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

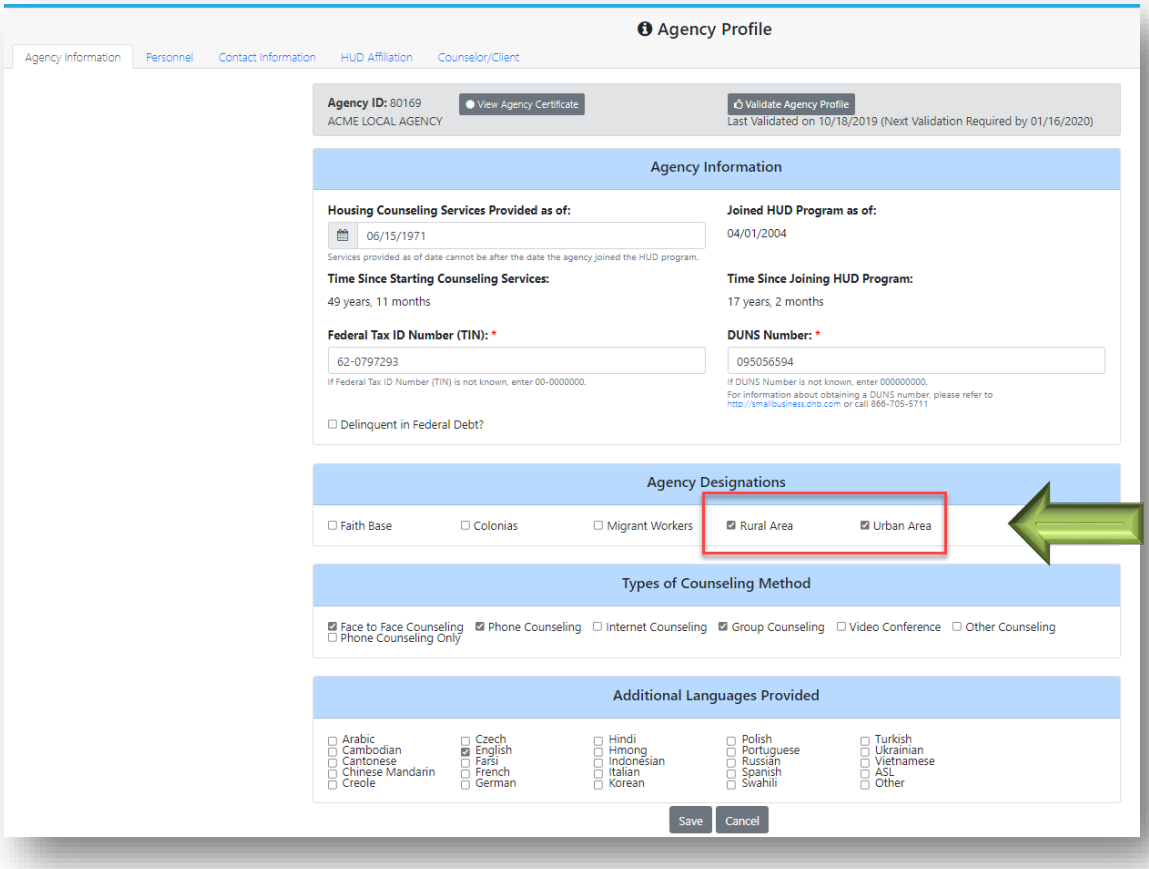
HUD Users:

- 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.



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

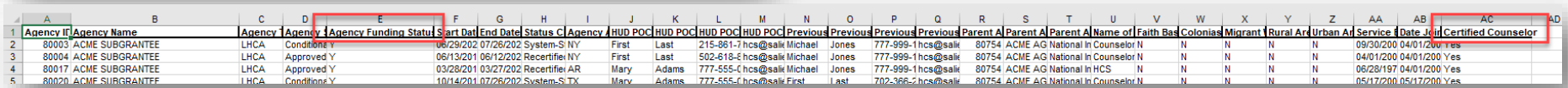
Advanced Agency Search Spreadsheets – Counselor Certification Status and Funded Status added to all 3 Spreadsheets

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.

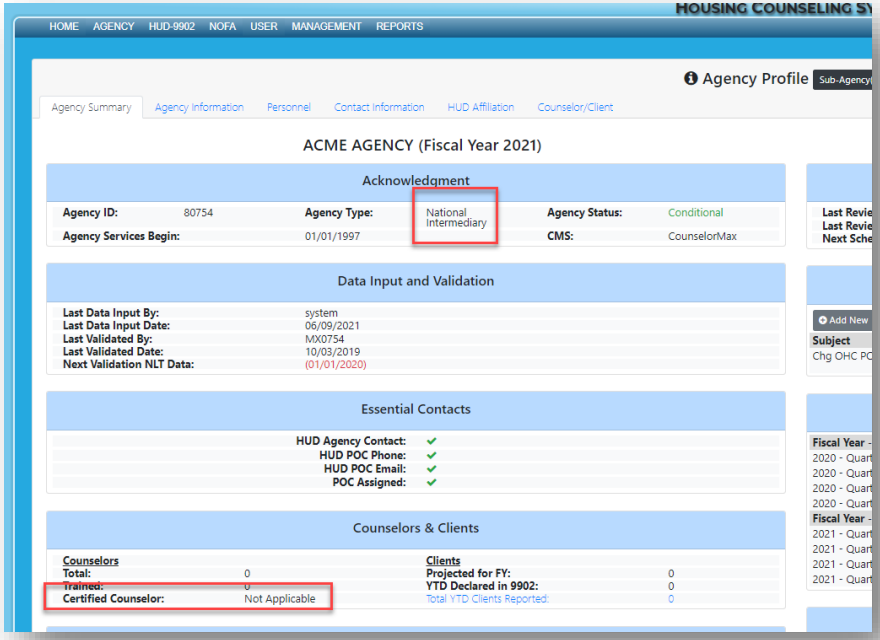


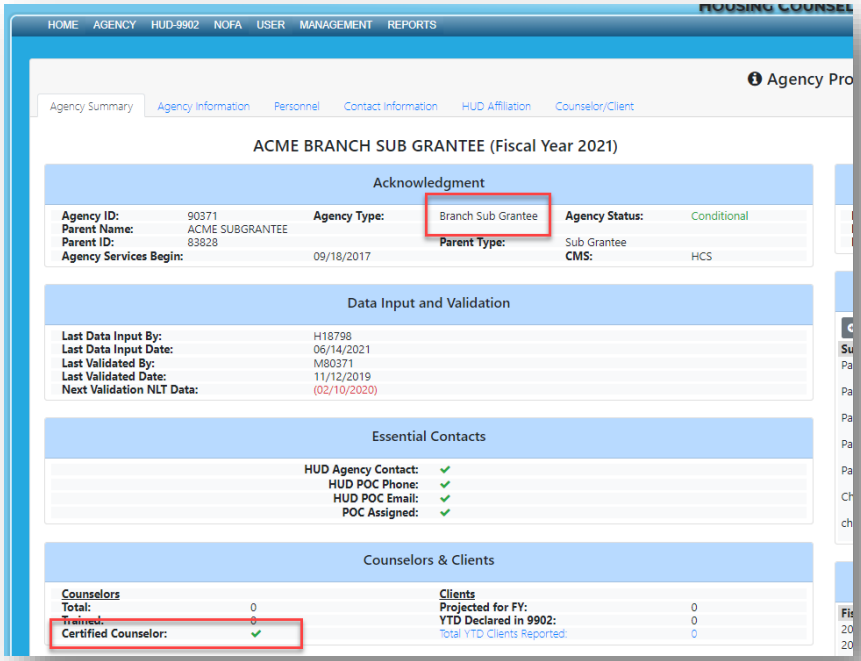
Agency Certified Counselor Status – Change Processing of Certified Counselor Indicator

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.

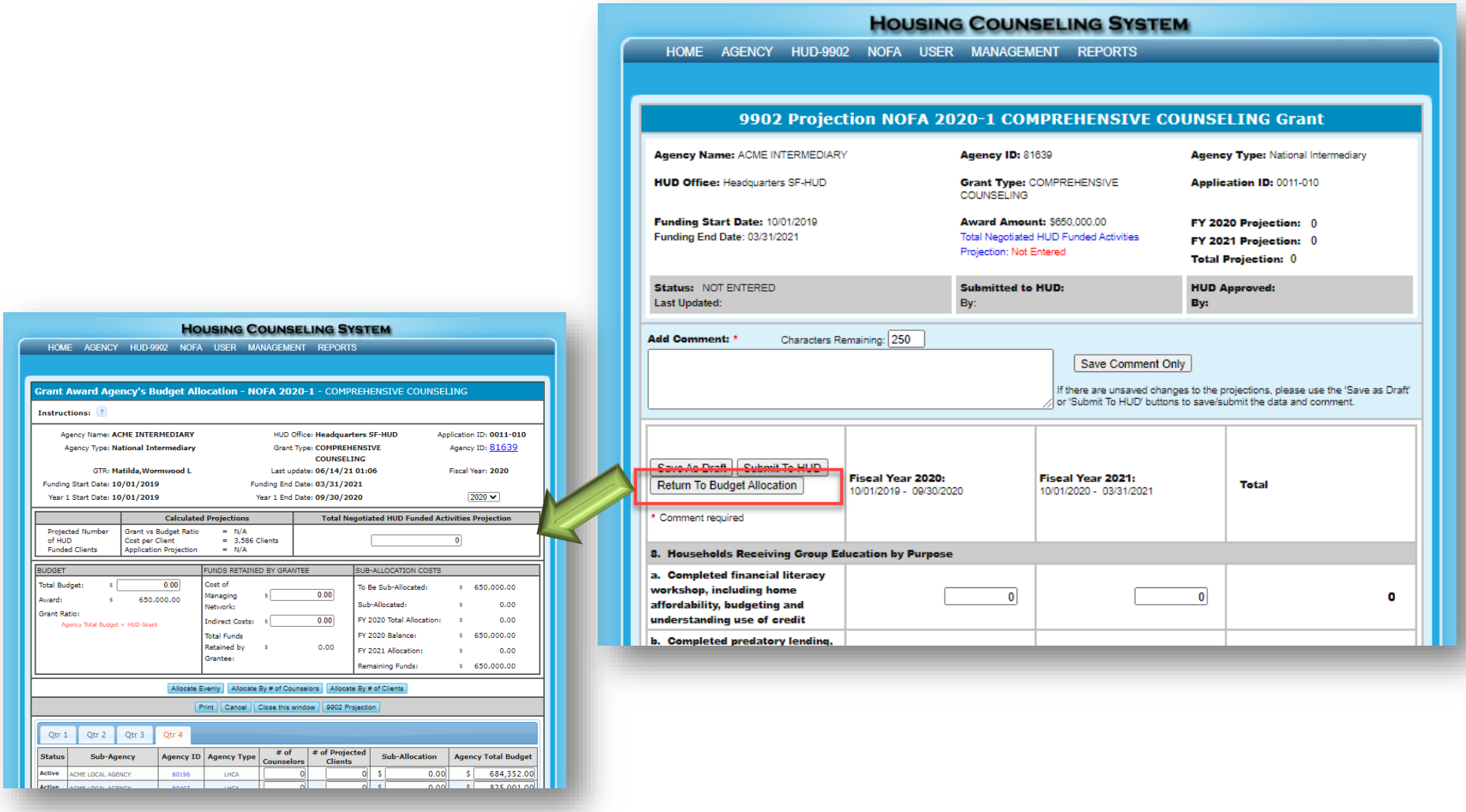
This is a change from the previous version that always marked Intermediaries as N or Y and Branch type agencies as Not Applicable.





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.

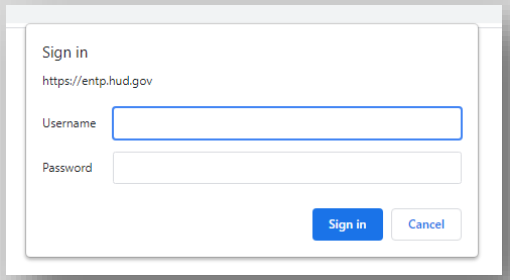


User Log-in Changes

A new log in screen has been implemented.

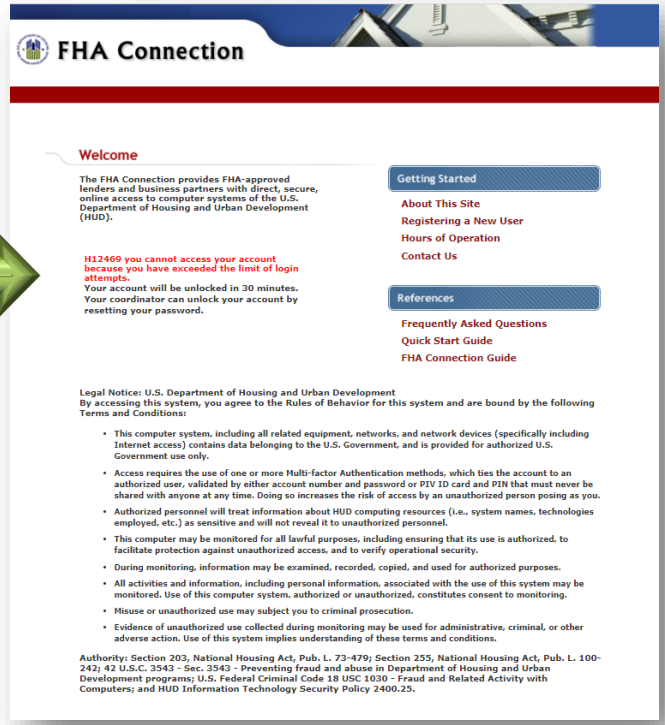
Enter your HCS **User ID** and **Password** then click Sign On.

Old Log-in

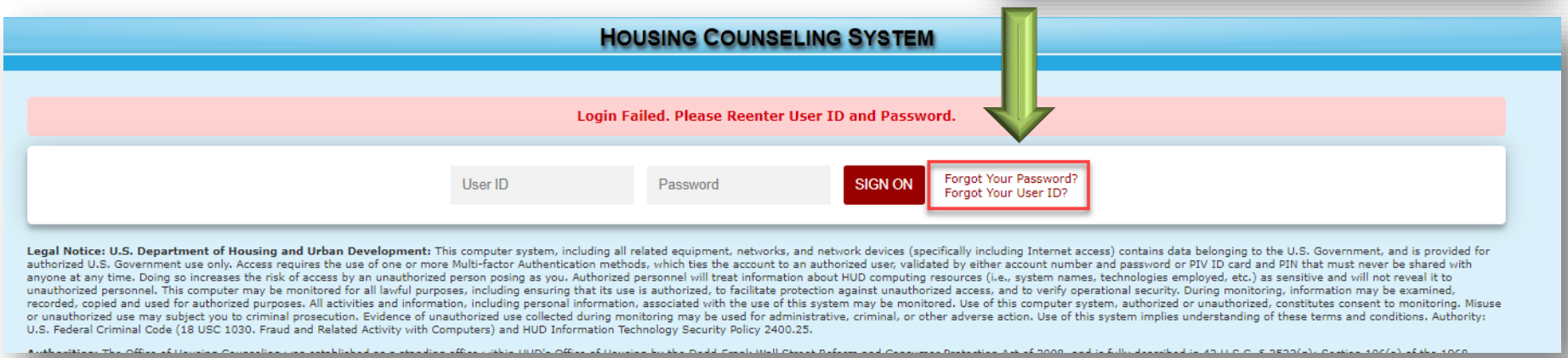


User Log-in Changes

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.

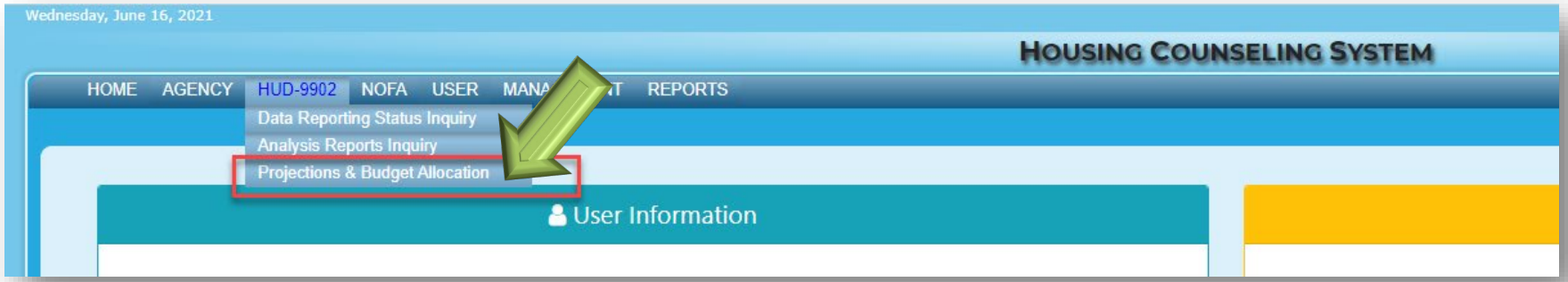


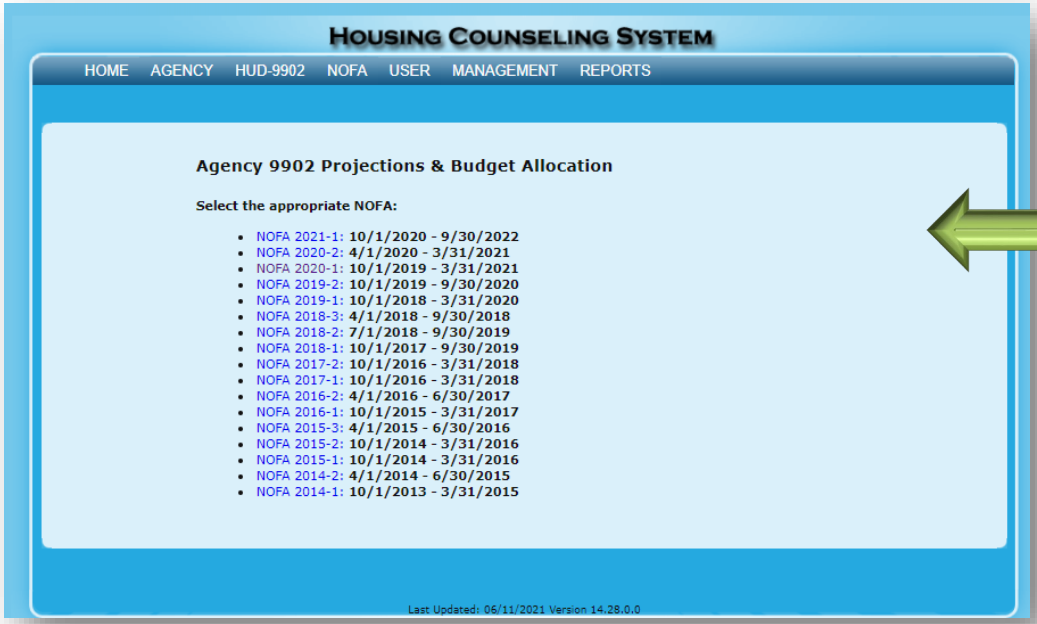
Click the **Forgot Your Password** link to go to the HUD Exchange for information on how to submit the password reset request.



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.**

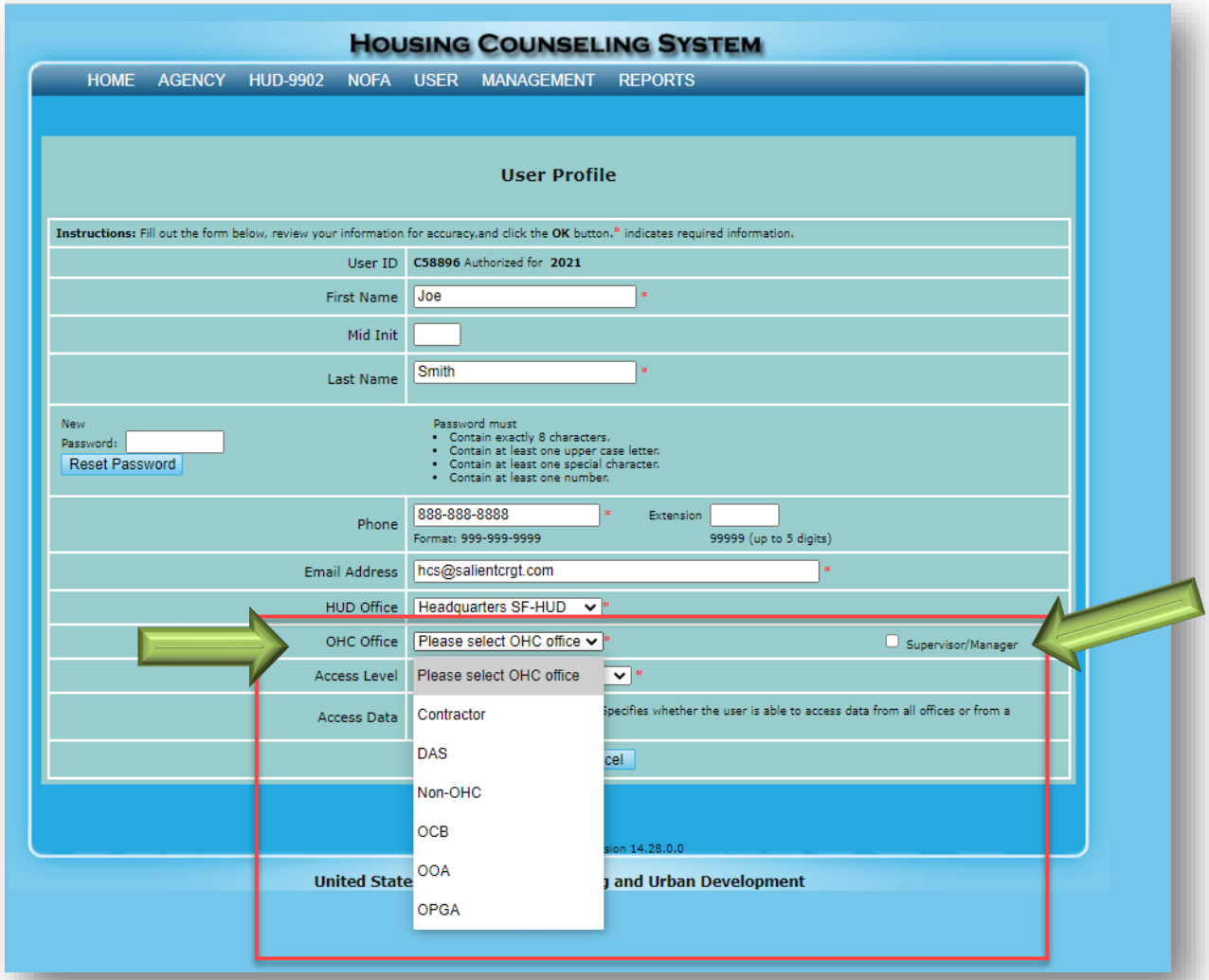




The link navigates to the Agency 9902 Projections & Budget Allocation screen. Click the grant associated grant to access either the Budget Allocation or 9902 Projections for a particularly agency.

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.**

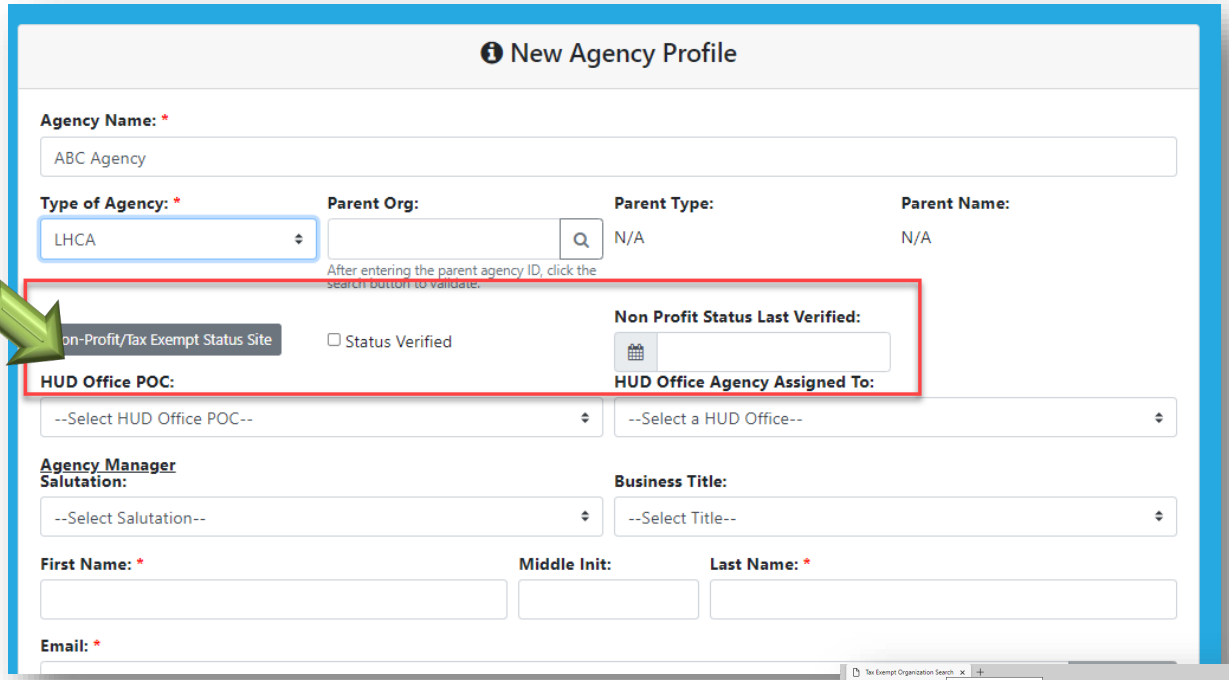


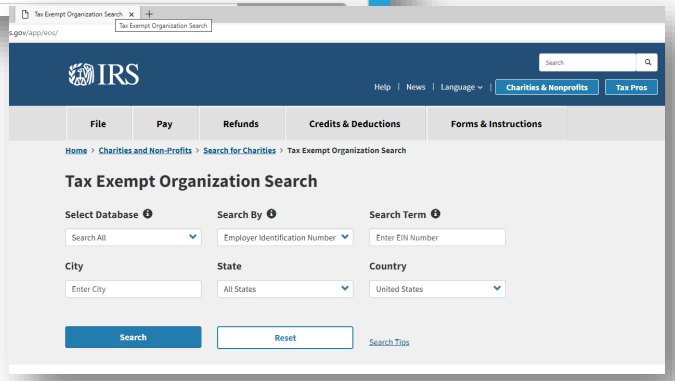
Select the user's **OHC Office.** If the User has an ID that starts with a C, **Contractor** should be selected.

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.



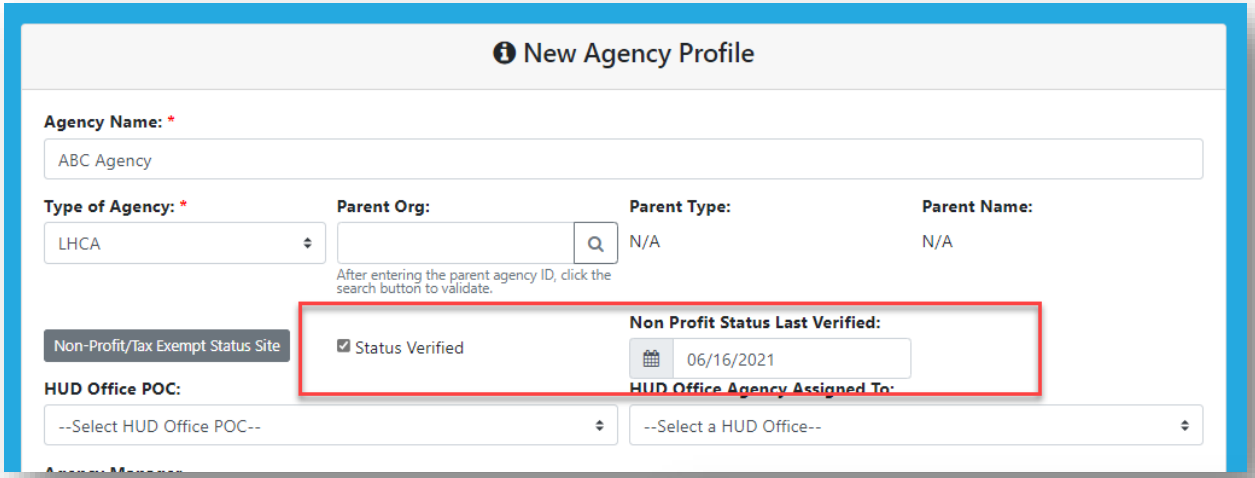


When adding a new agency, click the **Non-Profit/Tax Exempt Status Site** button.

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

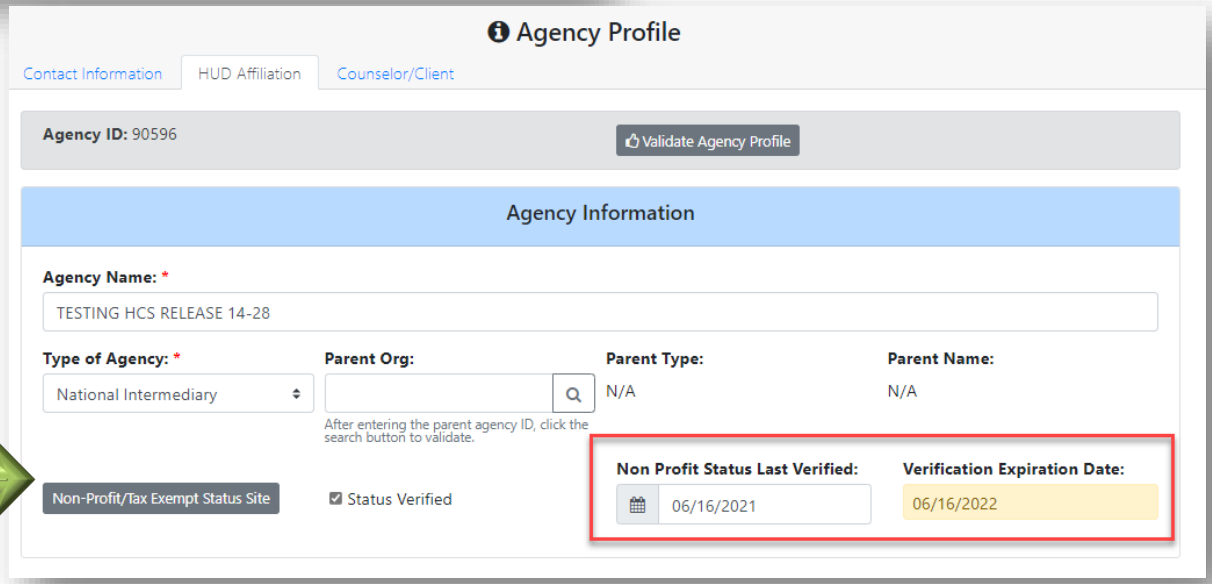
Agency Non-Profit Status Verification (continued)

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.



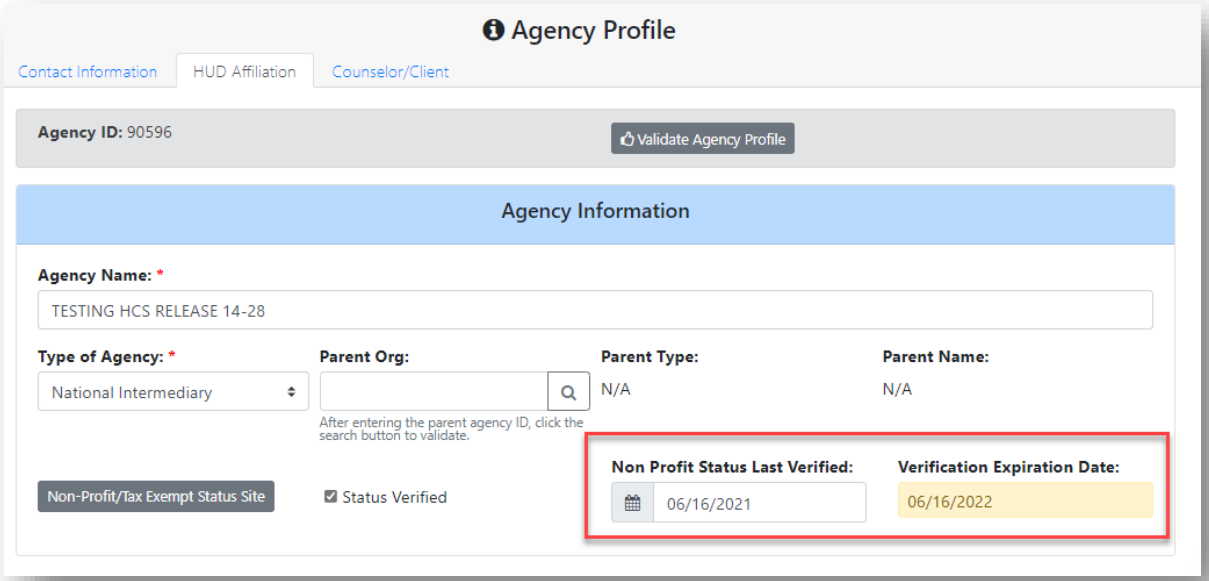
Continue filling out the form to add the new agency and save.

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.



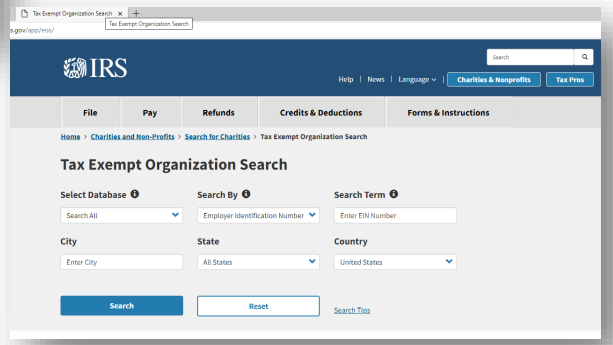
Agency Non-Profit Status Verification (continued)

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.



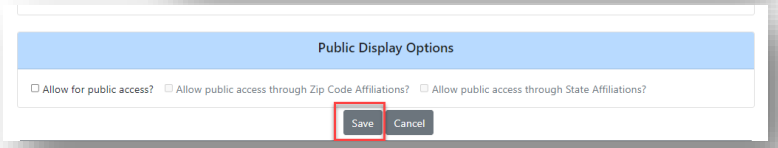
Click the **Non-Profit/Tax Exempt Status Site** button.

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.

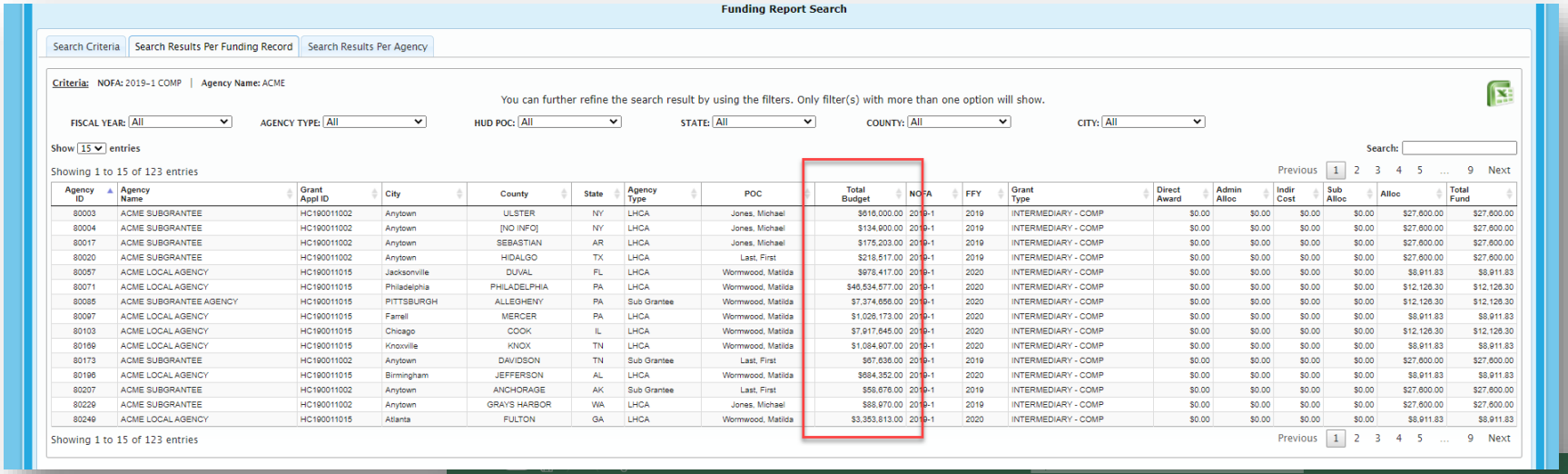
Click the **Save** button that displays under the **Public Display Options** section.



Funding Report Search – Columns Added for Agency Budgets

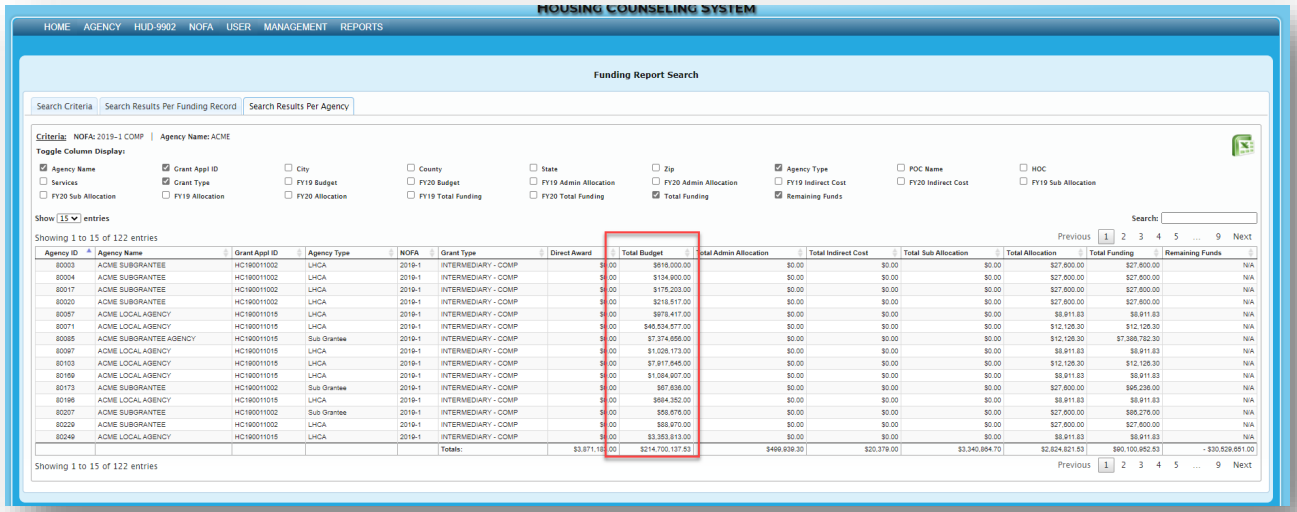
Additional columns have been added to the Funding Report Search to display an agency's total budget amount.

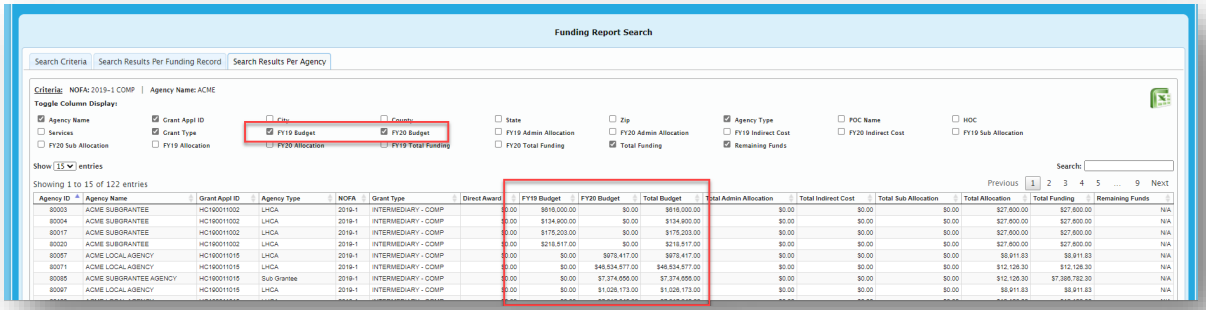
On the **Search Results Per Funding Record** the **Total Budget** for the agency for that **Funding Fiscal year (FFY)** displays in both the screen display and Excel File.



Funding Report Search – 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.



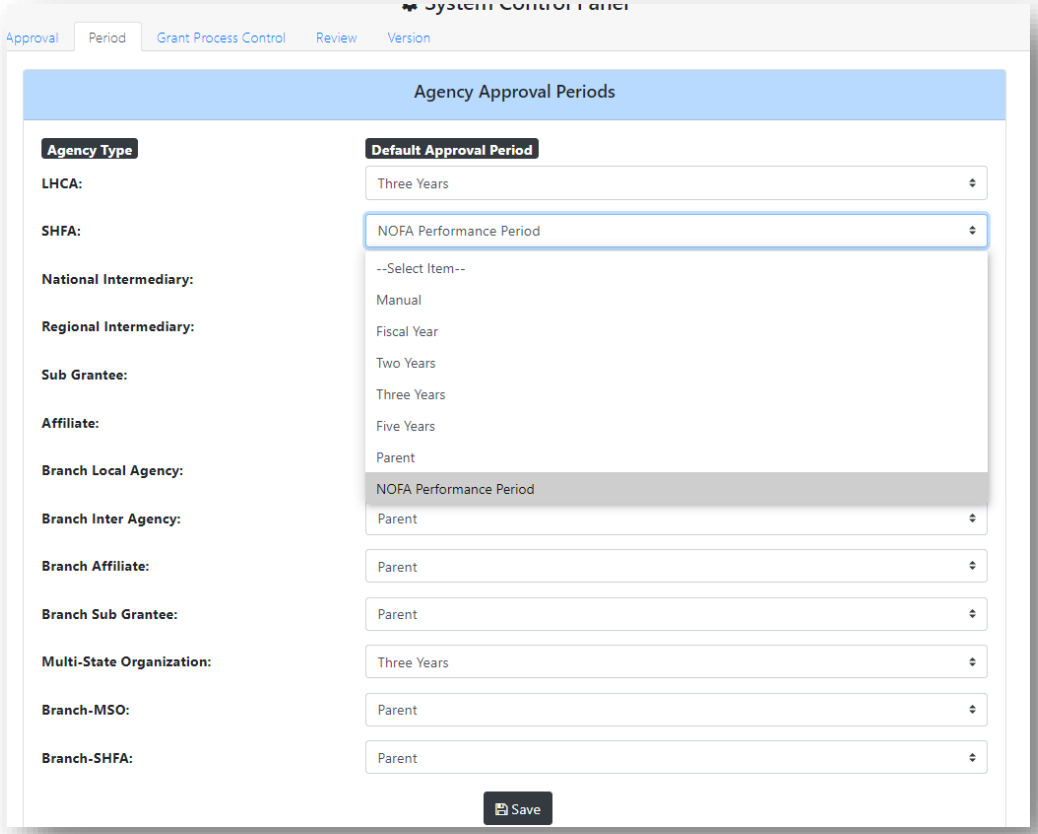


On the **Search Results Per Agency** the **Total Budget** column displays. It represents the total budget for the agency for all fiscal years in the grant's performance period. The total budget for each of the fiscal years can also be displayed by checking the check box for those columns.

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.**

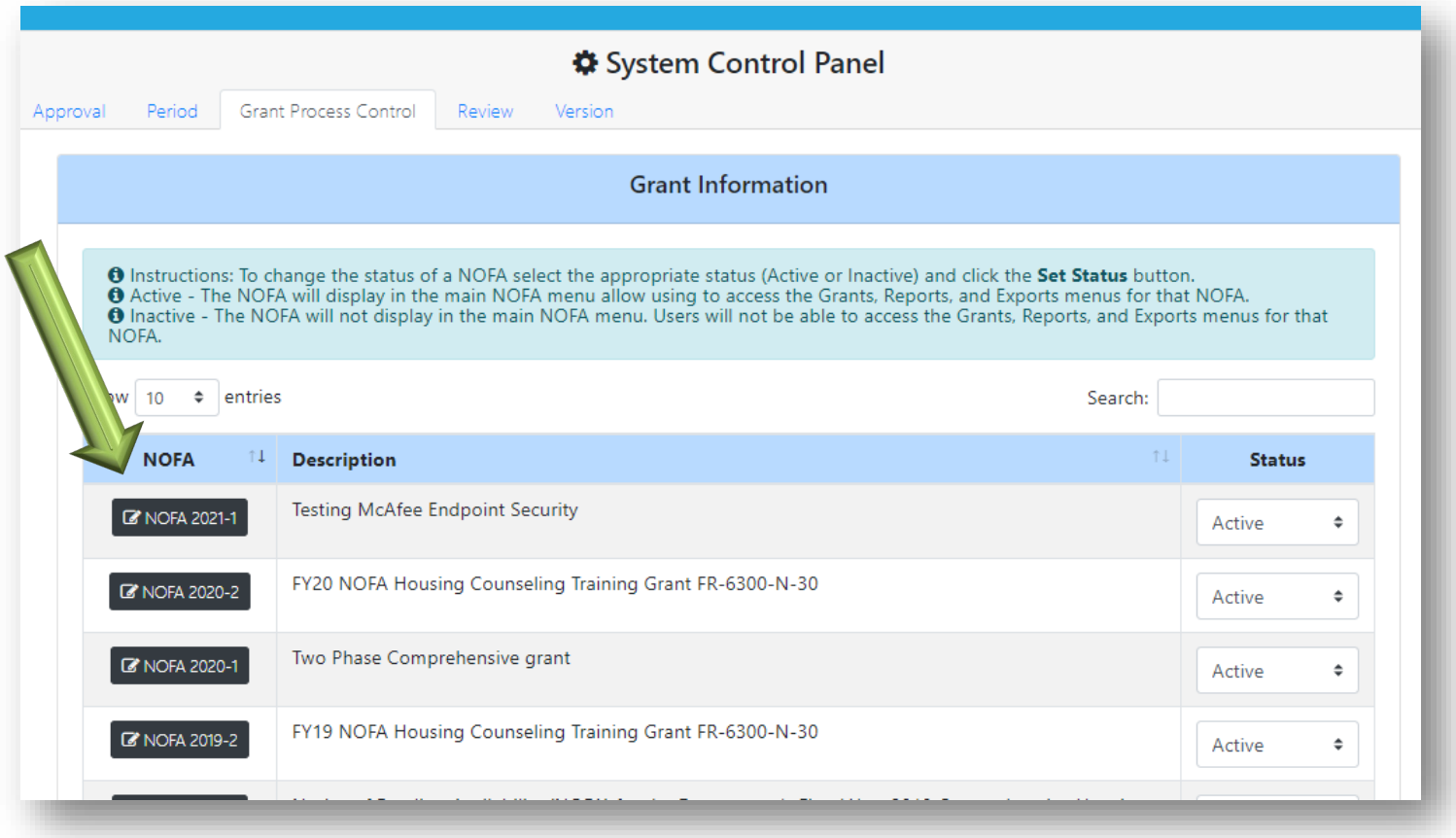


Select **NOFA Performance Period** as the **Default Approval Period** for the agency types that should use the NOFA Performance Period as their approval status. Click **Save.**

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.**

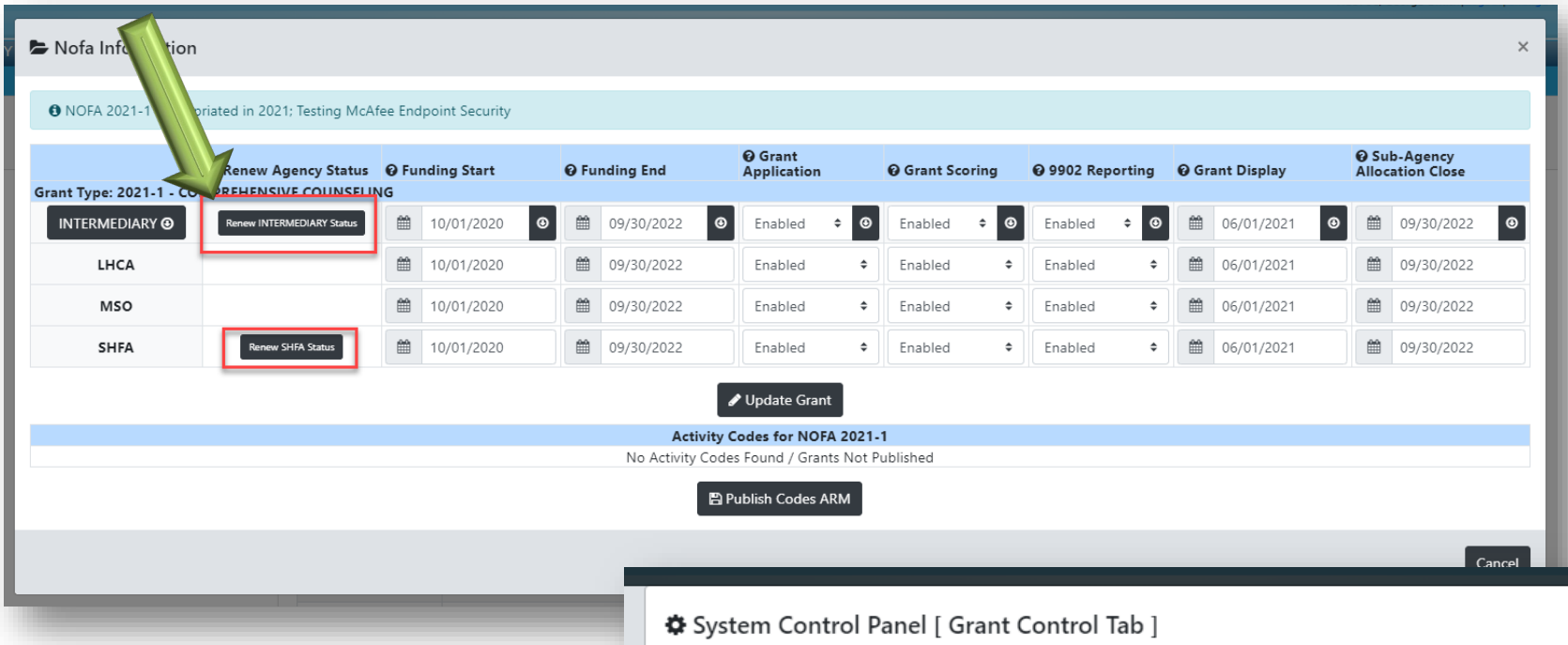
Click the button for the applicable NOFA.



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.

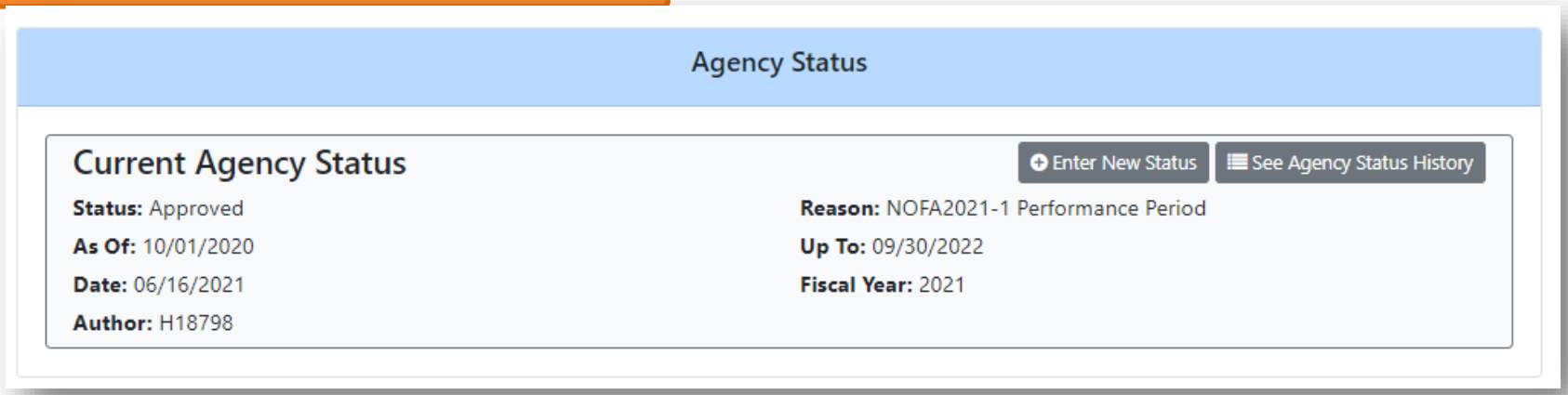


A message will display indicating the agency status has been renewed.

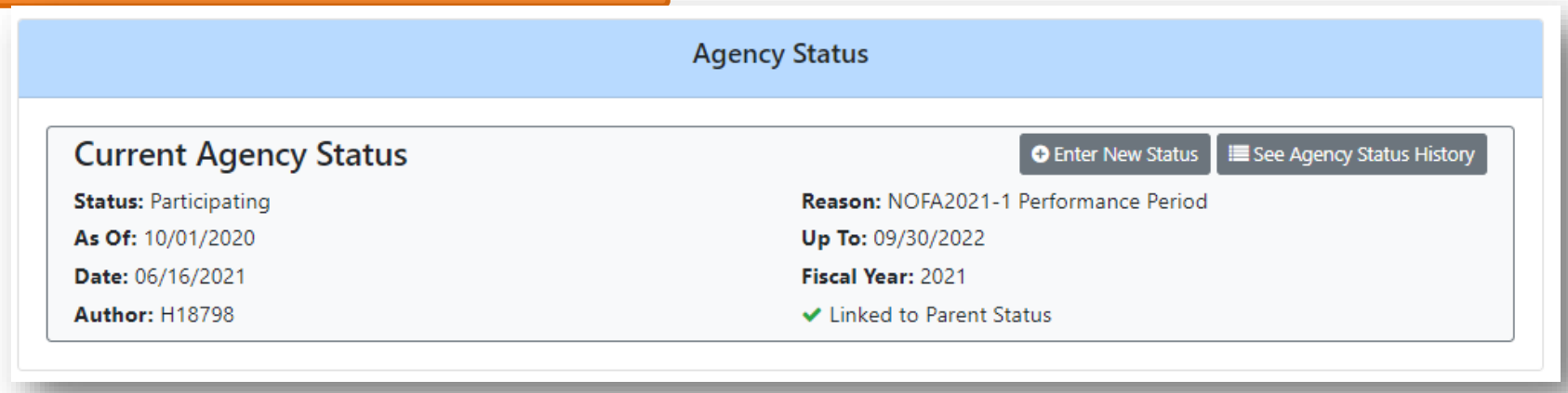
Automated Status Renewal Based on NOFA Performance Period (Cont)

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:



Sub Grantee Status:



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.

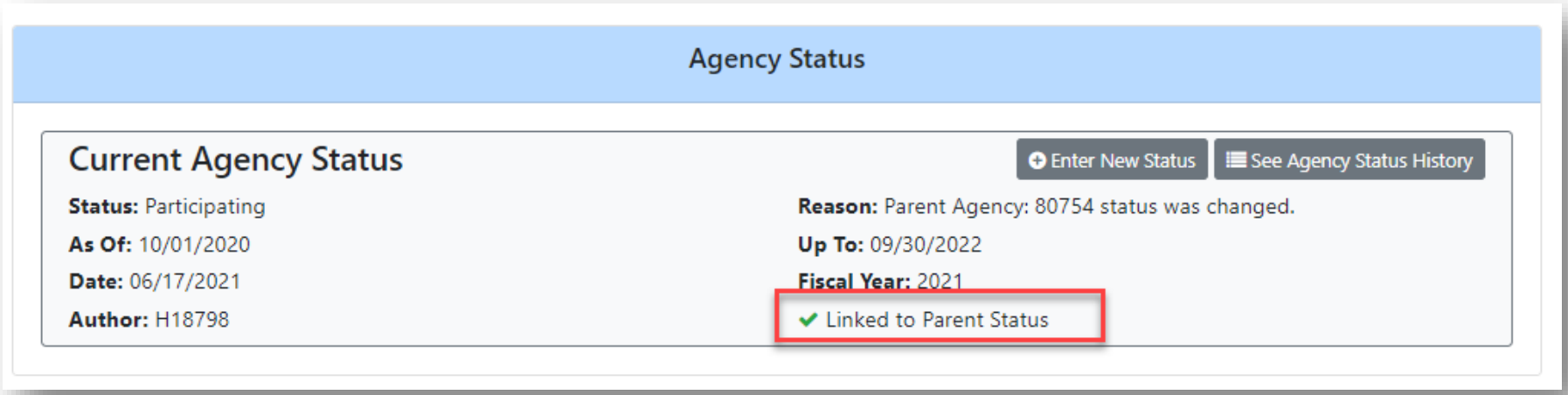
When entering a status of Conditional, Inactive, or Terminated for an Affiliate, Sub Grantee, or Branch type agency, a flag will display indicating the agency is unlinked from the parent for status updates.

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

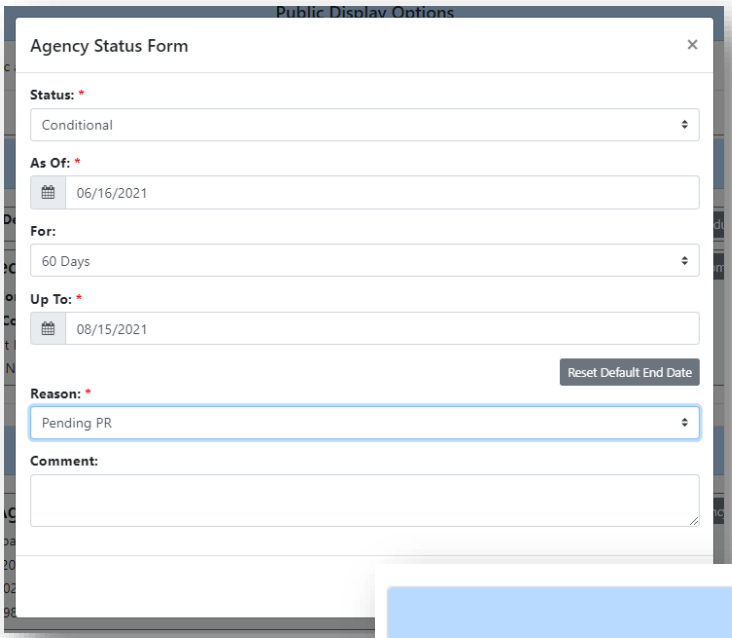
Prior to making the status change to a sub agency, a green check mark will display indicating that the sub agency is linked to the parent agency for status updates.



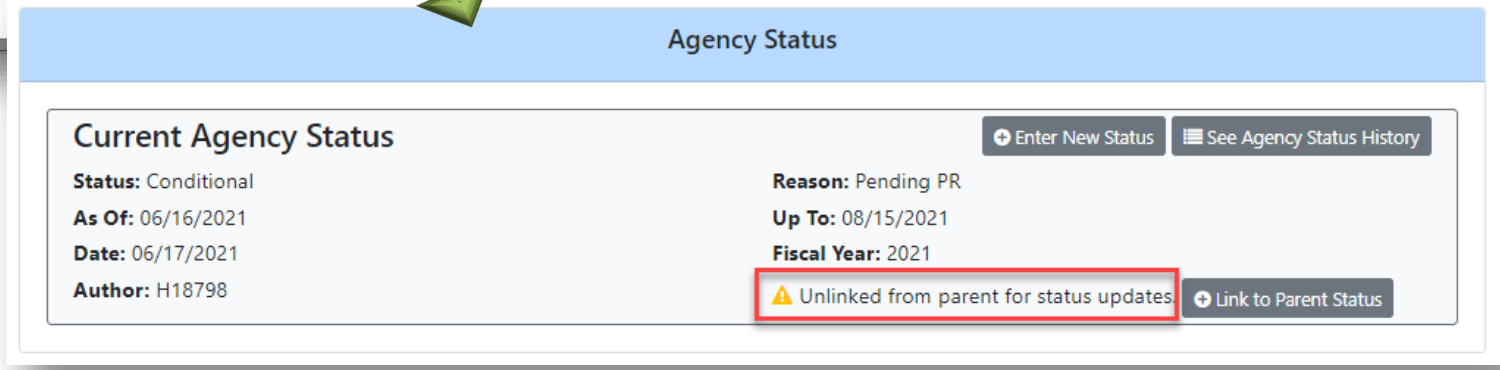
Allow Agencies to be Unlinked from their Parent Agency for Status Updates (Cont)

⚠ Unlinked from parent for status updates.

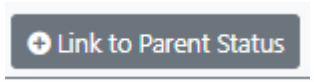
After entering the Conditional, Inactive, or Terminated status, the flag will change to a yellow alert indicating the agency is unlinked from the parent for status updates.



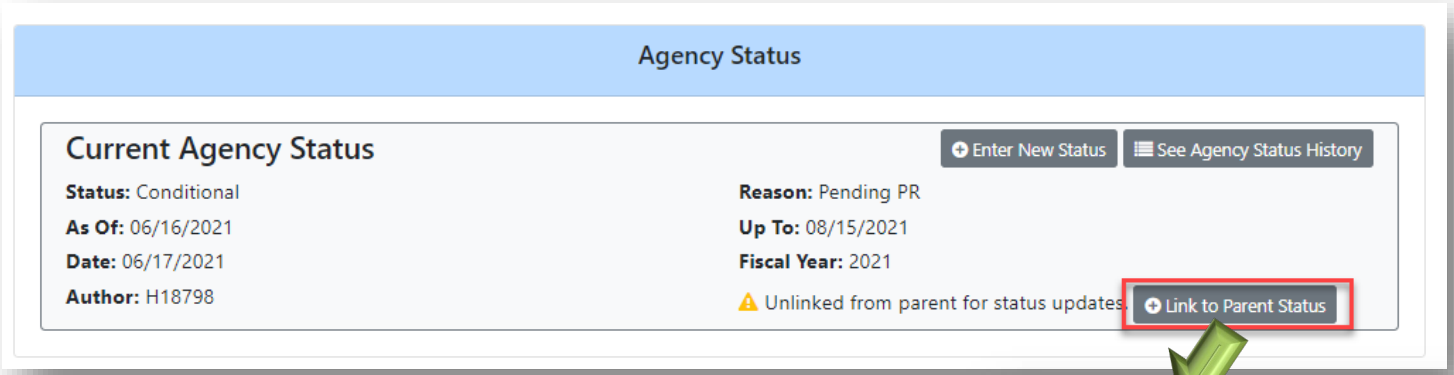
When an agency displays the yellow alert indicating unlinked from the parent for status updates, if the parent's status is updated, the sub agency will retain their current status.



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

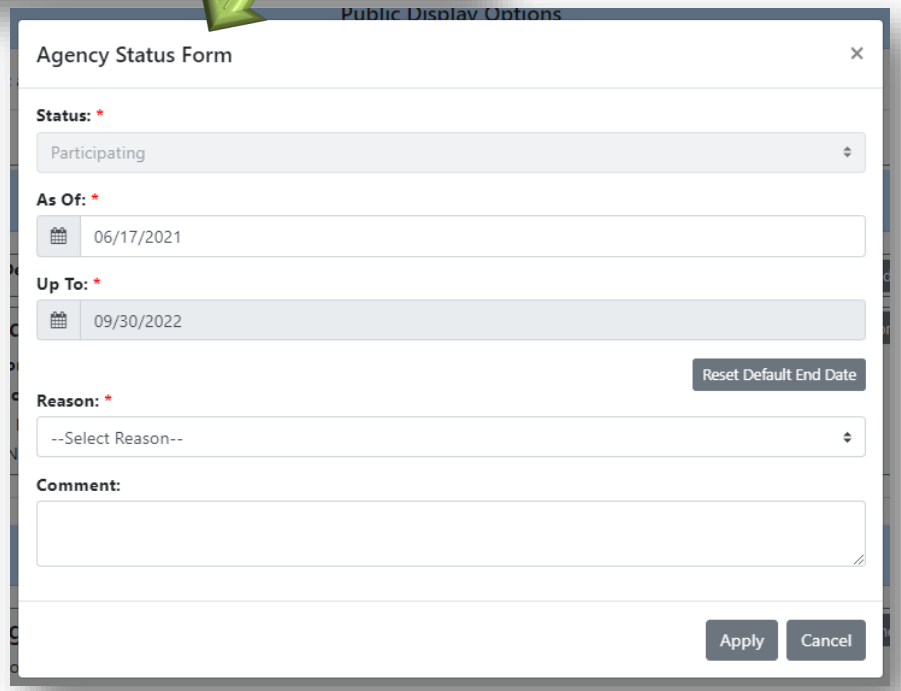


If the sub agency's status can be changed back to Participating and continue to follow the parent's status, click the **Link to Parent Status** button.



The 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.

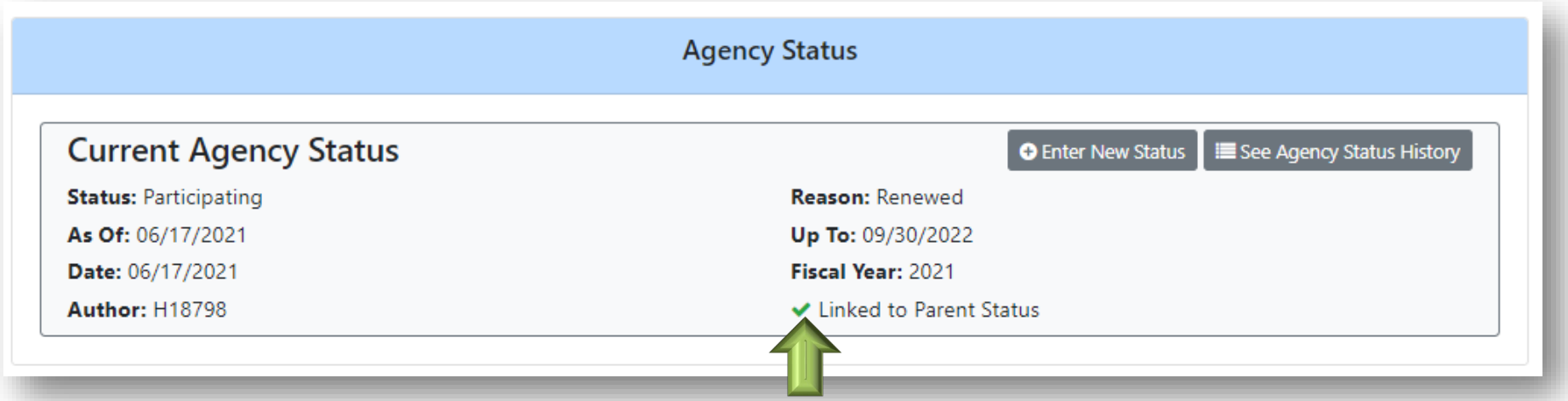


Enter the appropriate **As Of** date, **Reason**, and **Comment**. Click the **Apply** button.

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

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.



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

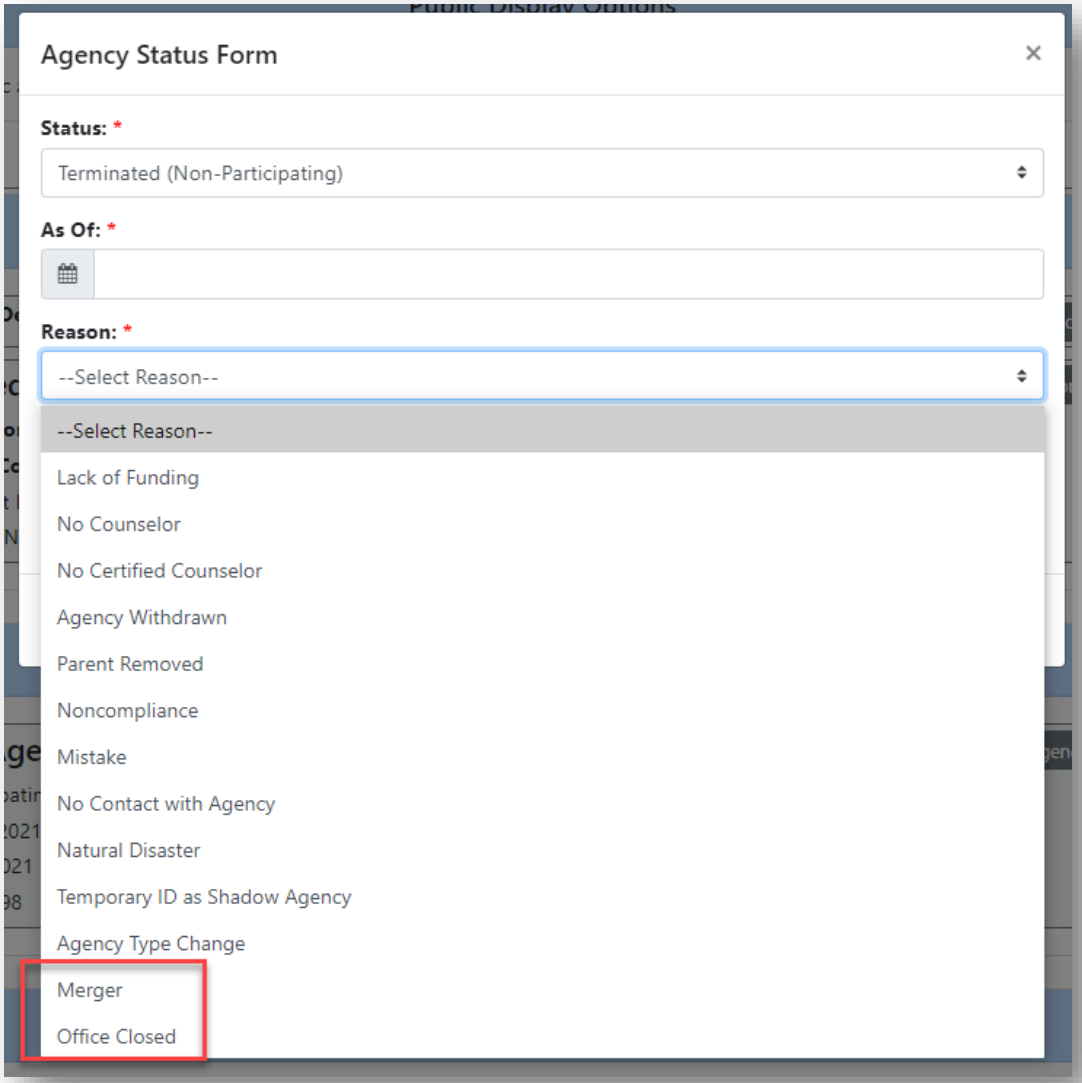
New Reasons for Terminated Status

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.

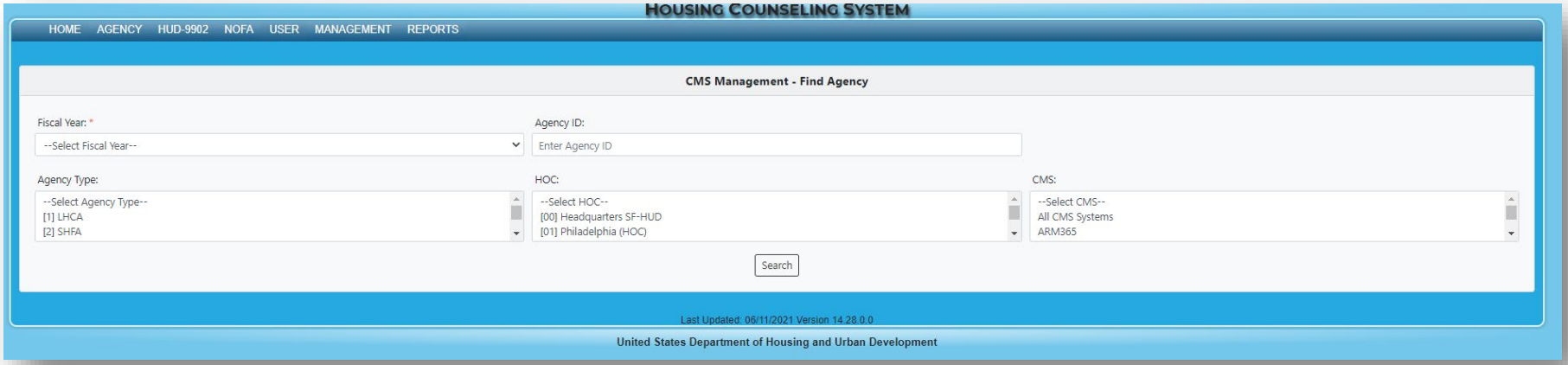
Office Closed – Use this termination reason if the agency's office is closing to the public.



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.



Edge Chromium Compatibility - CMS Management (Cont)

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

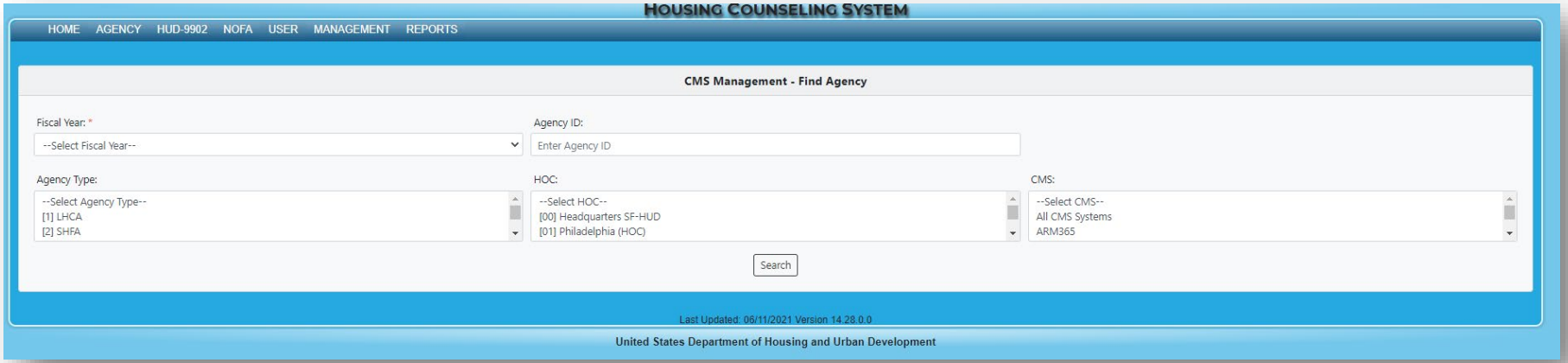
- Fiscal Year – Required. Select the Fiscal Year of the profile that requires the setting change

To search for a single agency:

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

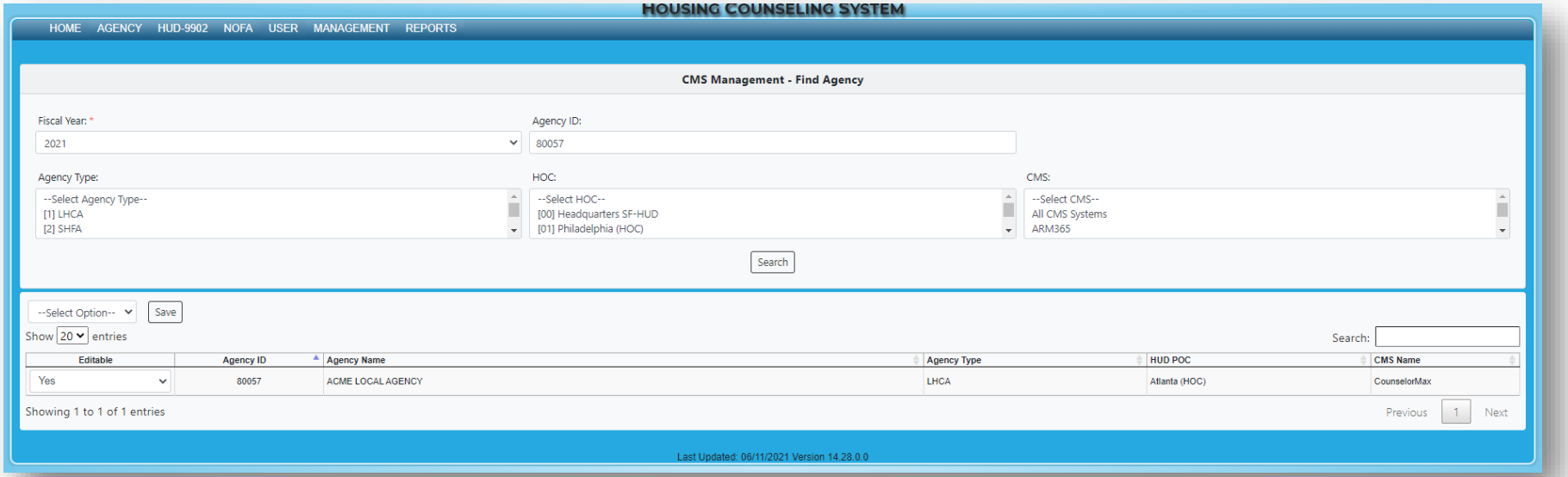
To search for multiple agencies, use one or more of the following search criteria and click the Search button:

- 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.



Edge Chromium Compatibility - CMS Management (Cont)

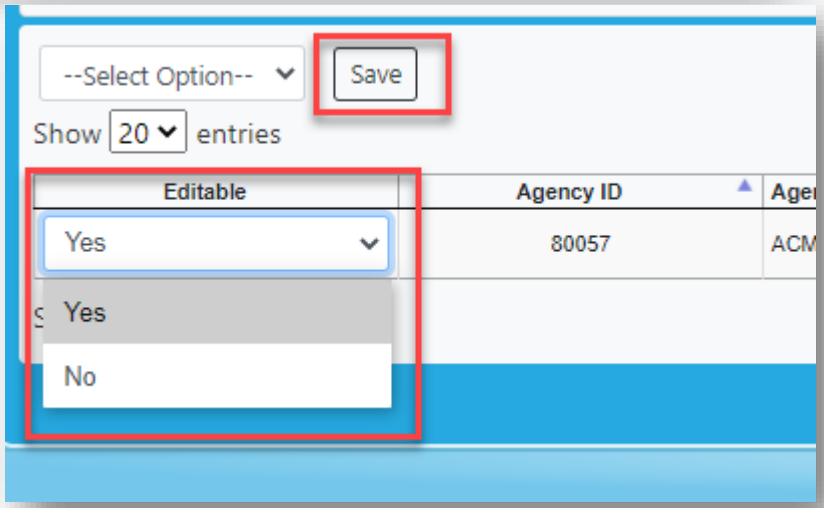
The results will display below the Search button.



In the Editable column, select the desired setting:

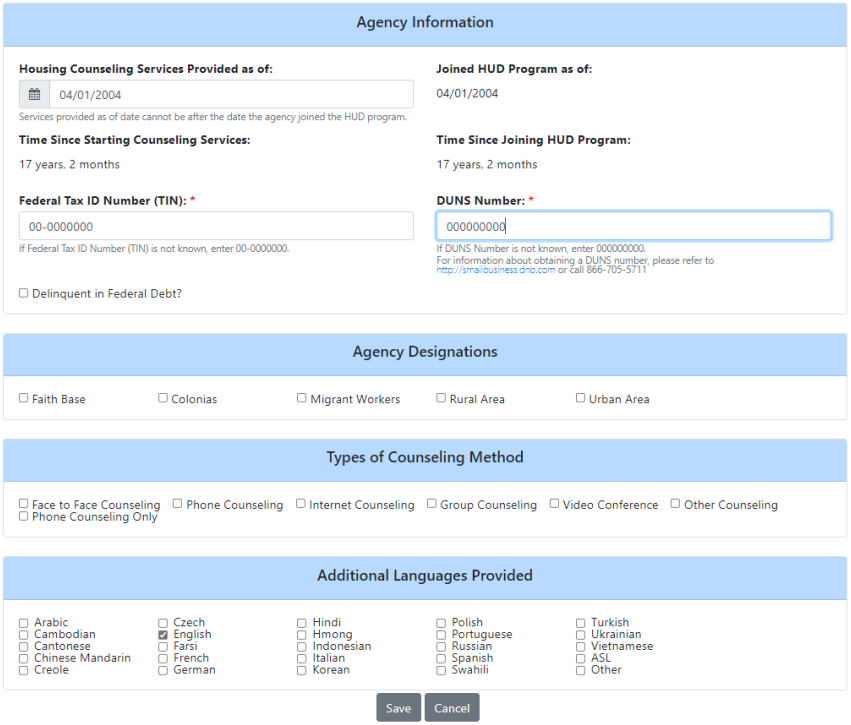
- **Yes** will set the profile to editable.
- **No** will lock the profile for edits. If a profile is locked for editing, updates can only be made from the agency's CMS.

After selecting the desired setting. Click the Save button.

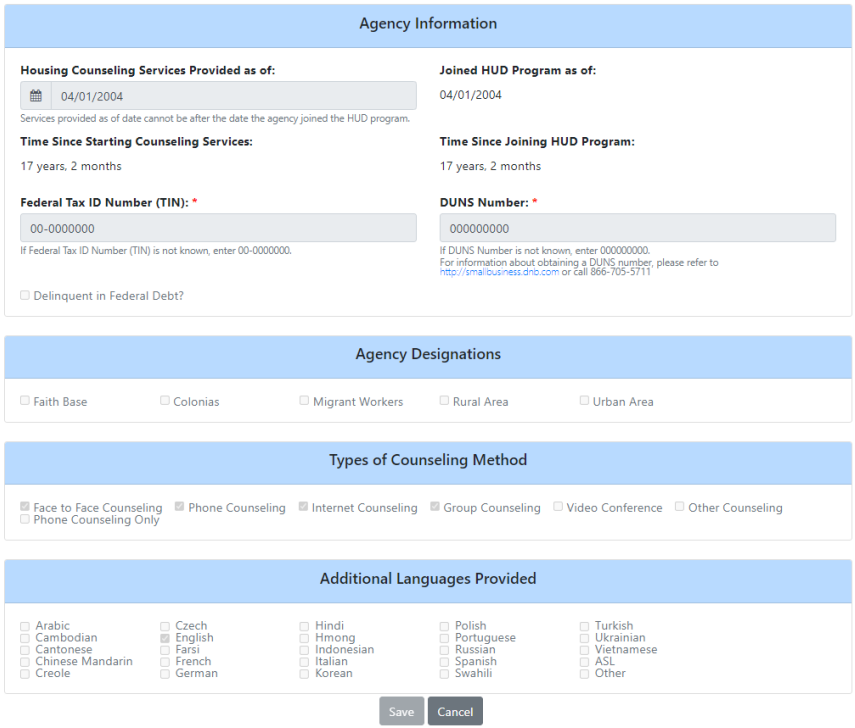


Edge Chromium Compatibility - CMS Management (Cont)

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



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



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