

# **HCS Improvements**

**HCS v14.14.0.0**

**May 22, 2018**

# Changes to HUD User Interface

**The following list are visible enhancements available at the Agency user level.**

- Identify Agencies Providing Reverse Mortgage Counseling using data file from FHAC
- Agency Profile - Validation Check for Date Agency Joined HUD Program
- Agency Profile - Move Methods of Counseling to Agency Information tab
- Agency Review Spreadsheet - Add HUD POC and Agency Status Date Information
- Basic Agency Spreadsheet - Add HUD POC and Status Change Reason to spreadsheet
- Report Submission Verification Module Updated

# Identify Agencies Providing Reverse Mortgage Counseling

- Agencies providing Reverse Mortgage Counseling will now match the list in CHUMS/FHAC database.
  - This feature in HCS is automatic and cannot be edited manually.
    - HUD POCs will not be able to change the selection.
  - Agencies providing this service will be acknowledge now on the agency search web site and phone directory matching the HECM list now in existence.
  - Nightly job will pull FHAC data file to identify agencies that have at least one HECM counselor.

# Identify Agencies Providing Reverse Mortgage Counseling

- A checked box indicates that the agency has at least one HECM counselor in FHAC.

**Types of Counseling Services:**

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

- An unchecked box indicates that the agency does not have a HECM counselor in FHAC.

**Types of Counseling Services:**

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

# Validation Check for Date Agency Joined HUD Program

- Agencies participating in the HUD's program must demonstrate experience.
  - Agency's start date must be earlier than the date they entered the HUD's program.
    - Agencies with a start date later than the date entering HUD's program need to be corrected
- The validation check for this discrepancy brings to your attention this error for you to take appropriate action to correct.

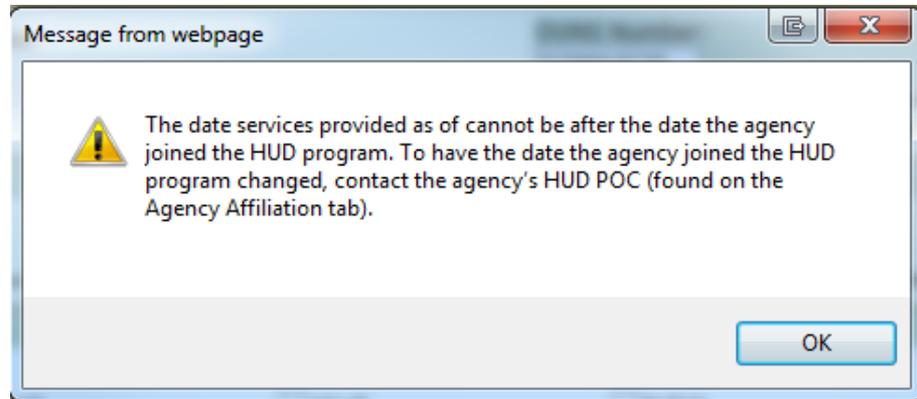
# Validation Check for Date Agency Joined HUD Program

## Agency Profile – Agency Information tab:

- If a user enters a date that is after the date the agency joined the HUD program and saves, an alert will display.

<u>Housing Counseling Services Provided as of:</u>	Joined HUD Program as of: <b>04/01/2004</b>
<input type="text" value="04/21/2005"/> 	
Services provided as of date cannot be after the date the agency joined the HUD program.	

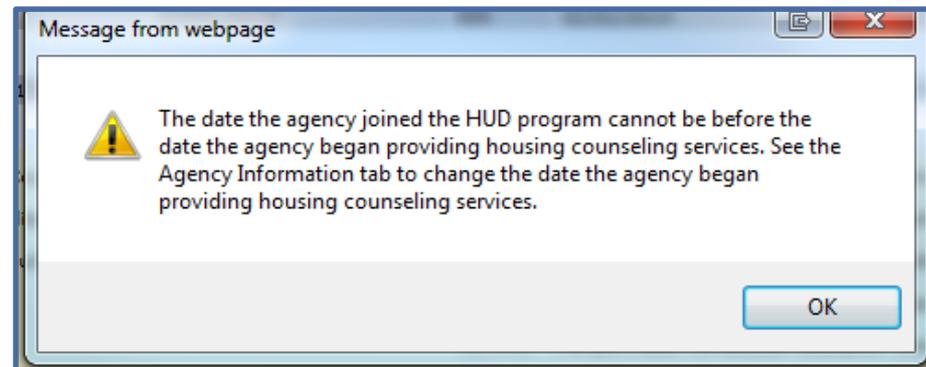
- In this example, the date of 04/21/2005 was entered as the date services were provided as of. That date is after the date the agency joined the HUD program – 04/01/2004.
- The alert displays:



# Validation Check for Date Agency Joined HUD Program

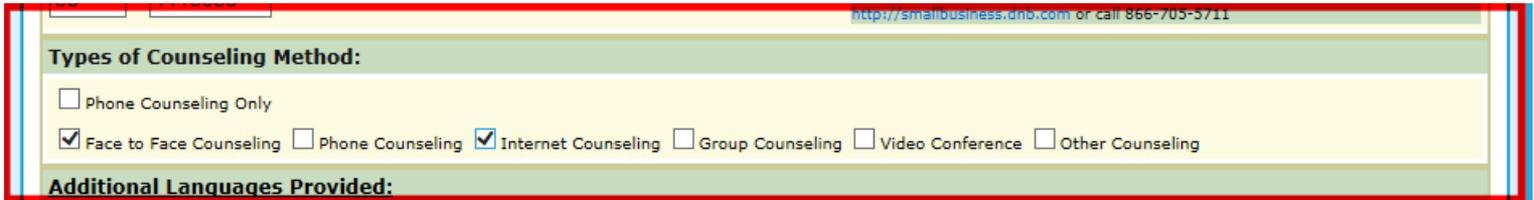
## Agency Profile – HUD Affiliation tab:

- The date the agency joined the HUD program **can only be entered by a HUD user**. The date must be equal to or after the date the agency began providing housing counseling services.
  - If a user enters a date that is before the date the agency started providing services, an alert will display.



# Agency Profile - Moved Methods of Counseling to Agency Information Tab

- Counseling was moved from the HUD Affiliation tab to the Agency Information Tab



The screenshot shows a web form with a red border. At the top right, there is a URL: <http://smallbusiness.dnb.com> or call 866-705-5711. Below this is a section titled "Types of Counseling Method:" with a light green background. It contains several radio button options: "Phone Counseling Only" (unchecked), "Face to Face Counseling" (checked), "Phone Counseling" (unchecked), "Internet Counseling" (checked), "Group Counseling" (unchecked), "Video Conference" (unchecked), and "Other Counseling" (unchecked). Below this section is another section titled "Additional Languages Provided:" with a light green background.

- Allows the Agency to mark the method of counseling and maintain this information more efficiently.
  - Now editable by agencies directly.
  - Take time to mark your Agency's counseling method as most are now blank.

# Agency Review Spreadsheet

## Added HUD POC and Agency Status Date Information

The agency's HUD POC and latest status date information has been added to the Agency Review Spreadsheet.

38 Agency(s) Found

**Search Criteria:**

- Fiscal Year: 2018
- POC Name: Grotheer, George (H18798)

[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
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D	E	F	G	H	I	J	K	L	M
Agency Address State	Agency Status	Status Start Date	Status End Date	Status Last Updated Date	HUD POC First Name	HUD POC Last Name	HUD POC Phone	HUD POC Email	Last Review Date
LA	Approved	7/22/2015	7/22/2018	8/10/2015	George	Grotheer	202-402-2294	gghcs@salientcrgt.com	7/22/2015
TX	Participating	9/20/2016	9/20/2019	9/29/2016	George	Grotheer	202-402-2294	gghcs@salientcrgt.com	4/6/2011

# Basic Agency Spreadsheet

## Added HUD POC and Status Change Reason to Spreadsheet

- The agency's HUD POC and latest status change reason has been added to the Basic Agency Spreadsheet.

38 Agency(s) Found

**Search Criteria:**

- Fiscal Year: 2018
- POC Name: Grotheer, George (H18798)

[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
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C	D	E	F	G	H	I	J	K	L	M
Type	Agency Status	Start Date	End Date	Status Change Reason	Agency Address State	HUD POC First Name	HUD POC Last Name	HUD POC Phone	HUD POC Email	Parent Agency
	Approved	10/1/2017	9/30/2020	Recertified	A	George	Grotheer	202-402-2294	gghcs@salientcrgt.com	
antee	Participating	10/1/2017	9/30/2020	Parent Agency:80867 status was changed.	A	George	Grotheer	202-402-2294	gghcs@salientcrgt.com	
	Approved	10/1/2017	9/30/2019	Recertified	A	George	Grotheer	202-402-2294	gghcs@salientcrgt.com	
				Parent Agency:83579 status was						

# CMS Report Submission Verification Module Updated

- The Reports Submission has added security features.
  - Used to check agency's data transmissions using their CMS.
  - Error messages in layman's term for easy understanding.
- Agency should look at this after each CMS transmission to verify data was successfully delivered to HCS.
  - If there was a problem, Agency can access this feature to determine why their transmission failed.

# CMS Report Submission Verification Module Updated

Agency Users – CMS Submission Verification is found in the main HCS navigation.

The image shows two screenshots from the Housing Counseling System. The top screenshot displays the main navigation menu with the following items: HOME, AGENCY, HUD-9902, BUDGET ALLOCATION, CMS SUBMISSION VERIFICATION (highlighted with a red box), and APPROVED CMS PRODUCTS. Below this is a sub-menu with options: Agency Summary, Agency Information, Personnel, Contact Information, HUD Affiliation, and Counselor/Client. A large blue arrow points from the highlighted menu item to the second screenshot. The second screenshot shows the 'CMS Submission Verification' form. It includes instructions: '1. Enter Start Date and End Date (\* required) 2. Enter search criteria (optional) 3. Select report button'. The form contains two date input fields: 'Start Date: (mm/dd/yyyy) \*' and 'End Date: (mm/dd/yyyy) \*', each with a calendar icon. Below these is a 'Submission Type' dropdown menu set to '--select--'. At the bottom of the form are four buttons: 'All Submissions', 'Failed List', 'Success List', and 'Clear'.

# CMS Report Submission Verification Module Updated

**Agency Users are limited to viewing submissions for their own agency.**

Agency users can filter searches by:

- Submission Type
- Failed Submissions only
- Successful submissions only.

**CMS Submission Verification**

Instructions: 1. Enter Start Date and End Date (\* required) 2. Enter search criteria (optional) 3. Select report button

Start Date: (mm/dd/yyyy) \*        End Date: (mm/dd/yyyy) \*  

Submission Type:  

