.

Public Display Options

Agency Status Form

Status: *
Conditional

As Of: *
06/16/2021

For: *
60 Days

Up To: *
08/15/2021

Reason: *
Pending PR

Comment:

Reset Default End Date

When an agency displays the yellow alert indicating unlinked from the parent for status updates, if the parent's status is updated, the sub agency will retain their current status.

Agency Status

Current Agency Status

Status: Conditional

As Of: 06/16/2021

Date: 06/17/2021

Author: H18798

Reason: Pending PR

Up To: 08/15/2021

Fiscal Year: 2021

⚠ Unlinked from parent for status updates

Enter New Status

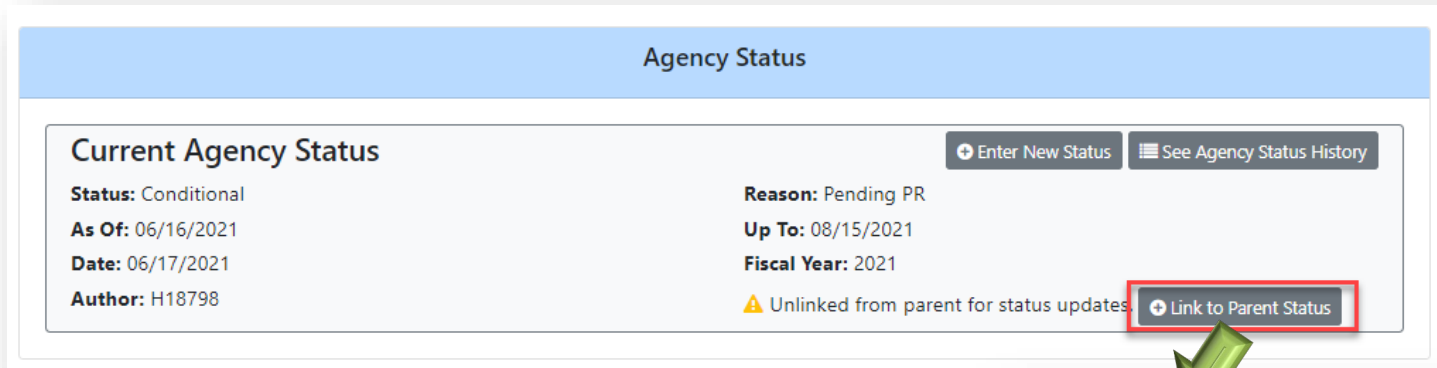
See Agency Status History

Link to Parent Status

Allow Agencies to be Unlinked from their Parent Agency for Status Updates (Cont)

➔ Link to Parent Status

If the sub agency's status can be changed back to Participating and continue to follow the parent's status, click the **Link to Parent Status** button.



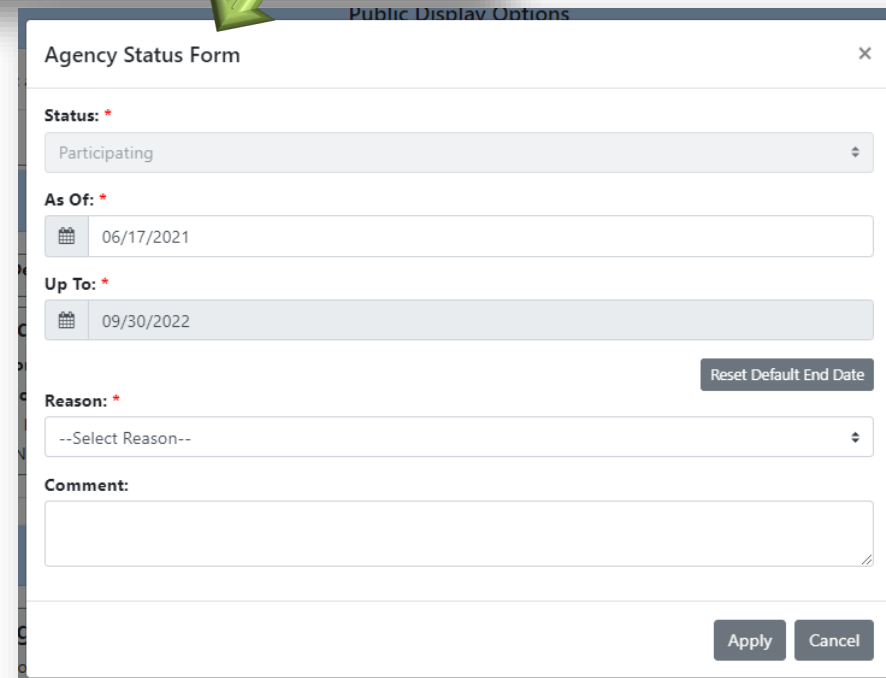
The screenshot shows the 'Agency Status' form. At the top, there's a blue header with the title 'Agency Status'. Below it, on the left, is a box titled 'Current Agency Status' containing the following information: Status: Conditional, As Of: 06/16/2021, Date: 06/17/2021, and Author: H18798. To the right of this box, there's a 'Reason: Pending PR' and 'Up To: 08/15/2021'. Below these, it says 'Fiscal Year: 2021' and a warning icon with the text 'Unlinked from parent for status updates'. At the bottom right of the form, there is a button labeled 'Link to Parent Status' which is highlighted with a red rectangle. Above this button are two other buttons: 'Enter New Status' and 'See Agency Status History'.

The Agency Status Form will open with:

- Participating status selected
- As Of Date auto-filled with the current date.
- Up To Date auto-filled with the parent's Up To date.

Enter the appropriate **As Of** date, **Reason**, and **Comment**. Click the **Apply** button.

When linking back to the parent's status, the Status and Up-To fields are disabled and cannot be changed.



The screenshot shows the 'Agency Status Form' with a close button (X) in the top right corner. The form contains the following fields: 'Status: *' with a dropdown menu showing 'Participating'; 'As Of: *' with a date picker showing '06/17/2021'; 'Up To: *' with a date picker showing '09/30/2022' and a 'Reset Default End Date' button; 'Reason: *' with a dropdown menu showing '--Select Reason--'; and 'Comment:' with a text area. At the bottom right, there are 'Apply' and 'Cancel' buttons. A green arrow points from the 'Link to Parent Status' button in the previous screenshot to the 'Status' field in this form.

Allow Agencies to be Unlinked from their Parent Agency for Status Updates (Cont)

After linking back to the parent agency's status, the flag will display a green check mark indicating Linked to Parent Status.

Agency Status

Current Agency Status

Enter New Status

See Agency Status History

Status: Participating

Reason: Renewed

As Of: 06/17/2021

Up To: 09/30/2022

Date: 06/17/2021

Fiscal Year: 2021

Author: H18798

✓ Linked to Parent Status

When the parent's status is next updated, the sub agency's status will also be updated.

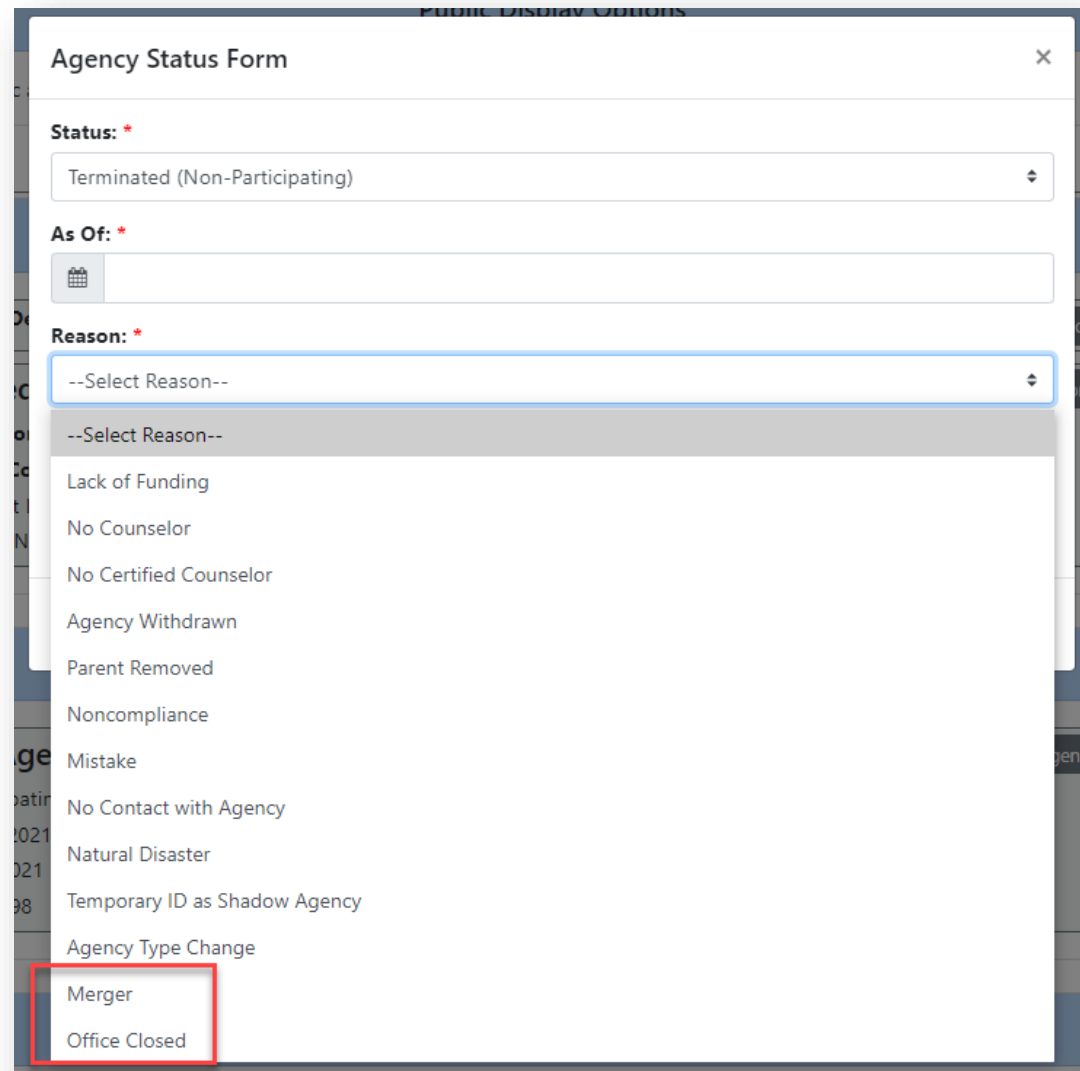
New Reasons for Terminated Status

Two new reasons for changing an agency's status to Terminated have been added:

- Merger
- Office Closed

Merger – Use this termination reason if the agency profile record is being terminated due to a merger with another agency.

Office Closed – Use this termination reason if the agency's office is closing to the public.



The screenshot shows the 'Agency Status Form' with the following fields:

- Status:** A dropdown menu with 'Terminated (Non-Participating)' selected.
- As Of:** A date picker icon and an empty text field.
- Reason:** A dropdown menu with '--Select Reason--' selected. The dropdown list is open, showing the following 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
 - Agency Type Change
 - Merger**
 - Office Closed**

The 'Merger' and 'Office Closed' options are highlighted with a red box.

Edge Chromium Compatibility - CMS Management

The CMS Management page that allows a HUD POC to change an agency's profile setting to editable or not editable has been updated to be compatible with the Edge Chromium browser.

To access the CMS Management Page, navigate to MANAGEMENT > Agency Reporting Module > CMS Management.

The screenshot displays the 'HOUSING COUNSELING SYSTEM' interface. At the top, a navigation bar includes links for HOME, AGENCY, HUD-9902, NOFA, USER, MANAGEMENT, and REPORTS. The main content area is titled 'CMS Management - Find Agency'. It features four input fields: 'Fiscal Year' (a dropdown menu with '--Select Fiscal Year--'), 'Agency ID' (a text box with the placeholder 'Enter Agency ID'), 'Agency Type' (a dropdown menu with options '[1] LHCA' and '[2] SHFA'), and 'HOC' (a dropdown menu with options '[00] Headquarters SF-HUD' and '[01] Philadelphia (HOC)'). A 'CMS' dropdown menu is also present, showing '--Select CMS--', 'All CMS Systems', and 'ARM365'. A 'Search' button is located below these fields. At the bottom of the page, a footer indicates 'Last Updated: 05/11/2021 Version 14.28.0.0' and 'United States Department of Housing and Urban Development'.

Edge Chromium Compatibility - CMS Management (Cont)

Search for the applicable agency by selecting from the appropriate search criteria:

- Fiscal Year – Required. Select the Fiscal Year of the profile that requires the setting change

To search for a single agency:

- Agency ID – Enter the agency ID and click the Search button.

To search for multiple agencies, use one or more of the following search criteria and click the Search button:

- Agency Type – Finds all agencies with the matching agency type.
- HOC – Finds all agencies with the matching HUD Office
- CMS – Finds all agencies with the matching CMS indicator.

The screenshot displays the 'HOUSING COUNSELING SYSTEM' interface with a navigation bar containing 'HOME', 'AGENCY', 'HUD-9902', 'NOFA', 'USER', 'MANAGEMENT', and 'REPORTS'. The main content area is titled 'CMS Management - Find Agency' and contains several search criteria:

- Fiscal Year:** A dropdown menu with the placeholder text '--Select Fiscal Year--'.
- Agency ID:** A text input field with the placeholder text 'Enter Agency ID'.
- Agency Type:** A dropdown menu with the placeholder text '--Select Agency Type--' and a list of options: '[1] LHCA' and '[2] SHFA'.
- HOC:** A dropdown menu with the placeholder text '--Select HOC--' and a list of options: '[00] Headquarters SF-HUD' and '[01] Philadelphia (HOC)'.
- CMS:** A dropdown menu with the placeholder text '--Select CMS--' and a list of options: 'All CMS Systems' and 'ARM365'.

A 'Search' button is located below the search criteria. At the bottom of the interface, there is a footer that reads 'Last Updated: 06/11/2021 Version 14.28.0.0' and 'United States Department of Housing and Urban Development'.

Edge Chromium Compatibility - CMS Management (Cont)

The results will display below the Search button.

HOUSING COUNSELING SYSTEM

CMS Management - Find Agency

Fiscal Year: 2021 Agency ID: 80057

Agency Type: --Select Agency Type-- [1] LHCA [2] SHFA HOC: --Select HOC-- [00] Headquarters SF-HUD [01] Philadelphia (HOC) CMS: --Select CMS-- All CMS Systems ARM365

Search

--Select Option-- Save

Show 20 entries

Editable	Agency ID	Agency Name	Agency Type	HUD POC	CMS Name
Yes	80057	ACME LOCAL AGENCY	LHCA	Atlanta (HOC)	CounselorMax

Showing 1 to 1 of 1 entries

Last Updated: 05/11/2021 Version 14.28.0.0

In the Editable column, select the desired setting:

- **Yes** will set the profile to editable.
- **No** will lock the profile for edits. If a profile is locked for editing, updates can only be made from the agency's CMS.

After selecting the desired setting. Click the Save button.

--Select Option-- Save

Show 20 entries

Editable	Agency ID	Agency Name
Yes	80057	ACME LOCAL AGENCY

Edge Chromium Compatibility - CMS Management (Cont)

Editable = Yes: Fields on the Agency profile and the Save button are enabled.

Agency Information

Housing Counseling Services Provided as of:

04/01/2004

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:

17 years, 2 months

Time Since Joining HUD Program:

17 years, 2 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://sma/business.dno.com> or call 866-705-5711

☐ Delinquent in Federal Debt?

Agency Designations

☐ Faith Base
 ☐ Colonias
 ☐ Migrant Workers
 ☐ Rural Area
 ☐ Urban Area

Types of Counseling Method

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

Additional Languages Provided

☐ Arabic
 ☐ Cambodian
 ☐ Cantonese
 ☐ Chinese Mandarin
 ☐ Creole

☐ Czech
 ☒ English
 ☐ Farsi
 ☐ French
 ☐ German

☐ Hindi
 ☐ Hmong
 ☐ Indonesian
 ☐ Italian
 ☐ Korean

☐ Polish
 ☐ Portuguese
 ☐ Russian
 ☐ Spanish
 ☐ Swahili

☐ Turkish
 ☐ Ukrainian
 ☐ Vietnamese
 ☐ ASL
 ☐ Other

Save

Cancel

The **Agency Profile HUD Affiliation tab** is not impacted by this setting. Only HUD staff can update fields on the HUD Affiliation tab.

Editable = No: Fields on the Agency profile and the Save button are disabled.

Agency Information

Housing Counseling Services Provided as of:

04/01/2004

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:

17 years, 2 months

Time Since Joining HUD Program:

17 years, 2 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://sma/business.dno.com> or call 866-705-5711

☐ Delinquent in Federal Debt?

Agency Designations

☐ Faith Base
 ☐ Colonias
 ☐ Migrant Workers
 ☐ Rural Area
 ☐ Urban Area

Types of Counseling Method

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

Additional Languages Provided

☐ Arabic
 ☐ Cambodian
 ☐ Cantonese
 ☐ Chinese Mandarin
 ☐ Creole

☐ Czech
 ☒ English
 ☐ Farsi
 ☐ French
 ☐ German

☐ Hindi
 ☐ Hmong
 ☐ Indonesian
 ☐ Italian
 ☐ Korean

☐ Polish
 ☐ Portuguese
 ☐ Russian
 ☐ Spanish
 ☐ Swahili

☐ Turkish
 ☐ Ukrainian
 ☐ Vietnamese
 ☐ ASL
 ☐ Other

Save

Cancel