User's Manual

Housing Counseling System (HCS F11)

Single Family Housing Counseling Program

Under PCAS # 251390

U.S. Department of Housing and Urban Development

June 2010

System:	HCS F11
Doc Type:	Final
Doc Date:	06/23/2010
Doc Number:	Rev 2.1
Contract Number:	C-OPC-23219

Revision Sheet

Release No.	Date	Revision Description
Rev. 1.0	10/3/06	Initial User‟s Manual
Rev. 1.1	2/28/07	Updated Program Manager Section
Rev.1.2	3/5/07	Updated Program Manager section, Agency Information sub-section
Rev.1.3	5/2/07	Updated Program Manager section, Edits from client
Rev.1.4	10/5/07	Incorporated edits and comments from HUD
Rev. 2.0	05/31/10	Complete update of the document to reflect system modifications.
Rev. 2.1	6/23/10	Minor naming changes

User's Manual
Authorization Memorandum

I have carefully assessed the User"s Manual for the Housing Counseling System. This document has been completed in accordance with the requirements of the HUD System Development Methodology.

MANAGEMENT CERTIFICATION – Please check the appropriate statement.

_____ The document is accepted.

_____ The document is accepted pending the changes noted.

_____ The document is not accepted.

We fully accept the changes as needed improvements and authorize initiation of work to proceed. Based on our authority and judgment, the continued operation of this system is authorized.

_____	_____
David Huynh Project Leader/GTM	DATE
_____	_____
Francine Bland GTR	DATE
_____	_____
George Grotheer Program Area/Sponsor Representative	DATE
_____	_____
Ruth Roman Program Area Sponsor/ Director	DATE

USER'S MANUAL

TABLE OF CONTENTS

1.0 GENERAL INFORMATION 1-1

1.1 System Overview 1-1

1.2 Project References 1-2

1.3 Authorized Use Permission 1-2

1.4 Points of Contact 1-2

1.4.1 Information 1-2
1.4.2 Coordination 1-3
1.4.3 Help Desk 1-3

1.5 Organization of the Manual 1-3

1.6 Acronyms and Abbreviations 1-4

2.0 SYSTEM SUMMARY 2-1

2.1 System Configuration 2-1

2.2 Data Flows 2-1

2.3 User Access Levels 2-2

2.4 Contingencies and Alternate Modes of Operation 2-3

2.5 Agency Data Input 2-3

3.0 GETTING STARTED 3-1

3.1 Logging On 3-1

3.2 System Menu 3-1

3.3 Changing User ID and Password 3-2

3.4 Exit System 3-3

4.0 USING THE SYSTEM ONLINE 4-1

5.0 AGENCY USER 5-1

5.1 Agency 5-1

5.1.1 Agency Search 5-1
5.1.2 Counselor Information 5-14
5.1.3 Client Information 5-16

5.2 HUD-9902 5-18

5.2.1 HUD-9902 Form 5-19

5.3 Input Awards 5-29

5.4 Submission Verification 5-31

5.4.1 ARM Submission 5-31

5.5 CMS Management 5-34

6.0 REVIEWER 6-1

6.1 Scoring 6-1

6.2 Reports 6-6
6.2.1 Viewing Reports 6-6
6.2.2 Report 6-9

6.3 Funding Allocations 6-12

7.0 GTR 7-1

7.1 Agency 7-1
7.1.1 Agency Search 7-2
7.1.2 Add New Agency 7-18
7.1.3 Counselor Information 7-20
7.1.4 Client Information 7-22

7.2 HUD-9902 7-24
7.2.1 9902 Data Reporting Status Inquiry 7-24
7.2.2 Analysis Reports Inquiry 7-39

7.3 Grants 7-51
7.3.1 Grant Application Process 7-52
7.3.2 Setup Grant Application 7-52
7.3.3 Scoring 7-55
7.3.4 Final Scoring for Primary Reviewer 7-60
7.3.5 Calculate Recommended Award 7-62
7.3.6 Input Award/Sub Allocations 7-62

7.4 ARM Submission Verification 7-66

7.5 Funding Allocations 7-69

7.6 Reports 7-72
7.6.1 Viewing Reports 7-72
7.6.2 Report Examples 7-76

8.0 OFFICE MANAGER 8-1

8.1 Agency 8-1
8.1.1 Agency Search 8-1
8.1.2 Add New Agency 8-16
8.1.3 Counselor Information 8-18
8.1.4 Client Information 8-20

8.2 HUD-9902 8-22
8.2.1 9902 Data Reporting Status Inquiry 8-22
8.2.2 Analysis Report Inquiry 8-37

8.3 Grants 8-49
8.3.1 Grant Application Process 8-50
8.3.2 Setup Grant Applications 8-50
8.3.3 Scoring 8-53
8.3.4 Final Scoring for Primary Reviewer 8-59
8.3.5 Calculate Recommended Award 8-61
8.3.6 Input Award/Sub Allocations 8-61

8.4 User 8-66

8.5 Management 8-74
8.5.1 Agency Reporting Module 8-74
8.5.2 Funding Allocations 8-79
8.5.3 Change Office Default 8-83

8.6 Reports 8-85
8.6.1 Viewing Reports 8-85
8.6.2 Report Examples 8-88

8.7 Export 8-106
8.7.1 Agency Award/No Award Letter 8-107
8.7.2 Agency Name Check Review 8-108
8.7.3 Application Data 8-109
8.7.4 Congressional Report Data 8-112
8.7.5 Draw Down Report Process 8-112
8.7.6 Funding Aggregate Report 8-119
8.7.7 HUD-1044 8-120
8.7.8 IRS Delinquent Data 8-123
8.7.9 List of Awardees 8-124
8.7.10 Procurement Accounting Data 8-126
8.7.11 Public Affairs Report 8-127

8.8 HCS Archive 8-128
8.8.1 Reports 8-129

9.0 PROGRAM MANAGER 9-1

9.1 Agency 9-2
9.1.1 Agency Search 9-2
9.1.2 Add New Agency 9-16
9.1.3 Counselor Information 9-18
9.1.4 Client Information 9-20

9.2 HUD-9902 9-22
9.2.1 9902 Data Reporting Status Inquiry 9-22
9.2.2 Analysis Report Inquiry 9-37

9.3 Grants 9-49
9.3.1 Grant Application Process 9-51
9.3.2 Setup Grant Applications 9-54
9.3.3 Scoring 9-59
9.3.4 Final Scoring for Primary Reviewer 9-64
9.3.5 Calculate Recommended Award 9-66
9.3.6 Input Award/Sub Allocations 9-70

9.4 User 9-74

9.5 Management 9-85
9.5.1 System Control Panel 9-86
9.5.2 Agency Report Module 9-90
9.5.3 Grant Maintenance 9-94
9.5.4 Agency Type Setup 9-113
9.5.5 HCS Menu Control 9-114
9.5.6 CMS Management 9-117
9.5.7 AD HOC Query 9-120
9.5.8 Change Office Defaults 9-122

9.6 Reports 9-124

9.6.1 Viewing Reports 9-124
9.6.2 Report Examples 9-128

9.7 Export 9-146
9.7.1 Agency Award/No Award Letter 9-147
9.7.2 Agency Name Check Review 9-148
9.7.3 Application Data 9-149
9.7.4 Congressional Report Data 9-151
9.7.5 Draw Down Report Processing 9-152
9.7.6 Funding Aggregate Report 9-158
9.7.7 HUD-1044 9-160
9.7.8 IRS Delinquent Data 9-163
9.7.9 List of Awardees 9-164
9.7.10 Procurement Accounting Spreadsheet 9-166
9.7.11 Public Affairs Report 9-167

9.8 HCS Archive 9-168
9.8.1 Reports 9-169

10.0 QUERYING 10-1

11.0 REPORTING 11-1

12.0 TROUBLE SHOOTING 12-1

12.1 User Cannot Access HCS 12-1

12.2 Agency Information is not Posted on HUD's Web Site 12-1

12.3 Counseling Services Agency 9902 Report is Not Available 12-2

1.0 GENERAL INFORMATION

1.0 GENERAL INFORMATION

1.1 System Overview

The Housing Counseling System (HCS) is an automated web-based system to support HUD‟s Single Family Housing Counseling Program. HCS has several components to collect data for reports and analysis. Three primary components are Agency information, HUD-9902 Report collection, and Grant Processing. The electronic form HUD-9902, Housing Counseling Agency Fiscal Year Activity Report, is available from the HUD web site for agencies to file their reports at the end of each fiscal year. HUD-approved housing counseling agencies, funded state housing finance agencies, and national and regional intermediaries and their funded affiliates are required to submit quarterly and annual HUD-9902 reports on their counseling activities.

The 9902 component collects individual and aggregate HUD-9902 reports. HCS provides tools to track agency 9902 submissions and analysis of the data submitted. HUD users can request, by Homeownership Center or HUD-wide, a list of agencies that have reported, a list of those that have not reported, or cumulative totals of data. The user can also get cumulative data, percentages, and HUD grants as a percentage of all counseling activities, by housing counseling agency, city, state, or HOC. Housing Counseling Agency data is also maintained within HCS and made available to the public via HUD‟s web site.

The housing counseling grant processing component helps HUD Single Family Headquarters and Homeownership Center staff evaluate applications for the annual housing counseling grant awards competition. HUD-approved housing counseling agencies, state housing finance agencies, and national and regional intermediaries submit applications each spring in response to HUD‟s SuperNOFA process.
HUD staff uses HCS to enter relevant application data and scores with comments on the factors. HCS determines recommended awards for each agency and produces all required documents to process the grant awards.

The major outputs from the grant component of HCS are award reports and Congressional notification letters. It also produces various reports associated with different element/stages of the evaluation process. The user can get reports on program cost, (to compare the amount requested to the scope and level of services), applicants' scores on the factors for awards, or on strengths and weaknesses of the factors.

The Housing Counseling System's purpose is to facilitate issuance of housing counseling grant funding, and to evaluate results. The Housing Counseling System provides an efficient means of monitoring and evaluating the performance of counseling agencies, keeping track of which agencies apply for grants, awarding the grants and making appropriate Congressional notifications. Direct benefits that result from the Housing Counseling system are pre-purchase counseling for first-time home buyers, foreclosure avoidance counseling for homeowners and rental counseling for the homeless. Additionally, the Housing Counseling system provides a process for investing counseling funds by merit and regulations in a timely manner.

In October 2006, in support of the Single Family Integration Plan, HCS was integrated with the Client Activity Reporting System (CARS) that was in October of 2008 replaced with Agency Reporting Module (ARM).

System Information Category	System Information
Responsible organization:	Office of the Deputy Assistant Secretary for Single Family Housing. Program Development
System name:	Housing Counseling System
System number:	F11
System category:	Major application
Operational status:	Release v10.7.0.0 is operational
System environment:	HCS operates on the HUD operating standard of Windows XP over the Internet as a Web-base system through HUD"s security server (LDAP) using Cold Fusion. The HCS data is stored in the cars database on the NTHHQP17 server. The HCS database has been developed in Sybase.

1.2 Project References

The following project references were used to compile the User"s Manual:

Business Program Documents

- HUD 9902 FORM
- HUD Handbook 4065.1
- SuperNOFA

Government Documents

- Department of Housing and Urban Development, System Development Methodology, Release 6.06

Other Documents

- System/Sub-System Spec
- Data Requirements Document

1.3 Authorized Use Permission

HCS is set up to retrieve data electronically. To safeguard these transactions and users privacy, all users are issued a User ID and password, and the data transmitted is stored on a secure server. The reports and data are only available to authorized users of the system.

1.4 Points of Contact

1.4.1 Information

The key personnel involved in the project are:

Type of Contact	Name	Department	Telephone
Program Area/Sponsor	Ruth Roman	Single Family Program Support	202 402-2112

Director		Division	
Project Sponsor Manager	George Grotheer	Single Family Program Support Division	202 402-2294
IT project leader/GTM	David Huynh	Office of Systems Integration and Efficiency	202 402-7493
Contractor Project Mgr.	Andrey Ignatov	DysTech, Inc.	571 3210-460 x109
Database Administrator	Anurag Mishra	DysTech, Inc.	571 3210-460 x115
Development Coordination/PVCS	Stephen Liu	DysTech, Inc.	571 3210-460 x121

1.4.2 Coordination

HCS will interface with the organizations listed below during the lifecycle of the development effort.

- Single Family Program Support Division – Participate in project initiation, requirements definition, and user acceptance test activities.
- Development Coordination Group (DCG) – This group provides change management and technical support for all Single Family Housing system development teams.
- Test Center and Assigned Field Offices – Performs verification and field-testing of HCS software prior to releases being installed into production.
- Office of Information Technology (OIT) – Provides technical support, monitors adherence to HUD Software Development Methodology (SDM), reviews and approves all project deliverables. Change Control Board (CCB) – Reviews and approves requests for HCS system releases.
- Office of the Chief Information Officer (OCIO).

1.4.3 Help Desk

The HCS Help Desk is handled through HUD‟s main help desk and can be reached at 202-708-3300. Tier 2 and 3 tickets are directed to the HCS system sponsor. HUD users should contact their HOC HCS POCs for first level assistance. HOC HCS POCs can contact the HUD Program Project Manager for any unresolved issues.

Agencies will contact their authorized HUD representatives for assistance.

1.5 Organization of the Manual

This User‟s Manual for HCS is organized in and contains the following sections:

- 1.0 – General Information including system overview, project references, contacts, and acronyms and abbreviations.
- 2.0 – System Summary which includes System Configuration, Data Flows, User Access Levels and Contingency plans.
- 3.0 – Getting Started includes an overview of logging on, system menus, changing USER ID and Password, and exiting the system.
- 4.0 – Using the System (Online) provides a description of basic functions found throughout the system and define certain terms used in this User‟s Manual.
- 5.0 – Agency User provides description of system functions available for agency users.
- 6.0 – Reviewer provides description of system functions available for HUD reviewers.
- 7.0 – GTR provides description of system functions available for HUD GTRs.
- 8.0 – Office Manager provides description of system functions available for HUD office manager.

- 9.0 – Program Manager provides description of system functions available for HUD program managers.
- 10.0 – Querying capabilities and procedures.
- 11.0 – Reporting capabilities and procedures.

1.6 Acronyms and Abbreviations

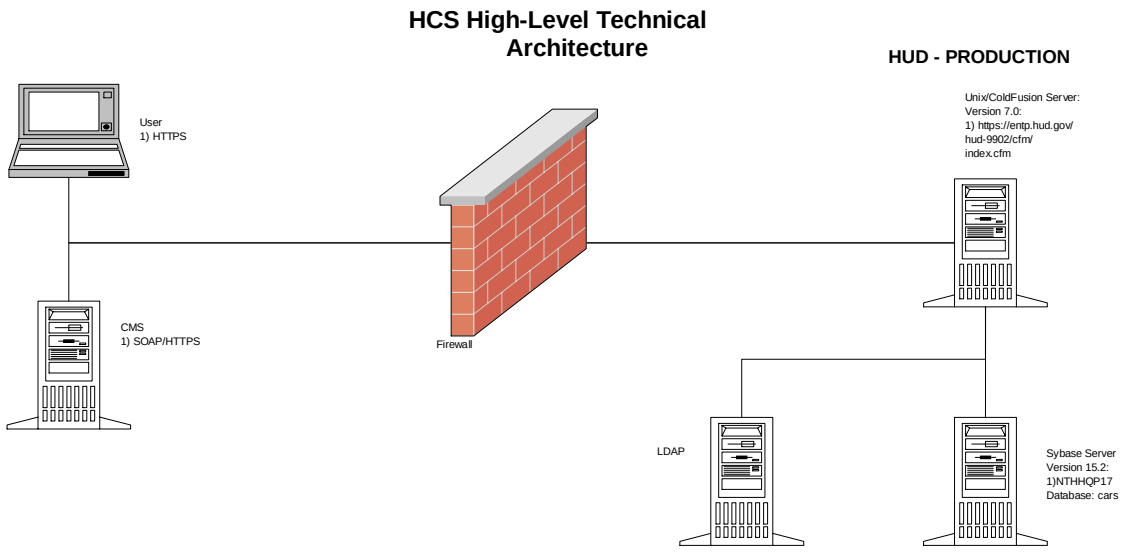
Terms and Abbreviations	
Abbreviations	**Definition**
ARM	Agency Reporting Module
CARS	Client Activity Reporting System
CCB	Control Board
CMS	Client Management System
DCG	Development Coordination Group
DUNS	Dun & Bradstreet number
FAQ	Frequently Asked Questions
GTR	Government Technical Officer
HCA	Housing Counseling Agency
HCS	Housing Counseling System
HOC	Homeownership Center
HQ	Headquarters
ISP	Internet Service Provider
OCIO	Office of the Chief Information Officer
OIT	Office of Information Technology
POC	Point of Contact
SSL	Secure Socket Layer
TIN	Federal Tax ID Number

2.0 SYSTEM SUMMARY

2.0 SYSTEM SUMMARY

2.1 System Configuration

HCS is a grant tracking and Housing Counseling Agency management system. It is a web-based application that runs on a clustered server environment available to HUD personnel and Housing Counseling Agency users located throughout all of the geographical United States. It is accessible to anyone on the internet through HTTP over Secure Socket Layer (SSL) and through proper authentication using an LDAP server. HCS is not a distributed system but does provide data feeds into other systems. (See Diagram #1 for overall system flow)



2.2 Data Flows

The Housing Counsel System is composed of several business process modules, grant processing module, client activity reporting (9902) module, and agency profile module, client module, counselor module, archives module, agency reporting module and system management module,. The agency profile management system supports the creation, read, update, and deletion of profile information of HUD approved agencies that participate in the HUD Housing Counseling program. The agency profile information provides the identity data for the grant processing and client activity reporting modules. The agency profile information is entered and updated at any time throughout the fiscal year.

The Grant Processing module supports the grant processing for housing counseling agencies. Before grant applications data can be entered into the system, HUD users prepare for the grant processing business by entering appropriations, grant categories, grant types, and performance evaluation criteria. These sets of data provide the foundation on which grant applications are processed. After the appropriations, grant categories, and grant types are entered into the system, grant applications are ready to be entered into the system by HUD users. Grant applications are reviewed and provided with performance scores by HUD Reviewers to evaluate the grant award amount. The performance scores are then finalized by HUD Reviewers and the system calculates, based on the performance evaluation criteria, a recommended award amount. A HUD Reviewer takes that system calculated amount into consideration when updating the application with a final award amount. In applicable situations, a HUD Reviewer also sub-allocates the

awarded amount to sub-agencies that perform counseling services. The entered grant processing data is then provided to HUD Reviewers, managers, and external systems through a variety of reports and spreadsheets.

The client activity reporting module gathers client counseling activity by approved agencies in the HUD Housing Counseling program. HUD users and agency users enter in client counseling activity numbers. The client activity data entered is then used by reviewers during the next fiscal year grant processing cycle to evaluate the worthiness of an agency for grant awards. The client activity data is also made available to HUD users and managers through a variety of reports and spreadsheets. The HUD-9902 performance report and Logic Model are created using client data.

2.3 User Access Levels

The current HCS system design has five kinds of users. They are:

- Agency Users
- HUD Reviewers
- HUD GTRs
- HUD Office Managers and
- HUD Program Managers.

Agency Users are HCS users provided by HUD to Housing Counseling Agencies with rights to:

- Submit HUD-9902 Forms
- Submit Agency information
- View Verification of Submissions
- Sub-allocate grant awards to their sub-agencies when applicable

HUD Reviewers are HUD HCS users who conduct grant applications review with rights to:

- View assigned Grant Applications
- Score assigned Grant Applications
- View Reviewers Reports

HUD GTR role within HCS provides the GTR with the ability to oversee the business process of their assigned agencies to monitor the HUD-9902 submission process as well as the Grants Process. They have the access rights and capabilities of an Agency User as well as the capability to review the Grants Process. Within HCS, the HUD GTR has the ability to:

- Submit/Review HUD-9902 forms
- Submit/Review Agency information
- Designate the agency status in the Housing Counseling program
- Enter the Grant Processing section of HCS to:
    - View Funding Allocations
    - Setup Grant Applications
    - Score Grant Applications
    - Calculate Recommended Awards
    - Input Awards and Sub-Allocations
    - View Reports
- View ARM Submission Information

HUD Office Manager role within HCS also provides the ability to oversee the business process of the HUD-9902 submissions and the Grants Process. In addition to the rights and capabilities of the HUD GTR, the Office Manager also has the capability to view User Information and perform some Management Functions. Within HCS, the HUD Office Manager has the ability to:

- Submit/Review HUD-9902 forms
- Submit/Review Agency information
- Enter the Grant Processing section of HCS to:
    - View Funding Allocations
    - Setup Grant Applications
    - Score Grant Applications
    - Calculate Recommended Awards
    - Input Awards and Sub-Allocations
    - View Reports
    - Export Grant information from HCS
- Manager HCS Manager User Information
- Perform some Management Functions

HUD Program Manager role is the one with full access rights to the HCS System.
Within HCS, the HUD Program Manager has the ability to:

- Submit/Review HUD-9902 forms
- Submit/Review Agency information
- Enter the Grant Processing section of HCS to:
    - View Funding Allocations
    - Setup Grant Applications
    - Score Grant Applications
    - Calculate Recommended Awards
    - Input Awards and Sub-Allocations
    - View Reports
    - Export Grant information from HCS
- Manager all HCS User Information

Perform all Management Functions

2.4 Contingencies and Alternate Modes of Operation

The magnitude and geographical diversity of HCS requires strict access control and security measures for hardware, software, communications, and personnel. The system and its data must be protected from errors, accidents, unauthorized access, data destruction, potential violations of the Privacy Act, and data transmission errors.

2.5 Agency Data Input

Agencies are required to submit their information in HCS through automated transactions from their counseling application referred to as Client Management System (CMS) to HCS Agency Reporting Module (ARM). Once an agency submits their data through their CMS, they will not be able to input data manually via HCS user interface. Agencies may review their data in HCS and shall validate the information. If the data in HCS is not correct, agencies need to make corrections in their CMS and retransmit their data into HCS via ARM.

Agencies submitting their information through their CMS will still access HCS to check and validate their information. Agencies that experience problems submitting required data must contact their HUD contact to gain temporary access to HCS and input their data manually until their CMS application is operating correctly again.

HUD users are required to input HUD internal data in the agency‟s profile and to process agency‟s grant application. HUD users will use HCS to create reports and to conduct analysis to assist in the management of HUD‟s Housing Counseling program.

The rest of the User Guide provides instructions how to use HCS User Interface.

3.0 GETTING STARTED

3.0 GETTING STARTED

3.1 Logging On

HCS is accessed through the HUD Internet using Microsoft Internet Explorer 7.0 or higher. A login ID and password are required to access HCS. The Login to HCS is available on the Single Family section of the HUD Website under Housing Counseling. You can also type "HCS" in the search bar on the www.hud.gov webpage to get a hyperlink to the HUD **HCS** System. Enter your unique User Name and password and then click the **<OK>** button or press **<ENTER>**.

Figure 1. All Users – HCS Login screen.

Depending on your access level, you will see different options in the upper menu screen. Only options you have been authorized to access will be presented.

If you have difficulty logging on to the system, it is mostly due to a problem with resetting the password. To ensure proper accessing procedures, check the following steps:

1. Open a new Microsoft Internet Explorer Browser
2. Do not bookmark the login in screen. You can bookmark the page with the login link.
3. Do not use the back arrow to re-initiate the login screen

If you still cannot log in successfully in HCS the most likely problem involves the password.

- Agency users should contact their assigned HUD representative for assistance.
- HUD users should contact their HCS manager for assistance.

HUD and Agency Users may also contact HUD National Help Desk and request password reset.

3.2 System Menu

The main System Menu for HCS consists of the functions listed below. A user"s access to any of these particular functions is determined by their user level. Not all users will have access to all functions.

- Home – will return you to the main HCS Home Page
- Agency: Allows you to perform a search for agencies, counselor and client information, as well as add a new agency
- HUD-9902: takes you to 9902 Reporting Options, Data Reporting Status Inquiry, and Analysis Reporting Inquiry
- Grants – takes you to the Grants Application Process as well as Scoring, Final Scoring for Primary, Recommended Awards Calculation, and Input Awards. NOTE – Sub-allocation and Grant draw down tools are linked here.
- User: Provides user information and allows managing users.
- Management: takes you to the management functions including Export Data Functions, Agency Reporting Module, Funding Allocations, Change Office Defaults
- Reports: Provides reports for Application Progress Status, Application Score Status, Awards Recommendation, Awards Report, Awards Report by Agency, Office, and State, Funding Report Search, Reviewers Report and Final Report, and the Application Number Reference
- Export: Allows you to export data ranging from Agency Award/No Award Letters, Agency Name Check Review, Application Data, Congressional Report Data, Draw Down Report Processing, Funding Aggregate Report, HUD-1044, IRS Delinquent Data, List of Awardees, Procurement Accounting Data, Public Affairs Report
- Reports: Prompts you to archived data that is beyond the current and preceding year
- Grant Fiscal Year – Allows the user to search various fiscal years through dropdown options
- Logout – Logs you off the system and takes you to the www.hud.gov web page
- Change Password – This prompts you to a screen to change your password

Figure 2. All Users – HCS Home Page – Menu screen.

3.3 Changing User ID and Password

Users must contact their HUD Manager in order to change User ID and Password

To reset the password, simply click the „**Change Password**" button. After you are logged into the system, you can click the change password link at any time, to change your HCS password.

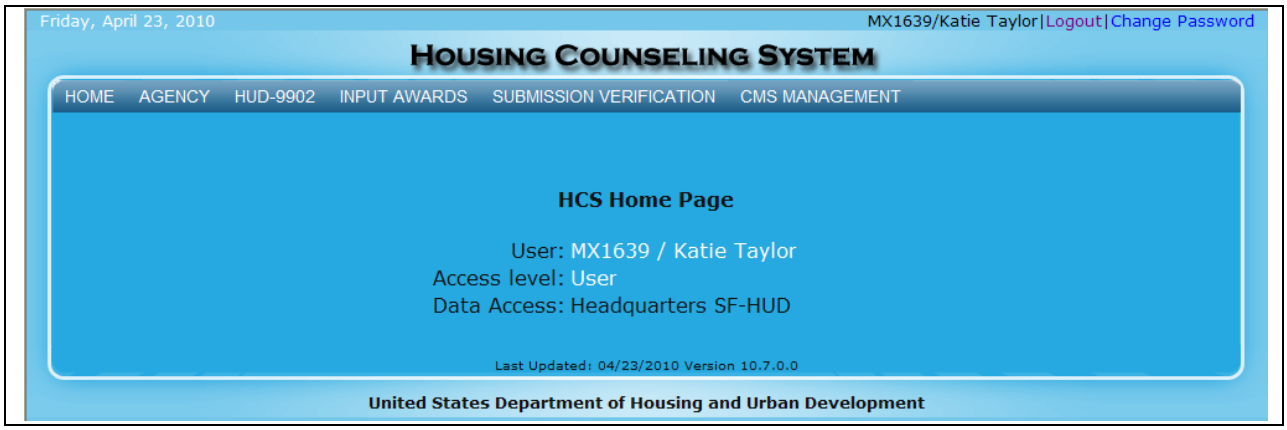


Figure 3. All Users – HCS Home Page – Agency User screen.

The system will load the change password screen.

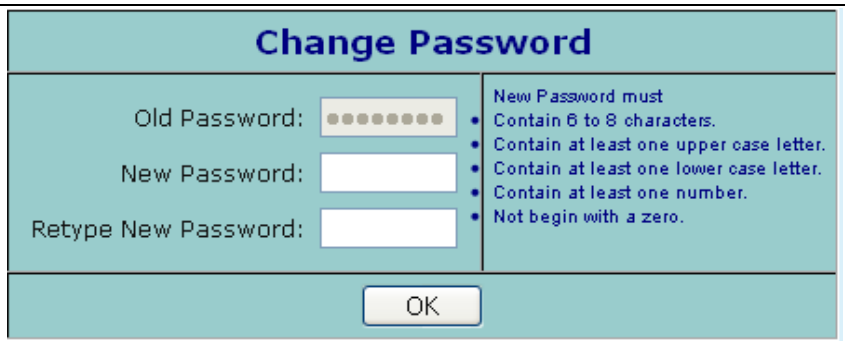


Figure 4. All Users – HCS Home Page – Change Password screen.

- **Old Password:** Your existing password (i.e. the password that has expired or the default password that your Administrator assigned to you).
- **New Password:** A new password of your choice. Your password must be between 6 and 8 characters. Please ensure your password abides by the following rules: It must have at least one special character (@, #, $, or %), and at least one lowercase letter; capital letter; and number. After you enter the system password, you will be prompted to change it to a unique password every 21 days. If you do not use the system after 90 days, your login will become inactive, and the Administrator will need to reset your login and password.

Retype New Password: Your new password of 6 to 8 characters; it must be the same password that you entered into the **New Password** field.

3.4 Exit System

To log out of the system Click the "Logout" hyperlink located in the top right corner.

Figure 5. All Users – HCS Home Page – Exit Menu.

This will log you out of the system and take you to the www.hud.gov web page.

4.0 USING THE SYSTEM ONLINE

4.0 USING THE SYSTEM ONLINE

This chapter contains a detailed description of all HCS system functions. The current HCS system design has five kinds of users. They are: Agency Users, HUD Reviewers, HUD GTRs, HUD Office Managers, and HUD Program Managers.

HCS provides HUD Housing Counseling Agency users the ability to:

- Submit HUD-9902 forms
- Submit Agency information
- View Verification of Submissions
- Validate agency information
- View sub-agencies‟ information

HUD Reviewers role allows HUD HCS users to conduct grant applications review with rights to:

- View assigned Grant Applications
- Score assigned Grant Applications
- View Reviewers Reports

The HUD GTR role within HCS provides the GTR with the ability to oversee the business process of the HUD-9902 submission process as well as the Grants Process. They have the access rights and capabilities of an Agency User as well as the capability to review the Grants Process. The GTR is responsible for entering HUD control data in their assigned agency‟s profiles. Within HCS, the HUD GTR has the ability to:

- Submit/Review HUD-9902 forms
- Submit/Review Agency information
- Enter the Grant Processing section of HCS to:
    - View Funding Allocations
    - Setup Grant Applications
    - Score Grant Applications
    - Calculate Recommended Awards
    - Input Awards and Sub-Allocations
    - View Reports
- View ARM Submission Information

The HUD Office Manager‟s role within HCS also provides the ability to oversee the business process of the HUD-9902 submissions and the Grants Process. In addition to the rights and capabilities of the HUD GTR, the Office Manager also has the capability to view User Information and perform some Management Functions. Within HCS, the HUD Office Manager has the ability to:

- Submit/Review HUD-9902 forms
- Submit/Review Agency information
- Enter the Grant Processing section of HCS to:
    - View Funding Allocations
    - Setup Grant Applications
    - Score Grant Applications
    - Calculate Recommended Awards
    - Input Awards and Sub-Allocations
    - View Reports
    - Export Grant information from HCS

- Manage some HCS User Information
- Perform some Management Functions

The HUD Program Manager"s role has full access rights to the HCS System.
Within HCS, the HUD Program Manager has the ability to:

- Submit/Review HUD-9902 forms
- Submit/Review Agency information
- Enter the Grant Processing section of HCS to:
    - View Funding Allocations
    - Setup Grant Applications
    - Score Grant Applications
    - Calculate Recommended Awards
    - Input Awards and Sub-Allocations
    - View Reports
    - Export Grant information from HCS
- Manage all HCS User Information
- Perform all Management Functions

The sections below provide detailed instructions on how each of the five types of HCS users can perform system functions.

5.0 AGENCY USER

5.0 AGENCY USER

In the HCS system, an *Agency User* is someone who belongs to an agency participating in the Housing Counseling Program but not affiliated with the Federal government. These Agency Users can:

- View and Edit **Agency** Information
- Submit **HUD-9902** Forms
- View **Input Awards** (*Only available for Parent Agency Users*)
- View **Submission Verifications**
- Access **CMS Management**

Upon logging into the system as an *Agency User*, you will see the following screen:

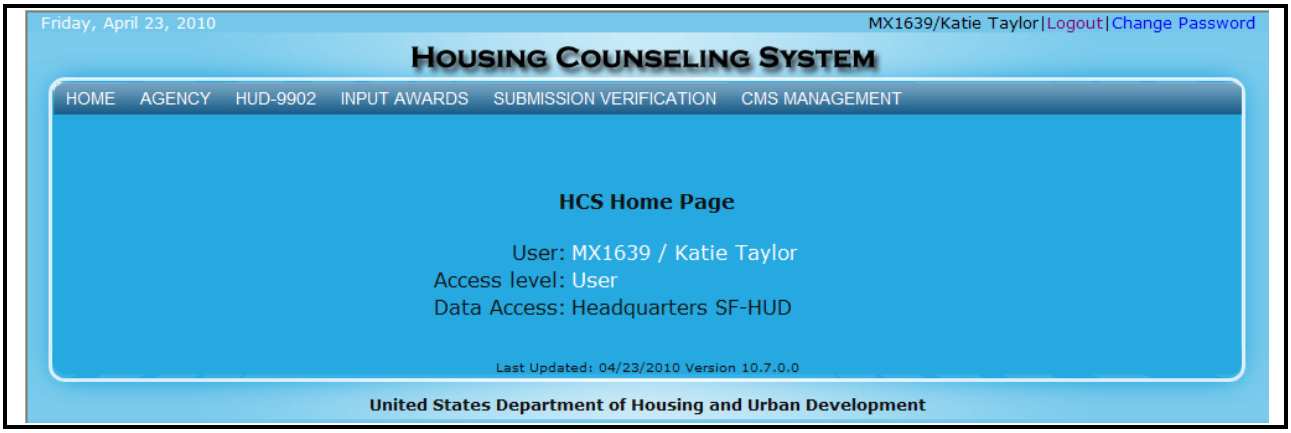


Figure 6. AU – HCS Home Page – Agency User screen.

If your agency has sub-agencies you will see a link to Input Awards.

The next sections explain how to use the functions while logged into the HCS System as an Agency User.

Note: Some Agency Users, who have sub-agencies under them, can search for, and edit all of the 9902 forms and agency profiles for their associated agencies. If you are an Agency User with other associated sub-agencies reporting to you, please see Section 5.2.1. for directions on how to search for and edit HUD-9902 forms and Agency Information (Agency Profiles).

5.1 Agency

Agency Information is important contact and reference information that uniquely identifies your agency. In the HCS system, the agency information is stored in an *Agency Profile*. As an Agency User, you can enter and edit your own agency profile. Agency information is the foundation of the Housing Counseling System. To maintain the accuracy of HCS information, it is essential that the agency profile information is always accurate and updated.

5.1.1 Agency Search

Below are steps on how to enter and/or edit your agency information.

1. From the top navigation menu, click the **Agency** hyperlink**.** Your *Agency Summary* screen appears. You can also access this from the **Agency Search** sub-menu option.

2. Click the dropdown box to select the fiscal year you wish to search for, and click **Go** button.

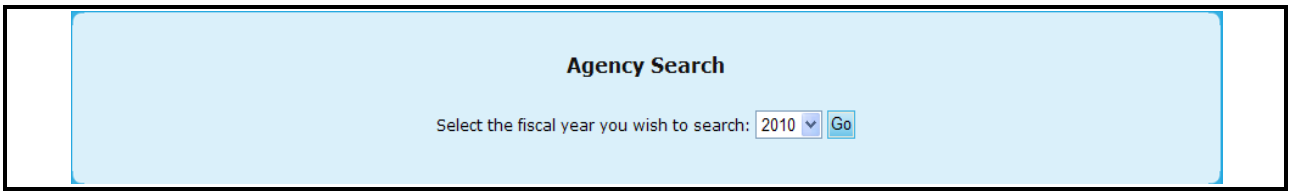


Figure 7.A. AU – Agency: Agency Search

3. The *Agency Search for FY 20XX* screen appears. From here you will be able to perform a Basic Search, or perform an Advanced Search. To go to the Advanced Search click the **Go to advanced agency search hyperlink**.

4. On the *Agency Search* page, the following listed search criteria have multiple selection enabled controls. Users can Click the field to display choices and select multiple items, or select one field to search. You can also enter values with comma to delimit list of values.
   a. Agency Information
   b. HUD Office & GTR
   c. Agency Location
   d. Agency Type & Services
   e. Agency Status & Validation
   f. Grant & 9902 Information

5. Fill out the form and click the **Search** button. The *Agency List* screen appears.

Note: Contingent on your Agency, you will be able to access multiple Agencies, or only your own. A Parent Agency User will be able to access the information for their Agency and the Sub-Agencies associated with them. Once you have decided on Agency, click **Search** to retrieve your results.

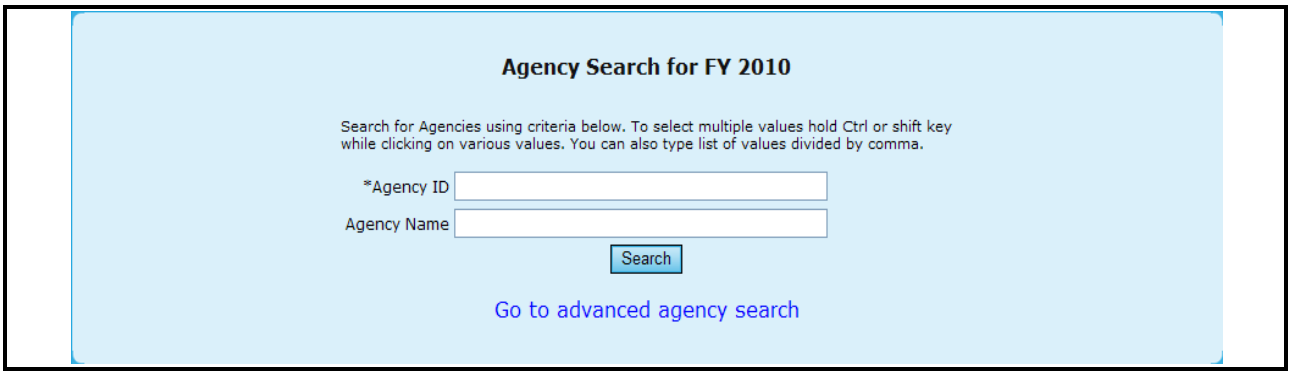


Figure 7.B. AU – Agency: Basic Agency Search for FY 20XX

Advanced Agency Search for FY 2010

Back to simple agency search

Search for Agencies using criteria below. To select multiple values hold Ctrl or shift key while clicking on various values. You can also type list of values divided by comma.

Search

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

Search by Agency Information

* Agency ID | Agency Name

Sub-Agencies List of Parent Agency

Has Sub-Agencies | * CMS Submission

Search by HUD Office and GTR

* HUD Office

GTR Assigned | GTR Name

Search by Agency Location

City | * State | * Zip Code

Search by Agency Type and Services

* Agency Type | * Counseling Services Provided

Search by Agency Status and Validation

* Status | Validated

Last Update Date Between and

Validated Date Validated Date Between and

Active Status Expiration | Expiration within: days after today's date | Active Status Expired or Will Expire Between and

Previous dates shows agencies that already expired; future dates shows agencies about to expire.

Search by Agency Grant and 9902 Information

Submitted 9902 | * You must select 9902 report period when you selected "Yes" or "No" from submitted 9902

HUD 9902 Report Period

Individual 9902 Submission Required

Delinquent in Federal Debt

Applied for Grant

Grant Funded Last Year

* Grant Type

* You must select "Grant Funded Last Year" when you selected "Grant Type"

Search | Clear the Search Criteria

Figure 7.C. AU – Agency: Agency Search for FY 20XX

Note: Provided below is an example of an Agency List Search result.

Figure 8. AU – Agency: Agency List

6. If you want to export the agency list to an Excel spreadsheet, Click the **Agency Spreadsheet** button. The *File Download* dialog box appears.

7. Select to either **Open** or **Save** the file and then return to Agency List screen.

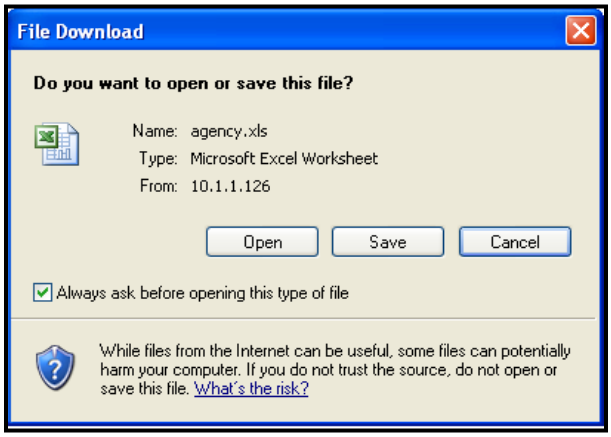


Figure 9. AU – Agency: Agency List File Download Dialog Box.

To view more information about or to update data of an agency listed in the *Agency List* page, click the agency"s name hyperlink in the **Agency Name** column. The *Agency Summary* screen for that agency appears.

8. From the *Agency Summary* screen, you have six tabs to choose from to view more detailed information regarding that specific agency. You can view information on:
    a. Agency Summary
    b. Agency Information
    c. Personnel
    d. Contact Information
    e. HUD Affiliation
    f. Counselor/Client

Note: You will be able to edit some information found in these tabs; however the edit function is not available in all fields.

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

ATLANTA URBAN LEAGUE, INC.

Acknowledgment

Agency ID: 80249 Agency Type: LHCA
Parent Name: NATIONAL URBAN LEAGUE
Parent ID: 81639 Parent Type: National Intermediary
Agency Services Begin: 10/29/2004
CMS: HCS

Data Input and Validation

Last Data Input By: H15584
Last Data Input Date: 01/25/2010
Last Validated By: MX0249
Last Validated Date: 01/14/2010
Next Validation NLT Date: (04/14/2010)

Essential Contacts

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

Clients & Counselors

	Counselors	Clients
Projected for FY:		0
Declared in 9902:		0
Reported :	0	0

Public Access Selection

HUD Web Site ✓ HUD IVR ✓

Public Services Information

Agency Address: ✓
Agency Web Site: ✓
Agency Email: ✓
IVR Posting: ✓
Web List Posting: ✓
Counseling Services: ✓
Languages: ✓

Performance Review

Fiscal Year: 2010 Status: Approved
Next Schedule Review NLT Date: 01/12/2012

HUD-9902 Submission Summary for Last FY

Quarter 4	submission status
10/28/2009	✓

HUD-9902 Submission Summary for Current FY

Quarter 1	submission status
01/26/2010	✓
Quarter 2	submission status
05/03/2010	LATE
Quarter 3	submission status
access 9902	N/A
Quarter 4	submission status
access 9902	N/A

HUD Grant Award - No funds requested for this FY

(Sub-)Allocation for Current FY

Grant Type	Current Grant Funding
COMP	$29,527.86
LDRC	$4,166.66
Total Funding:	$33,694.52

Figure 10.A. AU – Agency: Agency Summary

9. Under the **Agency Information** you are able to alter the following:
    a. Click an agency designation in the **Agency Designations** field. Your choices include: **Faith Based**, **Colonias**, and **Migrant Worker.**
    b. If your agency is delinquent in federal debt, click **Yes** in the **Delinquent in Federal Debt?** field.
    c. Enter your federal tax ID number in the **Federal Tax ID Number (TIN)** field.
    d. Enter your agency"s Dun & Bradstreet number (DUNS) number in the **DUNS Number** field.
    e. In the **Additional Languages Provided**, please select which other languages your agency supports.

Note: The following information in 10 – 12 reflects your agency office information and will be used to post on the HUD web site for the public to reference. Therefore, do not enter private information you do not what the public to know.

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

Agency ID: **80249**

☐ **Validated?**
Last Validated on **01/14/2010** (Next Validation Required by 04/14/2010)

Agency Name: **ATLANTA URBAN LEAGUE, INC.**

Agency Designations
☐ Faith Base ☐ Colonias ☐ Migrant Workers

Number of Counselors: **0** Number of Projected Clients: **0**

Housing Counseling Services Provided as of:
10/29/2004

Delinquent in Federal Debt? ☐ **Yes**

Federal Tax ID Number (TIN):
58 - 0593386 *

DUNS Number:
010115293
For information about obtaining a DUNS number, please refer to http://smallbusiness.dnb.com or call 866-705-5711

Education/Group Sessions

Session Title	Session Date	Attendees

Additional Languages Provided:

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

OK | Cancel | Sub-Agency(s)

Figure 10.B. AU – Agency: Agency Information

10. Under the **Personnel** tab, you will need to input/alter the following information:
    a. Enter your **Agency Manager**, which will include their Business Title, Full Name, and Cell Phone Number.
    b. Enter your **Agency Senior Executive**, which will include their Business Title, Full Name, and Cell Phone Number.
    c. Enter your **Agency Contact for HUD Use**, which will include their Business Title, Full Name, Cell Phone Number, and Email address.

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

Agency ID: 80249

☐ Validated?
Last Validated on 01/14/2010 (Next Validation Required by 04/14/2010)

Agency Name: ATLANTA URBAN LEAGUE, INC.

Agency Manager:
Salutation --select-- Business Title HUD Contact
Sharron *(First Name) J (Middle Init) Kelly *(Last Name)
Agency Manager's Cell Phone Number:
404 - 217 9983

Agency Senior Executive:
Salutation: Ms Business Title: HUD Contact
First Name: Nancy Flake Johnson Last Name: Pres-CEO
Agency Senior Executive Phone:
404 - 659 1150 6575

Agency Contact for HUD Use
Salutation: --select-- Business Title: HUD Contact
First Name: Sharron Last Name: Kelly
Agency POC Phone:
404 - 659 1150 6578
Agency POC Email:
skelly@atlul.org

OK | Cancel | Sub-Agency(s)

Figure 10.C. AU – Agency: Personnel

11. Under the **Contact Information** you will need to input/alter the following:
    a. Enter your agency"s physical location address (including city and zip code) in the **Address**, **City**, and **Zip** fields. Do not enter your mailing address if different.
    b. Enter your agency"s phone number, fax, and e-mail address in the **Phone**, **Fax**, and **Email** fields.
    c. Enter your agency"s Web site address in the **Web URL** field.
    d. If your agency has a toll free phone number, enter it in the **Toll Free Phone** field.

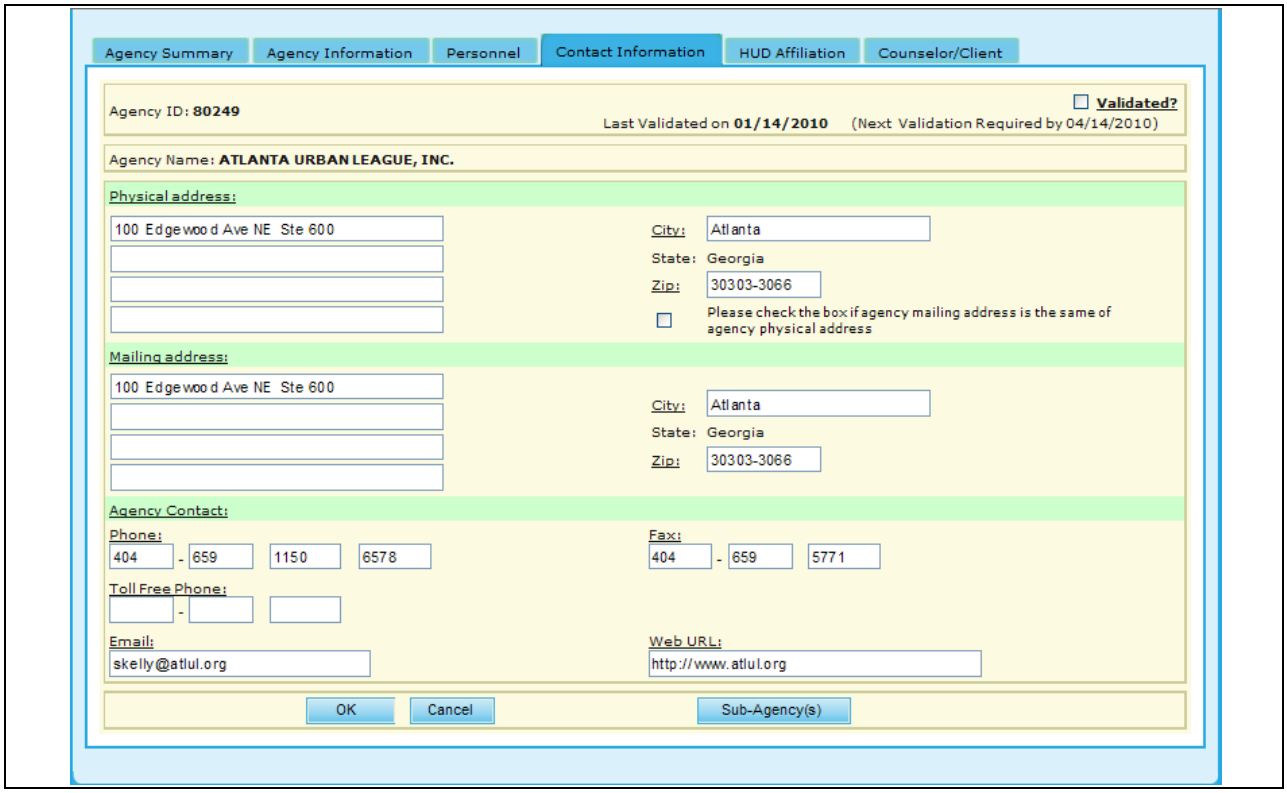


Figure 10.D. AU – Agency: Contact Information

12. Under the **HUD Affiliation** the following information is all edited by your assigned GTR:
    a. In the **Types of Counseling Services** box, notify your HUD contact to enter all of the types of counseling services that your agency offers.
    b. Scroll down to view the next section of the form.
    c. In the **Zip Code Affiliations** box, the default zip code associated with your agency is listed. **Note:** To add additional zip code affiliations serviced by your agency, please request through your GTR.
    d. In the **State Affiliation** area, your agency"s default state affiliation is listed. **Note:** To add additional state affiliations serviced by your agency, please request through your GTR.
    e. If you want to validate the information entered in this form, click the **Validated?** Box found in the upper right corner of this screen. Below this box, it lists when this form was last validated, and the date it must be validated by in the future. Validation must be conducted within the timeframe stated on the profile page.
    f. **Public Display Options** is another option that is edited through your HUD Office GTR.

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

Agency ID: 80249 — Validated? — Last Validated on 01/14/2010 (Next Validation Required by 04/14/2010)

Agency Name: ATLANTA URBAN LEAGUE, INC.

Status: Approved — As Of: 01/12/2010 — Up To: 01/12/2012

Type of Agency: LHCA — Parent Organization 81639 (Temporary Affiliate)

HUD Office GTR: Conni Perteet

HUD Office assigned to: Atlanta (HOC)

GTR's Phone: 404-331-5001-2346

Types of Counseling Services:

- [x] DFC - Mortgage Delinquency and Default Resolution Counseling
- [ ] DRC - Mobility and Relocation Counseling
- [ ] FHA - Fair Housing Assistance
- [ ] HEC - Home Equity Conversion Mortgage Counseling
- [x] HEP - Homebuyer Education Programs
- [ ] HIR - Home Improvement and Rehabilitation Counseling
- [ ] HOM - Services for Homeless
- [ ] LM - Loss Mitigation
- [ ] MDM - Money Debt Management
- [x] MOI - Marketing and Outreach Initiatives
- [x] PC - Prepurchase Counseling
- [x] PPC - Postpurchase Counseling
- [x] PRL - Predatory Lending
- [x] RC - Renters Assistance

Zip Code Affiliations:

Default Affiliation: 30303 — Add Another Zip Code

State Affiliations:

Default Affiliation: Georgia — Add Another State

Public display options

- [x] Allow for public access?
  - [x] Allow public access through Zip Code Affiliations?
  - [x] Allow public access through State Affiliations?

OK | Cancel | Sub-Agency(s)

Figure 10.E. AU – Agency: Agency HUD Affiliation.

13. Under the **Counselor/Client** tab, you will be prompted to a list of counselors that are under each specific agency. From this tab, you can also perform a **Counselor search**, **Add Counselor**, and perform a **Client search**.

14. Provided below is the screen that you will be prompted to for Counselor Search. This is further explained in Section 5.2.2.

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

The agency "GREENPATH INC." has 2 counselors and provides housing counseling services for over 0 clients.

Counselor search | Add Counselor | Client search

Figure 10.F. AU – Agency: Agency Counselor/Client.

15. To add a new counselor, click the **Add Counselor** hyperlink, and you will be prompted to a form which needs to be completed prior to officially adding that counselor. An example of this is provided below. Once you have completed the necessary fields, click **Add New** to save this counselor, or **Clear**, to erase previously input data.

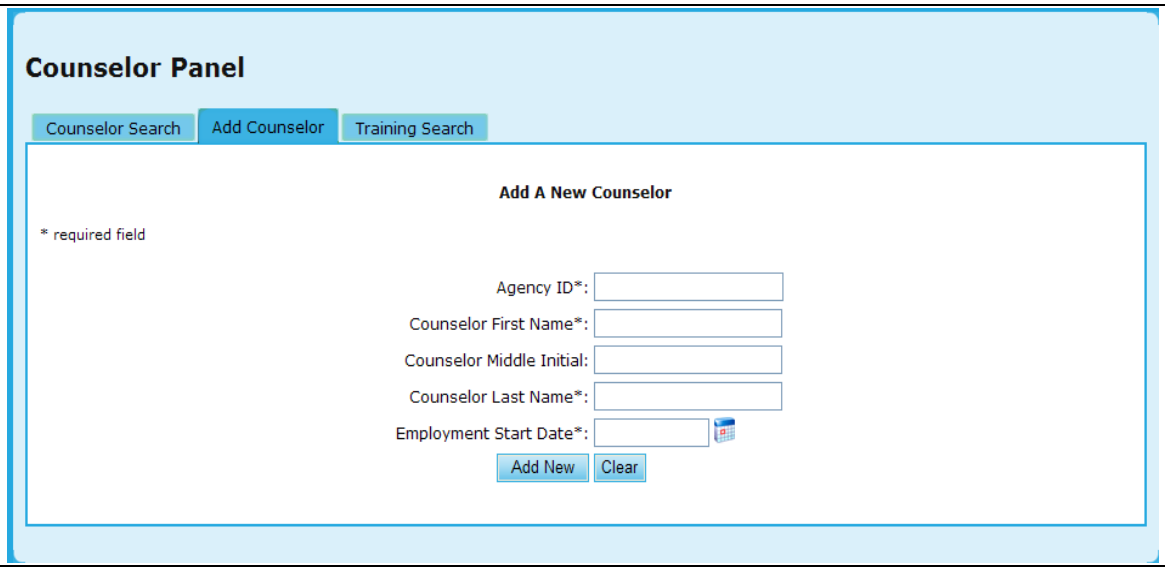


Figure 10.G. AU – Agency: Agency Add Counselor.

16. To perform a Counselor Training Search, click the **Training Search** hyperlink, and you will be prompted to a search which will allow you to narrow down your results. An example of this is provided below. Once you have completed your criteria, click **Search** to retrieve results, or **Clear** to erase previously input data.

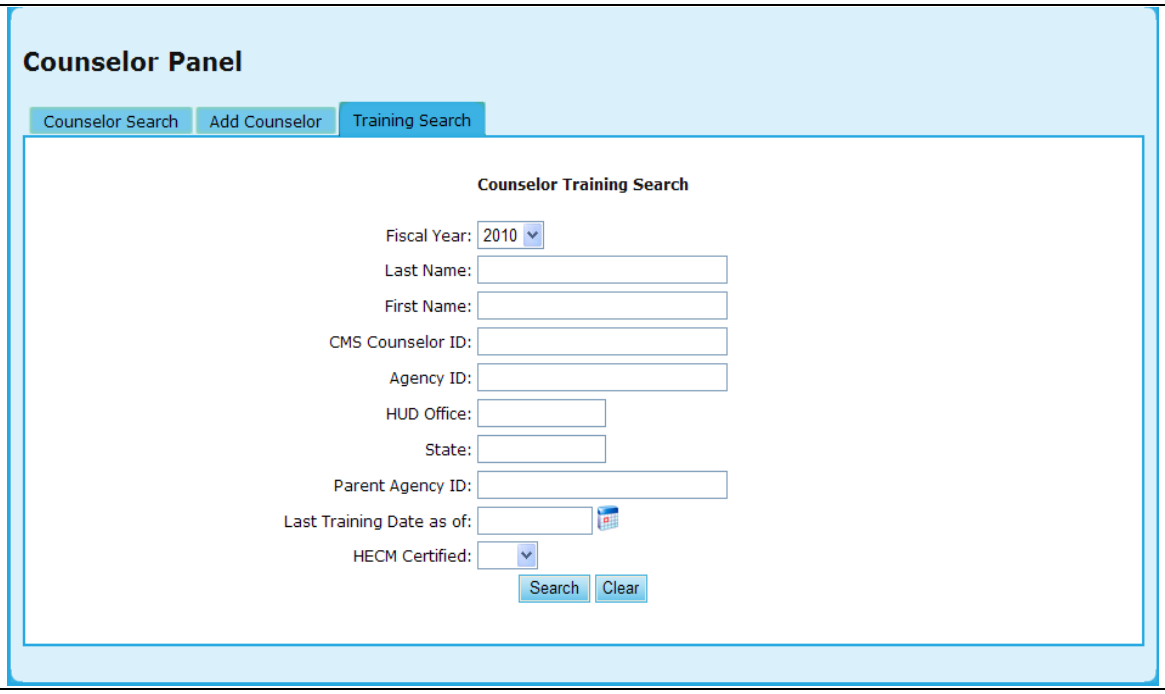


Figure 10.H.1. AU – Agency: Agency Training Search.

17. By clicking the hyperlink under the name, you will be prompted to the Counselor Profile.

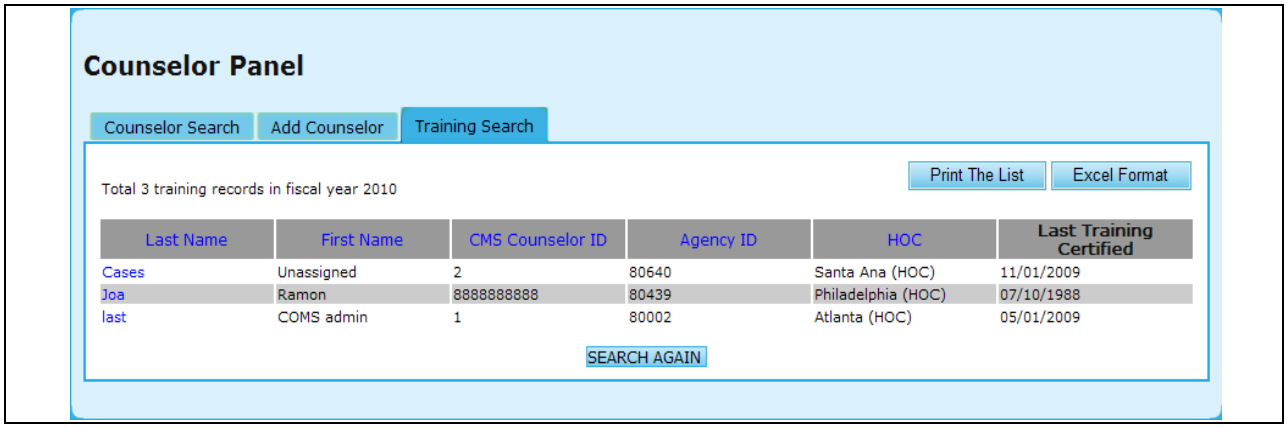


Figure 10.H.2. AU – Agency: Training Search Results.

18. If you desire to update this profile, edit the information you desire and click **Update info** to save those changes, or **Clear** to remove that information.

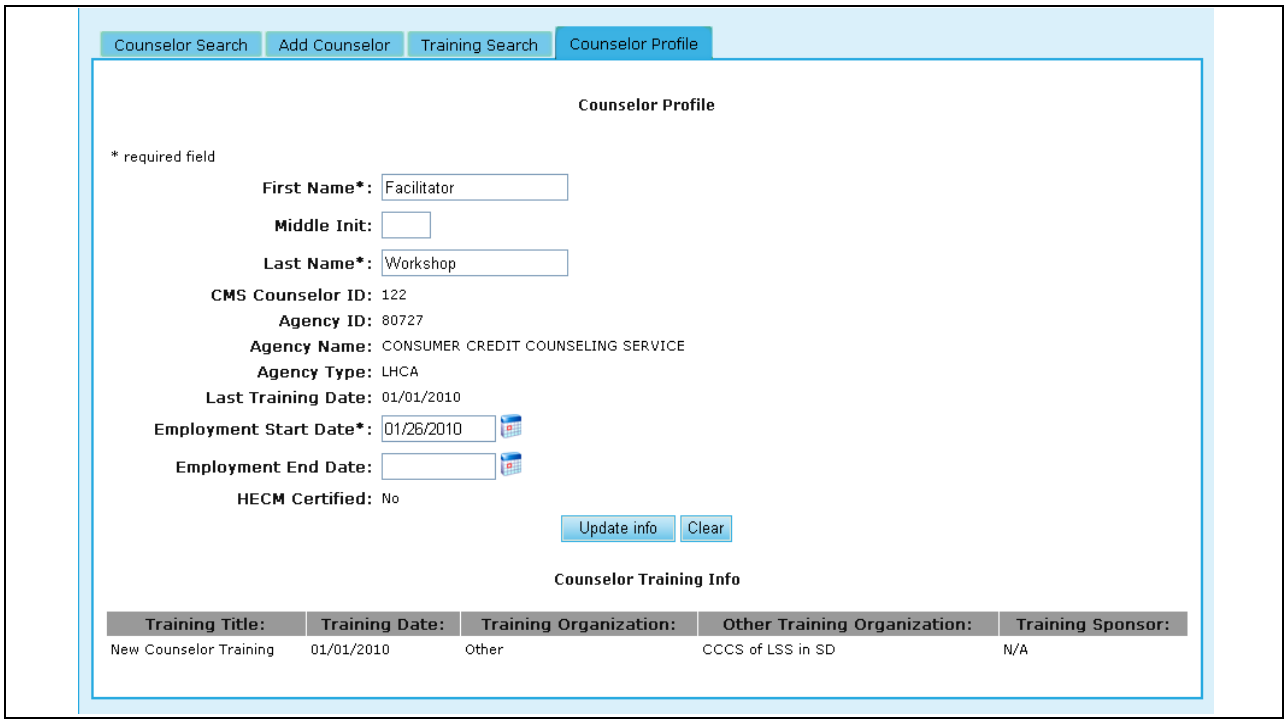


Figure 10.H.3. AU – Agency: Agency Counselor/Client – Training Search – Counselor Profile.

19. If you want to associate sub-agencies with your agency, click **Sub-Agency(s)**. The *Select Sub-Offices for (Agency Name)* screen appears.

20. In the **Available** column, select the sub-agencies you would like to assign to your agency. Press **Shift** and click the mouse to select multiple offices in a row, or press **Ctrl** and click the mouse to select more than one individual office at a time.

21. Click Assign Agency(s) to move your selected sub-agencies to the **Assigned** box. Or, to remove sub-agencies from the **Assigned** box, click Remove Agency(s) to move the sub-agencies back to the **Available** box.

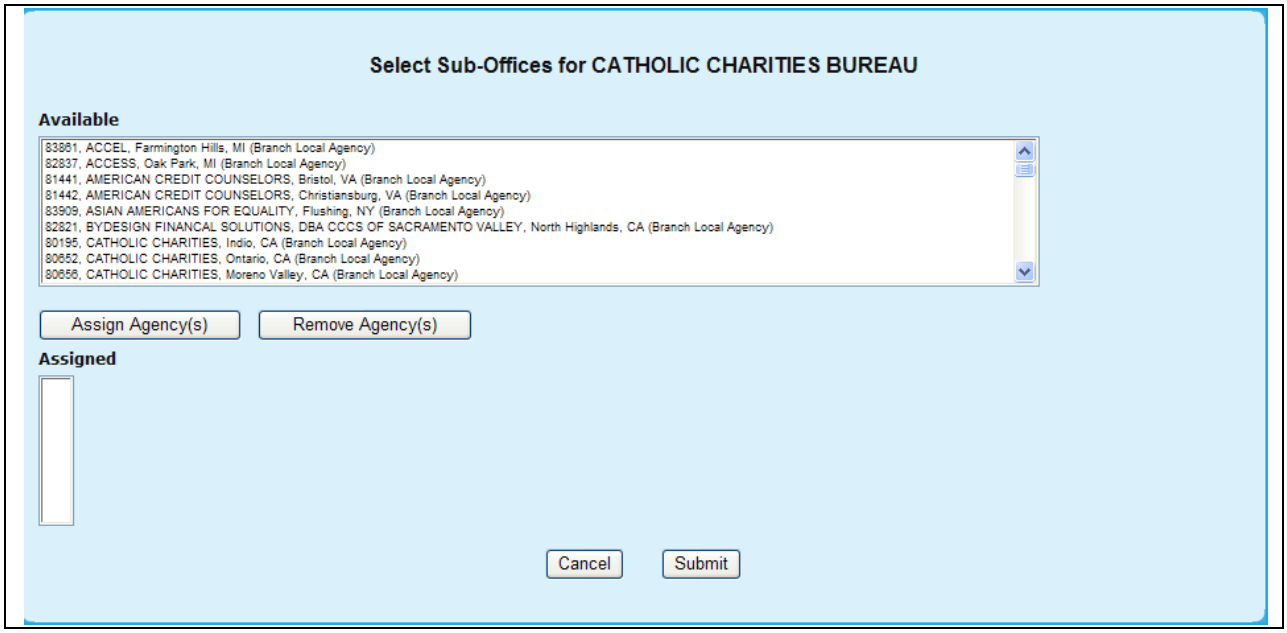


Figure 10.I.1. AU – Agency: Select Sub-Offices

22. To cancel these sub-agencies, click **Cancel**. To save these changes to the sub-agencies, click **Submit** and a confirmation message appears (see below); then click **Close**.

Figure 10.I.2. AU – Agency: Sub-Agencies Updated Confirmation Message

23. If you are finished viewing/editing/entering your agency profile, click **OK**. If you do not want to save your changes, click **Cancel**.

You have now finished viewing/editing/entering your agency profile.

5.1.1.1 *Agency Status*

APPROVED – LHCA & Intermediaries
Agencies that applied and was approved to participate in HUD"s SF Housing Counseling program and have a HUD-Approved certificate are the only agencies to have the Approved status.

PARTICIPATING – SHFA & Sub-Agencies
An agency that is participating in HUD"s SF Housing Counseling program on behalf of their relationship with an Approved organization has Participating status. SHFA are approved by their State and HUD recognizes them and allows SHFA to participate in HUD"s program as a courtesy.

Sub-agencies belonging to a HUD-Approved agency (LHCA & Intermediary) are participants in the program so long as their parent organization remains Approved.

CONDITIONAL – All Agencies
Agencies maintain a Conditional status for a limited time until they satisfy a condition to be Approved or Participating. The most applied situation is from the results of a recent BPR that an agency must make corrections to deficiencies discovered during their Review. If an agency does not attain an Approved or Participating status at the end of the Conditional period, HCS converts their status to the appropriate Terminated status.

INACTIVE – All Agencies
Agencies that are no longer participating in the program but require access to HCS to complete their 9902 reports or update their records have the Inactive Status. The agency‟s contact and counseling information is not made publicly available through any of HUD‟s systems or programs to reflect their non-participatory status with the SF Housing Counseling Program. The agency‟s profile is dormant until their last action is complete.

TERMINATED (DISAPPROVED) – LHCA & Intermediaries
An Approved agency that drops out of the program and no longer participates in the program is terminated. Access to HCS is denied and their profiles are dormant.

TERMINATED (NON-PARTICIPATING) – SHFA & Sub-Agencies
Any SHFA that drops out of the program and no longer participating in the program is terminated. All sub-agencies of a Terminated (Disapproved) agency are terminated from the program. Access to HCS is denied and their profiles are dormant.

STATUS DURATIONS
Agency‟s status can be changed any time depending upon their situation. Generally, however, the system recognizes the following durations for each status.

APPROVED
LHCA = 2 Calendar Years. LHCA will renew their 2 year Approval status on the date of their renewal.
INTERMEDIARIES = Fiscal Year (FY). Generally Intermediaries operate under a HUD Grant. Their approval is therefore based on the fiscal year, to better track their duration under the grant.

PARTICIPATING
SHFA = opened. SHFA do not have a preset termination date so their Participating status remains open indefinitely. The system does allow fix 2, 3, or 5 years settings if desired or an ending date can be manually entered.

Sub-Agencies‟ durations are the same as that of their Parent Agency. Sub-Agencies maintain the same status and duration as that of their parent agency‟s status. Individual sub-agency statuses can be down-graded if their circumstance warrants it. Their statuses however cannot be extended beyond that of their parent‟s status. Keep in mind that LHCA that are temporary affiliate to Intermediary maintains their Approval status independently regardless of the Intermediary‟s status change.

CONDITIONAL
Settings = 15, 30, 45, 60, 90, & 120 days. Conditional is a temporary reprieve to maintain their Approved or Participating status until their condition is corrected. If the conditions required to be

Approved or Participating are not satisfied, the status changes at the end of their end date to Terminated.

INACTIVE
Settings = 15, 30, 45, 60, 90, & 120 days. Inactive is a temporary status to allow an agency to access HCS to complete unfinished records or make data entry in their files. Another reason for an agency to be inactive is that their counselors left the agency and agency becomes Inactive until they hire replacement counselors. At the end of the status period, the status changes automatically to Terminated unless a HUD user manually upgrades their status.

TERMINATED (Disapproved & Nonparticipating)
Setting is open until a HUD responsible person manually changes the status.

STATUS CHANGES

AUTOMATIC STATUS CHANGES
Unless a HUD user manually changes the status, HCS will make the following changes to ensure no agencies remains in a non-terminated status indefinitely.

Approved end date changes the status to Conditional for 30-days. This allows HUD users time to make adjustments to correctly update the agency status.

Participating status for SHFA that exceeds the end date converts to Conditional for 30-days for the same reason as above.

Conditional end date converts the status to Terminated. During conditional status the HUD user had enough time to update the agency‟s status if warranted. Ignoring the Conditional status implies the condition was not satisfied and the agency should be terminated from the program.

Inactive end date converts the status to Terminated. The system assumes that the agency is not coming back to the program and terminates their participation. If the agency is to be re-activated, a HUD user manually changes the agency‟s status.

Sub-Agencies are connected to their parent agency‟s status. This relieves the HUD user from resetting individual agencies. Individual sub-agencies can always be downgraded when warranted.

5.1.2 Counselor Information

1. From the upper navigation menu, scroll over the **Agency** hyperlink**,** and select the **Counselor Information** button.

2. Once you have completed your criteria, click **Search** to retrieve results, or **Clear** to erase previously input data.

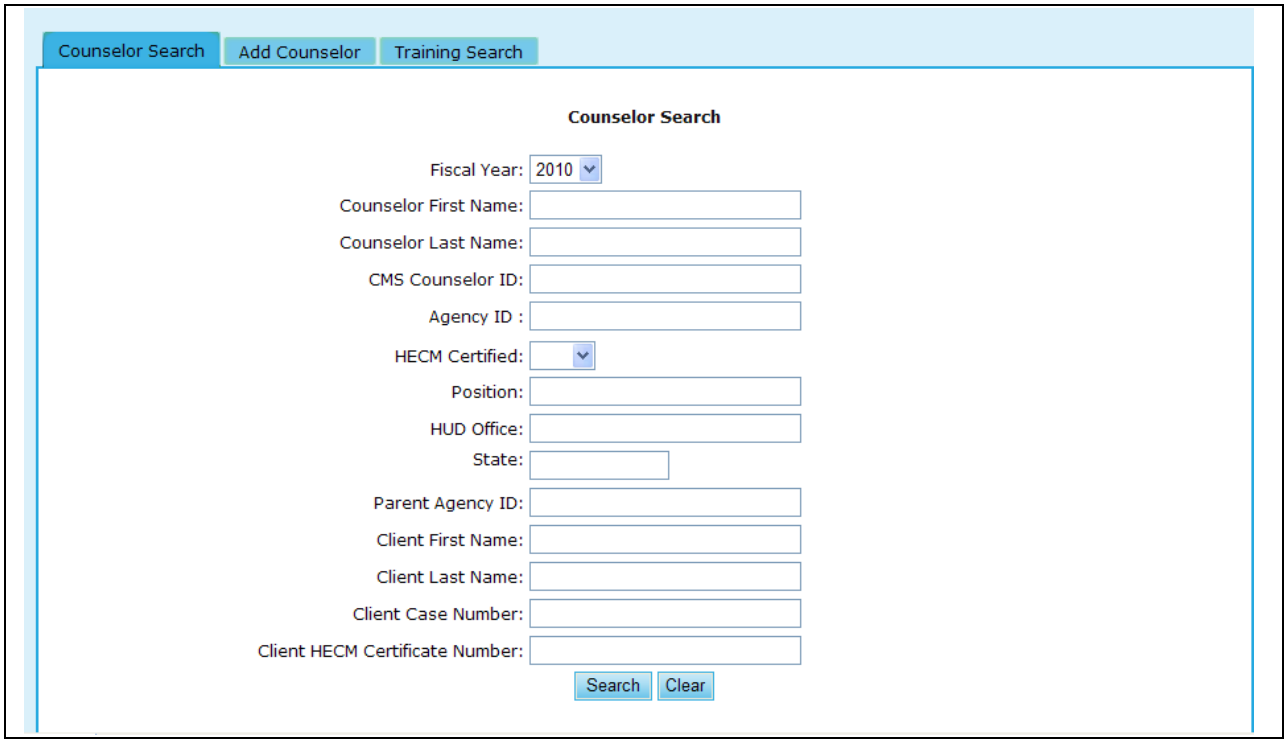
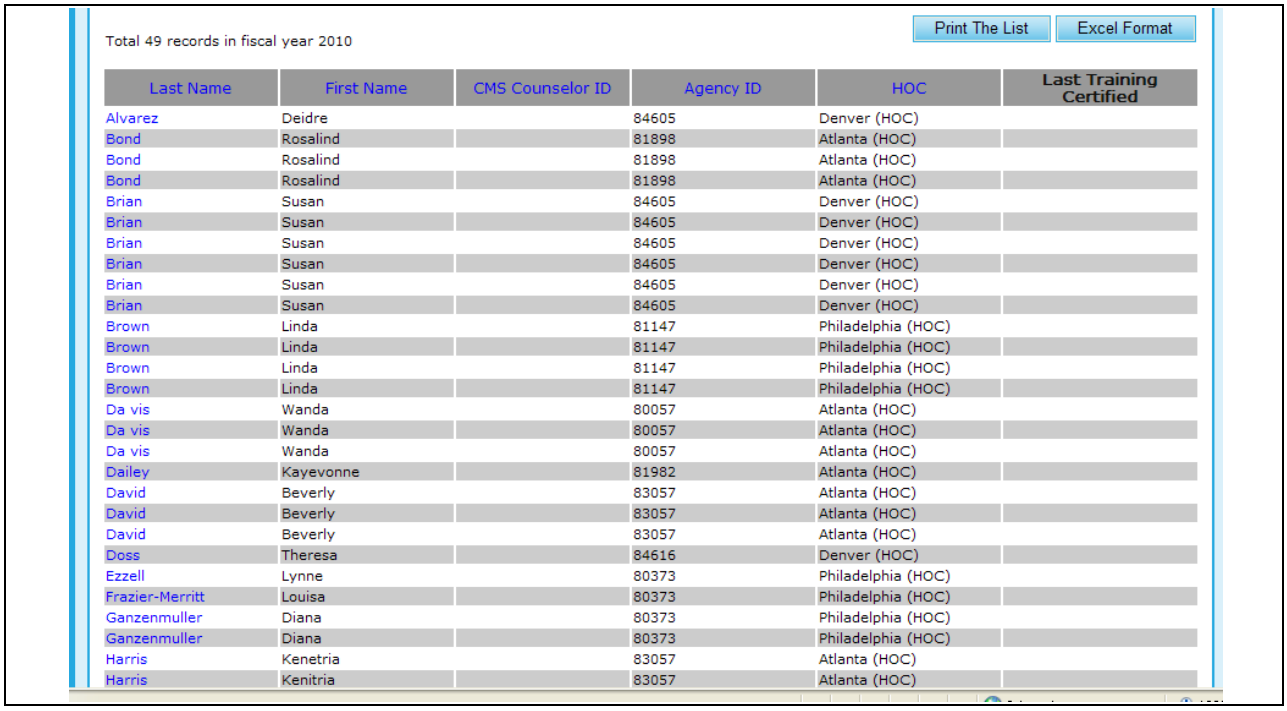


Figure 11.A. AU – Agency: Agency Counselor Search

3. Once you have retrieved your search results, you are able to access counselor information by clicking the hyperlink found under the Last Name column.



Last Name	First Name	CMS Counselor ID	Agency ID	HOC	Last Training Certified
Alvarez	Deidre		84605	Denver (HOC)	
Bond	Rosalind		81898	Atlanta (HOC)	
Bond	Rosalind		81898	Atlanta (HOC)	
Bond	Rosalind		81898	Atlanta (HOC)	
Brian	Susan		84605	Denver (HOC)	
Brian	Susan		84605	Denver (HOC)	
Brian	Susan		84605	Denver (HOC)	
Brian	Susan		84605	Denver (HOC)	
Brian	Susan		84605	Denver (HOC)	
Brian	Susan		84605	Denver (HOC)	
Brown	Linda		81147	Philadelphia (HOC)	
Brown	Linda		81147	Philadelphia (HOC)	
Brown	Linda		81147	Philadelphia (HOC)	
Brown	Linda		81147	Philadelphia (HOC)	
Da vis	Wanda		80057	Atlanta (HOC)	
Da vis	Wanda		80057	Atlanta (HOC)	
Da vis	Wanda		80057	Atlanta (HOC)	
Dailey	Kayevonne		81982	Atlanta (HOC)	
David	Beverly		83057	Atlanta (HOC)	
David	Beverly		83057	Atlanta (HOC)	
David	Beverly		83057	Atlanta (HOC)	
Doss	Theresa		84616	Denver (HOC)	
Ezzell	Lynne		80373	Philadelphia (HOC)	
Frazier-Merritt	Louisa		80373	Philadelphia (HOC)	
Ganzenmuller	Diana		80373	Philadelphia (HOC)	
Ganzenmuller	Diana		80373	Philadelphia (HOC)	
Harris	Kenetria		83057	Atlanta (HOC)	
Harris	Kenitria		83057	Atlanta (HOC)	

Figure 11.B. AU – Agency: Agency Counselor Results

4. Once you have selected the Counselor you would like to access, you are able to edit the information provided below. Once you have edited your desired information click **Update info** to save changes, or **Clear**, to delete information.
    a. First Name
    b. Middle Initial
    c. Last Name
    d. Employee Start Date
    e. Employee End Date

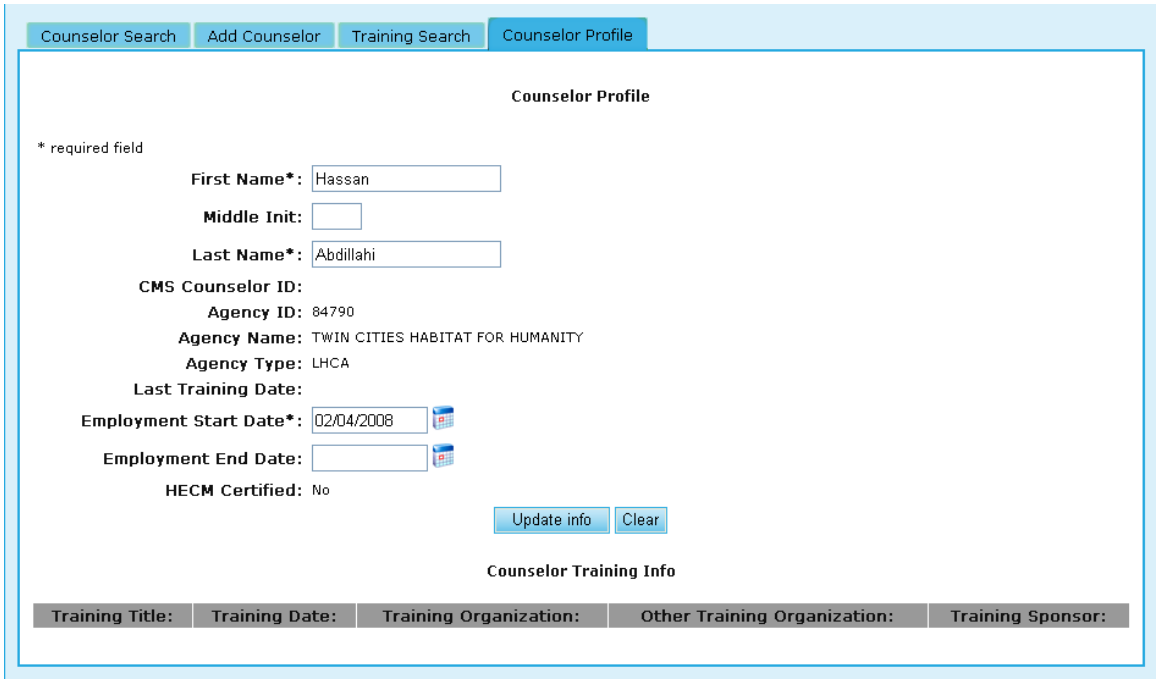


Figure 11.C. AU – Agency: Agency Counselor/Client Counselor Profile

5.1.3 Client Information

1. From the upper navigation menu, scroll over the **Agency** hyperlink**,** and select the **Client Information** button.

2. Enter the criteria you would like to specify for your search, and once you have done so, click **Search** to retrieve those results, or **Clear** to erase the data you had input.

Note: You will only retrieve results if there are clients associated with your Agency.

Client Search

Client Search

** To select multiple values at once hold the Ctrl or Shift key while clicking on various items

Fiscal Year: 2010

Client info

Case Number:

Client ID:

Client First Name:

Client Last Name:

**State: Alaska, Alabama, Arkansas

Counselor Info

CMS Counselor ID :

Counselor First Name:

Counselor Last Name:

Case Completed:

Agency Info

Agency ID:

HOC Info

HOC Info

**HUD Funded: Down Payment Assistance, Home Ownership Voucher, Not Applicable

9902 Info

Ethnicity:

Race:

**Income Group: a. < 50% of Area Median Income (AMI), b. 50 - 79% of AMI, c. 80 - 100% of AMI

**Workshop/Seminar: a. Pre-Purchase Homebuyer Education, b. Financial Literacy, c. Resolve or Prevent Mortgage Delinquency

Service category:

Service Outcome:

HECM Info

HECM Certified:

Client HECM Certificate Number:

Search Clear

Figure 12.A. AU – Agency: Client Information – Search

3. Provided below is an example of the search results retrieved while performing a counselor search.

4. To view further information on a counselor, click the hyperlink found in the Last Name column. By clicking the hyperlink under the name, you will be prompted to the Counselor Profile.

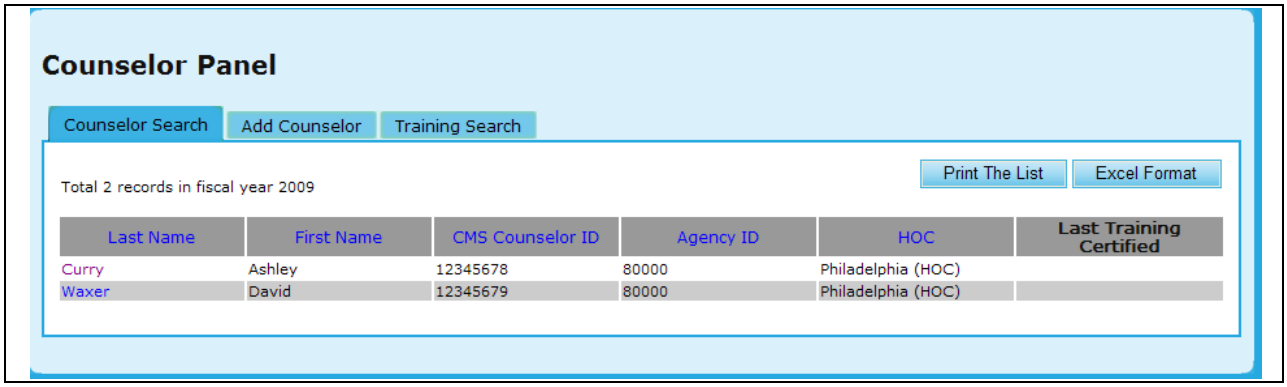


Figure 12.B. AU – Agency: Counselor Search

5. If you desire to update this profile, edit the information you desire and click **Update Profile** to save those changes, or **Clear** to remove that information.

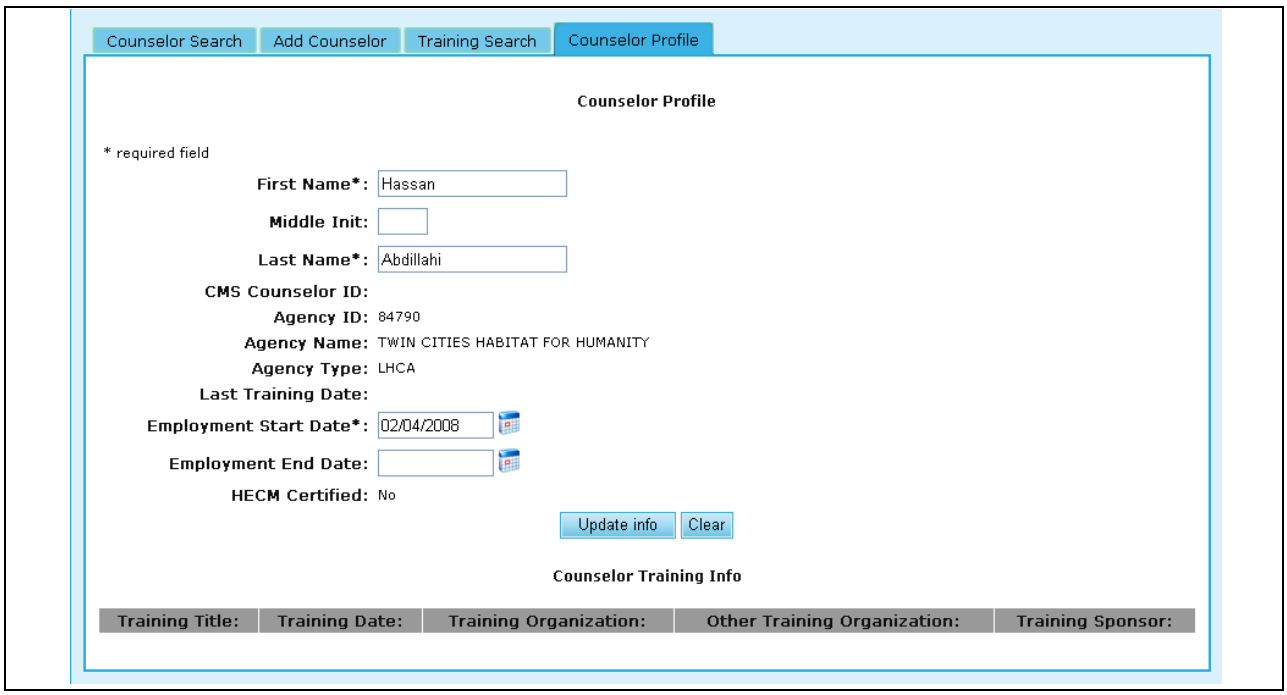


Figure 12.C. AU Agency: Agency Counselor Information Profile

5.2 HUD-9902

All agencies, except Branch-LHCA, are required to submit quarterly reports accumulating client data to the final annual report each fiscal year. Any agency with an active status of Approved, Participating, or Conditional, must submit a report covering the period of their active status. Agencies that did not receive a HUD grant will automatically have HUD Client column set to zero. Agencies awarded a HUD grant will provide their total budget to allow the 9902 report to automatically calculate the HUD client numbers based on their budget/grant ratio. This calculation makes an assumption and may not reflect actual numbers. Agencies will input their actual figures in their logic model. HUD will compare the 9902 and logic values for analysis.

The HUD-9902 Processing feature provides two sections. The Tracking section is used by both agency and HUD users to monitor the submission process of agencies submitting their required reports. The

Analysis section is being enhanced and will allow analysis of the data submitted to assist in the performance of the program. Review of an agency‟s report can be accessed from either section.

This HUD Fiscal Year Activity Report enables a HUD-approved housing counseling agency to report electronically all of its housing counseling activities and results for each quarter of a fiscal year. As an Agency User, you can complete (and edit) your agency‟s HUD-9902 form. Follow the steps below to complete the HUD-9902 form for your agency.

5.2.1 HUD-9902 Form

1. From the upper navigation menu, click the **HUD-9902 Processing** hyperlink. The *9902 Data Reporting Status Inquiry* screen appears.

2. Select the appropriate **Reporting Period** and **Fiscal Year**, then click **Continue.**

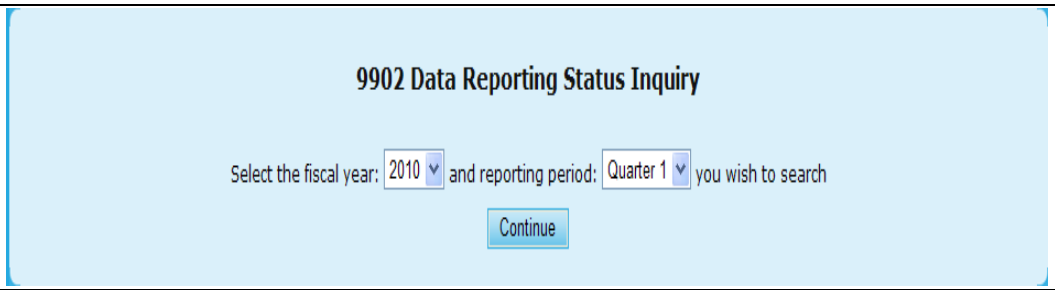


Figure 13. AU – HUD-9902: 9902 Data Reporting Status Inquiry screen.

3. This will prompt you to a search engine with various criteria to manipulate.
   a. Agency ID – Allows you to extract information based on a particular Agency‟s ID number
   b. GTR Name – Allows a search to be performed based off of a particular Government Technical Officer
   c. Agency Type – Allows a search to be made on an individual or multiple agency types
   d. Grant Awardees – This enables you to narrow down your results based on whether an agency was awarded a grant
   e. Have Reported Individual 9902 – This enables you to narrow down your results based on whether a particular Agency has individually reported their 9902
   f. Reported on Time – Along the lines of the 9902, this helps in determining if it was reported on time
   g. Reported Data are Validated – Allows a search to be made on whether or not reported data has been validated
   h. CMS – Allows you to perform a search based on various Client Management Systems

4. Once you have selected the criteria for your search, you will click the **Submit Inquiry** button to review your results. As an Agency User, you will only be able to view the HUD-9902 of your Agency.

Inquiry Scope	All inquiries are confined to the agencies under your jurisdiction.
Agency ID	
GTR Name	
Agency Type	This field allows multiple value entry. Click on the field to display choices and select item or enter a comma delimited list of values.
Grant Awardees	
Have Reported Individual 9902	Yes
Reported On Time	
Reported Data Are Validated	
CMS	This field allows multiple value entry. Click on the field to display choices and select item or enter a comma delimited list of values.
	SUBMIT INQUIRY

Figure 14. AU – HUD-9902: 9902 Data Reporting Status Inquiry Search screen.

5. Once you click **Submit Inquiry**, your search result will appear. From here you can Click the Agency Name to retrieve Agency Information as previously discussed in Section 5.2, or the 9902 icon under Details, which will prompt you to the HUD-9902 form.

38 agency(s) have Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- Have Reported 9902: Yes

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Details
80249	ATLANTA URBAN LEAGUE, INC.	LHCA	100 Edgewood Ave NE Ste 600 Atlanta, GA 30303-3066	404-659-1150-6578 404-659-5771	HCS	9902
80196	BIRMINGHAM URBAN LEAGUE, INC.	LHCA	1229 3rd Avenue North PO Box 11269 Birmingham, AL 35203	205-326-0162 205-521-6951	HCS	9902
80373	BUFFALO URBAN LEAGUE, INC.	Sub Grantee	15 East Genesee St Buffalo, NY 14203-1405	716-854-7625 716-854-8960	HCS	9902
80103	CHICAGO URBAN LEAGUE	LHCA	4510 South Michigan Avenue Chicago, IL 60653-3898	773-285-1500 773-285-0879	HCS	9902
83901	COLUMBUS URBAN LEAGUE	Sub Grantee	788 Mount Vernon Avenue Columbus, OH 43203	614-257-6300-305 614-372-2345	HCS	9902
81982	FORT WAYNE URBAN LEAGUE, INC.	LHCA	2135 S. Hanna St. Fort Wayne, IN 46803	260-745-3100-33 260-745-0405	HCS	9902
80323	GREATER BALTIMORE URBAN LEAGUE	Sub Grantee	512 Orchard St Baltimore, MD 21201-1947	410-523-8150-247 410-523-4022	HCS	9902
83902	GREATER PHOENIX URBAN LEAGUE	Sub Grantee	1402 South Seventh Avenue Phoenix, AZ 85007	602-254-5611-106 602-253-7359	HCS	9902
81147	GREATER WASHINGTON URBAN LEAGUE	Sub Grantee	2901 14th St NW Washington, DC 20009	202-265-8200 202-265-8929	HCS	9902

Figure 15. AU – HUD-9902: 9902 Data Reporting Status Inquiry Search screen.

Provided below is an example of a 9902 form.

Housing Counseling Agency Activity Report	U.S. Department of Housing and Urban Development Office of Housing Federal Housing Commissioner	OMB Approval No. 2502-0261 (Exp. 3/28/2009)

1. Counseling Agency Name		2. Reporting Period and Budget	
Agency Name NORTHEAST DENVER HOUSING CENTER		Reporting Period:	Quarter 1
Agency ID:	80213	Fiscal Year:	2010
Agency Type:	LHCA	From:	10/01/2009
Address: 1735 Gaylord St Denver, CO 80206-1208		To:	12/31/2009
		Initial Submission Date:	01/27/2010
		Date Updated:	01/27/2010
Parent Agency Name(if applicable)		Total Annual Housing Counseling Program Budget, All Sources: $ 214086.00	
Agency ID:		HUD Funded Activity Ratio: 14.13% (0.1413)	
Agency Type:			

Validated: Yes Deadline for late submissions has been extended until 02/28/2010

Last Validated: 02/05/2010 **Validated by:** Gary Thacker

HUD-9902 | HUD-9902 (Derived) | Logic Model

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds
3. Ethnicity of Clients (select only one)		
a. Hispanic	35	4.95
b. Not Hispanic	102	14.41
c. Chose not to respond	0	0
Section 3 Total:	**137**	**19.36**
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0	0
b. Asian	0	0
c. Black or African American	45	6.36
d. Native Hawaiian or Other Pacific Islander	0	0
e. White	52	7.35
Multi-Race		
f. American Indian or Alaska Native *and* White	2	.28
g. Asian *and* White	0	0
h. Black or African American *and* White	2	.28
i. American Indian or Alaska Native *and* Black or African American	0	0
j. Other multiple race	1	.14
k. Chose not to respond	35	4.95
Section 4 Total:	**137**	**19.36**
5. Income Levels		
a. < 50% of Area Median Income (AMI)	34	4.8
b. 50 - 79% of AMI	40	5.65
c. 80 - 100% of AMI	52	7.35
d. > 100% AMI	11	1.55
e. Chose not to respond	0	0
Section 5 Total:	**137**	**19.35**
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	8	1.13
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	0	0
c. Completed resolving or preventing mortgage delinquency workshop	0	0
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0
e. Completed fair housing workshop	0	0
f. Completed predatory lending workshop	0	0
g. Completed rental workshop	0	0
h. Other workshop	0	0
Group Session / Section 6 Total:	**8**	**1.13**

7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	5	.71
2) Client will be mortgage ready within 90 days	0	0
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	0	0
4) Receiving long term pre-purchase counseling	7	.99
5) Entered lease purchase program	0	0
6) Decided Not to purchase housing; no further effort to prepare needed	2	.28
7) Withdrew from counseling	0	0
8) Other	0	0
Section 7a Sub-total:	**14**	**1.98**
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	4	.57
2) Mortgage refinanced	0	0
3) Mortgage modified	5	.71
4) Received second mortgage	0	0
5) Initiated forbearance agreement/repayment plan	0	0
6) Executed a deed-in-lieu	0	0
7) Sold property/chose alternative housing solution	1	.14
8) Pre-forclosure sale	1	.14
9) Mortgage foreclosed	6	.85
10) Counseled and referred to another social service or emergency assistance agency	0	0
11) Obtained partial claim loan from FHA lender	0	0
12) Bankruptcy	1	.14
13) Entered debt management plan	0	0
14) Counseled and referred for legal assistance	0	0
15) Currently receiving foreclosure prevention/budget counseling	53	7.49
16) Withdrew from counseling	0	0
17) Other	6	.85
Section 7b Sub-total:	**77**	**10.89**
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	31	4.38
2) Counseled on HECM; decided not to obtain mortgage	5	.71
3) Obtained a non-FHA reverse mortgage	0	0
4) Received home equity or home improvement loan or other home repair assistance	0	0
5) Received consumer loan (unsecured)	0	0
6) Mortgage refinanced	0	0
7) Counseled and referred to other social service agency	0	0
8) Sold house/chose alternative housing solution	0	0
9) Completed financial management/budget counseling	0	0
10) Completed home maintenance counseling	0	0
11) Counseled and utilities brought current	0	0
12) Counseled and referred for legal assistance	0	0
13) Currently receiving counseling	0	0
14) Withdrew from counseling	0	0
15) Other	2	.28
Section 7c Sub-total:	**38**	**5.37**

d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	0	0
2) Obtained temporary rental relief	0	0
3) Counseled and referred to agency with rental assistance program	0	0
4) Advised on recertification for HUD/other subsidy program	0	0
5) Counseled and referred to other social service agency	0	0
6) Counseled and referred to legal aid agency for fair housing assistance	0	0
7) Counseled and referred to legal aid agency for assistance with eviction	0	0
8) Found alternative rental housing	0	0
9) Decided to remain in current housing situation	0	0
10) Resolved issue in current tenancy	0	0
11) Entered debt management/repayment plan	0	0
12) Counseled and utilities brought current	0	0
13) Resolved security deposit dispute	0	0
14) Currently receiving counseling	0	0
15) Withdrew from counseling	0	0
16) Other	0	0
Section 7d Sub-total:	**0**	**0**
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	0	0
2) Occupied transitional housing	0	0
3) Occupied permanent housing with rental assistance	0	0
4) Occupied permanent housing without rental assistance	0	0
5) Counseled Referred to other social service agency	0	0
6) Remained homeless	0	0
7) Currently receiving counseling	0	0
8) Withdrew from counseling	0	0
9) Other	0	0
Section 7e Sub-total:	**0**	**0**
Individual Counseling / Section 7 a-e Total:	**129**	**18.24**
Total Counseling / Section 6 and 7 Total:	**137**	**19.37**

8. HUD Housing Counseling Grant(s)-Summary Data

HUD Housing Counseling Grant or Sub-grant Number/Source	Grant Type	HUD Housing Counseling Grant Amount
0821-019	COMP	$25,244.00
0823-018	LDRC	$5,000.00
	Section 8 Totals:	$30,244.00

9. Authorization:

Input Official		**Agency Official**	
First Name:	Tracy	First Name:	Tracy
Last Name:	Smith	Last Name:	Smith
Title:		Title:	Agency Manager
Phone:		Phone:	

Send | Help | Reload | Back | PDF Version

Figure 16.A. AU: HUD-9902: HUD-9902 form.

6. Complete all possible fields. Steps 7-11 explain important aspects of the HUD-9902 form.

In the **Counseling Agency Name & Address** area, keep the following information in mind:

- Although the address shown may be modified on-line through the Agency Information page of HCS, Housing Counseling Agencies should notify their respective HUD Homeownership Center (HOC) of any address changes.
- Reference to HUD HOC offices can be found at:: http://www.hud.gov/offices/hsg/sfh/hoc/hsghocs.cfm

- Affiliates/branches are required to enter their Intermediary ID in the appropriate box on the Agency Information page of HCS.

In the **Reporting Period and Budget** section, remember that this is an accumulating quarterly report. All activities that took place from the first day of the fiscal year to the last day of the reporting period should be included in the report. Quarter 4 Reporting Period is the same as an annual report because it covers the entire fiscal year. Grant reporting period report are required for those agencies who have a grant agreement with HUD and should specify the starting date and ending date of the Grant reporting period.

7. Complete the Ethnicity of Clients, Race of Clients, Income Levels, and Number of Clients Receiving Educational/Outreach Services sections.

Note: The report contains two data columns for all sections of the HUD-9902 form:

- **All Counseling and Education Activities** – Enter data covering all housing counseling activities, including those performed under one or more HUD housing counseling grants.
- **Counseling and Education Activities attributed to HUD Housing Counseling Grant Funds** – Starting in FY 2007 the HUD Grant Activities are automatically calculated based on the HUD Funded Activity Ratio in Section 2. This ratio is determined by the total HUD grant awards in Section 8 divided by the Total Annual Housing Counseling Program Budget in Section 2. These data elements are recalculated when you enter a value into the All Counseling Activities column or when the Total Annual Housing Counseling Program Budget is changed.

8. For the **Number of Clients Counseled, by Purpose of Visit and Results** section, keep the following information in mind:
    a. Enter the number of clients to whom you provided counseling during the report period. This might include clients who entered your workload the previous report period but you carried over into and counseled during the current report period.
    b. Please remember that you report clients as defined in paragraph 1-7A of HUD's Housing Counseling Program Handbook 7610.1.
    c. You are not reporting the number of individual persons you counseled. Examples: A husband and wife or a brother and sister or three friends who are mortgagors under the same note count as one client. Three renting families who experience the same problem with the same landlord and come to your agency together for assistance count as one client.
    d. **Seeking Shelter or Services for the Homeless** – A client reported on this line must meet the definition for "homeless" or "homeless individual" set forth in Section 103, General Definition of Homeless Individual, of the Stewart B. McKinney Homeless Assistance Act (Public Law 100-77). Instructions / Guidance and FAQ – The following hyperlink will take you to the appropriate HUD website for form HUD-9902 instructions and FAQs. At the top of the site under INDEX, select "reports (PDF page)" and you will be directed to the proper location. Scroll down for further information at this location. http://www.hud.gov/offices/hsg/sfh/hcc/hc_faq.cfm

9. For **HUD Housing Counseling Grant Summary Data,** Section 8 of the form HUD-9902. This section is automatically calculated and shows the awards that were granted by HUD.

10. For the **Authorization** section, the first and last name of the user logged into HCS who completes this form is automatically entered for the Input Official when the Send button is clicked. The

Agency Official is the Director first name and last name from the Agency Information page of HCS.

11. Starting in January of 2008, agencies can submit their client level data through a CMS system. The HUD 9902 Form provides an automated tool that generates the HUD 9902 Form and Logic Model from the client level data submitted. To view the client level data derived HUD 9902 Form and Logic Model Click the HUD 9902 (Derived) and Logic Model tabs respectively.

The HUD 9902 (Derived) provides a features which overrides the permanent HUD 9902 Form. To use the client level data derived HUD 9902 Form as your permanent HUD 9902 Form, click the Commit Data button. This causes the System to over write the regular HUD 9902 Form.

12. To view a HUD-9902(Derived) Form, click the **HUD-9902 (Derived)** tab.

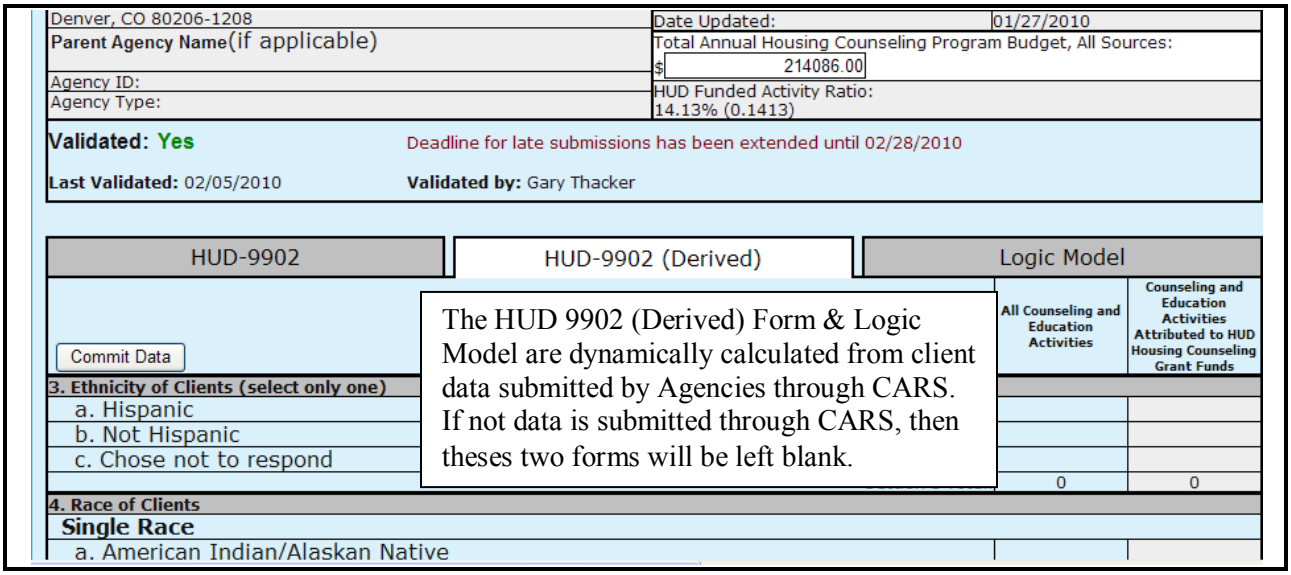


Figure 16.B. AU – HUD-9902: Form 9902 (Derived)

13. To view the Logic Model, Click the **Logic Model** tab and a new window is displayed that show the Logic Model filled out with the client level data submitted through the CMS systems.

	A	B	C	D	E	F	G	H	I	J
1			Applicant Name:	1ST CHOICE CREDIT UNION				US Department of Housing and Urban Development		
2			Project Name:							
3										
4						Period:		OMB Approval 2535-0114 exp. 09/30/2007		
5			TERM:			Start Date:				Component Name:
6			HUD Program Name:	Housing Counseling		End Date:				
7										
8	HUD Goals	Policy Priority	Problem, Need, Situation	Service or Activities/Output	Pre	Post	Outcome	Pre	Post	Evaluation Tools
9	1		2	3	4		5	6		7
10	Policy		Planning	Programming	Measure		Impact	Measure		Accountability
11			Need for information and advice regarding home buying and homeownership.	Pre-Purchase/Home buying - Group workshops	Workshops		Counseled on pre-purchase/home buying - Purchased home	Households		
12						0			0	
13				Financial literacy - Group workshops	Workshops		Counseled on pre-purchase/home buying - Mortgage Ready within 90 days	Households		
14						5			1	
15				Fair housing - Group workshops	Workshops		Counseled on pre-purchase/home buying - Mortgage Ready within 90 to 180 days	Households		
16						0			0	
17				Predatory lending - Group workshops	Workshops		Counseled on pre-purchase/home buying - Entered Lease Purchase Contract	Households		
18						0			1	
19				Other - Group Workshops	Workshops		Counseled on pre-purchase/home buying - Decided not to purchase housing; no further effort	Households		
20						0			0	
21				Pre-Purchase/Home buying - One-on-one counseling participants	Households		Counseled on pre-purchase/home buying - Withdrew	Households		
22						2			0	
23							Counseled on pre-purchase/home buying - Other outcome	Households		
24									0	
25			Need for information and advice regarding resolving or preventing mortgage delinquency or default.	Mortgage delinquency - Group workshops	Workshops		Counseled on mortgage delinquency - Brought mortgage current	Households		
26						5			0	
27				Mortgage delinquency - One-on-one counseling participants	Households		Counseled on mortgage delinquency - Referred to other social service agency or emergency	Households		
28						0			0	
29							Counseled on mortgage delinquency - Obtained partial claim loan from FHA lender	Households		
30									0	
31							Counseled on mortgage delinquency - Declared bankcruptcy	Households		
32									0	
33							Counseled on mortgage delinquency - Entered debt management plan	Households		
34									0	
35							Counseled on mortgage delinquency - Referred for legal assistance	Households		
36									0	
37							Counseled on mortgage delinquency - Withdrew	Households		
38									0	
39							Counseled on mortgage delinquency - Other outcome	Households		
40									0	
41							Counseled on mortgage delinquency - Mortgage	Households		

Figure 16.C AU – HUD-9902: Logic Model

14. When you finish completing this form, click **Send**. A message appears at the top of your screen.

A 9902 report has been created in database.

If the calculated totals don't agree with your calculations, verify your entries/totals and re-send the form if necessary.

Figure 16.D. AU – Database Updated Message

15. If you key in parent agency ID to the **Agency ID** field in *9902 Data Report Status Inquiry* criteria page, you will get a consolidated non-editable 9902 data report option.

1 agency(s) belonging to CATHOLIC CHARITIES USA have Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:	• Reporting Period: Quarter 4 • Fiscal Year: 2009 • Parent Agency ID: 80750 • Have Reported 9902: Yes

CATHOLIC CHARITIES USA (80750): 1 Affiliate(s) have Reported Consolidated 9902

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Click for Details
82257	CATHOLIC FAMILY AND COMMUNITY SERVICES, A CATHOLIC CHARITIES AGENCY FOR THE DIOCESE OF PATERSON	Sub Grantee	24 DeGrasse Street Paterson, NJ 07505	973-279-7100-20 973-523-1150	HCS	9902

Print | Export | Invalid Email List | Email Address List

Figure 17.A. AU – HUD-9902: 9902 Processing – Report of Affiliates Belonging to A Parent Agency Have Reported 9902 Data

16. Upon selecting Consolidated 9902 you will be prompted to the report, presented as followed.

Totals for Sub-Agencies of

CATHOLIC CHARITIES USA

Agency ID: 80750
Agency Type: National Intermediary
HUD Office GTR: Ronald Bedoya
Number of Sub-Agencies Reported: 1
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	130	70.17
b. Not Hispanic	141	76.11
c. Chose not to respond	0	0.00
Section 3 Total:	271	146.28
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0	0.00
b. Asian	0	0.00
c. Black or African American	87	46.96
d. Native Hawaiian or Other Pacific Islander	0	0.00
e. White	184	99.32
Multi-Race		
f. American Indian or Alaska Native and White	0	0.00
g. Asian and White	0	0.00
h. Black or African American and White	0	0.00
i. American Indian or Alaska Native and Black or African American	0	0.00

j. Other multiple race	0	0.00
k. Chose not to respond	0	0.00
Section 4 Total:	271	146.28
5. Income Levels		
a. < 50% of Area Median Income (AMI)	19	10.26
b. 50 - 79% of AMI	76	41.02
c. 80 - 100% of AMI	103	55.60
d. > 100% AMI	73	39.41
e. Chose not to respond	0	0.00
Section 5 Total:	271	146.29
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	0	0.00
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	0	0.00
c. Completed resolving or preventing mortgage delinquency workshop	0	0.00
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0.00
e. Completed fair housing workshop	0	0.00
f. Completed predatory lending workshop	0	0.00
g. Completed rental workshop	0	0.00
h. Other workshop	0	0.00
Group Session / Section 6 Total:	0	0.00
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	0	0.00
2) Client will be mortgage ready within 90 days	0	0.00
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	0	0.00
4) Receiving long term pre-purchase counseling	0	0.00
5) Entered lease purchase progra	0	0.00
6) Decided Not to purchase housing; no further effort to prepare needed	0	0.00
7) Withdrew from counseling	0	0.00
8) Other	0	0.00
Section 7a Sub-total:	0	0.00
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	0	0.00
2) Mortgage refinanced	0	0.00

3) Mortgage modified	0	0.00
4) Received second mortgage	0	0.00
5) Initiated forbearance agreement/repayment plan	4	2.16
6) Executed a deed-in-lieu	0	0.00
7) Sold property/chose alternative housing solution	1	0.54
8) Pre-forclosure sale	0	0.00
9) Mortgage foreclosed	0	0.00
10) Counseled and referred to another social service or emergency assistance agency	0	0.00
11) Obtained partial claim loan from FHA lender	0	0.00
12) Bankruptcy	0	0.00
13) Entered debt management plan	0	0.00
14) Counseled and referred for legal assistance	0	0.00
15) Currently receiving foreclosure prevention/budget counseling	0	0.00
16) Withdrew from counseling	0	0.00
17) Other	0	0.00
Section 7b Sub-total:	5	2.70
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	0	0.00
2) Counseled on HECM; decided not to obtain mortgage	0	0.00
3) Obtained a non-FHA reverse mortgage	0	0.00
4) Received home equity or home improvement loan or other home repair assistance	0	0.00
5) Received consumer loan (unsecured)	0	0.00
6) Mortgage refinanced	0	0.00
7) Counseled and referred to other social service agency	0	0.00
8) Sold house/chose alternative housing solution	0	0.00
9) Completed financial management/budget counseling	0	0.00
10) Completed home maintenance counseling	0	0.00
11) Counseled and utilities brought current	8	4.32
12) Counseled and referred for legal assistance	0	0.00
13) Currently receiving counseling	0	0.00
14) Withdrew from counseling	0	0.00
15) Other	0	0.00
Section 7c Sub-total:	8	4.32
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	0	0.00
2) Obtained temporary rental relief	80	43.18
3) Counseled and referred to agency with rental assistance program	0	0.00
4) Advised on recertification for HUD/other subsidy program	0	0.00
5) Counseled and referred to other social service agency	0	0.00
6) Counseled and referred to legal aid agency for fair housing assistance	0	0.00
7) Counseled and referred to legal aid agency for assistance with eviction	0	0.00
8) Found alternative rental housing	0	0.00
9) Decided to remain in current housing situation	0	0.00
10) Resolved issue in current tenancy	0	0.00
11) Entered debt management/repayment plan	0	0.00
12) Counseled and utilities brought current	111	59.92
13) Resolved security deposit dispute	0	0.00
14) Currently receiving counseling	0	0.00
15) Withdrew from counseling	0	0.00
16) Other	0	0.00
Section 7d Sub-total:	191	103.10
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	67	36.17
2) Occupied transitional housing	0	0.00
3) Occupied permanent housing with rental assistance	0	0.00
4) Occupied permanent housing without rental assistance	0	0.00
5) Counseled Referred to other social service agency	0	0.00
6) Remained homeless	0	0.00
7) Currently receiving counseling	0	0.00
8) Withdrew from counseling	0	0.00
9) Other	0	0.00
Section 7e Sub-total:	67	36.17
Individual Counseling / Section 7 a-e Total:	271	146.29
Total Counseling / Section 6 and 7 Total:	271	146.29

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$1,056,325.88

Figure 17.B. AU – HUD-9902: 9902 Processing – Consolidated 9902 Report

You have now successfully completed a HUD-9902 form.

5.3 Input Awards

Agencies that receive grant funding and have sub-agencies have the option of sub-allocating funds to their sub-agencies. Only those agencies that have sub-agencies are provided with this feature. To sub-allocate funding follow the steps below.

1. Click the **Input Awards** hyperlink in the upper navigation. The system displays all the applications the current agency submitted. Select a grant application to sub-allocate funding from.

Select a Grant Application to Award for FY 2009

Instructions: Click on the **Agency Name** that you wish to grant an award.

Agency Name	Agency ID	Agency Type	HUD office	City/State	Application ID	Grant Type	Awarded
NATIONAL URBAN LEAGUE	81639	National Intermediary	HQ SF-HUD	New York, NY	0011-013	COMP	$1,246,732.00
NATIONAL URBAN LEAGUE	81639	National Intermediary	HQ SF-HUD	New York, NY	0013-005	LDRC	$150,000.00
NATIONAL URBAN LEAGUE	81639	National Intermediary	HQ SF-HUD	New York, NY	0014-006	FLMF	$0.00

Figure 18.A. AU – Input Awards: Sub-Allocate Funding – Part I

2. Once you click the desired application, you will be prompted to further data regarding the Agency and application.

Input Awards for FY 2009

Instructions: Click the 'Sub-Agency Allocation' button to access screen to distribute funds to sub-agencies.

Agency Name:	NATIONAL URBAN LEAGUE (0011-013)		
Address:	120 Wall Street New York, NY 10005		
Requested:	$2,700,000.00	**Grant Category:**	INTERMEDIARY
		Grant Type:	COMP
Awarded:	$1,246,732.00		

Back | Agency/Sub-Agency Allocation

Figure 18.B. AU – Input Awards: Sub-Allocate Funding – Part II

3. To sub-allocate funds, you will click the **Agency/Sub-Agency Allocation** button located above, and will be prompted to the following screen. From here you are able to allocate funds based on three criteria.
   a. Allocate Evenly – Which splits your available funds evenly amongst Sub-Agencies.
   b. Allocated By # of Counselors – Which will provide agencies with more counselors with greater funds.
   c. Allocate By # of Clients – Which will provide agencies with more clients with greater funds.
4. Once you have allocated those funds, click **Submit** to save changes, or **Cancel** to erase those edits.

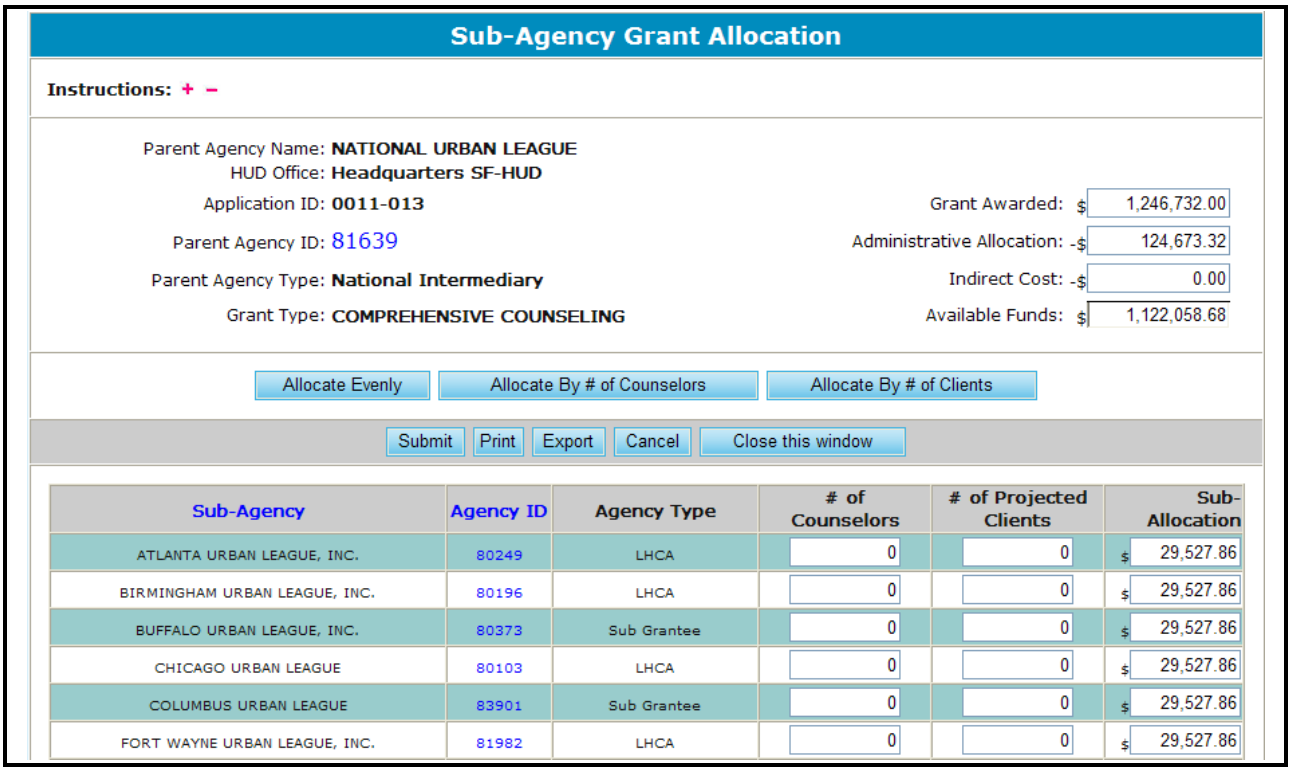


Figure 18.C. AU – Input Awards: Sub-Allocate Funding – Part III

5.4 Submission Verification

5.4.1 ARM Submission

Another option that you have as an Agency User is to perform an ARM Submission Verification.

1. From the top navigation menu, click the **Submission Verification** hyperlink. The *Submission Verification Screen* page appears.

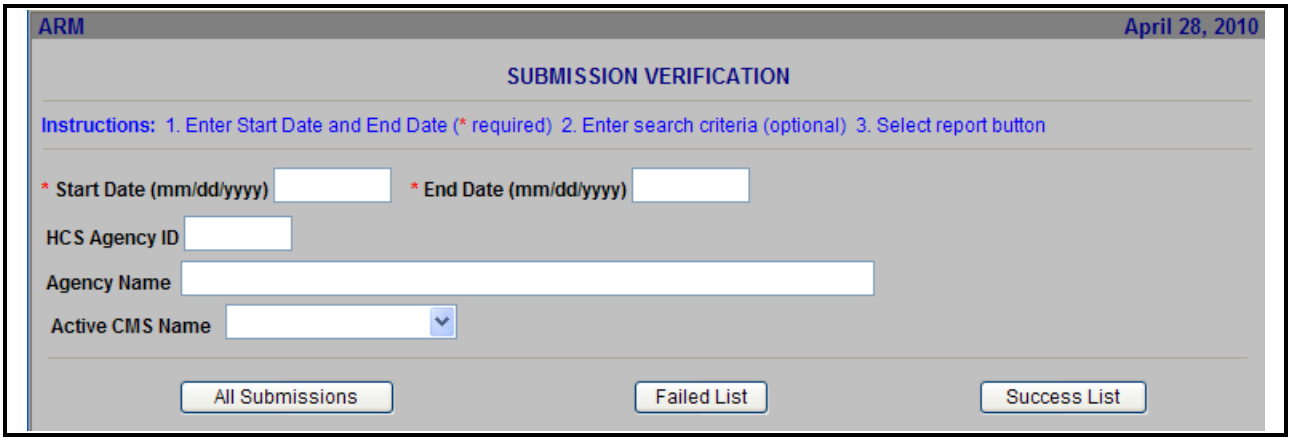


Figure 19. AU – Submission Verification: ARM Submission Verification

2. Upon narrowing down your search criteria, you have three types of submission reports to choose from:

a. **All Submission**: This will provide you a full list of submissions; the ones that failed and the ones that were successful
b. **Failed List**: This will provide a list of only the submissions that failed.
c. **Success List**: This will provide you a list of only the submissions that were successful.

ARM April 28, 2010

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) 01/01/2009 * End Date (mm/dd/yyyy) 05/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: All Submissions Total: 66

Date	Status	HCS Agency Id	Agency Name	CMS Name
Apr 27 2010 11:55	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:13	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:12	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 26 2010 2:41	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 23 2010 12:03	Successful	83530	HORIZONS, A FAMILY SERVICE ALLIANCE (HORIZONS CCCS)	Paragon
Apr 20 2010 11:19	Successful	80640	SUREPATH FINANCIAL SOLUTIONS	CPR
Apr 19 2010 5:49	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:48	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:47	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:45	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR

Figure 20.A. AU – Submission Verification: ARM Submission Verification Results – All Submissions

ARM April 28, 2010

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) 01/01/2009 * End Date (mm/dd/yyyy) 05/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: Failed List Total: 13

Date	Status	HCS Agency Id	Agency Name	CMS Name
Apr 19 2010 5:45	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:42	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:40	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 10:09	Failed	83279	CCCS OF NH & VT	CPR
Apr 16 2010 10:53	Failed	80727	CONSUMER CREDIT COUNSELING SERVICE	CPR
Apr 14 2010 4:17	Failed	83279	CCCS OF NH & VT	CPR
Mar 18 2010 4:03	Failed	83279	CCCS OF NH & VT	CPR
Mar 17 2010 12:22	Failed	83279	CCCS OF NH & VT	CPR
Mar 17 2010 12:21	Failed	83279	CCCS OF NH & VT	CPR
Mar 9 2010 4:49	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Mar 9 2010 4:47	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Mar 9 2010 4:31	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Feb 1 2010 12:06	Failed	80949	Catholic Charities of Chicago	HCS

Figure 20.B. AU – Submission Verification: ARM Submission Verification – Failed List

* Start Date (mm/dd/yyyy) 06/01/2009 * End Date (mm/dd/yyyy) 06/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: Success List Total: 56

Date	Status	HCS Agency Id	Agency Name	CMS Name
May 3 2010 2:28	Successful	80244	CCCS OF NORTH CENTRAL WEST VIRGINA	Paragon
Apr 30 2010 2:16	Successful	80941	CCCS OF DELAWARE VALLEY, INC.	CPR
Apr 30 2010 12:12	Successful	80727	CONSUMER CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:13	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:12	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 26 2010 2:41	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 23 2010 12:03	Successful	83530	HORIZONS, A FAMILY SERVICE ALLIANCE (HORIZONS CCCS)	Paragon
Apr 20 2010 11:19	Successful	80640	SUREPATH FINANCIAL SOLUTIONS	CPR
Apr 19 2010 5:49	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:48	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:47	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 12:42	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 12:38	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:48	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:33	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:31	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 16 2010 3:48	Successful	82951	CCCS, A DIVISION OF TRIANGLE FAMILY SERVICES, INC.	Paragon
Apr 16 2010 2:22	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 16 2010 2:17	Successful	80949	Catholic Charities of Chicago	CCARM

Figure 20.C. AU – Submission Verification: ARM Submission Verification – Successful List

You have successfully viewed the ARM Submission Verification.

5.5 CMS Management

Under CMS Management you are prompted to two charts. One chart, Figure 22.A, is a list of CMS products that successfully meet HUD"s standards and have completed testing. The second chart, Figure 22.B, is a list of CMS products that are in the process of meeting HUD standards, and are in the process of testing.

These charts provide further information in the following areas: Specific Client Management System (**CMS**), **Dataset Version**, **Vendor**, **Vendor POC**, **POC Email**, **Vendor Website**, and **Availability** (either public or exclusive).

HUD CERTIFIED CMS PRODUCTS FOR HUD HOUSING COUNSELING AGENCY USE

Total 45 records

Add new CMS | Export CMS List

Listed below are CMS products that successfully met HUD□s standards and have completed testing. Agencies using these products are able to transmit their data to HUD at this time.

CMS	DATASET VERSION	VENDOR	POC	EMAIL	WEB SITE	AVAILABILITY
CCARM	3.1	Catholic Charities	Donna Drinka	ddrinka@catholiccharities	www.catholiccharities.net	Exclusive
COMS	3.0	CIL Orlando	Ryan Dan	dryan@cilorlando.org	www.cilorlando.org	Public
CPR	3.1	Cooperative Processing Resources	Campion Kate	kate@cprops.com	www.cprops.com	Public
DebtLogic	3.0	Integrant, Inc.	Lacomble Ben	blacomble@integrantinc.c	www.integrantinc.com	Exclusive
FMS	3.1	GreenPath, Inc	McNeill Donna	DMcNeill@greenpath.com	www.greenpath.com	Exclusive
HRS	3.1	DLBNetwork	Daniel Bajema	dbajema@dlbnetwork.com	www.dlbnetwork.com	Exclusive
Paragon	3.1	Money Management International	Sandoval Darrin	Darrin.Sandoval@MoneyM	www.paragondms.com	Public

Figure 21.A. AU – CMS Management: HUD Certified CMS Products – Completed Testing

Listed below are CMS products that are in the process of meeting HUD□s standards but have not completed testing. Agencies using these products are not able to transmit their data to HUD at this time.

CMS	DATASET VERSION	VENDOR	POC	EMAIL	WEB SITE	AVAILABILITY
AdSysTech	3.0	AdSysTech	James Rushton	rjames@adsystech.com	www.adsystech.com	Public
ACCLIVCTR	3.0	Access Living in Chicago	Stu Landrum	mitware@swbell.net		Exclusive
ASPEN	3.1	The Brainard Group	Bob Osborn	bob@brainardgroup.com	www.brainardgroup.com	Public
Agate Software	3.1	Agate Software	Shea Bill	bshea@agatesoftware.com	www.intelligrants.com	Public
Budget Your Dream	3.0	Budget Your Dream, INC.	Stephon Lee	stephonlee@budgetyourdr	www.budgetyourdream.cor	Public
CAP-SYS	3.1	Spokane Neighborhood Action Programs	McFarland Alan	alanmcf@well.com		Exclusive
CAPNA	3.0	Community Action Partnership of North Alabama	Jack Green	jgreen@capna.org	www.dbafacspro.com	Exclusive
CCCS OF DALLAS	3.1	Cyfun Media	Robert Wier	rwier@cccs.net	www.cccs.net	Exclusive
CCCS OF GREATER ATLANTA	3.1	CCCS OF GREATER ATLANTA	Michelle Jones	michelle.jones@cccsinc.o		Exclusive
CCHR	3.1	Pin Technology, Inc.	Brite Lee	brite.lee@pintechnology.c	www.pintechnology.com	Exclusive

Figure 21.B. AU – CMS Management: HUD Certified CMS Products Awaiting Testing

6.0 REVIEWER

6.0 REVIEWER

In the HCS system, a *Reviewer* is someone who is a HUD HCS user who conducts grant application reviews. These Reviewers can:

- Access **Scoring**
- View **Reports**
- View **Funding Allocations**

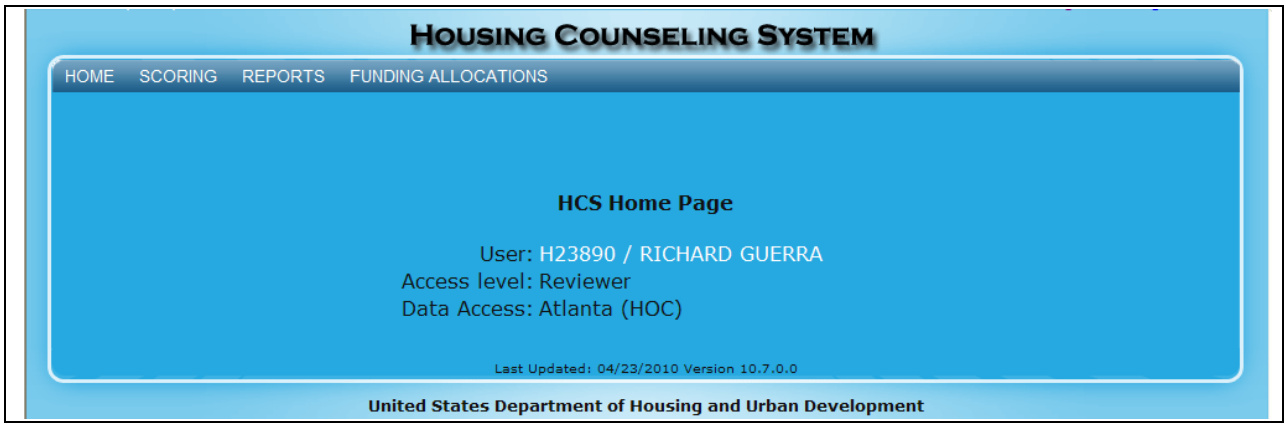


Figure 22. Reviewer – HCS Home Page – Agency User screen.

6.1 Scoring

As a Reviewer you will only be able to view the applications you were associated with for that Fiscal Year.

1. From the upper navigation menu, click the **Scoring** hyperlink. The *Application Scoring List Search for Fiscal Year 20XX* screen appears.

2. From here you will be able to edit your search criteria based on:
   a. Agency ID
   b. Agency Name
   c. Reviewer
   d. Application ID

3. Once you have narrowed down your search click the **Search** button to retrieve those results, or **Clear** to erase what was put into each field.

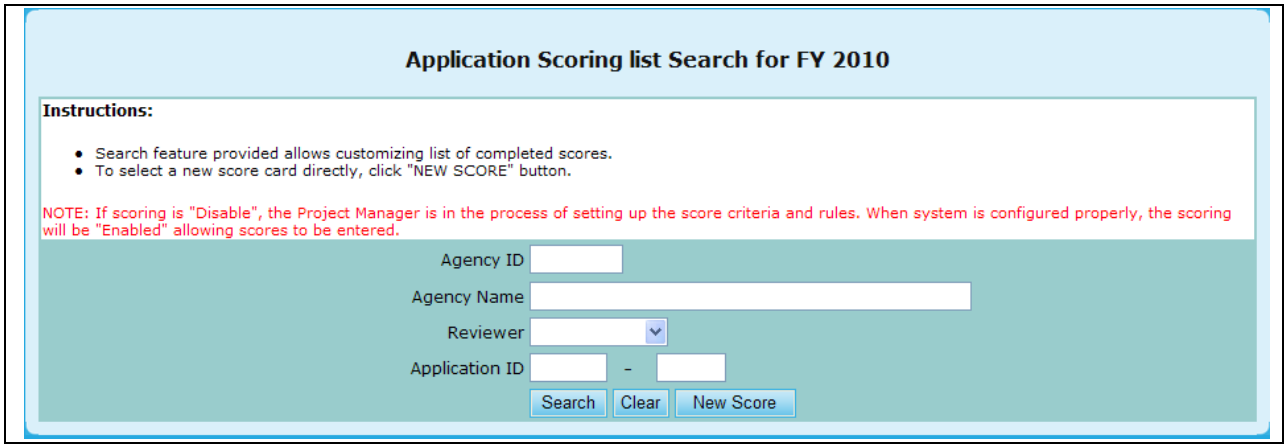


Figure 23. Reviewer – Scoring: Application Scoring List Search for FY 20XX

4. You will be prompted to your search results, which you can sort based off of the following criteria:
    a. Agency Name
    b. Agency ID
    c. Agency Type
    d. Application ID
    e. Reviewer

5. To open a specific scorecard, click the hyperlink under Agency Name that you would like to view.

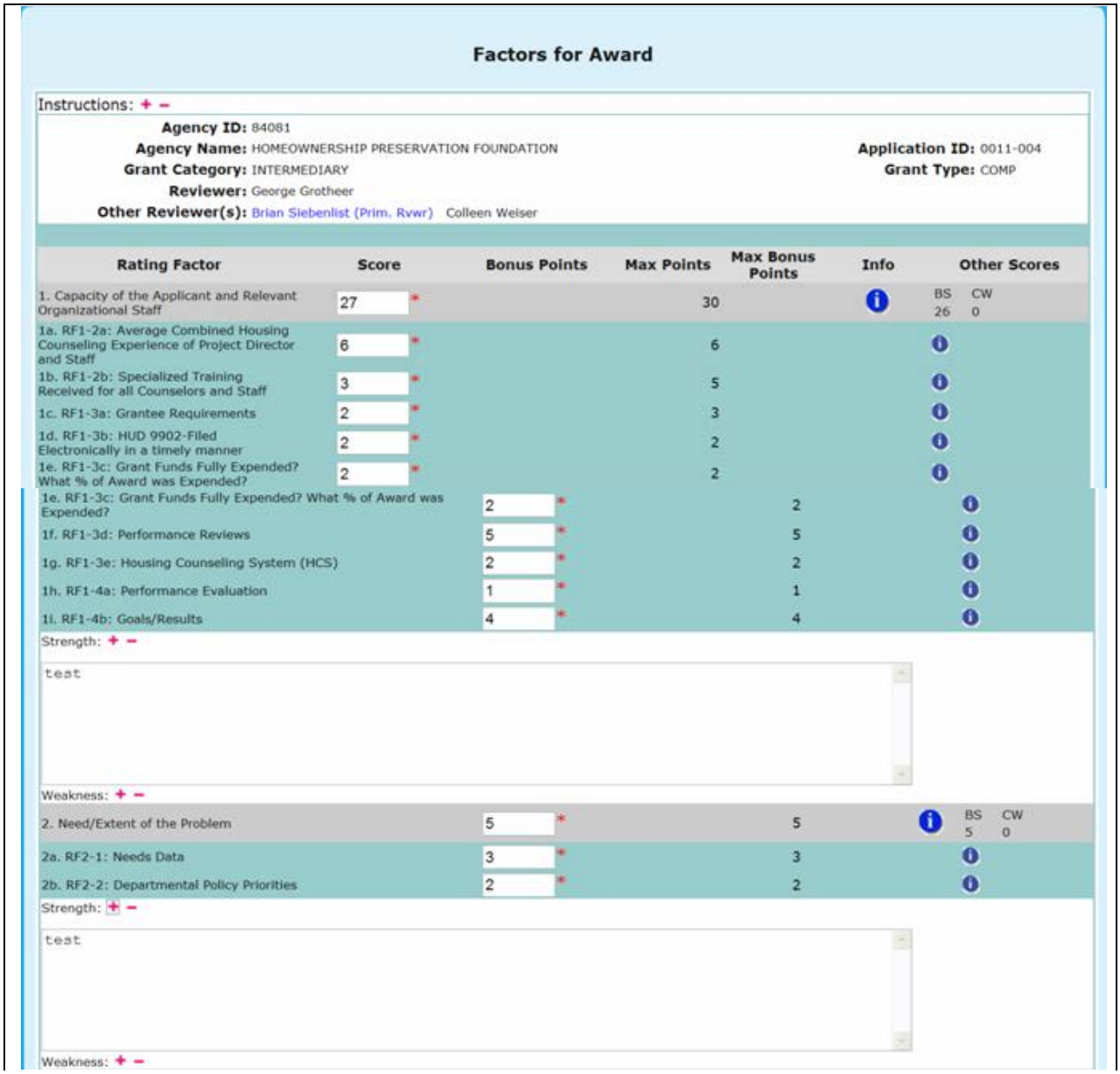
Note: to Delete or add New Score skip to step 9.

Figure 24. Reviewer – Scoring: Application(s) Scored for Fiscal Year 2010

6. Once you have chosen your desired Agency, you will be prompted to the Factors For Award scorecard.
    a. Check agency information for accuracy to ensure you are evaluating the correct score card.
    b. Other Reviewers assigned to this application are posted for reference.
    c. All sub-factor scores when listed must be scored. Major Factor scores cannot be over written when sub-factors are listed. Major Factor scores will automatically sum the scores of its sub-factors. If no sub-factors are listed, the score for the Major Factor can be entered directly.

d. If applicable, instructions to each sub-factor are provided by selecting the Blue Information icon.
e. **Bonus Points** are shown if applicable. Combine the Factor scores plus Bonus Points to determine Total Score.

7. When all scores have been entered, click the **OK** button on the bottom to save the score card, or **Cancel** to erase changes.



Factors for Award

Instructions: + −

Agency ID: 84081
Agency Name: HOMEOWNERSHIP PRESERVATION FOUNDATION
Grant Category: INTERMEDIARY
Reviewer: George Grotheer
Other Reviewer(s): Brian Siebenlist (Prim. Rvwr) Colleen Weiser
Application ID: 0011-004
Grant Type: COMP

Rating Factor	Score	Bonus Points	Max Points	Max Bonus Points	Info	Other Scores
1. Capacity of the Applicant and Relevant Organizational Staff	27 *		30			BS 26 CW 0
1a. RF1-2a: Average Combined Housing Counseling Experience of Project Director and Staff	6 *		6			
1b. RF1-2b: Specialized Training Received for all Counselors and Staff	3 *		5			
1c. RF1-3a: Grantee Requirements	2 *		3			
1d. RF1-3b: HUD 9902-Filed Electronically in a timely manner	2 *		2			
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?	2 *		2			
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?		2 *		2		
1f. RF1-3d: Performance Reviews		5 *		5		
1g. RF1-3e: Housing Counseling System (HCS)		2 *		2		
1h. RF1-4a: Performance Evaluation		1 *		1		
1i. RF1-4b: Goals/Results		4 *		4		

Strength: + −

test

Weakness: + −

2. Need/Extent of the Problem		5 *		5		BS 5 CW 0
2a. RF2-1: Needs Data		3 *		3		
2b. RF2-2: Departmental Policy Priorities		2 *		2		

Strength: + −

test

Weakness: + −

1f. RF1-3d: Performance Reviews	5	*	5			
1g. RF1-3e: Housing Counseling System (HCS)	2	*	2			
1h. RF1-4a: Performance Evaluation	1	*	1			
1i. RF1-4b: Goals/Results	4	*	4			
Strength: + − Weakness: + −						
2. Need/Extent of the Problem	5	*	5		BS 5	CW 0
2a. RF2-1: Needs Data	3	*	3			
2b. RF2-2: Departmental Policy Priorities	2	*	2			
Strength: + − Weakness: + −						
3. Soundness of Approach/Scope of Housing Counseling Services	40	*	45		BS 0	CW 0
3a. RF3-1a: Average Number of Hours per Client/per Counseling Type	0	*	2			
3b. RF3-1b: Types of Counseling	4	*	4			
3c. RF3-1c: Group vs One-on-One	1	*	1			
3d. RF3-1d: Marketing and Outreach	1	*	1			
3e. RF3-2a: Cost Per Client	6	*	6			
3f. RF3-2b: Capacity	1	*	1			
3g. RF3-2c: Training Expenditures	0	*	2			
3h. RF3-2d: Percentage of Grant Funding Passed Through	1	*	1			
3v. RF3-6a: Percent of Grant Funding to be Passed Through	2	*	3			
3w. RF3-6b: Capacity	1	*	1			
Strength: + − Weakness: + −						
4. Leveraging Resources	10	*	10		BS 10	CW 0
Strength: + − Weakness: + −						
5. Achieving Results and Program Evaluation	10	*	10		BS 0	CW 0
5a. RF5-1a: Outputs/Services	3	*	3			
5b. RF5-1b: Outcomes	3	*	3			
5c. RF5-1c: Logic Model Projections	3	*	3			
5d. RF5-1d: Evaluation Tools	1	*	1			
Strength: + − Weakness: + −						
Total	92		100	0	BS 41	CW 0

OK Cancel

Figure 25.A. Reviewer – Scoring: Application(s) Scored for Fiscal Year 2010

8. If you click **OK**, and there are errors associated with your scoring you will prompted to various messages.
    a. If the number you input is larger than the Max Points, a error message will pop-up
    b. If the number you input is not a whole number, a error message will pop-up
    c. If the number you input is not a positive number, a error message will pop-up

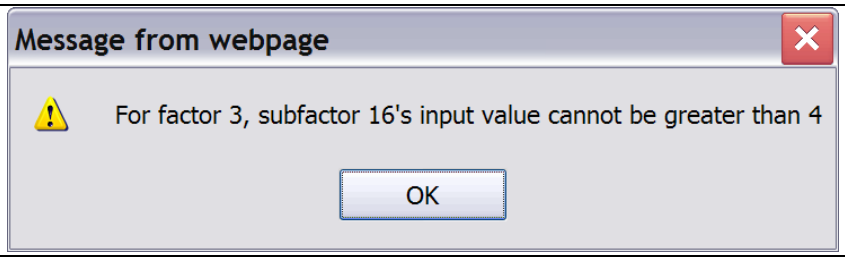


Figure 25.B. Reviewer – Scoring: Message from webpage (Step 8.a)

Figure 25.C. Reviewer – Scoring: Message from webpage (Step 8.b)

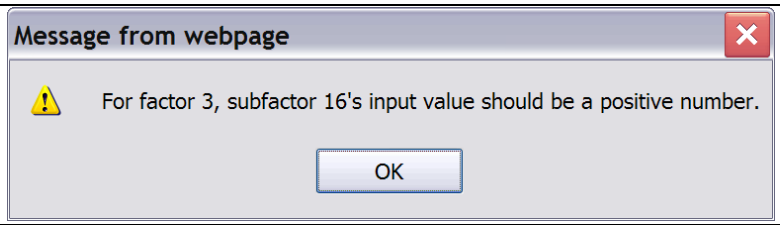


Figure 25.D. Reviewer – Scoring: Message from webpage (Step 8.c)

Agency Name	Agency ID	Agency Type	Grant Type	Application ID	Reviewer	Total Score	Delete
HOMEOWNERSHIP PRESERVATION FOUNDATION	84081	National Intermediary	COMP	0011-004	Grotheer, George	92	
NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS	84539	National Intermediary	COMP	0011-006	Grotheer, George	93	
NATIONAL URBAN LEAGUE	81639	National Intermediary	COMP	0011-013	Grotheer, George	89	
CCCS OF GREATER ATLANTA - MAIN OFFICE	84538	National Intermediary	COMP	0011-015	Grotheer, George	95	
CCCS OF GREATER ATLANTA - MAIN OFFICE	84538	National Intermediary	HECM	0012-002	Grotheer, George	94	

Figure 26. Reviewer – Scoring: Application(s) Scored for Fiscal Year 2010

9. To delete a score, click the *X* button found under the delete column on the *Application(s) Scored for Fiscal Year 2010*.

10. A message will be prompted prior to finalizing your action. Click **OK** to delete the score, or **Cancel** to return back to the *Application(s) Scored for Fiscal Year 2010* page.

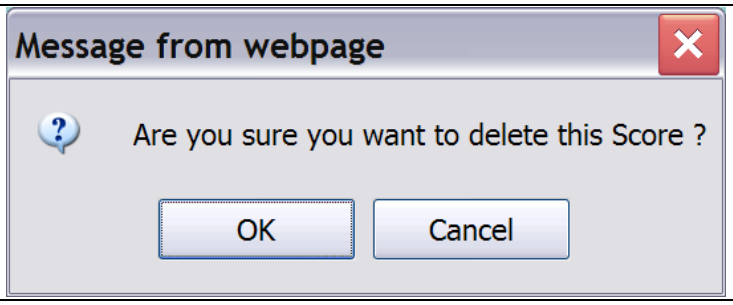


Figure 27. Reviewer – Scoring: Message from webpage Delete a Score

11. To add a New Score, click the **New Score** button located above and below the Agency Name column.

12. This will prompt you to a list of scorecards that are awaiting your review, similar to Figure 27.

13. The scorecard, and process, will be the same as previously described in Steps 6 and 7.

6.2 Reports

6.2.1 Viewing Reports

To view any of the HCS system reports, take the following steps:

1. From the upper navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click **Reviewers Final Report** hyperlink from the menu, the *Select a Grant Application for FY 20XX* screen appears.

Select a Grant Application for FY 2009

Instructions: Click on the Agency Name that you wish to generate the report.

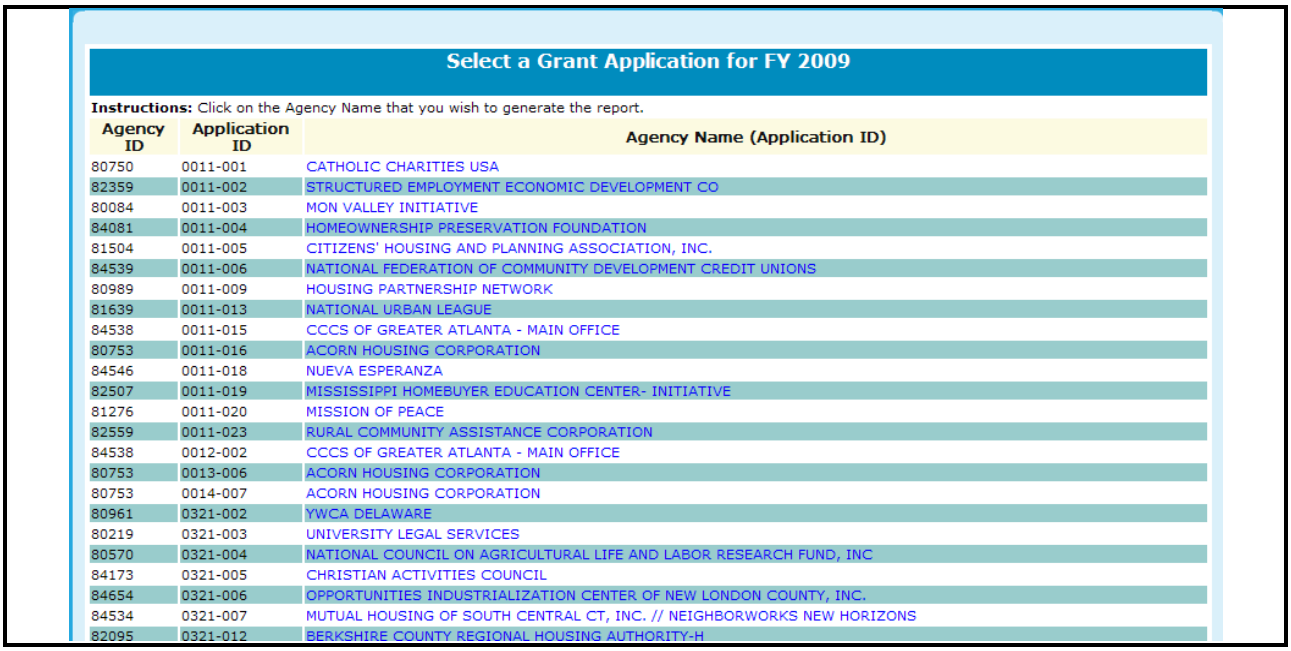
Agency ID	Application ID	Agency Name (Application ID)
80750	0011-001	CATHOLIC CHARITIES USA
82359	0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO
80084	0011-003	MON VALLEY INITIATIVE
84081	0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION
81504	0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.
84539	0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS
80989	0011-009	HOUSING PARTNERSHIP NETWORK
81639	0011-013	NATIONAL URBAN LEAGUE
84538	0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0011-016	ACORN HOUSING CORPORATION
84546	0011-018	NUEVA ESPERANZA
82507	0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE
81276	0011-020	MISSION OF PEACE
82559	0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION
84538	0012-002	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0013-006	ACORN HOUSING CORPORATION
80753	0014-007	ACORN HOUSING CORPORATION
80961	0321-002	YWCA DELAWARE
80219	0321-003	UNIVERSITY LEGAL SERVICES
80570	0321-004	NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC
84173	0321-005	CHRISTIAN ACTIVITIES COUNCIL
84654	0321-006	OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.
84534	0321-007	MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS
82095	0321-012	BERKSHIRE COUNTY REGIONAL HOUSING AUTHORITY-H

Figure 28. Reviewer – Reports: Reviewers Final Report

6.2.1.1 *Printing Reports*

You can print any of the HCS system reports by following these steps:

1. From the upper navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click **Reviewers Final Report** hyperlink from the menu, the *Select a Grant Application for FY 20XX* screen appears.



Select a Grant Application for FY 2009

Instructions: Click on the Agency Name that you wish to generate the report.

Agency ID	Application ID	Agency Name (Application ID)
80750	0011-001	CATHOLIC CHARITIES USA
82359	0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO
80084	0011-003	MON VALLEY INITIATIVE
84081	0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION
81504	0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.
84539	0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS
80989	0011-009	HOUSING PARTNERSHIP NETWORK
81639	0011-013	NATIONAL URBAN LEAGUE
84538	0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0011-016	ACORN HOUSING CORPORATION
84546	0011-018	NUEVA ESPERANZA
82507	0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE
81276	0011-020	MISSION OF PEACE
82559	0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION
84538	0012-002	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0013-006	ACORN HOUSING CORPORATION
80753	0014-007	ACORN HOUSING CORPORATION
80961	0321-002	YWCA DELAWARE
80219	0321-003	UNIVERSITY LEGAL SERVICES
80570	0321-004	NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC
84173	0321-005	CHRISTIAN ACTIVITIES COUNCIL
84654	0321-006	OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.
84534	0321-007	MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS
82095	0321-012	BERKSHIRE COUNTY REGIONAL HOUSING AUTHORITY-H

Figure 29. Reviewer – Reports: Reviewers Final Report

2. Click the **Print** button. The *Print* dialog box similar to follow appears. Once you have selected your printing criteria, click Print to have a printout of the document.

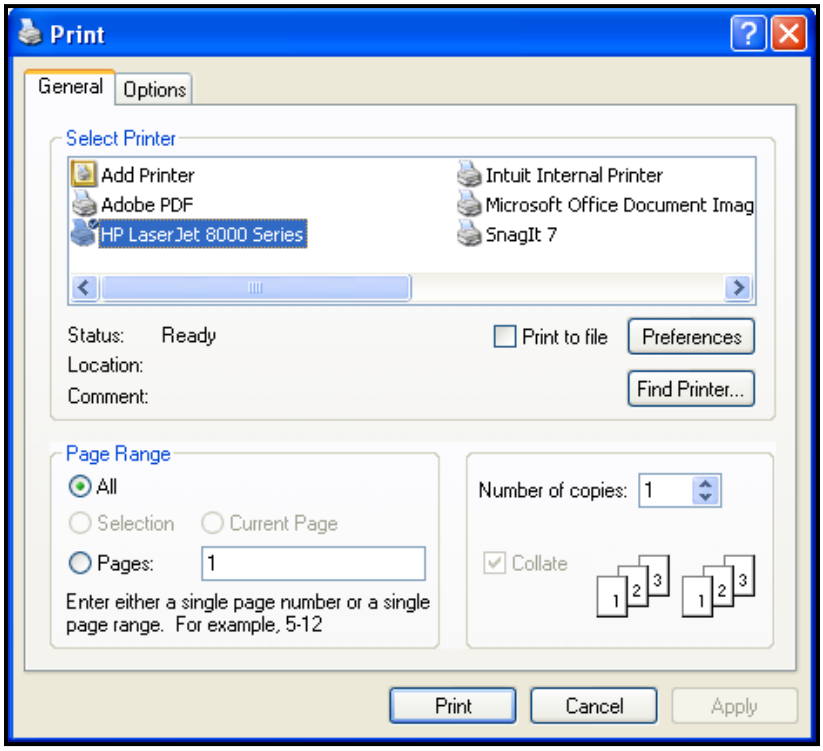


Figure 30. Reviewer – Reports: Print Dialog Box.

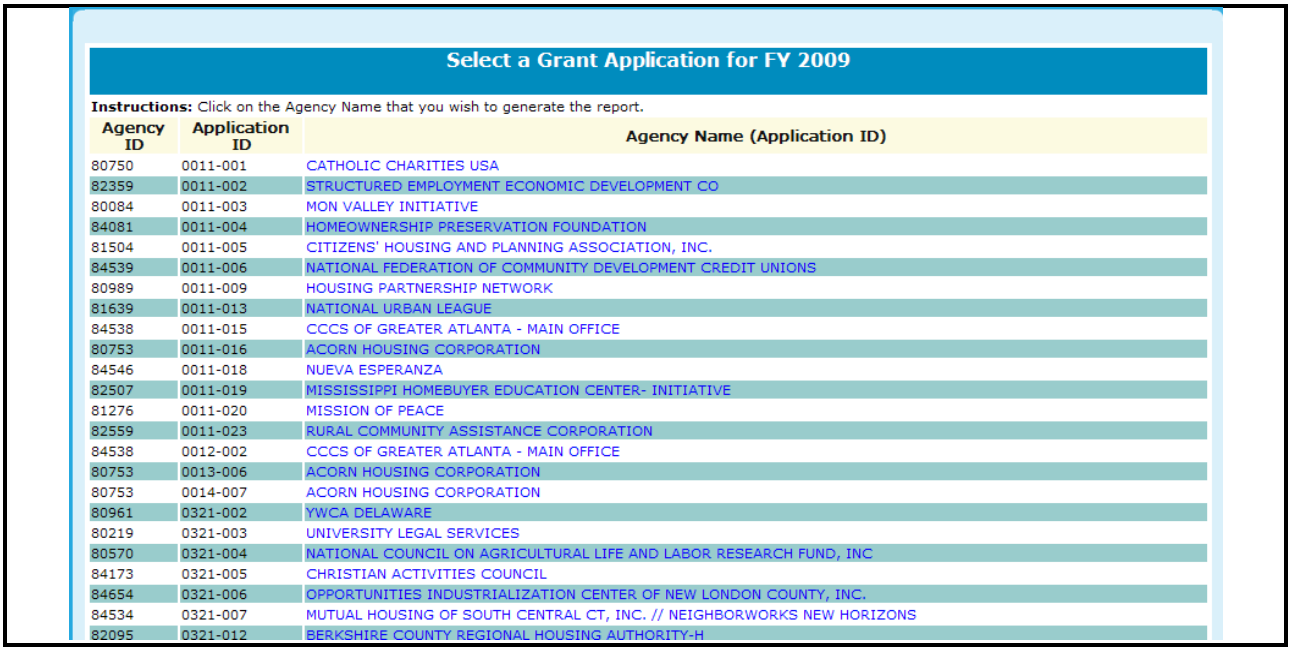
You have now successfully printed a report. Repeat these steps to print any of the other reports available.

6.2.1.2 *Exporting Reports*

You can export any of the HCS system reports to Excel spreadsheet by following these steps:

1. From the upper navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click **Reviewers Final Report** hyperlink from the menu, the *Select a Grant Application for FY 20XX* screen appears.

2. **Click the** Export **button.** The *File Download* dialog box appears**.**



Select a Grant Application for FY 2009

Instructions: Click on the Agency Name that you wish to generate the report.

Agency ID	Application ID	Agency Name (Application ID)
80750	0011-001	CATHOLIC CHARITIES USA
82359	0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO
80084	0011-003	MON VALLEY INITIATIVE
84081	0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION
81504	0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.
84539	0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS
80989	0011-009	HOUSING PARTNERSHIP NETWORK
81639	0011-013	NATIONAL URBAN LEAGUE
84538	0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0011-016	ACORN HOUSING CORPORATION
84546	0011-018	NUEVA ESPERANZA
82507	0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE
81276	0011-020	MISSION OF PEACE
82559	0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION
84538	0012-002	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0013-006	ACORN HOUSING CORPORATION
80753	0014-007	ACORN HOUSING CORPORATION
80961	0321-002	YWCA DELAWARE
80219	0321-003	UNIVERSITY LEGAL SERVICES
80570	0321-004	NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC
84173	0321-005	CHRISTIAN ACTIVITIES COUNCIL
84654	0321-006	OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.
84534	0321-007	MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS
82095	0321-012	BERKSHIRE COUNTY REGIONAL HOUSING AUTHORITY-H

Figure 31. Reviewer – Reports: Reviewers Final Report

3. Click the **Open** button to open the spreadsheet in HCS web page. Or, click the **Save** button and follow the instruction to save the report to a Microsoft Excel file.

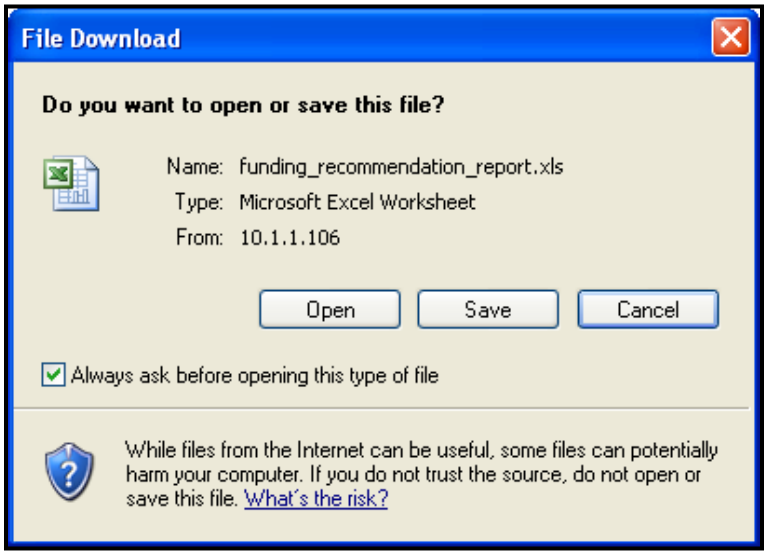


Figure 32. Reviewer – Reports: File Download Dialog Box.

You have now exported an HCS system report. Follow these steps again to export any of the other reports.

6.2.2 Report

6.2.2.1 *Reviewers Final Report*

1. From the top navigation menu, under **Reports** sub-menu, click the **Reviewers Final Report** hyperlink, the Select a Grant Application for Fiscal Year 20XX appears.

2. This will prompt you to a list of Grant Applications arranged by Agency. To view an Agency report, click the hyperlink for that Agency under the **Agency Name** column.

Select a Grant Application for FY 2009

Instructions: Click on the Agency Name that you wish to generate the report.

Agency ID	Application ID	Agency Name (Application ID)
80750	0011-001	CATHOLIC CHARITIES USA
82359	0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO
80084	0011-003	MON VALLEY INITIATIVE
84081	0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION
81504	0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.
84539	0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS
80989	0011-009	HOUSING PARTNERSHIP NETWORK
81639	0011-013	NATIONAL URBAN LEAGUE
84538	0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0011-016	ACORN HOUSING CORPORATION
84546	0011-018	NUEVA ESPERANZA
82507	0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE
81276	0011-020	MISSION OF PEACE
82559	0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION
84538	0012-002	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0013-006	ACORN HOUSING CORPORATION
80753	0014-007	ACORN HOUSING CORPORATION
80961	0321-002	YWCA DELAWARE
80219	0321-003	UNIVERSITY LEGAL SERVICES
80570	0321-004	NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC
84173	0321-005	CHRISTIAN ACTIVITIES COUNCIL
84654	0321-006	OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.
84534	0321-007	MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS
82095	0321-012	BERKSHIRE COUNTY REGIONAL HOUSING AUTHORITY-H

Figure 33.A. Reviewer – Reports: Reviewers Final Report

Note: Provided below is an example of a Final Reviewer Report.

Under each Factor, there are six places for comments based on the following criteria:

- Primary R. Strength
- Reviewers Strength
- Final Primary Reviewer Strength
- Primary R. Weakness
- Reviewers Weakness
- Final Primary Reviewer Weakness

Primary Reviewer Final Comment - Chairman Reports

Instructions: + –

Agency ID:	82456		
Agency Name:	HRS	**Application ID:**	0321-030
Grant Category:	LHCA	**Grant Type:**	COMP
Reviewer:	Maryanne Daniel (Prim. Rvwr)		
Reviewer(s):	Tom Hardy David Gallian		

Rating Factor	Score	Bonus Points	Max Points	Max Bonus Points	Other Scores	
1. Capacity of the Applicant and Relevant Organizational Staff	27	0	30	2	**TH** 0	**DG** 26
1a. RF1-2a: Average Combined Housing Counseling Experience of Project Director and Staff	6		6		0	6
1b. RF1-2b: Specialized Training Received for all Counselors and Staff	5		5		0	3
1c. RF1-3a: Grantee Requirements	2		3		0	1
1d. RF1-3b: HUD 9902-Filed Electronically in a timely manner	1		2		0	0
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?	2		2		0	3
1f. RF1-3d: Performance Reviews	5		5		0	0
1g. RF1-3e: Housing Counseling System (HCS)	2		2		0	0
1h. RF1-4a: Performance Evaluation	0		1		0	0
1i. RF1-4b: Goals/Results	4		4		0	0

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

2. Need/Extent of the Problem	4	0	5		**TH** 0	**DG** 4
2a. RF2-1: Needs Data	3		3		0	6
2b. RF2-2: Departmental Policy Priorities	1		2		0	3

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

3. Soundness of Approach/Scope of Housing Counseling Services	37	0	45		**TH** 0	**DG** 39
3a. RF3-1a: Average Number of Hours per Client/per Counseling Type	1		2		0	6
3b. RF3-1b: Types of Counseling	4		4		0	3
3c. RF3-1c: Group vs One-on-One	0		1		0	1
3d. RF3-1d: Marketing and Outreach	1		1		0	0
3e. RF3-2a: Cost Per Client	6		6		0	3
3f. RF3-2b: Capacity	1		1		0	0

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

4. Leveraging Resources	10	0	10		TH 0	DG 10

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

5. Achieving Results and Program Evaluation	10	0	10		TH 0	DG 10
5a. RF5-1a: Outputs/Services	3		3		0	6
5b. RF5-1b: Outcomes	3		3		0	3
5c. RF5-1c: Logic Model Projections	3		3		0	1
5d. RF5-1d: Evaluation Tools	1		1		0	0

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

Total	88	0	100	2	TH 0	DG 89

Print

Figure 33.B. Reviewer – Reports: Reviewers Final Report Result

Note: In order to maximize or minimize these comments either select the + –. Provided below is an example of the comments boxes maximized in order to read the comments by those who reviewed this agency‟s request.

Primary R. Strength: + –

2 bilingual counselors on staff; no performanc review conducted last year. Director has more than 8 yrs of experience. Most of the counselors have certifications.

Reviewers Strength: + –

this rating factor was well organized and easy to read. applicant addressed most of the questions.

Final Primary Reviewer Strength: + –

Primary R. Weakness: + –

Lost point for timeliness of 9902

Figure 33.C. Reviewer – Reports: Reviewers Final Report Result – Strengths and Weaknesses

Note: If a primary reviewer has not reviewed a specific application, you will see the following message at the top of a report.

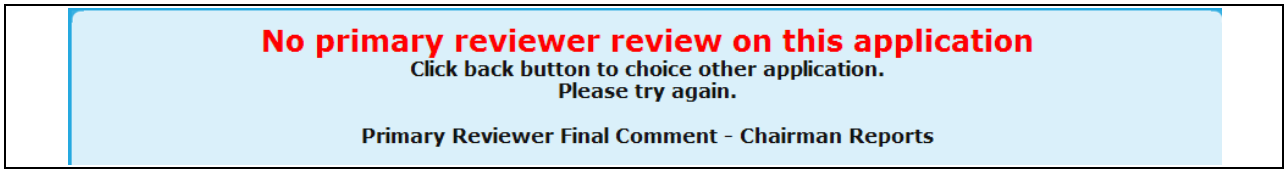
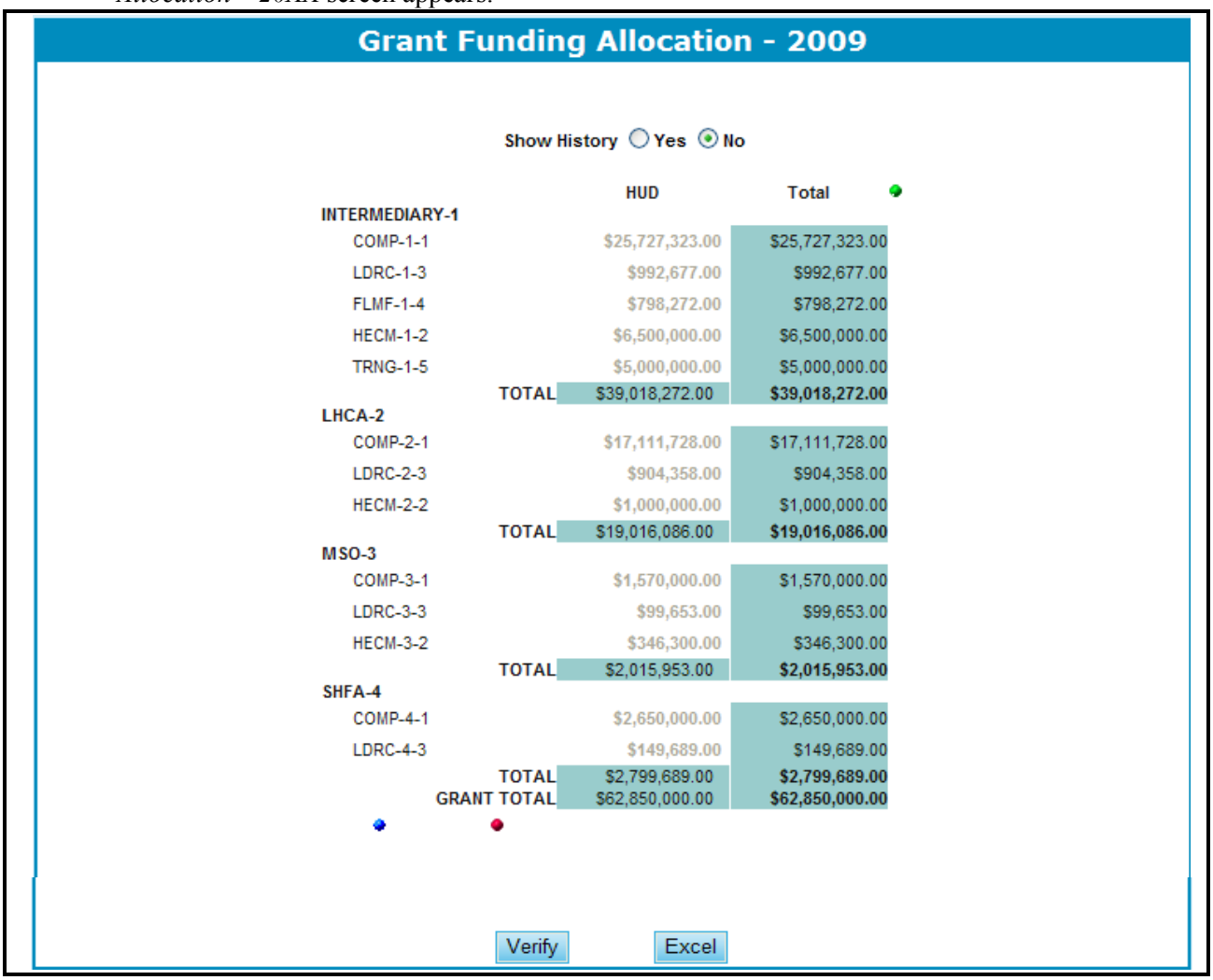


Figure 33.D. Reviewer – Reports: Reviewers Final Report Result – No Review Alert

6.3 Funding Allocations

The Program Manager at HQ enters all of the funding allocations. HCS supports two methods of allocating funds. The first method allocates by grant type only. The second method used in previous fiscal years is according to grant type and HUD office. Depending on which method used by HQ, the funding allocation information available to a Reviewer is different.

1. From the upper navigation menu, click the **Funding Allocations** hyperlink. The *Grant Funding Allocation – 20XX* screen appears.

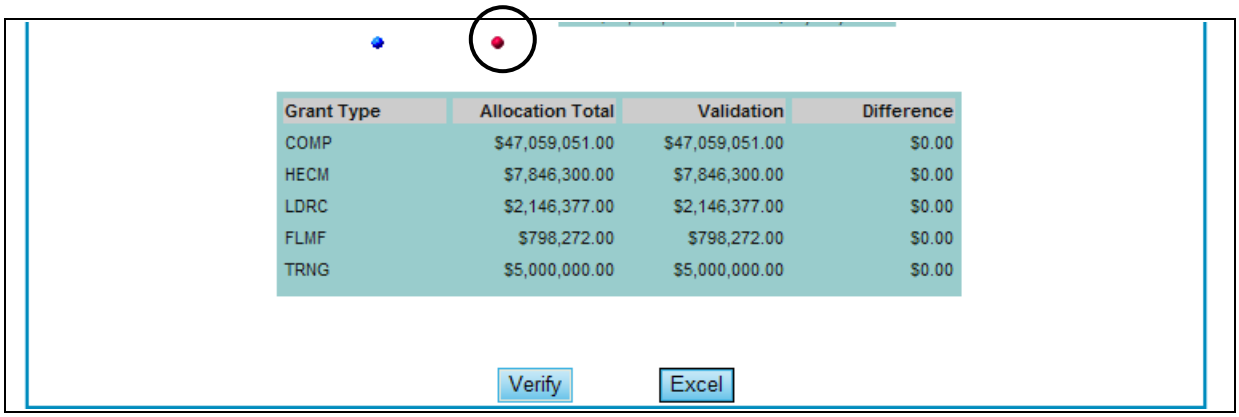


		HUD	Total
INTERMEDIARY-1			
COMP-1-1		$25,727,323.00	$25,727,323.00
LDRC-1-3		$992,677.00	$992,677.00
FLMF-1-4		$798,272.00	$798,272.00
HECM-1-2		$6,500,000.00	$6,500,000.00
TRNG-1-5		$5,000,000.00	$5,000,000.00
	TOTAL	$39,018,272.00	$39,018,272.00
LHCA-2			
COMP-2-1		$17,111,728.00	$17,111,728.00
LDRC-2-3		$904,358.00	$904,358.00
HECM-2-2		$1,000,000.00	$1,000,000.00
	TOTAL	$19,016,086.00	$19,016,086.00
MSO-3			
COMP-3-1		$1,570,000.00	$1,570,000.00
LDRC-3-3		$99,653.00	$99,653.00
HECM-3-2		$346,300.00	$346,300.00
	TOTAL	$2,015,953.00	$2,015,953.00
SHFA-4			
COMP-4-1		$2,650,000.00	$2,650,000.00
LDRC-4-3		$149,689.00	$149,689.00
	TOTAL	$2,799,689.00	$2,799,689.00
	GRANT TOTAL	$62,850,000.00	$62,850,000.00

Figure 34.A. Reviewer – Funding Allocations: Funding Allocation by Grant Category

2. When the method of allocating funds is according to grant type only, The Funding Allocation 20XX by Grant Category is displayed.

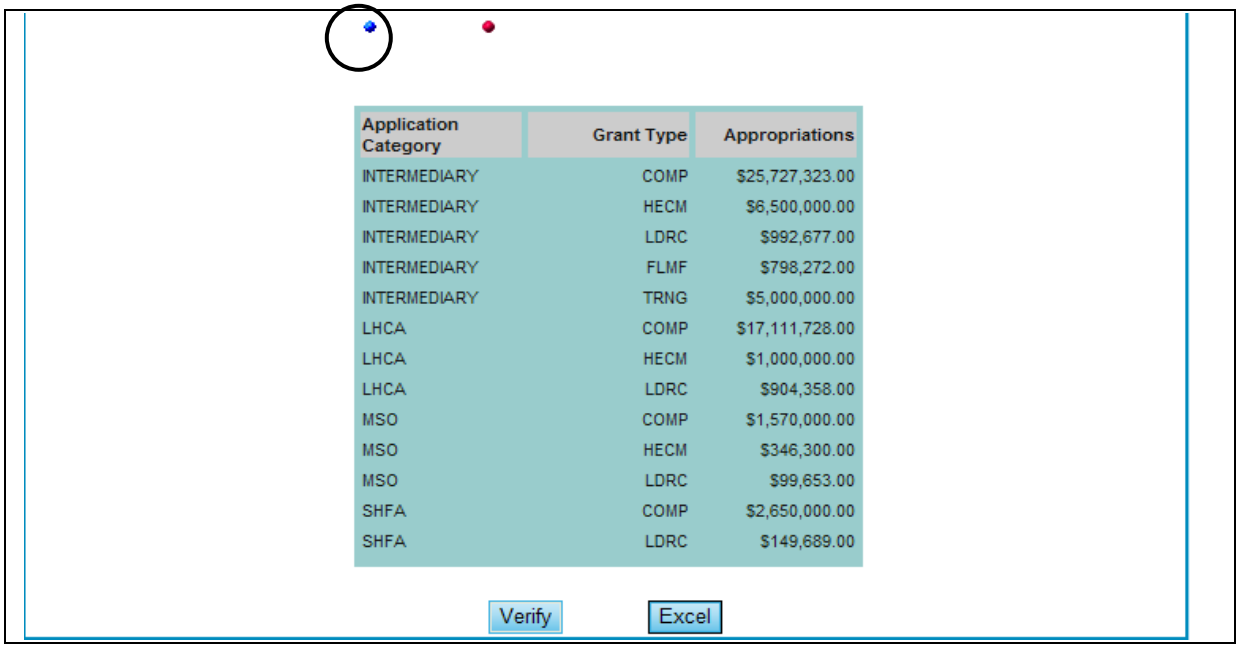
3. To view the allocations described by Grant Type, click the red dot circled below.



Grant Type	Allocation Total	Validation	Difference
COMP	$47,059,051.00	$47,059,051.00	$0.00
HECM	$7,846,300.00	$7,846,300.00	$0.00
LDRC	$2,146,377.00	$2,146,377.00	$0.00
FLMF	$798,272.00	$798,272.00	$0.00
TRNG	$5,000,000.00	$5,000,000.00	$0.00

Figure 34.B. Reviewer – Funding Allocations: Funding Allocation By Grant Type

4. To view the Grant information in matrix form, click the blue dot, as depicted below.



Application Category	Grant Type	Appropriations
INTERMEDIARY	COMP	$25,727,323.00
INTERMEDIARY	HECM	$6,500,000.00
INTERMEDIARY	LDRC	$992,677.00
INTERMEDIARY	FLMF	$798,272.00
INTERMEDIARY	TRNG	$5,000,000.00
LHCA	COMP	$17,111,728.00
LHCA	HECM	$1,000,000.00
LHCA	LDRC	$904,358.00
MSO	COMP	$1,570,000.00
MSO	HECM	$346,300.00
MSO	LDRC	$99,653.00
SHFA	COMP	$2,650,000.00
SHFA	LDRC	$149,689.00

Figure 34.C. Reviewer – Funding Allocations: Funding Allocation Grant Matrix Validation

5. To see additional information (such as the validation or difference), click the green dot. Those two fields will be displayed.

Show History ○ Yes ◉ No

	HUD	Total	Validation	Difference
INTERMEDIARY-1				
COMP-1-1	$25,727,323.00	$25,727,323.00		
LDRC-1-3	$992,677.00	$992,677.00		
FLMF-1-4	$798,272.00	$798,272.00		
HECM-1-2	$6,500,000.00	$6,500,000.00		
TRNG-1-5	$5,000,000.00	$5,000,000.00		
TOTAL	$39,018,272.00	**$39,018,272.00**	$39,018,272.00	$0.00
LHCA-2				
COMP-2-1	$17,111,728.00	$17,111,728.00		
LDRC-2-3	$904,358.00	$904,358.00		
HECM-2-2	$1,000,000.00	$1,000,000.00		
TOTAL	$19,016,086.00	**$19,016,086.00**	$19,016,086.00	$0.00
MSO-3				
COMP-3-1	$1,570,000.00	$1,570,000.00		
LDRC-3-3	$99,653.00	$99,653.00		
HECM-3-2	$346,300.00	$346,300.00		
TOTAL	$2,015,953.00	**$2,015,953.00**	$2,015,953.00	$0.00
SHFA-4				
COMP-4-1	$2,650,000.00	$2,650,000.00		
LDRC-4-3	$149,689.00	$149,689.00		
TOTAL	$2,799,689.00	**$2,799,689.00**	$2,799,689.00	$0.00
GRANT TOTAL	$62,850,000.00	**$62,850,000.00**	$62,850,000.00	$0.00

Verify Excel

Figure 34.D. Reviewer – Funding Allocations: Funding Allocation Additional Information

6. To see the history of this funding allocation, click **Yes** next to **Show History**. The history appears at the bottom of the screen.

TOTAL	$2,015,953.00	**$2,015,953.00**
SHFA-4		
COMP-4-1	$2,650,000.00	$2,650,000.00
LDRC-4-3	$149,689.00	$149,689.00
TOTAL	$2,799,689.00	**$2,799,689.00**
GRANT TOTAL	$62,850,000.00	**$62,850,000.00**

Show History

Allocation History -
No information available

Figure 34.E. Reviewer – Funding Allocations: Funding Allocation Show History

7. To verify the funding allocation, click **Verify**. A confirmation message appears.

Figure 35. Reviewer – Funding Allocations: Funding Allocation Verification Message

8. You have now verified this information. Click **OK**.

9. To export this Funding Allocation information into an Excel spreadsheet, click **Excel**. When the following dialog box appears, decide whether to **Open**, **Save**, or **Cancel** the spreadsheet.

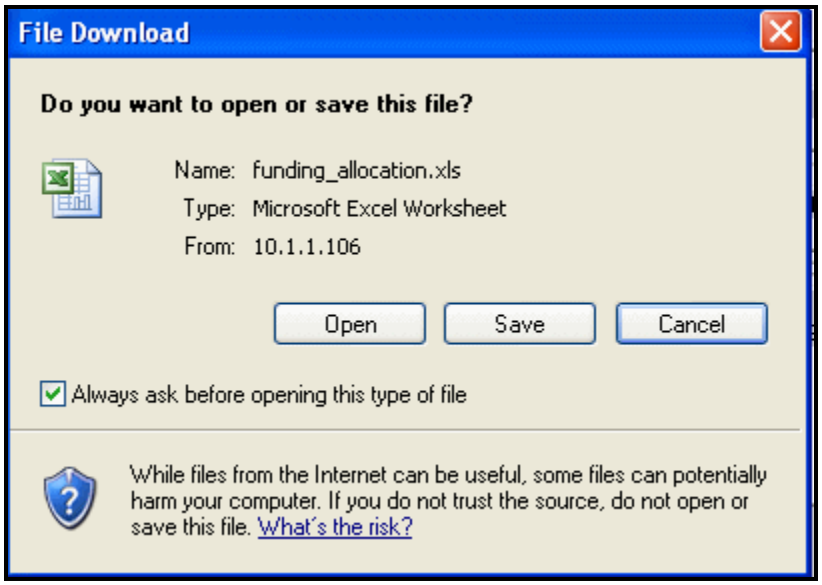


Figure 36. Reviewer – Funding Allocations: Funding Allocation Export to Excel

You have now finished using the HCS system‟s **Funding Allocations** feature.

7.0 GTR

7.0 GTR

The HUD GTR role within HCS provides the GTR with the ability to oversee the business process of the HUD-9902 submission process as well as the Grants Process. They have the access rights and capabilities of an Agency User as well as the capability to review the Grants Process. Within HCS, the HUD GTR has the ability to:

- Perform **Agency** searches, and access to counselor & client information.
- Submit/Review **HUD-9902** forms
- Enter the **Grant Processing** section of HCS to:
  - Setup Grant Applications
  - Score Grant Applications
  - Final Score for Primary
  - Calculate Recommended Awards
  - Input Awards and Sub-Allocations
- View **Submission Verification**
- View **Funding Allocations**
- Access the following **Reports:**
  - Application Progress Status
  - Application Score Status
  - Awards Recommendation
  - Awards Report
  - Awards Report by Agency
  - Awards Report by Office
  - Awards Report by State
  - Funding Report Search
  - Reviewers Final Report
  - Reviewers Report
  - Application Number Reference

Upon logging into the system as a *GTR*, you will see the following screen:

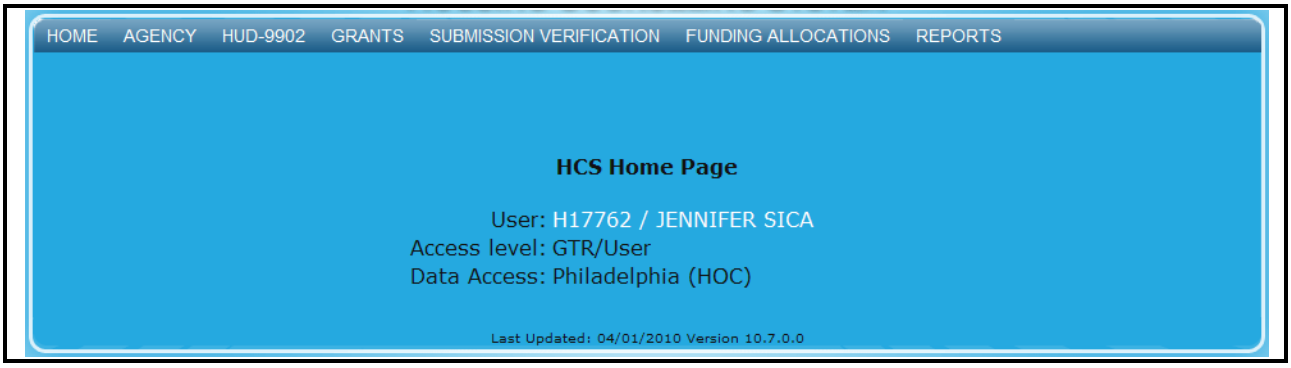


Figure 37. GTR – Home Page

7.1 Agency

As a GTR, you can also review or submit information about the agencies that you are involved with.

7.1.1 Agency Search

1. From the top navigation menu, click the **Agency** hyperlink**.** The *Agency Search* screen appears. You can also access this from the **Agency Search** sub-menu option.

2. Click the dropdown box to select the fiscal year you wish to search for, and click **Go** button.

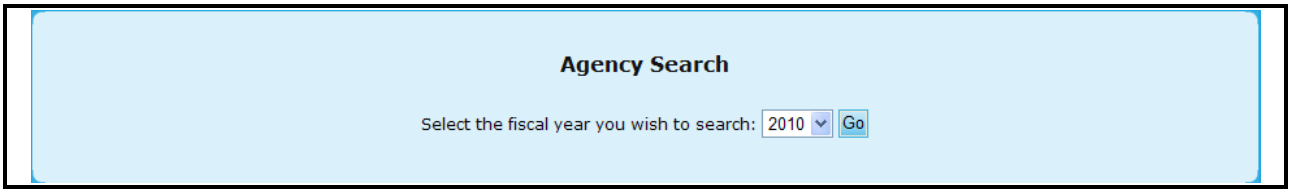


Figure 38.A. GTR – Agency: Agency Search

3. The *Agency Search for FY 20XX* screen appears. From here you will be able to perform a Basic Search, or perform an Advanced Search. To go to the Advanced Search click the **Go to advanced agency search** hyperlink.

4. On the *Agency Search* page, the following listed search criteria have multiple selection enabled controls. Users can Click the field to display choices and select multiple items, or select one field to search. You can also enter values with comma to delimit list of values.
   a. Agency Information
   b. HUD Office & GTR
   c. Agency Location
   d. Agency Type & Services
   e. Agency Status & Validation
   f. Grant & 9902 Information

5. Fill out the form and click the **Search** button. The *Agency List* screen appears.

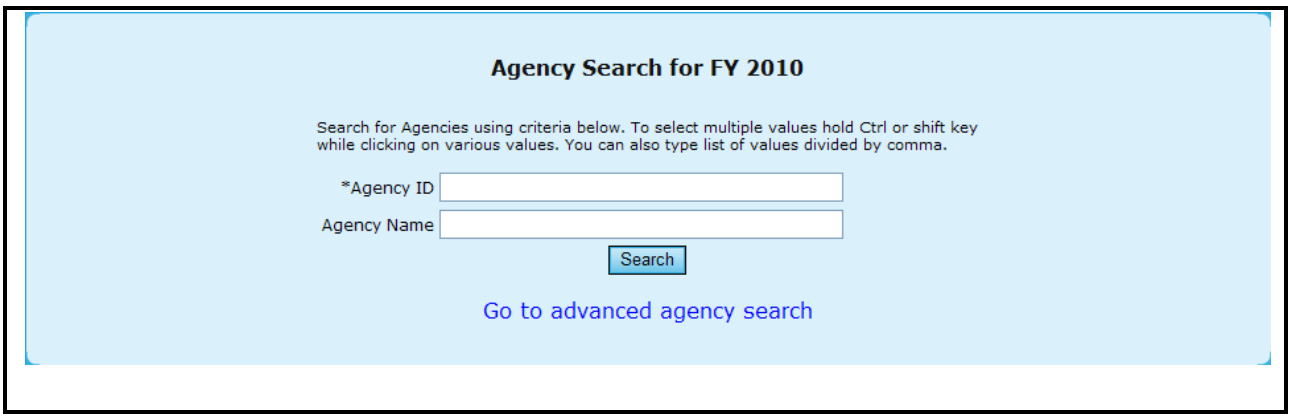


Figure 38.B. GTR – Agency: Basic Agency Search for FY 20XX

Advanced Agency Search for FY 2010

Back to simple agency search

Search for Agencies using criteria below. To select multiple values hold Ctrl or shift key while clicking on various values. You can also type list of values divided by comma.

Search

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

Search by Agency Information

* Agency ID | Agency Name

Sub-Agencies List of Parent Agency

Has Sub-Agencies | * CMS Submission

Search by HUD Office and GTR

* HUD Office

GTR Assigned | GTR Name

Search by Agency Location

City | * State | * Zip Code

Search by Agency Type and Services

* Agency Type | * Counseling Services Provided

Search by Agency Status and Validation

* Status | Validated

Last Update Date Between and

Validated Date Validated Date Between and

Active Status Expiration | Expiration within: days after today's date | Active Status Expired or Will Expire Between and

Previous dates shows agencies that already expired; future dates shows agencies about to expire.

Search by Agency Grant and 9902 Information

Submitted 9902 | * You must select 9902 report period when you selected "Yes" or "No" from submitted 9902

HUD 9902 Report Period

Individual 9902 Submission Required

Delinquent in Federal Debt

Applied for Grant

Grant Funded Last Year

* Grant Type

* You must select "Grant Funded Last Year" when you selected "Grant Type"

Search | Clear the Search Criteria

Figure 38.C. GTR – Agency: Agency Search for FY 20XX

Note: Provided below is an example of an Agency List Search result.

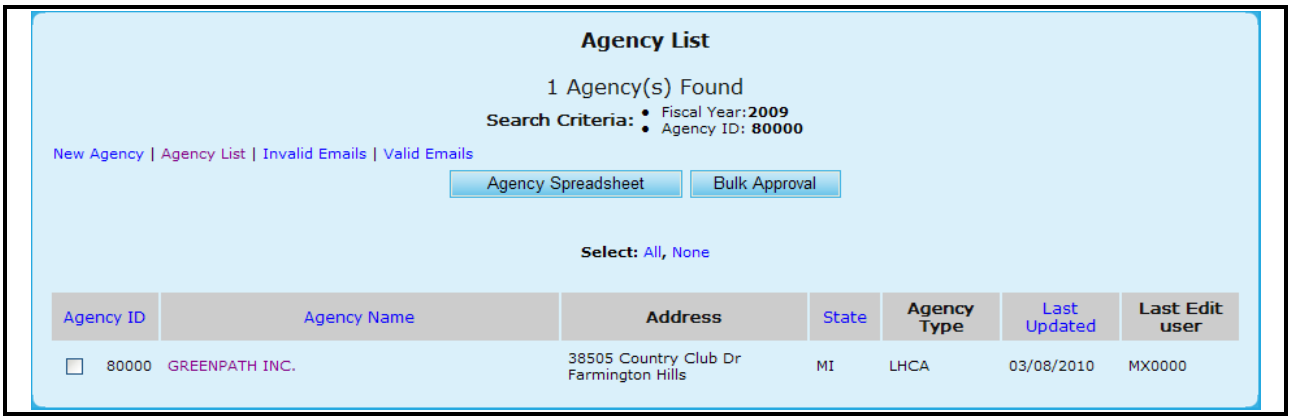


Figure 39.A. GTR – Agency: Agency List

6. To retrieve a list of email addresses for the agencies listed, click the **Valid Emails** hyperlink. A list of valid email addresses is listed from which an exported file can be generated.

Figure 39.B. GTR – Agency: Agency List Valid Emails

7. To view a list of agencies that do not have a valid email address, click the **Invalid Emails** hyperlink. A list of agencies that do not have a valid email address is listed. From this list, you can edit or enter a valid email address for the agency.
    a. To edit or enter a valid email address for the agency, Click the email text in the Invalid Email Address column.
    b. An input box with an Update and Cancel button appears.
    c. Enter a valid email address and click the **Update** button to save or **Cancel** to undo.
    d. Once Updated with a valid email address, the agency is removed from the current list and added to the Valid Emails list.

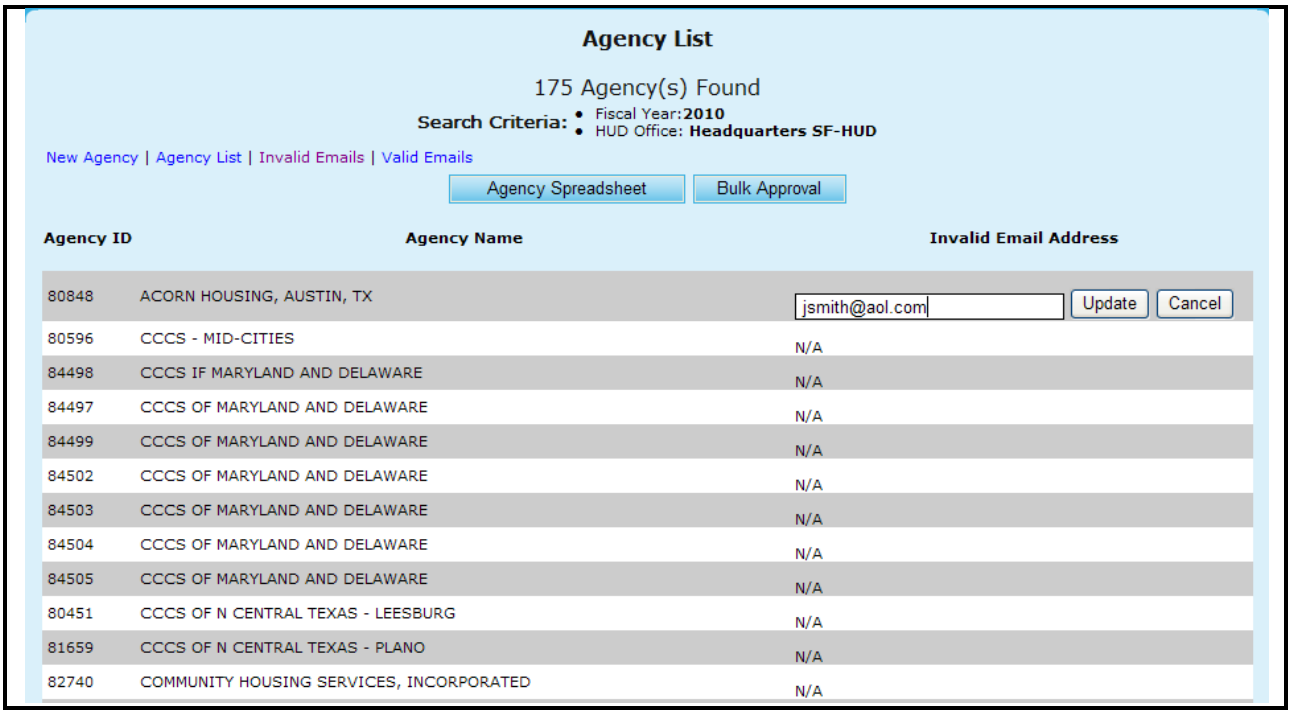


Figure 39.C. GTR – Agency: Agency List Invalid Emails

8. If you want to export the agency list to an Excel spreadsheet, Click the **Agency Spreadsheet** button. The *File Download* dialog box appears.

9. Select to either **Open** or **Save** the file and then return to Agency List screen.

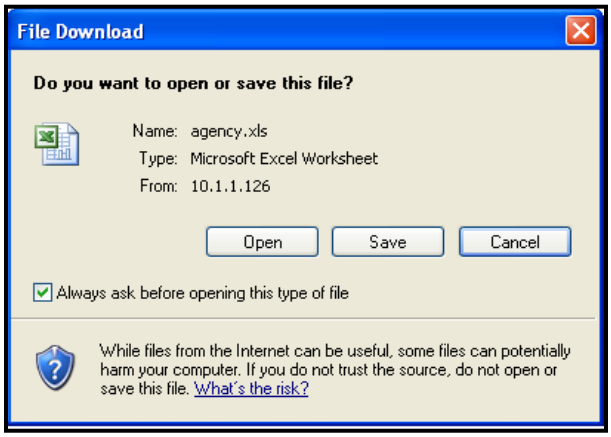


Figure 40. GTR – Agency: Agency List File Download Dialog Box.

To view more information about or to update data of an agency listed in the *Agency List* page, click the agency"s name hyperlink in the **Agency Name** column. The *Agency Summary* screen for that agency appears.

10. From the *Agency Summary* screen, you have six tabs to choose from to view more detailed information regarding that specific agency. You can view information on:
    a. Agency Summary
    b. Agency Information
    c. Personnel

d. Contact Information
e. HUD Affiliation
f. Counselor/Client

Note: You will be able to edit some information found in these tabs; however the edit function is not available in all fields.

11. From the **Agency Summary** you are able to add and delete HUD Comments.

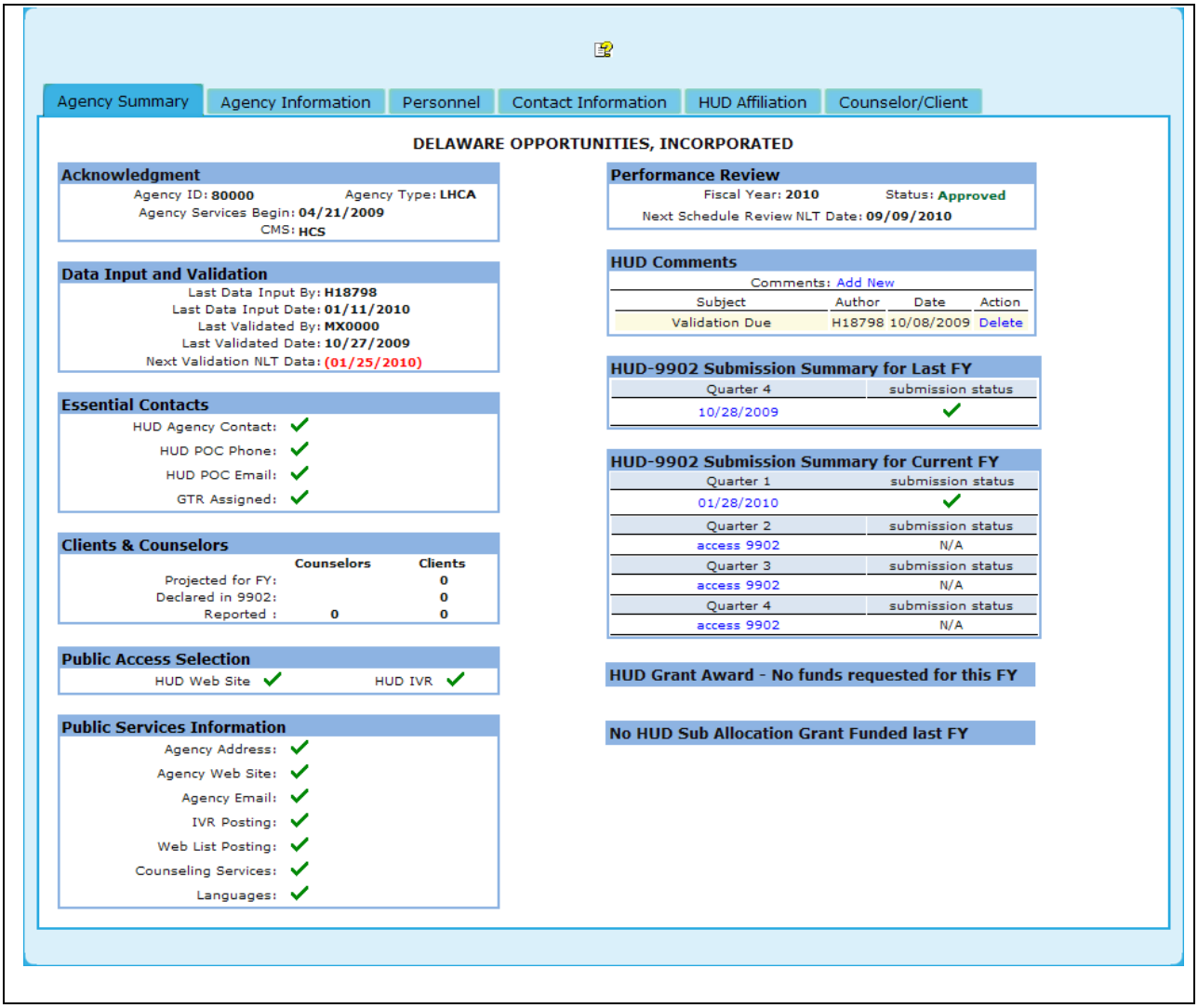


Figure 41.A. GTR – Agency: Agency Summary

12. To add a HUD Comment, click the Add New hyperlink found next to comments in the HUD Comments box.

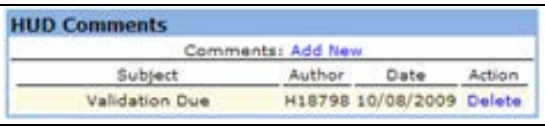


Figure 41.B.1. GTR – Agency: Agency Summary – HUD Comments

13. Enter the Subject and your comment, and click **Save**, to save the comment, or **Cancel** to close the Comment box.

Figure 41.B.2. GTR – Agency: Agency Summary – Add New HUD Comment

14. To delete a comment, click the **Delete** hyperlink located under the Action column.

15. Under the **Agency Information** you are able to alter the following:
    a. Click an agency designation in the **Agency Designations** field. Your choices include: **Faith Based**, **Colonias**, and **Migrant Worker.**
    b. If the agency is delinquent in federal debt, click **Yes** in the **Delinquent in Federal Debt?** field.
    c. Enter the federal tax ID number in the **Federal Tax ID Number (TIN)** field.
    d. Enter the agency‟s Dun & Bradstreet number (DUNS) number in the **DUNS Number** field.
    e. In the **Additional Languages Provided**, please select which other languages your agency supports.

Note: The following information in 10 – 12 reflects the agency office information and will be used to post on the HUD web site for the public to reference. Therefore, do not enter private information you do not what the public to know.

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

Agency ID: **80000**

☐ **Validated?**
Last Validated on **10/27/2009** (Next Validation Required by 01/25/2010)

Agency Name: **DELAWARE OPPORTUNITIES, INCORPORATED**

Agency Designations
☐ Faith Base ☐ Colonias ☐ Migrant Workers

Number of Counselors: **0** Number of Projected Clients: **0**

Housing Counseling Services Provided as of:
04/21/2009

Delinquent in Federal Debt? ☐ **Yes**

Federal Tax ID Number (TIN):
16 - 6063879 *

DUNS Number:
020664538
For information about obtaining a DUNS number, please refer to http://smallbusiness.dnb.com or call 866-705-5711

Education/Group Sessions

Session Title	Session Date	Attendees

Additional Languages Provided:

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

OK | Cancel | Sub-Agency(s) | Associated Applications:

Figure 41.C. GTR – Agency: Agency Information

13. Under the **Personnel** tab, you will need to input the following information:
    a. Enter the **Agency Manager**, which will include their Business Title, Full Name, and Cell Phone Number.
    b. Enter the **Agency Senior Executive**, which will include their Business Title, Full Name, and Cell Phone Number.
    c. Enter the **Agency Contact for HUD Use**, which will include their Business Title, Full Name, Cell Phone Number, and Email address.

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

Agency ID: **80000**

☐ **Validated?**
Last Validated on **10/27/2009** (Next Validation Required by 01/25/2010)

Agency Name: **DELAWARE OPPORTUNITIES, INCORPORATED**

Agency Manager:
Salutation --select-- User ID: **MX0000** Business Title HUD Contact
John *(First Name) (Middle Init) Doe *(Last Name)
Agency Manager's Cell Phone Number:
607 - 555 - 1600

Agency Senior Executive:
Salutation: Ms Business Title: HUD Contact
First Name: John Last Name: Doe
Agency Senior Executive Phone:
607 - 555 - 1600 x 601

Agency Contact for HUD Use
Salutation: --select-- Business Title: HUD Contact
First Name: Mary Last Name: Hart
Agency POC Phone:
607 - 555 - 1650 x 118
Agency POC Email:
mary.hart@delawareopportunities.org

Agency Contact for HUD Use
Salutation: --select-- Business Title: HUD Contact
First Name: Mary Last Name: Hart
Agency POC Phone:
607 - 555 - 1650 x 118
Agency POC Email:
mary.hart@delawareopportunities.org

OK | Cancel | Sub-Agency(s) | Associated Applications:

Figure 41.D. GTR – Agency: Agency Personnel

14. Under the **Contact Information** you will need to input/alter the following:
    a. Enter the agency‟s physical location address (including city and zip code) in the **Address**, **City**, and **Zip** fields. Do not enter your mailing address if different.
    b. Enter the agency‟s phone number, fax, and e-mail address in the **Phone**, **Fax**, and **Email** fields.
    c. Enter the agency‟s Web site address in the **Web URL** field.
    d. If the agency has a toll free phone number, enter it in the **Toll Free Phone** field.

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

Agency ID: **80000**

☐ **Validated?**
Last Validated on **04/15/2010** (Next Validation Required by 07/14/2010)

Agency Name: **DELAWARE OPPORTUNITIES, INCORPORATED**

Physical address:

35430 State Hwy 10

City: Hamden
State: New York *
Zip: 13782
☐ Please check the box if agency mailing address is the same of agency physical address

Mailing address:

35430 State Hwy 10

City: Hamden
State: New York *
Zip: 13782

Agency Contact:

Phone: 607 - 555 - 1650 x 118
Fax: 607 - 746 - 1648
Toll Free Phone: - -
Email: mary.hart@delawareopportunities.org
Web URL: http://n/a

OK | Cancel | Sub-Agency(s) | Associated Applications:

Figure 41.E. GTR – Agency: Agency Contact Information

12. Under the **HUD Affiliation** tab you will be able to edit the following information:
    a. Agency Name
    b. Type of Agency
    c. Status (Further information can be found in Section 7.2.2.1.)
    d. HUD Office GTR
    e. GTR Phone Number
    f. HUD Office Assigned to
    g. Types of Counseling Services
    h. Zip Codes Affiliation(By pressing the **Add Another Zip Code** hyperlink, an input box will appear which will allow you to insert a new zip code)
    i. State Affiliations (By pressing the **Add Another State** hyperlink, a drop-down box will appear)
    j. Allow for Public Access

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

Agency ID: **80000**

☐ **Validated?**
Last Validated on **04/15/2010** (Next Validation Required by 07/14/2010)

Agency Name:
DELAWARE OPPORTUNITIES, INCORPORATED *

Status: **Approved** As Of: **09/09/2008** Up To: **09/09/2010** Change | View History

Type of Agency: LHCA *
Parent Org:
☐ Temporary Affiliate

HUD Office GTR: Stopera, Glen
GTR Phone: 212 - 542 - 7900 x 7746

HUD Office assigned to: Philadelphia (HOC) *

Types of Counseling Services:

- ☐ DFC - Mortgage Delinquency and Default Resolution Counseling
- ☑ FHA - Fair Housing Assistance
- ☑ HEP - Homebuyer Education Programs
- ☐ HOM - Services for Homeless
- ☑ MDM - Money Debt Management
- ☑ PC - Prepurchase Counseling
- ☑ PRL - Predatory Lending
- ☐ DRC - Mobility and Relocation Counseling
- ☐ HEC - Home Equity Conversion Mortgage Counseling
- ☑ HIR - Home Improvement and Rehabilitation Counseling
- ☐ LM - Loss Mitigation
- ☐ MOI - Marketing and Outreach Initiatives
- ☑ PPC - Postpurchase Counseling
- ☑ RC - Renters Assistance

Zip Code Affiliations:
Default Affiliation: 13782

12167	12406	12421	12430	12434
12438	12455	12459	12474	13731
13737	13740	13750	13751	13752
13753	13754	13755	13756	13757
13775	13782	13783	13786	13788
13789	13804	13805	13806	13820
13838	13839	13846	13847	13856

Add Another Zip Code

State Affiliations:
Default Affiliation: New York

Add Another State

Public display options
☑ Allow for public access?
☑ Allow public access through Zip Code Affiliations?
☑ Allow public access through State Affiliations?

OK | Cancel | Sub-Agency(s)

Figure 41.F. GTR – Agency: Agency HUD Affiliation

13. Under the **Counselor/Client** tab, you will be prompted to a list of counselors that are under each specific agency. From this tab, you can also perform a **Counselor search**, **Add Counselor**, and perform a **Client search**.

14. Provided below is the screen that you will be prompted to for Counselor Search. This is further explained in Section 7.2.3.

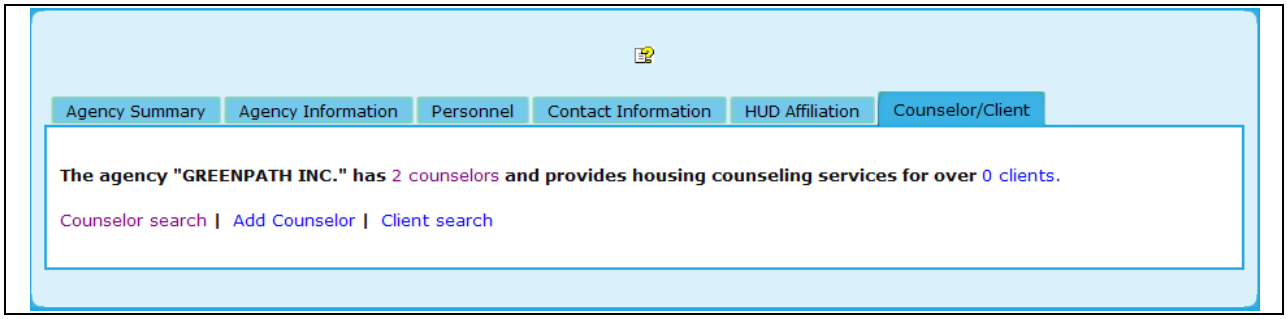


Figure 41.G.1. GTR – Agency: Counselor/Client

15. To add a new counselor, click the **Add Counselor** hyperlink, and you will be prompted to a form which needs to be completed prior to officially adding that counselor. An example of this is provided below. Once you have completed the necessary fields, click **Add New** to save this counselor, or **Clear**, to erase previously input data.

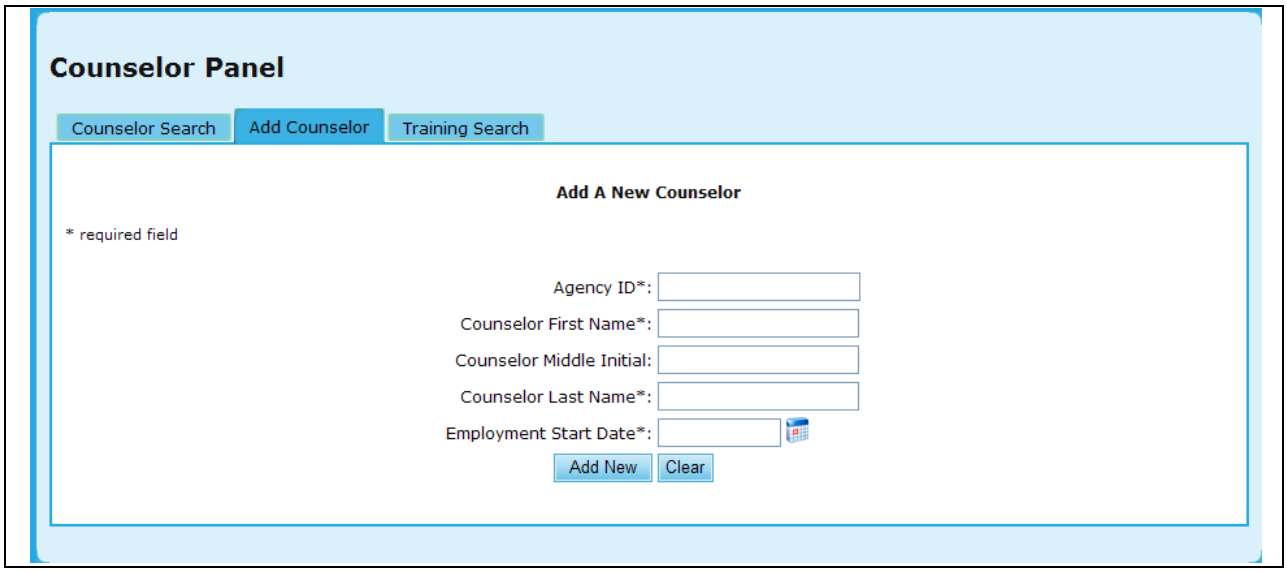


Figure 41.G.2. GTR – Agency: Add Counselor

16. To perform a Counselor Training Search, click the **Training Search** hyperlink, and you will be prompted to a search which will allow you to narrow down your results. An example of this is provided below. Once you have completed your criteria, click **Search** to retrieve results, or **Clear** to erase previously input data.

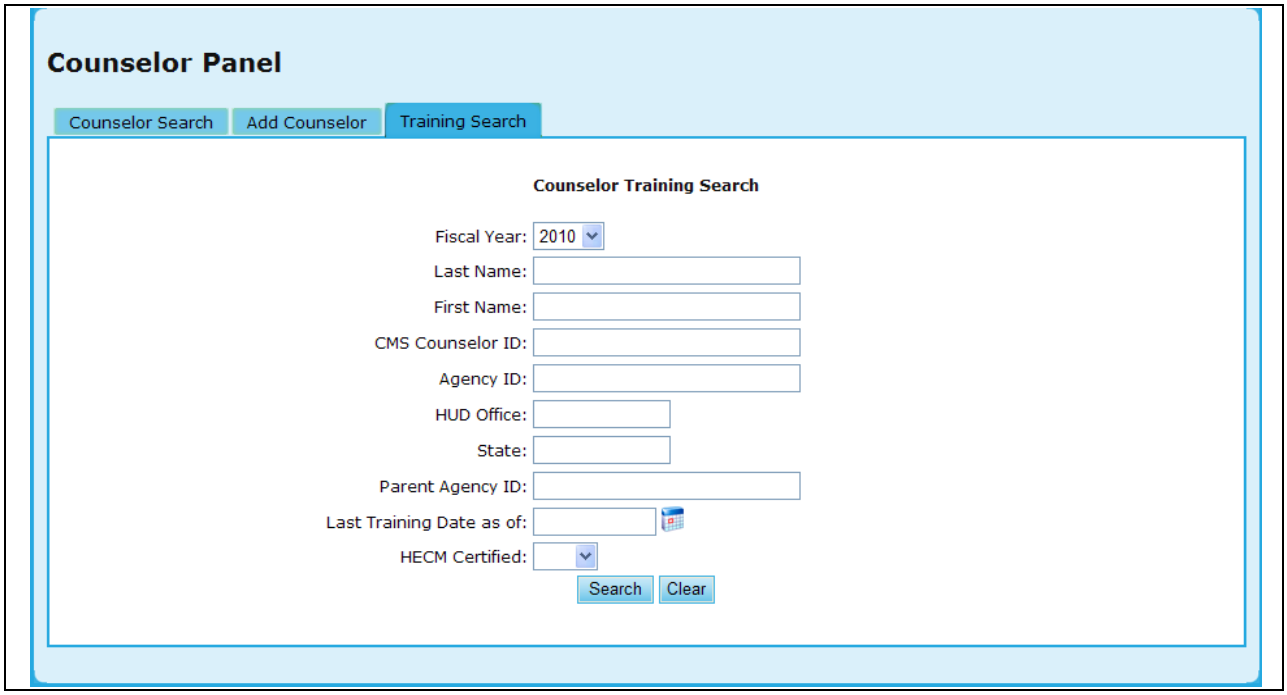


Figure 41.G.3. GTR – Agency: Counselor Training Search

17. By clicking the hyperlink under the name, you will be prompted to the Counselor Profile.

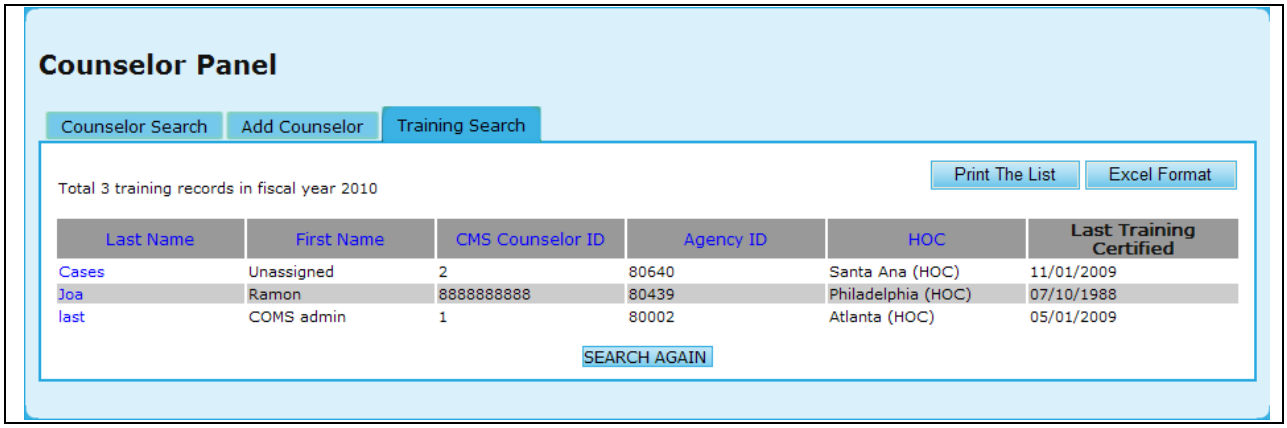


Figure 41.G.4. GTR – Agency: Training Search Results

18. If you desire to update this profile, edit the information you desire and click **Update info** to save those changes, or **Clear** to remove that information.

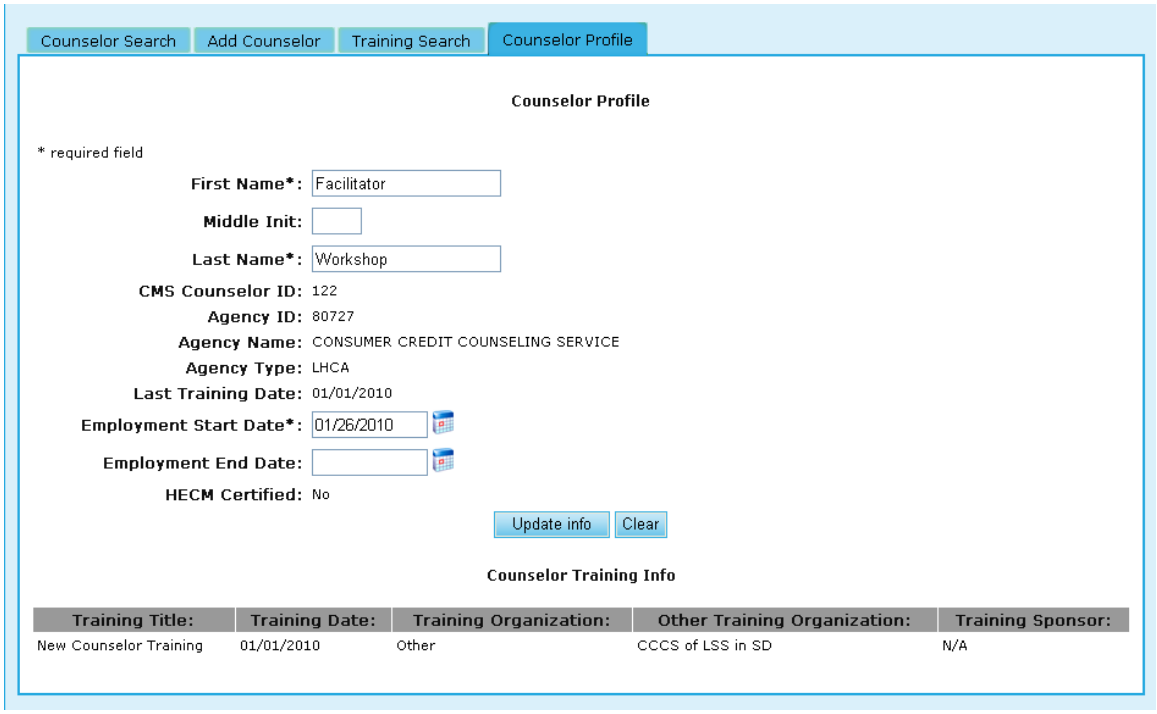


Figure 41.G.5. GTR – Agency: Agency Counselor/Client – Training Search – Counselor Profile

7.1.1.1 *Agency Status Update*

APPROVED – LHCA & Intermediaries
Agencies that applied and was approved to participate in HUD‟s SF Housing Counseling program and have a HUD-Approved certificate are the only agencies to have the Approved status.

PARTICIPATING – SHFA & Sub-Agencies
An agency that is participating in HUD‟s SF Housing Counseling program on behalf of their relationship with an Approved organization has Participating status. SHFA are approved by their State and HUD recognizes them and allows SHFA to participate in HUD‟s program as a courtesy. Sub-agencies belonging to a HUD-Approved agency (LHCA & Intermediary) are participants in the program so long as their parent organization remains Approved.

CONDITIONAL – All Agencies
Agencies maintain a Conditional status for a limited time until they satisfy a condition to be Approved or Participating. The most applied situation is from the results of a recent BPR that an agency must make corrections to deficiencies discovered during their Review. If an agency does not attain an Approved or Participating status at the end of the Conditional period, HCS converts their status to the appropriate Terminated status.

INACTIVE – All Agencies
Agencies that are no longer participating in the program but require access to HCS to complete their 9902 reports or update their records have the Inactive Status. The agency‟s contact and counseling information is not made publicly available through any of HUD‟s systems or programs to reflect their non-participatory status with the SF Housing Counseling Program. The agency‟s profile is dormant until their last action is complete.

TERMINATED (DISAPPROVED) – LHCA & Intermediaries

An Approved agency that drops out of the program and no longer participates in the program is terminated. Access to HCS is denied and their profiles are dormant.

TERMINATED (NON-PARTICIPATING) – SHFA & Sub-Agencies
Any SHFA that drops out of the program and no longer participating in the program is terminated. All sub-agencies of a Terminated (Disapproved) agency are terminated from the program. Access to HCS is denied and their profiles are dormant.

STATUS DURATIONS
Agency‟s status can be changed any time depending upon their situation. Generally, however, the system recognizes the following durations for each status.

APPROVED
LHCA = 2 Calendar Years. LHCA will renew their 2 year Approval status on the date of their renewal.
INTERMEDIARIES = Fiscal Year (FY). Generally Intermediaries operate under a HUD Grant. Their approval is therefore based on the fiscal year, to better track their duration under the grant.

PARTICIPATING
SHFA = opened. SHFA do not have a preset termination date so their Participating status remains open indefinitely. The system does allow fix 2, 3, or 5 years settings if desired or an ending date can be manually entered.

Sub-Agencies‟ durations are the same as that of their Parent Agency. Sub-Agencies maintain the same status and duration as that of their parent agency‟s status. Individual sub-agency statuses can be down-graded if their circumstance warrants it. Their statuses however cannot be extended beyond that of their parent‟s status. Keep in mind that LHCA that are temporary affiliate to Intermediary maintains their Approval status independently regardless of the Intermediary‟s status change.

CONDITIONAL
Settings = 15, 30, 45, 60, 90, & 120 days. Conditional is a temporary reprieve to maintain their Approved or Participating status until their condition is corrected. If the conditions required to be Approved or Participating are not satisfied, the status changes at the end of their end date to Terminated.

INACTIVE
Settings = 15, 30, 45, 60, 90, & 120 days. Inactive is a temporary status to allow an agency to access HCS to complete unfinished records or make data entry in their files. Another reason for an agency to be inactive is that their counselors left the agency and agency becomes Inactive until they hire replacement counselors. At the end of the status period, the status changes automatically to Terminated unless a HUD user manually upgrades their status.

TERMINATED (Disapproved & Nonparticipating)
Setting is open until a HUD responsible person manually changes the status.

STATUS CHANGES
AUTOMATIC STATUS CHANGES
Unless a HUD user manually changes the status, HCS will make the following changes to ensure no agencies remains in a non-terminated status indefinitely.

Approved end date changes the status to Conditional for 30-days. This allows HUD users time to make adjustments to correctly update the agency status.

Participating status for SHFA that exceeds the end date converts to Conditional for 30-days for the same reason as above.

Conditional end date converts the status to Terminated. During conditional status the HUD user had enough time to update the agency‟s status if warranted. Ignoring the Conditional status implies the condition was not satisfied and the agency should be terminated from the program.

Inactive end date converts the status to Terminated. The system assumes that the agency is not coming back to the program and terminates their participation. If the agency is to be re-activated, a HUD user manually changes the agency‟s status.

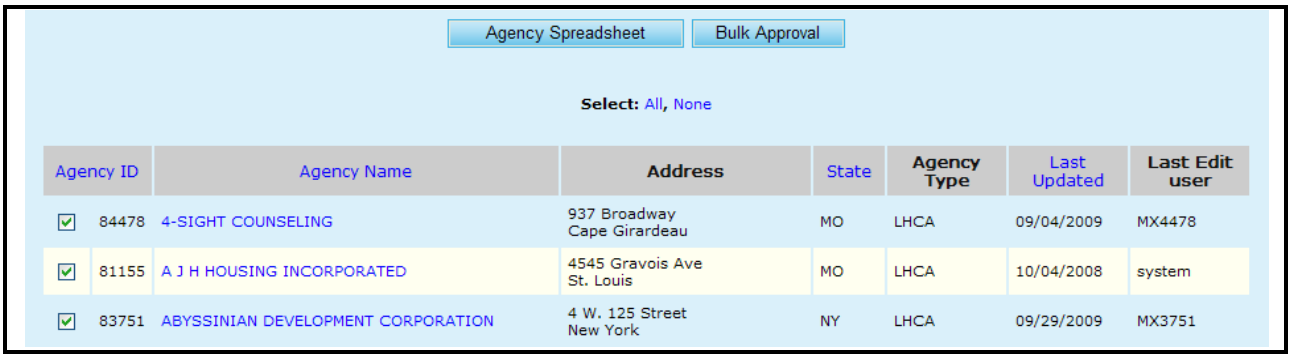
Sub-Agencies are connected to their parent agency‟s status. This relieves the HUD user from resetting individual agencies. Individual sub-agencies can always be downgraded when warranted.

7.1.1.2 *Update Status from Agency List*

Agency Search results provide an option to update multiple agencies‟ statuses with a single start date. The duration of the approval period is determined according to the rules specified 7.2.1.1. above.
To update the active status of multiple agencies follow the steps below:

1. From the *Agency Search for FY 2XXX* page, select the criteria you wish to find agencies with.
   a. The System displays a list of agencies that match your criteria.
   b. Note the check boxes that appear next to some of the agencies listed. Only LHCA‟s, SHFA‟s, Intermediaries, and Multi-State Organizations are permitted to have their statuses updated from the search results page.
   c. You can click the **All** hyperlink next to Select to check all checkable agencies in the list. You can also click the **None** hyperlink next to Select to uncheck all agencies in the list.

2. After checking the agencies you want to update, click the **Bulk Approve** button.



Agency ID	Agency Name	Address	State	Agency Type	Last Updated	Last Edit user
84478	4-SIGHT COUNSELING	937 Broadway Cape Girardeau	MO	LHCA	09/04/2009	MX4478
81155	A J H HOUSING INCORPORATED	4545 Gravois Ave St. Louis	MO	LHCA	10/04/2008	system
83751	ABYSSINIAN DEVELOPMENT CORPORATION	4 W. 125 Street New York	NY	LHCA	09/29/2009	MX3751

Figure 42.A. GTR – Agency: Update Agency Status Bulk Approve

3. Enter the Approval effective date and click the **Apply** button to apply status change. If you wish not to change the statuses, click the **Cancel** button or the **Close** button.

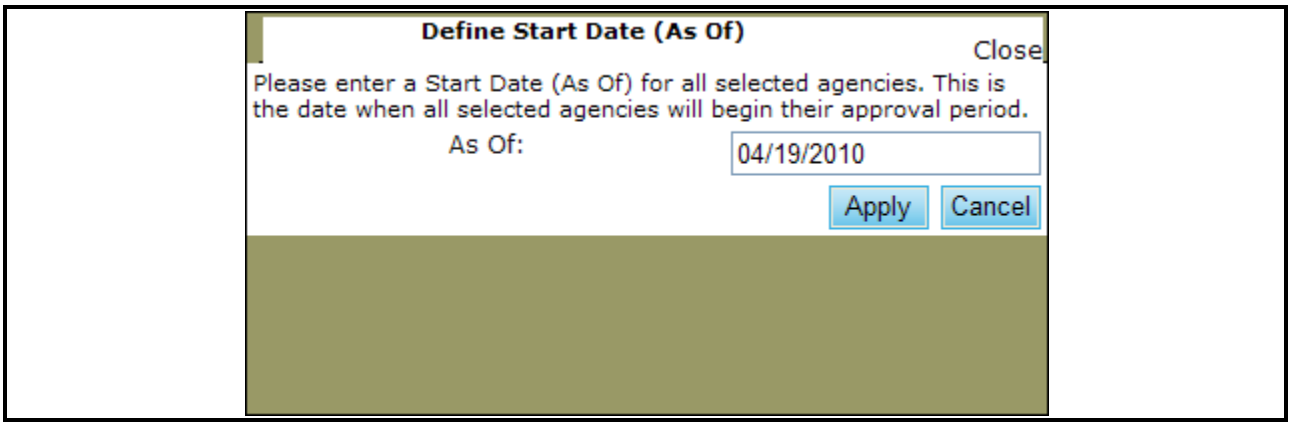
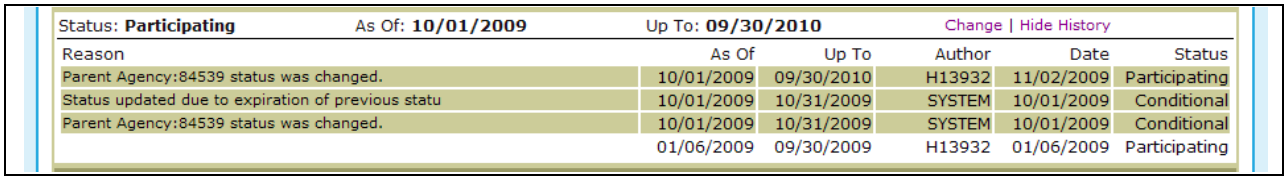


Figure 42.B. GTR – Agency: Update Agency Status – Bulk Approve

7.1.1.3 *Update Status from Information*

To update the status for a single agency, go to the agency profile for the agency you wish to update and following the steps below:

1. Under the HUD Affiliation tab, you will see Status, with the option to either **Change** or **View History**. Figure 44.A demonstrates the View History, and once in view mode, you have the option to select **Hide History**.



Status: **Participating** As Of: **10/01/2009** Up To: **09/30/2010** Change | Hide History

Reason	As Of	Up To	Author	Date	Status
Parent Agency:84539 status was changed.	10/01/2009	09/30/2010	H13932	11/02/2009	Participating
Status updated due to expiration of previous statu	10/01/2009	10/31/2009	SYSTEM	10/01/2009	Conditional
Parent Agency:84539 status was changed.	10/01/2009	10/31/2009	SYSTEM	10/01/2009	Conditional
	01/06/2009	09/30/2009	H13932	01/06/2009	Participating

Figure 43.A. GTR – Agency: Update Agency Status – Agency Profile – View History

2. In the Status Change pop up box, you can change the following information:
   a. Status – the Status options listed reflect only those statuses an agency type can have. Please refer to Section 4.1.5 concerning active statuses. Changing statuses creates a new status history record.
   b. For – This option is only available for Conditional and Inactive statuses. It is used to auto-calculate the Up To date.
   c. Renew – This creates a new status history record instead of overwriting the current status record. Renew is only applicable if the status has not changed but the As Of and Up To dates have changed. If Status has changed, the Renew checkbox is ignored.
   d. Status As Of Date – The effective date of the status
   e. Status Up To Date – The last day on which the selected status is effective
   f. Reason – A brief description for the reasoning behind updating the status
   g. Comment – A longer description for the reasoning behind updating the status

3. Click the **Apply** button to save the status update.

4. After clicking the Apply button, the pop up box is closed and the updated status information is displayed on the Agency Profile. You do not need to click the **OK** button to save the status change as it has already been saved.

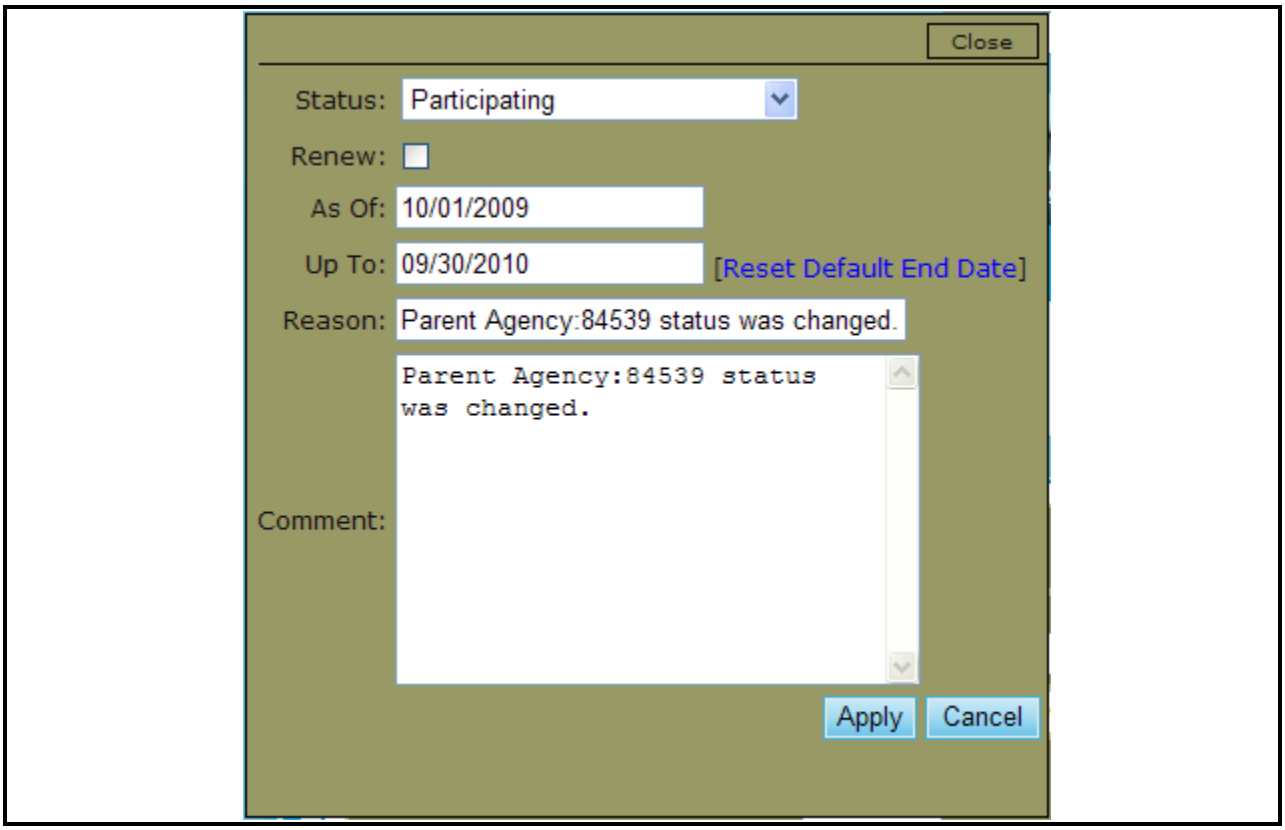


Figure 43.B. GTR – Agency: Update Agency Status – Agency Profile – Change

7.1.2 Add New Agency

You can click **Add New Agency** button from *Agency Search* page or from *Agency List* page to add a new agency to the HCS system.

1. From the upper navigation menu, scroll over the **Agency** hyperlink**.** And select the **Add New Agency** button.

2. Complete all of the required fields that are marked with *. Fields that are not marked with * are not mandatory. Following are the *Agency Profile* required fields.
   a. Agency Name
   b. Type of Agency: Following are the options of type of agency shown in the dropdown list.
   c. HUD Office GTR: The GTR assigned to this agency, as well as their contact number and office location.
   d. Agency Manager: The Point of Contact for the newly formed Agency.
   e. Physical Address: What is required is the City, State, and Zip Code of the Agency Office location.
      i. State: Select a state from the dropdown list where the agency physically resides in. System automatically assigns a HUD Office to the agency based on the State selected.
   f. Fiscal Year: The fiscal year the new agency profile is being created for. The options are „This Year" and „Next Year".
   g. Federal Tax ID Number (TIN): This is agency"s federal employer identification number. The system defaults its value to "00-0000000". If user leaves the default value unchanged,

following warning message appears when the **OK** button is clicked by user to save data. Click the OK button from the warning message window to continue the process.

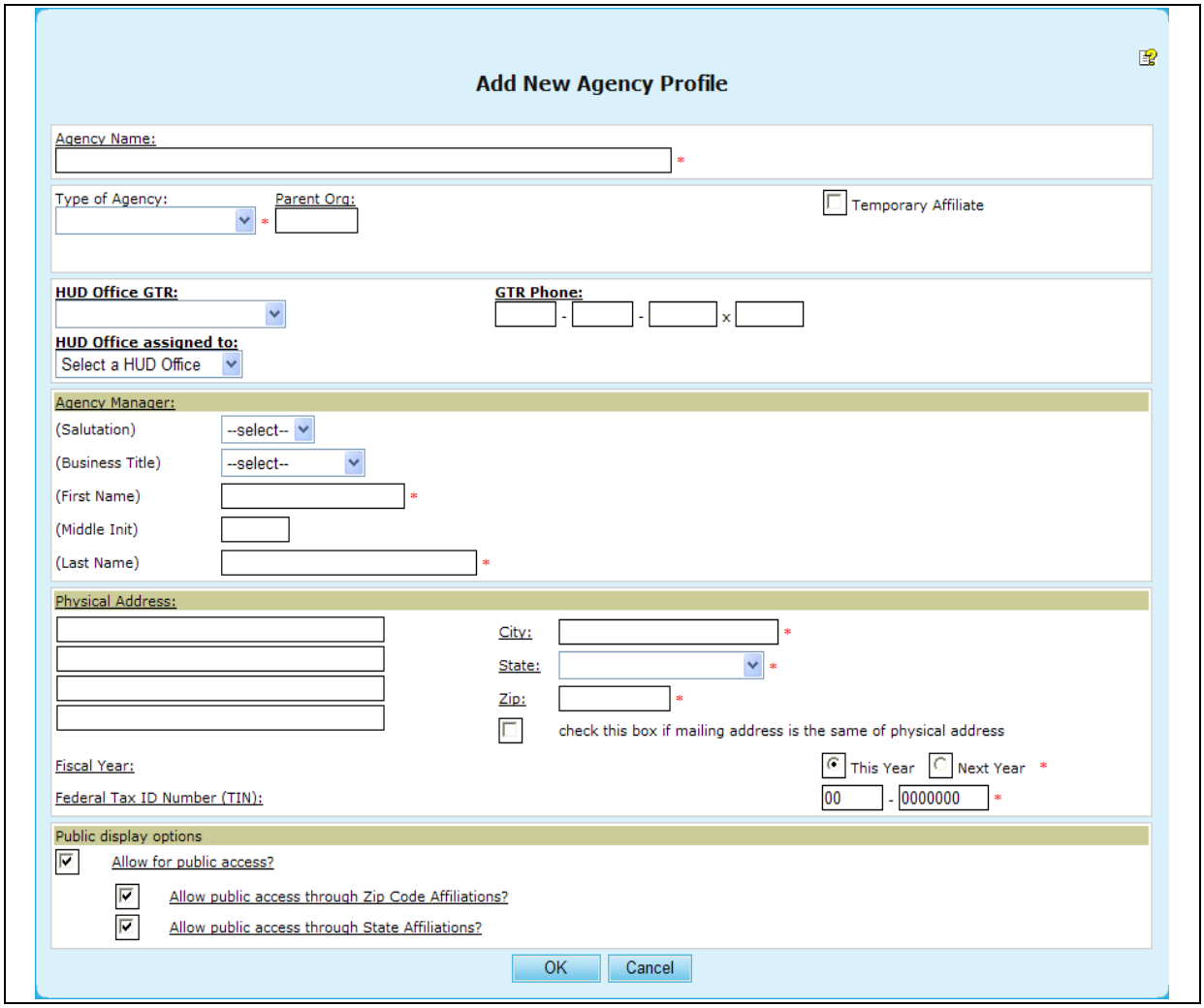


Figure 44.A. GTR – Agency: Add New Agency Profile

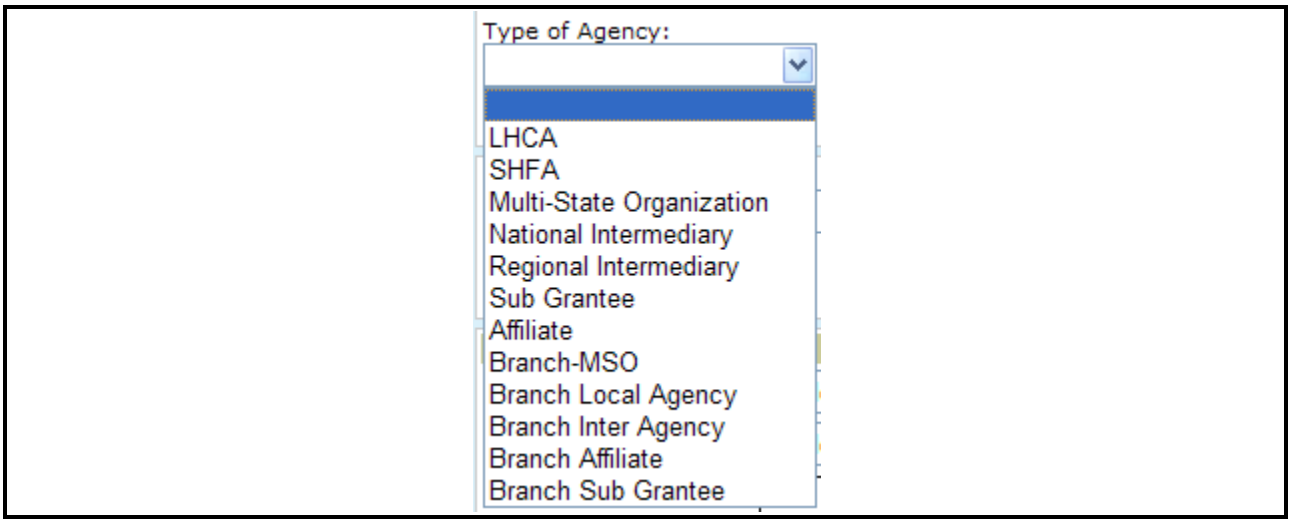


Figure 44.B. GTR – Agency: Type of Agency Dropdown List

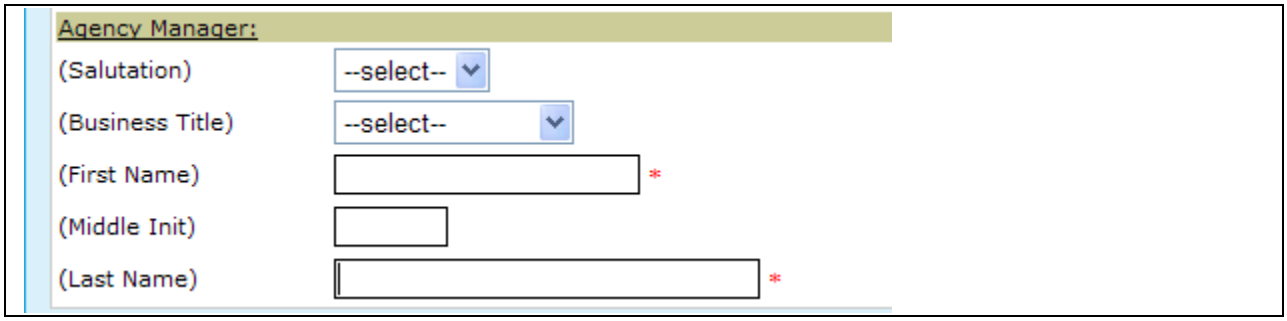


Figure 44.C. GTR – Agency: Agency Manager

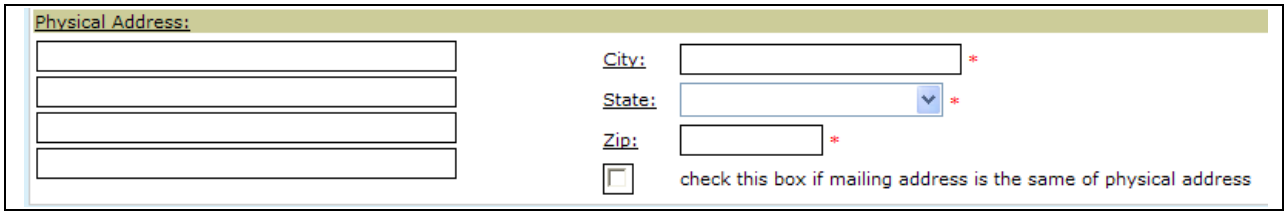


Figure 44.D. GTR – Agency: Agency Physical Address

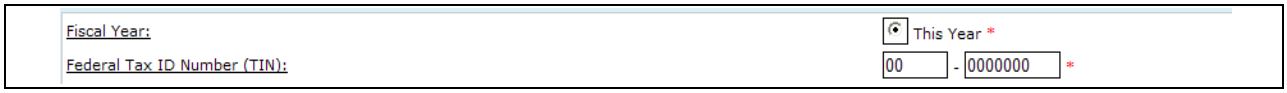


Figure 44.E. GTR – Agency: Fiscal Year and Federal Tax ID Number

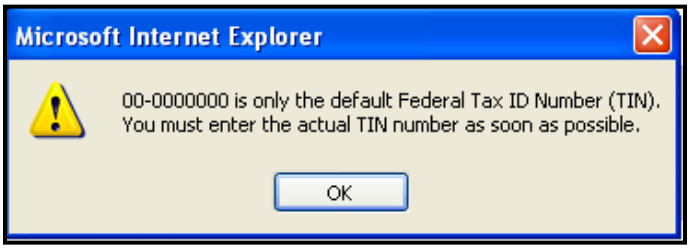


Figure 44.F. GTR – Agency: Default TIN Number Warning Message

Complete the form. To save, click **OK** button. To exit without saving, click **Cancel** button. Screen returns to previous page.

7.1.3 Counselor Information

1. From the upper navigation menu, scroll over the **Agency** hyperlink**.** And select the **Counselor Information** button.

2. Once you have completed your criteria, click **Search** to retrieve results, or **Clear** to erase previously input data.

Counselor Search | Add Counselor | Training Search

Counselor Search

Fiscal Year: 2010
Counselor First Name:
Counselor Last Name:
CMS Counselor ID:
Agency ID :
HECM Certified:
Position:
HUD Office:
State:
Parent Agency ID:
Client First Name:
Client Last Name:
Client Case Number:
Client HECM Certificate Number:
Search Clear

Figure 45.A. GTR – Agency: Counselor Information Search

6. Provided below is an example of the search results retrieved while performing a counselor search.

7. To view further information on a counselor, click the hyperlink found in the Last Name column. By clicking the hyperlink under the name, you will be prompted to the Counselor Profile.

Counselor Panel

Counselor Search | Add Counselor | Training Search

Total 2 records in fiscal year 2009

Print The List | Excel Format

Last Name	First Name	CMS Counselor ID	Agency ID	HOC	Last Training Certified
Curry	Ashley	12345678	80000	Philadelphia (HOC)	
Waxer	David	12345679	80000	Philadelphia (HOC)	

Figure 45.B. GTR – Agency: Counselor Search

8. If you desire to update this profile, edit the information you desire and click **Update Profile** to save those changes, or **Clear** to remove that information.

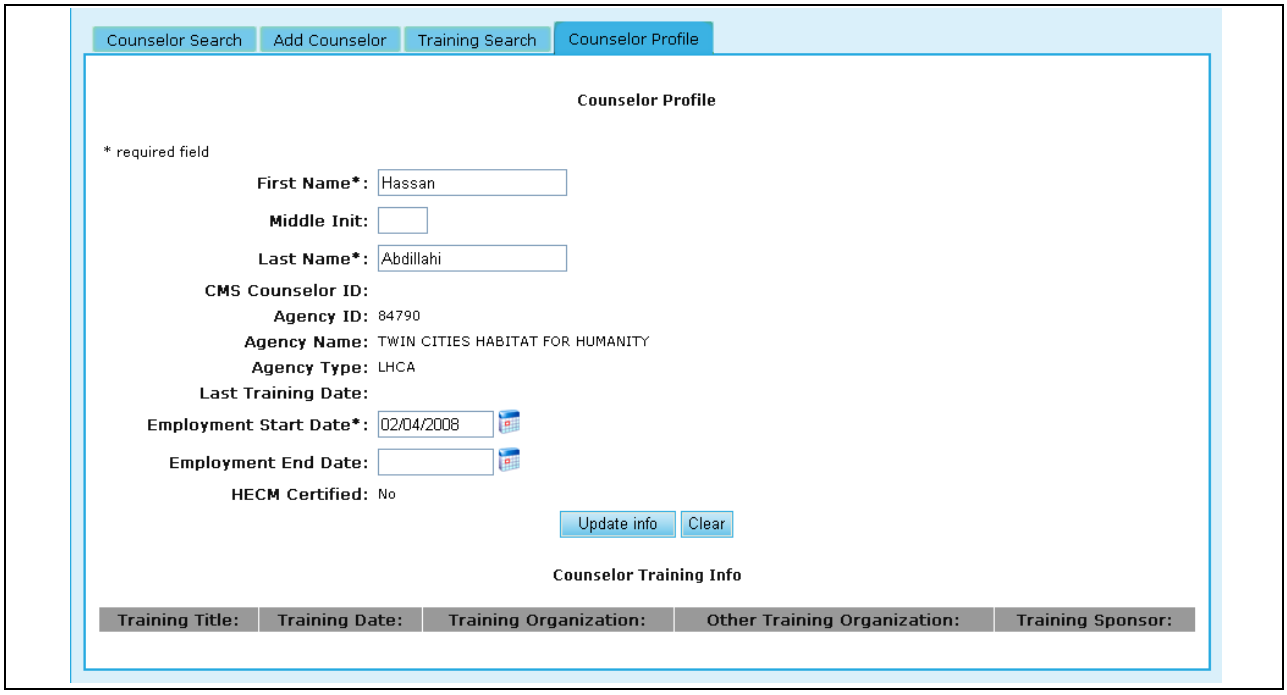


Figure 45.C. GTR – Agency: Agency Counselor Information Profile

7.1.4 Client Information

Client Search under the **Agency** tab provides the same options as demonstrated under the **Agency Search** function (Section 7.2.2).

1. From the upper navigation menu, scroll over the **Agency** hyperlink**.** And select the **Client Search** button.

2. Select the criteria in which you would like to search for, and click **Search** to retrieve those results, or **Clear**, to erase what was previously typed.

Client Search

Client Search

** To select multiple values at once hold the Ctrl or Shift key while clicking on various items

Fiscal Year: 2010

Client info

Case Number:

Client ID:

Client First Name:

Client Last Name:

**State: Alaska, Alabama, Arkansas

Counselor Info

CMS Counselor ID :

Counselor First Name:

Counselor Last Name:

Case Completed:

Agency Info

Agency ID:

Parent ID:

HOC Info

**HUD Funded: Other HUD Program, Place Based Rental Assistance, Purchase REO Property, Rental Voucher

**HOC: Atlanta (HOC), Denver (HOC), Headquarters SF-HUD

9902 Info

Ethnicity:

Race:

**Income Group: a. < 50% of Area Median Income (AMI), b. 50 - 79% of AMI, c. 80 - 100% of AMI

**Workshop/Seminar: a. Pre-Purchase Homebuyer Education, b. Financial Literacy, c. Resolve or Prevent Mortgage Delinquency

Service category:

Service Outcome:

HECM Info

HECM Certified:

Client HECM Certificate Number:

Search Clear

Figure 46.A. GTR – Agency: Client Search Options

3. To view further detail, click the hyperlink found under the Case Number column.

Client List

Total 463 records in fiscal year 2010

Print The List | Excel Format

Next 200 records

Case Number	Last Name	First Name	City	State	Agency ID	HOC	Service	CMS Counselor ID
1141179	ABRAHAM	SARAH	TULSA	OK	80724	Denver (HOC)		274
1141886	ALFRED	SARAH	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	191
1142306	ALLEN	LUTISHA	OKLAHOMA CITY	OK	80724	Denver (HOC)		7
1142287	ALYEA	CHRISTINA	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	15
1141840	ANDERSON	CONNIE	HASKELL	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	209
1142447	ANDERSON	CAROL	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	191
1142240	ANDERSON	KENYATTA	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	191
1141258	AZLIN	JIMMY	WEWOKA	OK	80724	Denver (HOC)		7
1888466	Adams	Tracy	Sicklerville	NJ	80941	Philadelphia (HOC)		102
1860964	Aleogena	Irene	Williamstown	NJ	80941	Philadelphia (HOC)		102
22114	Algee	Mary	Dayton	OH	84573	Philadelphia (HOC)		122
1780781	Antonucci	Michael	West Chester	PA	80941	Philadelphia (HOC)		13

Figure 46.B. GTR – Agency: Client Search Results

Note: Provided below is an example of the Client Profile.

Client Search | Client Profile

Client Profile

First Name: SARAH
Middle Name: A
Last Name: ABRAHAM
Address1: 1616 W 47TH ST
Address2:
City: TULSA
State: OK
Zip: 74107
Phone: 918-447-7776
Case Number: 1141179
Service:

Figure 46.C. GTR – Agency: Client Search Client Detail

7.2 HUD-9902

As a GTR, you can submit and review HUD-9902 forms. To do so, you must first search for the agency on whose behalf you"d like submit or review.

7.2.1 9902 Data Reporting Status Inquiry

This feature is primarily a tool to track agencies that are required to submit their 9902 reports.

To view/update the HUD-9902 form, you must perform a 9902 Data Reporting Status Inquiry.

1. From the upper navigation menu, click the **HUD-9902 Processing** hyperlink**.** The *9902 Data Reporting Status Inquiry* page appears.

2. In the drop-down box, select the fiscal year and reporting period that you wish to search. Then click **Continue**. The *9902 Data Reporting Status Inquiry for FY 20XX* screen appears.

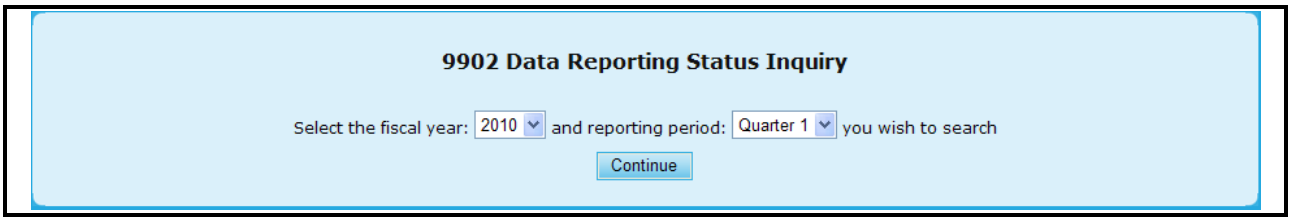


Figure 47. GTR – HUD-9902: 9902 Data Reporting Status Inquiry Fiscal Year Selection

3. To enter a single agency‟s 9902 report, enter Agency ID in the upper section in *9902 Data Reporting Status Inquiry* page. Click the **Submit Inquiry** button, and 9902 form is displayed.

4. Complete all of the fields you want to search on or just leave the fields blank to retrieve all the reported HUD-9902 forms. Click **Submit Inquiry**. The inquired 9902 result screen appears.
   a. Agency ID – Allows you to extract information based on a particular Agency‟s ID number.
   b. GTR Name – Allows a search to be performed based off of a particular Government Technical Officer.
   c. Agency Type – Allows a search to be made on an individual or multiple agency types.
   d. Grant Awardees – This enables you to narrow down your results based on whether an agency was awarded a grant.
   e. Have Reported Individual 9902 – This enables you to narrow down your results based on whether a particular Agency and individually reported their 9902.
   f. Reported on Time – Along the lines of the 9902, this helps in determining if it was reported on time.
   g. Reported Data are Validated – Allows a search to be made on whether or not reported data has been validated.
   h. CMS – Allows you to perform a search based on various Client Management Systems.

5. To get online help instructions for Form-9902, click the FAQ button found on the Search page.

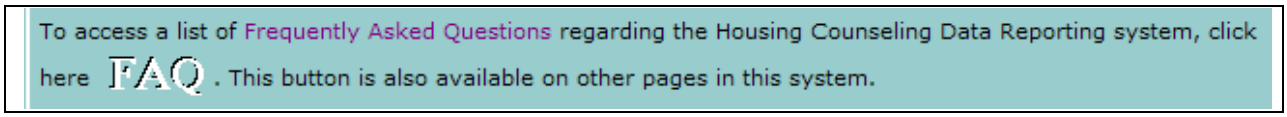


Figure 48.A. GTR – HUD-9902: 9902 Processing – FAQ

HOUSING COUNSELING 9902 REPORTING

9902 Data Reporting Status Inquiry for Quarter 4 of FY 2009

Instructions: + −

Inquiry Scope	Assigned Area
Agency ID	
Parent Agency ID (for sub-agencies listing)	
HUD Office	
GTR Name	
Agency Type	This field allows multiple value entry. Click on the field to display choices and select item or enter a comma delimited list of values.
Grant Awardees	
Have Reported Individual 9902	Yes
Reported On Time	
Reported Data Are Validated	
CMS	This field allows multiple value entry. Click on the field to display choices and select item or enter a comma delimited list of values.
	SUBMIT INQUIRY
	To access a list of Frequently Asked Questions regarding the Housing Counseling Data Reporting system, click here FAQ. This button is also available on other pages in this system.

Figure 48.B. GTR – HUD-9902: 9902 Data Reporting Status Inquiry Criteria Screen

6. Upon the retrieval of your search criteria, you can view the details of a 9902 form for any Agency represented. This is done by clicking the **9902** hyperlink located under the **Details** header.

1809 agency(s) have Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- Have Reported 9902: Yes

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Details
82337	1ST CHOICE CREDIT UNION	Sub Grantee	315 Auburn Avenue Atlanta, GA 30303	404-832-5800 404-607-8252	HCS	9902
83799	28TH LEGISLATIVE DISTRICT COMMUNITY DEVELOPMENT CORPORATION	Sub Grantee	815 N. Hickory Street Chattanooga, TN 37404	423-698-8190 423-698-8191	HCS	9902
84478	4-SIGHT COUNSELING	LHCA	937 Broadway Broadway Plaza, Suite 305 Cape Girardeau, MO 63701	573-334-7995 573-335-8610	HCS	9902
83504	A.G.A.P.E. CDC	Sub Grantee	5205 Capital Boulevard Suite 5293 Raleigh, NC 27616	919-876-1239 888-876-1238	HCS	9902
83502	ABCD INC.	Sub Grantee	1225 Gross Avenue N.E. Canton, OH 44705-1605	330-455-6385 330-456-3913	HCS	9902
83751	ABYSSINIAN DEVELOPMENT CORPORATION	LHCA	4 W. 125 Street New York, NY 10027	646-442-6545 646-442-6598	HCS	9902
80015	ACCESS INCORPORATED	LHCA	3630 Aviation Way PO Box 4666 Medford, OR 97501	541-779-6691 541-779-8886	HCS	9902
84019	YWCA VIRGINIA PENINSULA	Sub Grantee	2702 Orcutt Avenue Newport News, VA 23607	757-245-6026 757-247-6485	HCS	9902
80824	YWCA-CCCS EL PASO DEL NORTE REGION	LHCA	1600 N. Brown St El Paso, TX 79902-4725	915-577-2530 915-533-8132	HCS	9902

Print | Export | Invalid Email List | Email Address List

Figure 49. GTR – HUD-9902: 9902 Data Reporting Status Inquiry Criteria Screen

Note: Provided below is an example of a 9902 form report.

Housing Counseling Agency Activity Report

U.S. Department of Housing and Urban Development
Office of Housing
Federal Housing Commissioner

OMB Approval No. 2502-0261
(Exp. 3/28/2009)

1. Counseling Agency Name		**2. Reporting Period and Budget**	
Agency Name AFFORDABLE HOMES OF SOUTH TEXAS, INC.		Reporting Period:	Quarter 4
Agency ID:	80020	Fiscal Year:	2009
Agency Type:	LHCA	From:	10/01/2008
Address: 1420 Erie Avenue McAllen, TX 78501		To:	09/30/2009
		Initial Submission Date:	10/27/2009
		Date Updated:	11/10/2009
Parent Agency Name (if applicable)		Total Annual Housing Counseling Program Budget, All Sources: $ 28000.00	
Agency ID:		HUD Funded Activity Ratio: 0% (0)	
Agency Type:			

Validated: Yes

Deadline for late submissions has been extended until 02/28/2010
Updates are not allowed at this time

Last Validated: 11/12/2009 **Validated by:** Susan Aleman

HUD-9902	HUD-9902 (Derived)	Logic Model	
		All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds

3. Ethnicity of Clients (select only one)		
a. Hispanic	261	0
b. Not Hispanic	0	0
c. Chose not to respond	0	0
Section 3 Total:	**261**	**0**
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0	0
b. Asian	0	0
c. Black or African American	0	0
d. Native Hawaiian or Other Pacific Islander	0	0
e. White	261	0
Multi-Race		
f. American Indian or Alaska Native *and* White	0	0
g. Asian *and* White	0	0
h. Black or African American *and* White	0	0
i. American Indian or Alaska Native *and* Black or African American	0	0
j. Other multiple race	0	0
k. Chose not to respond	0	0
Section 4 Total:	**261**	**0**
5. Income Levels		
a. < 50% of Area Median Income (AMI)	56	0
b. 50 - 79% of AMI	186	0
c. 80 - 100% of AMI	19	0
d. > 100% AMI	0	0
e. Chose not to respond	0	0
Section 5 Total:	**261**	**0**
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	46	0
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	11	0
c. Completed resolving or preventing mortgage delinquency workshop	0	0
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0
e. Completed fair housing workshop	0	0
f. Completed predatory lending workshop	0	0
g. Completed rental workshop	0	0
h. Other workshop	0	0
Group Session / Section 6 Total:	**57**	**0**
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	66	0
2) Client will be mortgage ready within 90 days	16	0
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	61	0
4) Receiving long term pre-purchase counseling	2	0
5) Entered lease purchase program	0	0
6) Decided Not to purchase housing; no further effort to prepare needed	0	0
7) Withdrew from counseling	18	0
8) Other	1	0
Section 7a Sub-total:	**164**	**0**
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	21	0

2) Mortgage refinanced	0	0
3) Mortgage modified	0	0
4) Received second mortgage	0	0
5) Initiated forbearance agreement/repayment plan	0	0
6) Executed a deed-in-lieu	0	0
7) Sold property/chose alternative housing solution	0	0
8) Pre-forclosure sale	0	0
9) Mortgage foreclosed	0	0
10) Counseled and referred to another social service or emergency assistance agency	0	0
11) Obtained partial claim loan from FHA lender	0	0
12) Bankruptcy	0	0
13) Entered debt management plan	0	0
14) Counseled and referred for legal assistance	0	0
15) Currently receiving foreclosure prevention/budget counseling	0	0
16) Withdrew from counseling	0	0
17) Other	0	0
Section 7b Sub-total:	**21**	**0**
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	0	0
2) Counseled on HECM; decided not to obtain mortgage	0	0
3) Obtained a non-FHA reverse mortgage	0	0
4) Received home equity or home improvement loan or other home repair assistance	0	0
5) Received consumer loan (unsecured)	19	0
6) Mortgage refinanced	0	0
7) Counseled and referred to other social service agency	0	0
8) Sold house/chose alternative housing solution	0	0
9) Completed financial management/budget counseling	0	0
10) Completed home maintenance counseling	0	0
11) Counseled and utilities brought current	0	0
12) Counseled and referred for legal assistance	0	0
13) Currently receiving counseling	0	0
14) Withdrew from counseling	0	0
15) Other	0	0
Section 7c Sub-total:	**19**	**0**
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	0	0
2) Obtained temporary rental relief	0	0
3) Counseled and referred to agency with rental assistance program	0	0
4) Advised on recertification for HUD/other subsidy program	0	0
5) Counseled and referred to other social service agency	0	0
6) Counseled and referred to legal aid agency for fair housing assistance	0	0
7) Counseled and referred to legal aid agency for assistance with eviction	0	0
8) Found alternative rental housing	0	0
9) Decided to remain in current housing situation	0	0
10) Resolved issue in current tenancy	0	0
11) Entered debt management/repayment plan	0	0
12) Counseled and utilities brought current	0	0
13) Resolved security deposit dispute	0	0
14) Currently receiving counseling	0	0

15) Withdrew from counseling	0	0
16) Other	0	0
Section 7d Sub-total:	0	0
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	0	0
2) Occupied transitional housing	0	0
3) Occupied permanent housing with rental assistance	0	0
4) Occupied permanent housing without rental assistance	0	0
5) Counseled Referred to other social service agency	0	0
6) Remained homeless	0	0
7) Currently receiving counseling	0	0
8) Withdrew from counseling	0	0
9) Other	0	0
Section 7e Sub-total:	0	0
Individual Counseling / Section 7 a-e Total:	204	0
Total Counseling / Section 6 and 7 Total:	261	0

8. HUD Housing Counseling Grant(s)-Summary Data

HUD Housing Counseling Grant or Sub-grant Number/Source	Grant Type	HUD Housing Counseling Grant Amount
	Section 8 Totals:	$0.00

9. Authorization:

Input Official		**Agency Official**	
First Name:	Isabel	First Name:	Isabel
Last Name:	Mercado	Last Name:	Mercado
Title:		Title:	Agency Manager
Phone:		Phone:	

Help | Reload | Back | PDF Version

Figure 50.A. GTR – HUD-9902: 9902 form

7. Complete all fields. Steps 8-14 explain important aspects of the HUD-9902 form.

8. In the **Counseling Agency Name & Address** area, keep the following information in mind:
   a. Although the address shown may be modified on-line through the Agency Information page of HCS, Housing Counseling Agencies should notify their respective HUD Homeownership Center (HOC) of any address changes.
   b. Reference to HUD HOC offices can be found at: http://www.hud.gov/offices/hsg/sfh/hoc/hsghocs.cfm
   c. Affiliates/branches are required to enter their Intermediary ID in the appropriate box on the Agency Information page of HCS.
9. In the **Reporting Period and Budget** section, remember that this is an accumulating quarterly report. All activities that took place from the first day of the fiscal year to the last day of the reporting period should be included in the report. Quarter 4 Reporting Period is the same as an annual report because it covers the entire fiscal year. Grant reporting period report are required for those agencies who have a grant agreement with HUD and should specify the starting date and ending date of the Grant reporting period.

10. Complete the Ethnicity of Clients, Race of Clients, Income Levels, and Number of Clients Receiving Educational/Outreach Services sections.

Note: The report contains two data columns for all sections of the HUD-9902 form:

- **All Counseling and Education Activities** – Enter data covering all housing counseling activities, including those performed under one or more HUD housing counseling grants.
- **Counseling and Education Activities attributed to HUD Housing Counseling Grant Funds** – Starting in FY 2007 the HUD Grant Activities are automatically calculated based on the HUD

Funded Activity Ratio in Section 2. This ratio is determined by the total HUD grant awards in Section 8 divided by the Total Annual Housing Counseling Program Budget in Section 2. These data elements are recalculated when you enter a value into the All Counseling Activities column or when the Total Annual Housing Counseling Program Budget is changed.

11. For the **Number of Clients Counseled, by Purpose of Visit and Results** section, keep the following information in mind:
    a. Enter the number of clients to whom you provided counseling during the report period. This might include clients who entered your workload the previous report period but you carried over into and counseled during the current report period.
    b. You are not reporting the number of individual persons you counseled. Examples: A husband and wife or a brother and sister or three friends who are mortgagors under the same note count as one client. Three renting families who experience the same problem with the same landlord and come to your agency together for assistance count as one client.
    c. **Seeking Shelter or Services for the Homeless** – A client reported on this line must meet the definition for "homeless" or "homeless individual" set forth in Section 103, General Definition of Homeless Individual, of the Stewart B. McKinney Homeless Assistance Act (Public Law 100-77). Instructions / Guidance and FAQ – The following hyperlink will take you to the appropriate HUD website for form HUD-9902 instructions and FAQs. At the top of the site under INDEX, select "reports (PDF page)" and you will be directed to the proper location. Scroll down for further information at this location. http://www.hud.gov/offices/hsg/sfh/hcc/hc_faq.cfm

12. For **HUD Housing Counseling Grant Summary Data,** Section 8 of the form HUD-9902. This section is automatically calculated and shows the awards that were granted by HUD.

13. For **HUD Housing Counseling Grant Summary Data,** Section 8 of the form HUD-9902. This section is automatically calculated and shows the awards that were granted by HUD.

14. For the **Authorization** section, the first and last name of the user logged into HCS who completes this form is automatically entered for the Input Official when the Send button is clicked. The Agency Official is the Director first name and last name from the Agency Information page of HCS.

15. Starting in January of 2008, agencies can submit their client level data through a CMS system. The HUD 9902 Form provides an automated tool that generates the HUD 9902 Form and Logic Model from the client level data submitted. To view the client level data derived HUD 9902 Form and Logic Model Click the HUD 9902 (Derived) and Logic Model tabs respectively

The HUD 9902 (Derived) provides a features which overrides the permanent HUD 9902 Form. To use the client level data derived HUD 9902 Form as your permanent HUD 9902 Form click the Commit Data button. This causes the System to overwrite the regular HUD 9902 Form.

Denver, CO 80206-1208
Parent Agency Name(if applicable)
Agency ID:
Agency Type:

Date Updated: 01/27/2010
Total Annual Housing Counseling Program Budget, All Sources:
$ 214086.00
HUD Funded Activity Ratio:
14.13% (0.1413)

Validated: Yes — Deadline for late submissions has been extended until 02/28/2010

Last Validated: 02/05/2010 — **Validated by:** Gary Thacker

HUD-9902 | HUD-9902 (Derived) | Logic Model

Commit Data

The HUD 9902 (Derived) Form & Logic Model are dynamically calculated from client data submitted by Agencies through CARS. If not data is submitted through CARS, then theses two forms will be left blank.

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds
3. Ethnicity of Clients (select only one)		
a. Hispanic		
b. Not Hispanic		
c. Chose not to respond		
	0	0
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native		

Figure 50.B. GTR – HUD-9902: 9902 (Derived)

16. To view the Logic Model, Click the Logic Model tab and a new window is displayed that show the Logic Model filled out with the client level data submitted through the CMS systems.

Applicant Name: 1ST CHOICE CREDIT UNION
Project Name:
TERM:
HUD Program Name: Housing Counseling
Period:
Start Date:
End Date:
US Department of Housing and Urban Development
OMB Approval 2535-0114 exp. 09/30/2007
Component Name:

HUD Goals	Policy Priority	Problem, Need, Situation	Service or Activities/Output	Pre	Post	Outcome	Pre	Post	Evaluation Tools
1		2	3	4		5	6		7
Policy		Planning	Programming	Measure		Impact	Measure		Accountability
		Need for information and advice regarding home buying and homeownership.	Pre-Purchase/Home buying - Group workshops	Workshops	0	Counseled on pre-purchase/home buying - Purchased home	Households	0	
			Financial literacy - Group workshops	Workshops	5	Counseled on pre-purchase/home buying - Mortgage Ready within 90 days	Households	1	
			Fair housing - Group workshops	Workshops	0	Counseled on pre-purchase/home buying - Mortgage Ready within 90 to 180 days	Households	0	
			Predatory lending - Group workshops	Workshops	0	Counseled on pre-purchase/home buying - Entered Lease Purchase Contract	Households	1	
			Other - Group Workshops	Workshops	0	Counseled on pre-purchase/home buying - Decided not to purchase housing; no further effort	Households	0	
			Pre-Purchase/Home buying - One-on-one counseling participants	Households	2	Counseled on pre-purchase/home buying - Withdrew	Households	0	
						Counseled on pre-purchase/home buying - Other outcome	Households	0	
		Need for information and advice regarding resolving or preventing mortgage delinquency or default.	Mortgage delinquency - Group workshops	Workshops	5	Counseled on mortgage delinquency - Brought mortgage current	Households	0	
			Mortgage delinquency - One-on-one counseling participants	Households	0	Counseled on mortgage delinquency - Referred to other social service agency or emergency	Households	0	
						Counseled on mortgage delinquency - Obtained partial claim loan from FHA lender	Households	0	
						Counseled on mortgage delinquency - Declared bankruptcy	Households	0	
						Counseled on mortgage delinquency - Entered debt management plan	Households	0	
						Counseled on mortgage delinquency - Referred for legal assistance	Households	0	
						Counseled on mortgage delinquency - Withdrew	Households	0	
						Counseled on mortgage delinquency - Other outcome	Households	0	
						Counseled on mortgage delinquency - Mortgage	Households		

Figure 50.C. GTR – HUD-9902: Logic Model

17. When you finish completing this form, click **Send**. A message appears at the top of your screen.

A 9902 report has been created in database.

If the calculated totals don't agree with your calculations, verify your entries/totals and re-send the form if necessary.

Figure 51. GTR – HUD-9902: Database Updated Message

You have now successfully completed a HUD-9902 form.

There are other dynamics associated with the Data Reporting Status Inquiry, which are found at the bottom of your returned search.

18. To print this list, click **Print**. A print dialog box appears allowing you to print the search results.

19. To export this list to Microsoft Excel, click **Export**. A File Download dialog box appears allowing you to save or open the search results using Microsoft Excel.

1809 agency(s) have Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- Have Reported 9902: Yes

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Details
82337	1ST CHOICE CREDIT UNION	Sub Grantee	315 Auburn Avenue Atlanta, GA 30303	404-832-5800 404-607-8252	HCS	9902
83799	28TH LEGISLATIVE DISTRICT COMMUNITY DEVELOPMENT CORPORATION	Sub Grantee	815 N. Hickory Street Chattanooga, TN 37404	423-698-8190 423-698-8191	HCS	9902
84478	4-SIGHT COUNSELING	LHCA	937 Broadway Broadway Plaza, Suite 305 Cape Girardeau, MO 63701	573-334-7995 573-335-8610	HCS	9902
83504	A.G.A.P.E. CDC	Sub Grantee	5205 Capital Boulevard Suite 5293 Raleigh, NC 27616	919-876-1239 888-876-1238	HCS	9902
83502	ABCD INC.	Sub Grantee	1225 Gross Avenue N.E. Canton, OH 44705-1605	330-455-6385 330-456-3913	HCS	9902
83751	ABYSSINIAN DEVELOPMENT CORPORATION	LHCA	4 W. 125 Street New York, NY 10027	646-442-6545 646-442-6598	HCS	9902
80015	ACCESS INCORPORATED	LHCA	3630 Aviation Way PO Box 4666 Medford, OR 97501	541-779-6691 541-779-8886	HCS	9902

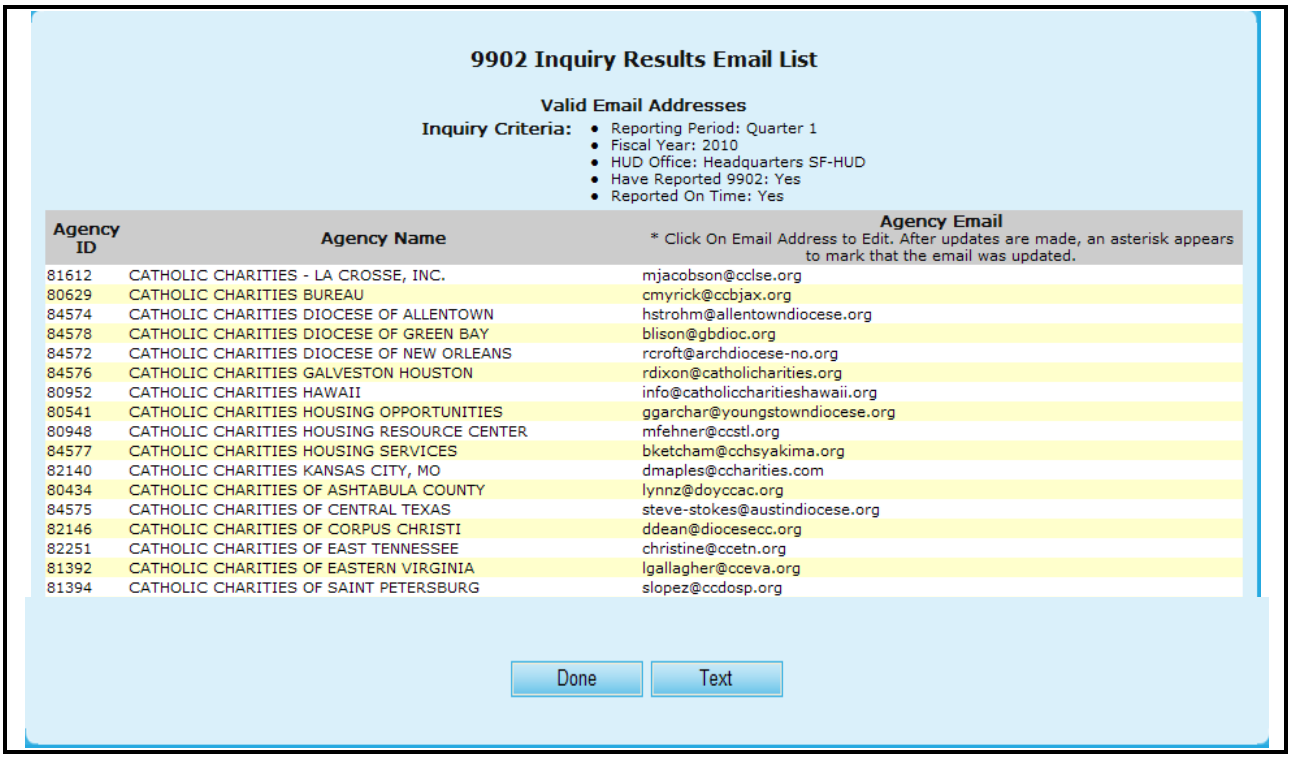
Print | Export | Invalid Email List | Email Address List

Figure 52. GTR – HUD-9902: 9902 Data Reporting Status Inquiry Results

20. To view the e-mail list for this agency, click **Email Address List**. The *9902 Inquiry Results Email List* screen appears.

21. To save the email list as a text file, click **Text**. A File Download dialog box appears; click **Save** or **Open**.

22. When you are done reviewing the **Email List**, click **Done**. You return to the *9902 Inquiry Search Results List* screen



9902 Inquiry Results Email List

Valid Email Addresses

Inquiry Criteria:
- Reporting Period: Quarter 1
- Fiscal Year: 2010
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: Yes
- Reported On Time: Yes

Agency ID	Agency Name	Agency Email * Click On Email Address to Edit. After updates are made, an asterisk appears to mark that the email was updated.
81612	CATHOLIC CHARITIES - LA CROSSE, INC.	mjacobson@cclse.org
80629	CATHOLIC CHARITIES BUREAU	cmyrick@ccbjax.org
84574	CATHOLIC CHARITIES DIOCESE OF ALLENTOWN	hstrohm@allentowndiocese.org
84578	CATHOLIC CHARITIES DIOCESE OF GREEN BAY	blison@gbdioc.org
84572	CATHOLIC CHARITIES DIOCESE OF NEW ORLEANS	rcroft@archdiocese-no.org
84576	CATHOLIC CHARITIES GALVESTON HOUSTON	rdixon@catholicharities.org
80952	CATHOLIC CHARITIES HAWAII	info@catholiccharitieshawaii.org
80541	CATHOLIC CHARITIES HOUSING OPPORTUNITIES	ggarchar@youngstowndiocese.org
80948	CATHOLIC CHARITIES HOUSING RESOURCE CENTER	mfehner@ccstl.org
84577	CATHOLIC CHARITIES HOUSING SERVICES	bketcham@cchsyakima.org
82140	CATHOLIC CHARITIES KANSAS CITY, MO	dmaples@ccharities.com
80434	CATHOLIC CHARITIES OF ASHTABULA COUNTY	lynnz@doyccac.org
84575	CATHOLIC CHARITIES OF CENTRAL TEXAS	steve-stokes@austindiocese.org
82146	CATHOLIC CHARITIES OF CORPUS CHRISTI	ddean@diocesecc.org
82251	CATHOLIC CHARITIES OF EAST TENNESSEE	christine@ccetn.org
81392	CATHOLIC CHARITIES OF EASTERN VIRGINIA	lgallagher@cceva.org
81394	CATHOLIC CHARITIES OF SAINT PETERSBURG	slopez@ccdosp.org

Done Text

Figure 53. GTR – HUD-9902: Inquiry Results Email List

23. To view the missing and invalid e-mail address(es) for this agency, click **Invalid Email List**. The *9902 Inquiry Results Email List* screen appears.

9902 Inquiry Results Email List

Missing/Invalid Email Addresses

Inquiry Criteria:
- Reporting Period: Quarter 1
- Fiscal Year: 2010
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: Yes
- Reported On Time: Yes

Agency ID	Agency Name	Agency Email * Click On Email Address to Edit. After updates are made, an asterisk appears to mark that the email was updated.
82259	HOUSING EDUCATION RESOURCE CENTER	N/A
84287	SOUTHSIDE COMM DEVEL & HOUSING	N/A
84437	METROPOLITAN MILWAUKEE FAIR HOUSING COUNCIL	N/A
80604	CENTRO DE APOYO FAMILIAR (CAF)	N/A
80605	COMMUNITY HOUSING WORKS	N/A
84330	HARVEST AMERICA	N/A
80627	IN CHARGE DEBT SOLUTIONS	N/A
84684	PATH STONE	N/A
80628	SOUTHWEST KEY PROGRAMS, INC.	n/a
81001	NEIGHBORWORKS HOME RESOURCES	N/A
82812	CALIFORNIA RURAL LEGAL ASSISTANCE	N/A
82810	CALIFORNIA RURAL LEGAL ASSISTANCE-MARYSVILLE OFFICE	N/A
81240	ASSOCIATION HOUSE	N/A
84558	BROOKLYN HOUSING AND FAMILY SERVICES	N/A
84211	CENTER FOR WORKING FAMILIES	N/A
81238	HUMBOLDT PARK SOCIAL SERVICES	N/A
81261	NEAR WESTSIDE COMMUNITY DEVELOPMENT CORPROATION	N/A
81239	SOUTHEAST CHICAGO DEVELOPMENT COMMISSION	N/A
83795	ST NICHOLAS NEIGHBORHOOD PRESERVATION CORPORATION	N/A
84219	UNIVERSITY SETTLEMENT	N/A
82987	WEST JACKSON CDC	N/A

Done

Figure 54.A. GTR – HUD-9902: 9902 Inquiry Results Invalid Email List

a. To update the invalid email address, Click the invalid email address text under Agency Email.
b. An input box appears with two buttons, **Update** and **Cancel**.
c. Enter a valid email address and click the **Update** button to save.

9902 Inquiry Results Email List

Missing/Invalid Email Addresses

Inquiry Criteria:
- Reporting Period: Quarter 1
- Fiscal Year: 2010
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: Yes
- Reported On Time: Yes

Agency ID	Agency Name	Agency Email * Click On Email Address to Edit. After updates are made, an asterisk appears to mark that the email was updated.
82259	HOUSING EDUCATION RESOURCE CENTER	testing@aol.com Update Cancel
84287	SOUTHSIDE COMM DEVEL & HOUSING	N/A
84437	METROPOLITAN MILWAUKEE FAIR HOUSING COUNCIL	N/A

Done

Figure 54.B. GTR – HUD-9902: 9902 Inquiry Results Invalid Email List – Edit

24. When you are finished reviewing this list, click **Done** to be returned back to the *9902 Inquiry Results* list screen.

9902 Inquiry Results Email List

Missing/Invalid Email Addresses

Inquiry Criteria:
- Reporting Period: Quarter 1
- Fiscal Year: 2010
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: Yes
- Reported On Time: Yes

Agency ID	Agency Name	Agency Email * Click On Email Address to Edit. After updates are made, an asterisk appears to mark that the email was updated.
82259	HOUSING EDUCATION RESOURCE CENTER	testing@aol.com *
84287	SOUTHSIDE COMM DEVEL & HOUSING	N/A
84437	METROPOLITAN MILWAUKEE FAIR HOUSING COUNCIL	N/A

Done

Figure 54.C GTR – HUD-9902: 9902 Inquiry Results Invalid Email List – Saved

25. To view more information about an agency listed on the agency search list, select an agency by clicking the hyperlink under the **Agency Name** column. The *Agency Summary* screen appears, as depicted in Section 9.2.1.

26. To view the HUD-9902 form for an agency, click the 9902 hyperlink. The HUD-9902 form appears.

27. If you key in a parent agency ID to the **Agency ID** field in *9902 Data Report Status Inquiry* criteria page, you will get a consolidated non-editable 9902 data report.

1 agency(s) belonging to CATHOLIC CHARITIES USA have Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- Parent Agency ID: 80750
- Have Reported 9902: Yes

CATHOLIC CHARITIES USA (80750): 1 Affiliate(s) have Reported Consolidated 9902

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Click for Details
82257	CATHOLIC FAMILY AND COMMUNITY SERVICES, A CATHOLIC CHARITIES AGENCY FOR THE DIOCESE OF PATERSON	Sub Grantee	24 DeGrasse Street Paterson, NJ 07505	973-279-7100-20 973-523-1150	HCS	9902

Print | Export | Invalid Email List | Email Address List

Figure 55.A. GTR – HUD-9902: 9902 Processing – Report of Affiliates Belonging to A Parent Agency Have Reported 9902 Data

28. Upon selecting Consolidated 9902 you will be prompted to the report, presented as followed.

Totals for Sub-Agencies of

CATHOLIC CHARITIES USA

Agency ID: 80750
Agency Type: National Intermediary
HUD Office GTR: Ronald Bedoya
Number of Sub-Agencies Reported: 1
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	130	70.17
b. Not Hispanic	141	76.11
c. Chose not to respond	0	0.00
Section 3 Total:	271	146.28
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0	0.00
b. Asian	0	0.00
c. Black or African American	87	46.96
d. Native Hawaiian or Other Pacific Islander	0	0.00
e. White	184	99.32
Multi-Race		
f. American Indian or Alaska Native and White	0	0.00
g. Asian and White	0	0.00
h. Black or African American and White	0	0.00
i. American Indian or Alaska Native and Black or African American	0	0.00
j. Other multiple race	0	0.00
k. Chose not to respond	0	0.00
Section 4 Total:	271	146.28
5. Income Levels		
a. < 50% of Area Median Income (AMI)	19	10.26
b. 50 - 79% of AMI	76	41.02
c. 80 - 100% of AMI	103	55.60
d. > 100% AMI	73	39.41
e. Chose not to respond	0	0.00
Section 5 Total:	271	146.29
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	0	0.00
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	0	0.00
c. Completed resolving or preventing mortgage delinquency workshop	0	0.00
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0.00
e. Completed fair housing workshop	0	0.00
f. Completed predatory lending workshop	0	0.00
g. Completed rental workshop	0	0.00
h. Other workshop	0	0.00
Group Session / Section 6 Total:	0	0.00
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	0	0.00
2) Client will be mortgage ready within 90 days	0	0.00
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	0	0.00
4) Receiving long term pre-purchase counseling	0	0.00
5) Entered lease purchase progra	0	0.00
6) Decided Not to purchase housing; no further effort to prepare needed	0	0.00
7) Withdrew from counseling	0	0.00
8) Other	0	0.00
Section 7a Sub-total:	0	0.00
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	0	0.00
2) Mortgage refinanced	0	0.00

3) Mortgage modified	0	0.00
4) Received second mortgage	0	0.00
5) Initiated forbearance agreement/repayment plan	4	2.16
6) Executed a deed-in-lieu	0	0.00
7) Sold property/chose alternative housing solution	1	0.54
8) Pre-forclosure sale	0	0.00
9) Mortgage foreclosed	0	0.00
10) Counseled and referred to another social service or emergency assistance agency	0	0.00
11) Obtained partial claim loan from FHA lender	0	0.00
12) Bankruptcy	0	0.00
13) Entered debt management plan	0	0.00
14) Counseled and referred for legal assistance	0	0.00
15) Currently receiving foreclosure prevention/budget counseling	0	0.00
16) Withdrew from counseling	0	0.00
17) Other	0	0.00
Section 7b Sub-total:	5	2.70
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	0	0.00
2) Counseled on HECM; decided not to obtain mortgage	0	0.00
3) Obtained a non-FHA reverse mortgage	0	0.00
4) Received home equity or home improvement loan or other home repair assistance	0	0.00
5) Received consumer loan (unsecured)	0	0.00
6) Mortgage refinanced	0	0.00
7) Counseled and referred to other social service agency	0	0.00
8) Sold house/chose alternative housing solution	0	0.00
9) Completed financial management/budget counseling	0	0.00
10) Completed home maintenance counseling	0	0.00
11) Counseled and utilities brought current	8	4.32
12) Counseled and referred for legal assistance	0	0.00
13) Currently receiving counseling	0	0.00
14) Withdrew from counseling	0	0.00
15) Other	0	0.00
Section 7c Sub-total:	8	4.32
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	0	0.00
2) Obtained temporary rental relief	80	43.18
3) Counseled and referred to agency with rental assistance program	0	0.00
4) Advised on recertification for HUD/other subsidy program	0	0.00
5) Counseled and referred to other social service agency	0	0.00
6) Counseled and referred to legal aid agency for fair housing assistance	0	0.00
7) Counseled and referred to legal aid agency for assistance with eviction	0	0.00
8) Found alternative rental housing	0	0.00
9) Decided to remain in current housing situation	0	0.00
10) Resolved issue in current tenancy	0	0.00
11) Entered debt management/repayment plan	0	0.00
12) Counseled and utilities brought current	111	59.92
13) Resolved security deposit dispute	0	0.00
14) Currently receiving counseling	0	0.00
15) Withdrew from counseling	0	0.00
16) Other	0	0.00
Section 7d Sub-total:	191	103.10
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	67	36.17
2) Occupied transitional housing	0	0.00
3) Occupied permanent housing with rental assistance	0	0.00
4) Occupied permanent housing without rental assistance	0	0.00
5) Counseled Referred to other social service agency	0	0.00
6) Remained homeless	0	0.00
7) Currently receiving counseling	0	0.00
8) Withdrew from counseling	0	0.00
9) Other	0	0.00
Section 7e Sub-total:	67	36.17
Individual Counseling / Section 7 a-e Total:	271	146.29
Total Counseling / Section 6 and 7 Total:	271	146.29

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$1,056,325.88

Figure 55.B. GTR – HUD-9902: 9902 Processing – Consolidated 9902 Report

29. If you select „Headquarters SF-HUD" from **HUD Office** dropdown, select „No" from **Have Reported Individual 9902** dropdown, and click **Submit Inquiry** button. The following report appears. In this report, name of parent agency, count and information of affiliates that have not reported 9902 data, links to agency profile(s) and individual 9902 report(s) are available and are grouped by parent agency name. You may click the individual 9902 report link to input 9902 data, or click agency name link to view or edit agency profile data.

926 agency(s) belonging to the Headquarters SF-HUD have Not Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: No

2 Agency(s) Having No Current Association

83453	HOPE HOUSING COUNSELING AGENCY	Affiliate	315 E. 7th Street Lawrence, KS 66049	785-856-4444 785-749-0095	HCS	9902
80920	NEIGHBORHOOD HOUSING SERVICES OF NORTH TEXAS (FORMERLY NHS OF FORT WORTH)	Sub Grantee	2315 N Main St Ste 401 Fort Worth, TX 76106	817-624-9454 817-624-0860	HCS	9902

ACORN HOUSING CORPORATION (80753): 39 Affiliate(s) have Not Reported

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Details
83075	ACORN HOUSING , ORLANDO, FL	Sub Grantee	120 E. Colonial Dr. Orlando, FL 32801	407-254-5974 407-254-0841	HCS	9902
84343	ACORN HOUSING BATON ROUGE, LA	Branch Inter Agency	5177 Greenwell Spring Road Baton Rounge, LA 70806	225-925-0937	HCS	9902

Figure 56. GTR – HUD-9902: 9902 Processing – Report of Agencies Associated with Intermediaries in HQ Have Not Reported 9902 Data

7.2.2 Analysis Reports Inquiry

As a GTR, you can perform an Analysis Reports Inquiry. The Analysis Reports Inquiry is used to organize and/or retrieve 9902 information. It can be exported into Excel spreadsheet in order to manipulate the data for other purpose.

1. From the top navigation menu, click **Analysis Reports Inquiry** hyperlink**.** The *9902 Data Analysis Reports Inquiry* page appears.

2. Complete all appropriate search fields in second half of the inquiry page and click the **Submit Inquiry** button.

Note: To view the differences in Analysis Type options, skip to Step 5.

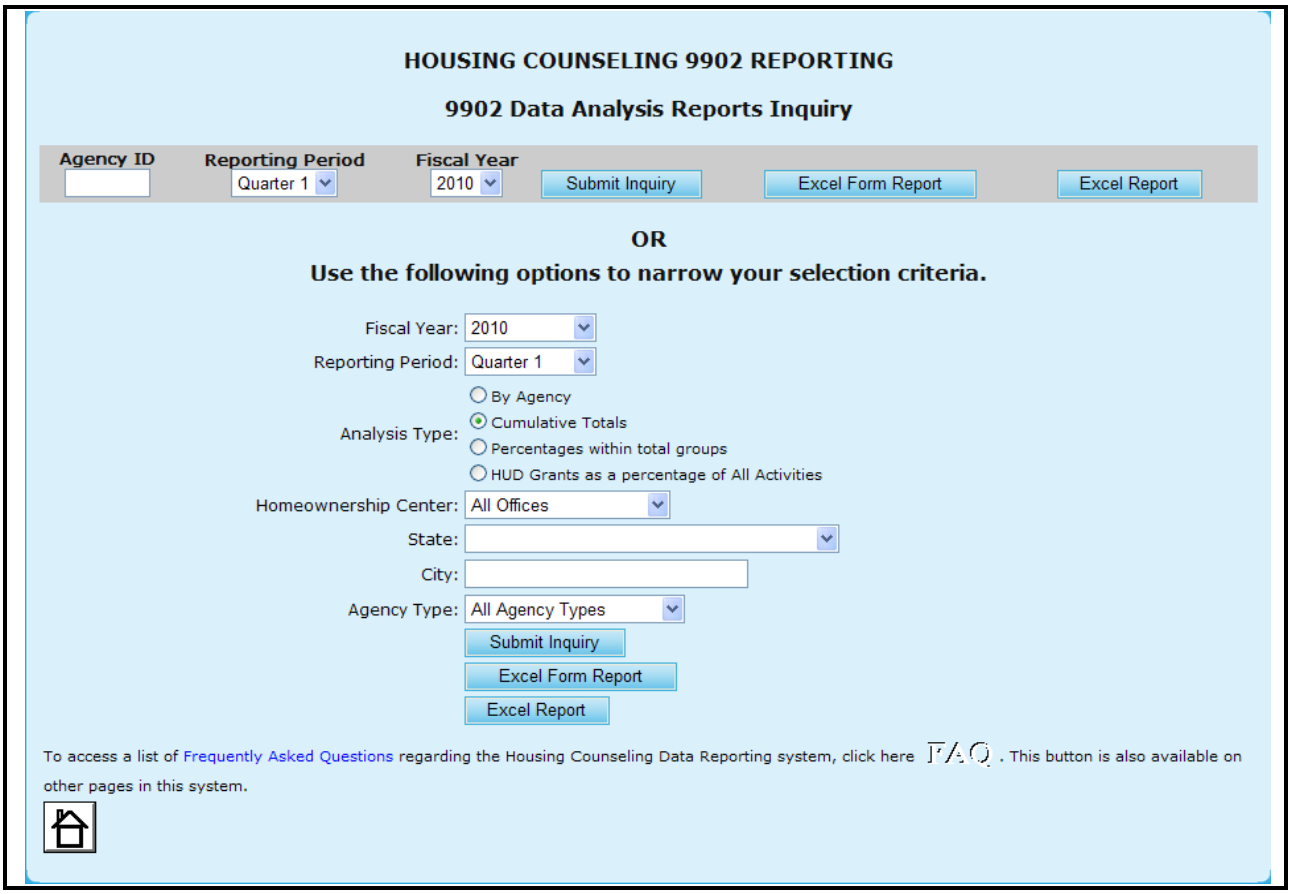


Figure 57.A. GTR – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry

3. Key in agency ID into **Agency ID** field and click the **Submit Inquiry** button, a read-only 9902 report appears. If a non-parent agency ID is keyed in, an individual 9902 report is displayed. Otherwise, a consolidated 9902 report will be displayed.

4. Key in agency ID into **Agency ID** field and click the **Excel Report** button, the *File Download* window appears. Follow the prompt to **Open** or to **Save** 9902 data in Excel spreadsheet.

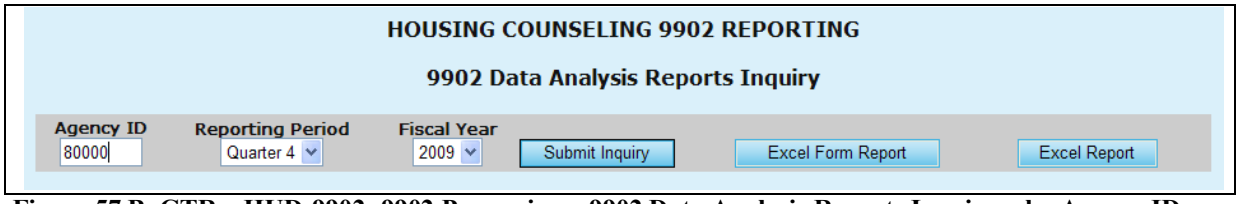


Figure 57.B. GTR – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – by Agency ID

Note: Provided below is an example of a Data Analysis Report when pressing Submit Inquiry.

DELAWARE OPPORTUNITIES, INCORPORATED

Agency ID: 80000
Agency Type: LHCA
HUD Office GTR: Glen Stopera
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	4	0.00
b. Not Hispanic	129	0.00
c. Chose not to respond	0	0.00
Section 3 Total:	133	0.00
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0	0.00
b. Asian	1	0.00
c. Black or African American	11	0.00
d. Native Hawaiian or Other Pacific Islander	1	0.00
e. White	118	0.00
Multi-Race		
f. American Indian or Alaska Native and White	0	0.00
g. Asian and White	0	0.00
h. Black or African American and White	1	0.00
i. American Indian or Alaska Native and Black or African American	0	0.00
j. Other multiple race	0	0.00
k. Chose not to respond	1	0.00
Section 4 Total:	133	0.00
5. Income Levels		
a. < 50% of Area Median Income (AMI)	14	0.00
b. 50 - 79% of AMI	85	0.00
c. 80 - 100% of AMI	34	0.00
d. > 100% AMI	0	0.00
e. Chose not to respond	0	0.00
Section 5 Total:	133	0.00
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	3	0.00
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	2	0.00
c. Completed resolving or preventing mortgage delinquency workshop	0	0.00
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0.00
e. Completed fair housing workshop	0	0.00
f. Completed predatory lending workshop	0	0.00
g. Completed rental workshop	0	0.00
h. Other workshop	0	0.00
Group Session / Section 6 Total:	5	0.00
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	3	0.00
2) Client will be mortgage ready within 90 days	5	0.00
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	0	0.00
4) Receiving long term pre-purchase counseling	1	0.00
5) Entered lease purchase progra	0	0.00
6) Decided Not to purchase housing; no further effort to prepare needed	1	0.00
7) Withdrew from counseling	1	0.00
8) Other	0	0.00
Section 7a Sub-total:	11	0.00

b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	0	0.00
2) Mortgage refinanced	0	0.00
3) Mortgage modified	0	0.00
4) Received second mortgage	0	0.00
5) Initiated forbearance agreement/repayment plan	0	0.00
6) Executed a deed-in-lieu	0	0.00
7) Sold property/chose alternative housing solution	0	0.00
8) Pre-forclosure sale	0	0.00
9) Mortgage foreclosed	0	0.00
10) Counseled and referred to another social service or emergency assistance agency	0	0.00
11) Obtained partial claim loan from FHA lender	0	0.00
12) Bankruptcy	0	0.00
13) Entered debt management plan	0	0.00
14) Counseled and referred for legal assistance	0	0.00
15) Currently receiving foreclosure prevention/budget counseling	0	0.00
16) Withdrew from counseling	0	0.00
17) Other	0	0.00
Section 7b Sub-total:	0	0.00
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	115	0.00
2) Counseled on HECM; decided not to obtain mortgage	2	0.00
3) Obtained a non-FHA reverse mortgage	0	0.00
4) Received home equity or home improvement loan or other home repair assistance	0	0.00
5) Received consumer loan (unsecured)	0	0.00
6) Mortgage refinanced	0	0.00
7) Counseled and referred to other social service agency	0	0.00
8) Sold house/chose alternative housing solution	0	0.00
9) Completed financial management/budget counseling	0	0.00
10) Completed home maintenance counseling	0	0.00
11) Counseled and utilities brought current	0	0.00
12) Counseled and referred for legal assistance	0	0.00
13) Currently receiving counseling	0	0.00
14) Withdrew from counseling	0	0.00
15) Other	0	0.00
Section 7c Sub-total:	117	0.00
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	0	0.00
2) Obtained temporary rental relief	0	0.00
3) Counseled and referred to agency with rental assistance program	0	0.00
4) Advised on recertification for HUD/other subsidy program	0	0.00
5) Counseled and referred to other social service agency	0	0.00
6) Counseled and referred to legal aid agency for fair housing assistance	0	0.00
7) Counseled and referred to legal aid agency for assistance with eviction	0	0.00
8) Found alternative rental housing	0	0.00
9) Decided to remain in current housing situation	0	0.00
10) Resolved issue in current tenancy	0	0.00
11) Entered debt management/repayment plan	0	0.00
12) Counseled and utilities brought current	0	0.00
13) Resolved security deposit dispute	0	0.00
14) Currently receiving counseling	0	0.00
15) Withdrew from counseling	0	0.00
16) Other	0	0.00
Section 7d Sub-total:	0	0.00
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	0	0.00
2) Occupied transitional housing	0	0.00
3) Occupied permanent housing with rental assistance	0	0.00
4) Occupied permanent housing without rental assistance	0	0.00
5) Counseled Referred to other social service agency	0	0.00
6) Remained homeless	0	0.00
7) Currently receiving counseling	0	0.00
8) Withdrew from counseling	0	0.00
9) Other	0	0.00
Section 7e Sub-total:	0	0.00
Individual Counseling / Section 7 a-e Total:	128	0.00
Total Counseling / Section 6 and 7 Total:	133	0.00

8. HUD Housing Counseling Grant(s) Data		
HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$0.00

Figure 58.A. GTR – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – Individual 9902 Report

Note: Provided below is an example of a Data Analysis Report when pressing the **Excel Form Report** button.

A1 DELAWARE OPPORTUNITIES, INCORPORATED

	A	B	C	D	E
1	**DELAWARE OPPORTUNITIES, INCORPORATED**				
2	**Agency ID:** 80000				
3	**Report Period:** HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009				
4	**Fiscal Year:** 2009				
5		All Counseling and	Counseling and Education Activities Attributed to HUD Housing Counseling		
6		Education Activities	Grant		
7	3. Ethnicity of Clients (select only one)				
8	a. Hispanic	4	0		
9	b. Not Hispanic	129	0		
10	c. Chose not to respond	0	0		
11	Section 3 Total:	133	0		
12	4. Race of Clients				
13	**Single Race**				
14	a. American Indian/Alaskan Native	0	0		
15	b. Asian	1	0		
16	c. Black or African American	11	0		
17	d. Native Hawaiian or Other Pacific Islander	1	0		
18	e. White	118	0		
19	**Multi-Race**				
20	f. American Indian or Alaska Native and White	0	0		
21	g. Asian and White	0	0		
22	h. Black or African American and White	1	0		
23	i. American Indian or Alaska Native and Black or African American	0	0		
24	j. Other multiple race	0	0		
25	k. Chose not to respond	1	0		
26	Section 4 Total:	133	0		

Figure 58.B. GTR – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry –9902 Excel Form Report Spreadsheet

Note: Provided below is an example of a Data Analysis Report when pressing the **Excel Report** button.

A1 DELAWARE OPPORTUNITIES, INCORPORATED

	A	B	C	D	E
1	**DELAWARE OPPORTUNITIES, INCORPORATED**				
2	**Agency ID:** 80000				
3	**Report Period:** HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009				
4	**Fiscal Year:** 2009				
5					
6	Agency ID	Ethnicity_Clients_Counseling_Hispanic_all	Ethnicity_Clients_Counseling_Hispanic_hud	Ethnicity_Clients_Counseling_Non_Hispanic_all	Ethnicity_Clients_Counseling_hud
7	80000	4	0	129	
8					

(data abbreviated)

Figure 58.C. GTR – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry –9902 Excel Report Spreadsheet

5. If the default **Cumulative Totals** criteria is chosen for Analysis Type, the *Cumulative Totals* report will be prompted, as depicted below. By pressing either the **Excel Form Report** or **Excel Report** buttons, you will be prompted to similar reports as illustrated in Step 4.

Cumulative Totals

HOC: All Offices
Agency Type: All Agency Types
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	498,079	59,425.51
b. Not Hispanic	2,061,154	278,568.97
c. Chose not to respond	430,677	33,571.67
Section 3 Total:	2,989,910	371,566.15
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	24,729	4,616.63
b. Asian	68,199	6,206.53
c. Black or African American	846,978	117,424.24
d. Native Hawaiian or Other Pacific Islander	14,912	1,794.28
e. White	1,310,642	181,519.80
Multi-Race		
f. American Indian or Alaska Native and White	6,236	931.13
g. Asian and White	4,106	501.93
h. Black or African American and White	19,785	2,591.11
i. American Indian or Alaska Native and Black or African American	2,968	422.22
j. Other multiple race	192,178	18,566.43
k. Chose not to respond	505,379	37,422.81
Section 4 Total:	2,996,112	371,997.11
5. Income Levels		
a. < 50% of Area Median Income (AMI)	1,070,242	158,837.61
b. 50 - 79% of AMI	619,615	88,735.09
c. 80 - 100% of AMI	283,499	35,948.79
d. > 100% AMI	335,236	32,513.20
e. Chose not to respond	678,008	54,911.26
Section 5 Total:	2,986,600	370,945.95
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	186,377	37,950.50
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	124,537	20,107.26
c. Completed resolving or preventing mortgage delinquency workshop	54,274	9,106.57
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	14,801	2,902.63
e. Completed fair housing workshop	12,361	1,730.57
f. Completed predatory lending workshop	14,989	2,218.11
g. Completed rental workshop	20,207	5,694.89
h. Other workshop	337,180	24,526.38
Group Session / Section 6 Total:	764,726	104,236.91
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	34,168	7,312.68
2) Client will be mortgage ready within 90 days	67,330	13,031.85
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	35,399	7,659.90
4) Receiving long term pre-purchase counseling	48,509	9,993.02
5) Entered lease purchase progra	607	104.34
6) Decided Not to purchase housing; no further effort to prepare needed	6,740	1,372.07
7) Withdrew from counseling	24,389	3,498.80
8) Other	16,873	3,204.65
Section 7a Sub-total:	234,015	46,177.31

b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	41,170	4,338.38
2) Mortgage refinanced	13,599	917.72
3) Mortgage modified	218,799	18,059.16
4) Received second mortgage	14,017	545.40
5) Initiated forbearance agreement/repayment plan	80,715	7,528.13
6) Executed a deed-in-lieu	3,892	235.31
7) Sold property/chose alternative housing solution	9,829	681.13
8) Pre-forclosure sale	27,011	1,356.88
9) Mortgage foreclosed	18,408	1,722.50
10) Counseled and referred to another social service or emergency assistance agency	83,169	5,764.14
11) Obtained partial claim loan from FHA lender	2,649	286.87
12) Bankruptcy	43,129	3,638.79
13) Entered debt management plan	18,265	1,909.95
14) Counseled and referred for legal assistance	21,295	2,700.70
15) Currently receiving foreclosure prevention/budget counseling	528,677	47,816.46
16) Withdrew from counseling	74,659	5,710.59
17) Other	202,909	17,545.51
Section 7b Sub-total:	1,402,192	120,757.62
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	116,647	15,653.38
2) Counseled on HECM; decided not to obtain mortgage	23,162	2,577.15
3) Obtained a non-FHA reverse mortgage	502	71.34
4) Received home equity or home improvement loan or other home repair assistance	6,880	1,538.77
5) Received consumer loan (unsecured)	402	80.63
6) Mortgage refinanced	1,703	214.64
7) Counseled and referred to other social service agency	7,471	1,236.24
8) Sold house/chose alternative housing solution	1,650	101.63
9) Completed financial management/budget counseling	24,393	3,420.69
10) Completed home maintenance counseling	4,513	589.00
11) Counseled and utilities brought current	10,417	1,367.82
12) Counseled and referred for legal assistance	7,201	1,110.38
13) Currently receiving counseling	32,791	6,856.23
14) Withdrew from counseling	6,596	1,078.75
15) Other	19,897	1,935.51
Section 7c Sub-total:	264,225	37,832.16
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	35,366	5,817.78
2) Obtained temporary rental relief	19,078	4,834.89
3) Counseled and referred to agency with rental assistance program	11,070	2,527.34
4) Advised on recertification for HUD/other subsidy program	16,738	4,394.14
5) Counseled and referred to other social service agency	13,180	2,467.68
6) Counseled and referred to legal aid agency for fair housing assistance	3,280	522.73
7) Counseled and referred to legal aid agency for assistance with eviction	17,041	1,940.27
8) Found alternative rental housing	9,173	1,728.94
9) Decided to remain in current housing situation	29,942	5,133.64
10) Resolved issue in current tenancy	23,810	3,418.16
11) Entered debt management/repayment plan	7,898	1,562.10
12) Counseled and utilities brought current	26,052	3,662.19
13) Resolved security deposit dispute	5,827	585.61
14) Currently receiving counseling	43,308	6,246.32
15) Withdrew from counseling	6,310	1,118.38
16) Other	35,865	5,982.83
Section 7d Sub-total:	303,938	51,943.00
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	25,979	6,420.77
2) Occupied transitional housing	4,098	546.15
3) Occupied permanent housing with rental assistance	8,014	1,788.51
4) Occupied permanent housing without rental assistance	2,932	496.03
5) Counseled Referred to other social service agency	4,836	755.84
6) Remained homeless	3,148	547.89
7) Currently receiving counseling	7,089	1,734.12
8) Withdrew from counseling	1,316	406.81
9) Other	2,166	316.56
Section 7e Sub-total:	59,578	13,012.68
Individual Counseling / Section 7 a-e Total:	2,263,948	269,722.77
Total Counseling / Section 6 and 7 Total:	3,028,674	373,959.68

8. HUD Housing Counseling Grant(s) Data		
HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$41,502,773.55

Figure 59. GTR – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – Cumulative Totals Report

6. If the default **By Agency** criteria is chosen for Analysis Type, the *By Agency* report will be prompted, as depicted below. By pressing either the **Excel Form Report** or **Excel Report** buttons, you will be prompted to similar reports as illustrated in Step 4.

Reporting Period: HUD-9902 Data from Oct 1, 2009 to Dec 31, 2009
Fiscal Year: 2010

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	15,563	1,978.90
b. Not Hispanic	61,932	12,318.99
c. Chose not to respond	19,267	558.22
Section 3 Total:	96,762	14,856.11
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	427	113.36
b. Asian	1,320	156.63
c. Black or African American	29,370	6,911.16
d. Native Hawaiian or Other Pacific Islander	169	28.13
e. White	44,754	6,630.25
Multi-Race		
f. American Indian or Alaska Native and White	135	17.71
g. Asian and White	83	10.96
h. Black or African American and White	638	140.25
i. American Indian or Alaska Native and Black or African American	51	6.31
j. Other multiple race	4,033	390.16
k. Chose not to respond	15,994	487.42
Section 4 Total:	96,974	14,892.34
5. Income Levels		
a. < 50% of Area Median Income (AMI)	37,313	7,400.64
b. 50 - 79% of AMI	22,147	3,721.23
c. 80 - 100% of AMI	9,956	1,772.53
d. > 100% AMI	9,392	1,064.57
e. Chose not to respond	18,044	852.74
Section 5 Total:	96,852	14,811.71

6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	7,638	1,529.39
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	11,019	1,143.23
c. Completed resolving or preventing mortgage delinquency workshop	1,518	202.76
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	501	204.05
e. Completed fair housing workshop	156	67.72
f. Completed predatory lending workshop	229	31.45
g. Completed rental workshop	546	250.17
h. Other workshop	5,568	395.40
Group Session / Section 6 Total:	27,175	3,824.17
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	1,418	266.96
2) Client will be mortgage ready within 90 days	1,854	395.64
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	1,523	345.40
4) Receiving long term pre-purchase counseling	2,845	685.05
5) Entered lease purchase progra	22	15.76
6) Decided Not to purchase housing; no further effort to prepare needed	273	61.38
7) Withdrew from counseling	535	85.69
8) Other	536	104.44
Section 7a Sub-total:	9,006	1,960.32
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	1,908	119.95
2) Mortgage refinanced	875	30.72
3) Mortgage modified	5,729	458.46
4) Received second mortgage	2,259	6.92
5) Initiated forbearance agreement/repayment plan	2,731	382.73
6) Executed a deed-in-lieu	368	15.17
7) Sold property/chose alternative housing solution	433	21.31
8) Pre-forclosure sale	257	22.81
9) Mortgage foreclosed	1,033	39.49
10) Counseled and referred to another social service or emergency assistance agency	748	108.54
11) Obtained partial claim loan from FHA lender	160	7.17

12) Bankruptcy	2,875	127.45
13) Entered debt management plan	447	12.77
14) Counseled and referred for legal assistance	691	131.89
15) Currently receiving foreclosure prevention/budget counseling	12,118	2,042.43
16) Withdrew from counseling	2,032	165.95
17) Other	2,092	151.74
Section 7b Sub-total:	36,756	3,845.50
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	5,318	592.52
2) Counseled on HECM; decided not to obtain mortgage	518	49.35
3) Obtained a non-FHA reverse mortgage	37	3.27
4) Received home equity or home improvement loan or other home repair assistance	267	49.29
5) Received consumer loan (unsecured)	16	0.00
6) Mortgage refinanced	270	1.08
7) Counseled and referred to other social service agency	80	21.82
8) Sold house/chose alternative housing solution	6	1.87
9) Completed financial management/budget counseling	718	433.60
10) Completed home maintenance counseling	142	63.97
11) Counseled and utilities brought current	397	107.79
12) Counseled and referred for legal assistance	807	108.87
13) Currently receiving counseling	2,751	706.75
14) Withdrew from counseling	513	71.78
15) Other	2,387	63.76
Section 7c Sub-total:	14,227	2,275.72
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	691	328.39
2) Obtained temporary rental relief	732	165.48
3) Counseled and referred to agency with rental assistance program	260	69.22
4) Advised on recertification for HUD/other subsidy program	952	421.82
5) Counseled and referred to other social service agency	620	164.96
6) Counseled and referred to legal aid agency for fair housing assistance	26	1.40
7) Counseled and referred to legal aid agency for assistance with eviction	61	7.92
8) Found alternative rental housing	297	113.11
9) Decided to remain in current housing situation	563	136.13
10) Resolved issue in current tenancy	946	124.91
11) Entered debt management/repayment plan	113	59.35
12) Counseled and utilities brought current	570	71.71
13) Resolved security deposit dispute	8	23.42
14) Currently receiving counseling	1,697	594.99
15) Withdrew from counseling	154	51.31
16) Other	1,565	208.79
Section 7d Sub-total:	9,255	2,542.91
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	77	13.58
2) Occupied transitional housing	106	40.74
3) Occupied permanent housing with rental assistance	140	103.70
4) Occupied permanent housing without rental assistance	54	20.94
5) Counseled Referred to other social service agency	248	164.96
6) Remained homeless	167	71.09
7) Currently receiving counseling	112	16.51
8) Withdrew from counseling	104	36.74
9) Other	158	26.09
Section 7e Sub-total:	1,166	494.35
Individual Counseling / Section 7 a-e Total:	70,410	11,118.80
Total Counseling / Section 6 and 7 Total:	97,585	14,942.97

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$9,475,101.32

Figure 60. GTR – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – By Agency Report

7. If the default **Percentages Within Total Group** criteria is chosen for Analysis Type, the *Percentages Within Total Group* report will be prompted, as depicted below. By pressing either the Excel Form Report or Excel Report buttons, you will be prompted to similar reports as illustrated in Step 4.

Percentages Within Total Groups

HOC: All Offices
Agency Type: All Agency Types
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	16.7%	16.0%
b. Not Hispanic	68.9%	75.0%
c. Chose not to respond	14.4%	9.0%
Section 3 Total:	100.0%	100.0%
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0.8%	1.2%
b. Asian	2.3%	1.7%
c. Black or African American	28.3%	31.6%
d. Native Hawaiian or Other Pacific Islander	0.5%	0.5%
e. White	43.7%	48.8%
Multi-Race		
f. American Indian or Alaska Native and White	0.2%	0.3%
g. Asian and White	0.1%	0.1%
h. Black or African American and White	0.7%	0.7%
i. American Indian or Alaska Native and Black or African American	0.1%	0.1%
j. Other multiple race	6.4%	5.0%
k. Chose not to respond	16.9%	10.1%
Section 4 Total:	100.0%	100.0%
5. Income Levels		
a. < 50% of Area Median Income (AMI)	35.8%	42.8%
b. 50 - 79% of AMI	20.7%	23.9%
c. 80 - 100% of AMI	9.5%	9.7%
d. > 100% AMI	11.2%	8.8%
e. Chose not to respond	22.7%	14.8%
Section 5 Total:	100.0%	100.0%
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	24.4%	36.4%
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	16.3%	19.3%
c. Completed resolving or preventing mortgage delinquency workshop	7.1%	8.7%
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	1.9%	2.8%
e. Completed fair housing workshop	1.6%	1.7%
f. Completed predatory lending workshop	2.0%	2.1%
g. Completed rental workshop	2.6%	5.5%
h. Other workshop	44.1%	23.5%
Group Session / Section 6 Total:	100.0%	100.0%
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	14.6%	15.8%
2) Client will be mortgage ready within 90 days	28.8%	28.2%
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	15.1%	16.6%
4) Receiving long term pre-purchase counseling	20.7%	21.6%
5) Entered lease purchase progra	0.3%	0.2%
6) Decided Not to purchase housing; no further effort to prepare needed	2.9%	3.0%
7) Withdrew from counseling	10.4%	7.6%
8) Other	7.2%	6.9%
Section 7a Sub-total:	100.0%	100.0%
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	2.9%	3.6%
2) Mortgage refinanced	1.0%	0.8%
3) Mortgage modified	15.6%	15.0%
4) Received second mortgage	1.0%	0.5%
5) Initiated forbearance agreement/repayment plan	5.8%	6.2%
6) Executed a deed-in-lieu	0.3%	0.2%
7) Sold property/chose alternative housing solution	0.7%	0.6%

8) Other	7.2%	6.9%
Section 7a Sub-total:	100.0%	100.0%
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	2.9%	3.6%
2) Mortgage refinanced	1.0%	0.8%
3) Mortgage modified	15.6%	15.0%
4) Received second mortgage	1.0%	0.5%
5) Initiated forbearance agreement/repayment plan	5.8%	6.2%
6) Executed a deed-in-lieu	0.3%	0.2%
7) Sold property/chose alternative housing solution	0.7%	0.6%
8) Pre-forclosure sale	1.9%	1.1%
9) Mortgage foreclosed	1.3%	1.4%
10) Counseled and referred to another social service or emergency assistance agency	5.9%	4.8%
11) Obtained partial claim loan from FHA lender	0.2%	0.2%
12) Bankruptcy	3.1%	3.0%
13) Entered debt management plan	1.3%	1.6%
14) Counseled and referred for legal assistance	1.5%	2.2%
15) Currently receiving foreclosure prevention/budget counseling	37.7%	39.6%
16) Withdrew from counseling	5.3%	4.7%
17) Other	14.5%	14.5%
Section 7b Sub-total:	100.0%	100.0%
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	44.1%	41.4%
2) Counseled on HECM; decided not to obtain mortgage	8.8%	6.8%
3) Obtained a non-FHA reverse mortgage	0.2%	0.2%
4) Received home equity or home improvement loan or other home repair assistance	2.6%	4.1%
5) Received consumer loan (unsecured)	0.2%	0.2%
6) Mortgage refinanced	0.6%	0.6%
7) Counseled and referred to other social service agency	2.8%	3.3%
8) Sold house/chose alternative housing solution	0.6%	0.3%
9) Completed financial management/budget counseling	9.2%	9.0%
10) Completed home maintenance counseling	1.7%	1.6%
11) Counseled and utilities brought current	3.9%	3.6%
12) Counseled and referred for legal assistance	2.7%	2.9%
13) Currently receiving counseling	12.4%	18.1%
14) Withdrew from counseling	2.5%	2.9%
15) Other	7.5%	5.1%
Section 7c Sub-total:	100.0%	100.0%
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	11.6%	11.2%
2) Obtained temporary rental relief	6.3%	9.3%
3) Counseled and referred to agency with rental assistance program	3.6%	4.9%
4) Advised on recertification for HUD/other subsidy program	5.5%	8.5%
5) Counseled and referred to other social service agency	4.3%	4.8%
6) Counseled and referred to legal aid agency for fair housing assistance	1.1%	1.0%
7) Counseled and referred to legal aid agency for assistance with eviction	5.6%	3.7%
8) Found alternative rental housing	3.0%	3.3%
9) Decided to remain in current housing situation	9.9%	9.9%
10) Resolved issue in current tenancy	7.8%	6.6%
11) Entered debt management/repayment plan	2.6%	3.0%
12) Counseled and utilities brought current	8.6%	7.1%
13) Resolved security deposit dispute	1.9%	1.1%
14) Currently receiving counseling	14.2%	12.0%
15) Withdrew from counseling	2.1%	2.2%
16) Other	11.8%	11.5%
Section 7d Sub-total:	100.0%	100.0%
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	43.6%	49.3%
2) Occupied transitional housing	6.9%	4.2%
3) Occupied permanent housing with rental assistance	13.5%	13.7%
4) Occupied permanent housing without rental assistance	4.9%	3.8%
5) Counseled Referred to other social service agency	8.1%	5.8%
6) Remained homeless	5.3%	4.2%
7) Currently receiving counseling	11.9%	13.3%
8) Withdrew from counseling	2.2%	3.1%
9) Other	3.6%	2.4%
Section 7e Sub-total:	100.0%	100.0%
Individual Counseling / Section 7 a-e Total:	100.0%	100.0%
Total Counseling / Section 6 and 7 Total:	100.0%	100.0%

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$41,502,773.55

Figure 61. GTR – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – Percentages Within Total Groups Report

8. If the default **HUD Grants as a Percentage of All Activities** criteria is chosen for Analysis Type, the *HUD Grants as a Percentage of All Activities* report will be prompted, as depicted below. By pressing either the Excel Form Report or Excel Report buttons, you will be prompted to similar reports as illustrated in Step 4.

HUD Grants as a Percentage of All Activities

HOC: All Offices
Agency Type: All Agency Types
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	100.0%	11.9%
b. Not Hispanic	100.0%	13.5%
c. Chose not to respond	100.0%	7.8%
Section 3 Total:	100.0%	12.4%
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	100.0%	18.7%
b. Asian	100.0%	9.1%
c. Black or African American	100.0%	13.9%
d. Native Hawaiian or Other Pacific Islander	100.0%	12.0%
e. White	100.0%	13.8%
Multi-Race		
f. American Indian or Alaska Native and White	100.0%	14.9%
g. Asian and White	100.0%	12.2%
h. Black or African American and White	100.0%	13.1%
i. American Indian or Alaska Native and Black or African American	100.0%	14.2%
j. Other multiple race	100.0%	9.7%
k. Chose not to respond	100.0%	7.4%
Section 4 Total:	100.0%	12.4%
5. Income Levels		
a. < 50% of Area Median Income (AMI)	100.0%	14.8%
b. 50 - 79% of AMI	100.0%	14.3%
c. 80 - 100% of AMI	100.0%	12.7%
d. > 100% AMI	100.0%	9.7%
e. Chose not to respond	100.0%	8.1%
Section 5 Total:	100.0%	12.4%
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	100.0%	20.4%
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	100.0%	16.1%
c. Completed resolving or preventing mortgage delinquency workshop	100.0%	16.8%
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	100.0%	19.6%
e. Completed fair housing workshop	100.0%	14.0%
f. Completed predatory lending workshop	100.0%	14.8%
g. Completed rental workshop	100.0%	28.2%
h. Other workshop	100.0%	7.3%
Group Session / Section 6 Total:	100.0%	13.6%
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	100.0%	21.4%
2) Client will be mortgage ready within 90 days	100.0%	19.4%
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	100.0%	21.6%
4) Receiving long term pre-purchase counseling	100.0%	20.6%
5) Entered lease purchase progra	100.0%	17.2%
6) Decided Not to purchase housing; no further effort to prepare needed	100.0%	20.4%
7) Withdrew from counseling	100.0%	14.3%
8) Other	100.0%	19.0%
Section 7a Sub-total:	100.0%	19.7%
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	100.0%	10.5%
2) Mortgage refinanced	100.0%	6.7%
3) Mortgage modified	100.0%	8.3%
4) Received second mortgage	100.0%	3.9%
5) Initiated forbearance agreement/repayment plan	100.0%	9.3%
6) Executed a deed-in-lieu	100.0%	6.0%
7) Sold property/chose alternative housing solution	100.0%	6.9%

8) Pre-forclosure sale	100.0%	5.0%
9) Mortgage foreclosed	100.0%	9.4%
10) Counseled and referred to another social service or emergency assistance agency	100.0%	6.9%
11) Obtained partial claim loan from FHA lender	100.0%	10.8%
12) Bankruptcy	100.0%	8.4%
13) Entered debt management plan	100.0%	10.5%
14) Counseled and referred for legal assistance	100.0%	12.7%
15) Currently receiving foreclosure prevention/budget counseling	100.0%	9.0%
16) Withdrew from counseling	100.0%	7.6%
17) Other	100.0%	8.6%
Section 7b Sub-total:	100.0%	8.6%
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	100.0%	13.4%
2) Counseled on HECM; decided not to obtain mortgage	100.0%	11.1%
3) Obtained a non-FHA reverse mortgage	100.0%	14.2%
4) Received home equity or home improvement loan or other home repair assistance	100.0%	22.4%
5) Received consumer loan (unsecured)	100.0%	20.1%
6) Mortgage refinanced	100.0%	12.6%
7) Counseled and referred to other social service agency	100.0%	16.5%
8) Sold house/chose alternative housing solution	100.0%	6.2%
9) Completed financial management/budget counseling	100.0%	14.0%
10) Completed home maintenance counseling	100.0%	13.1%
11) Counseled and utilities brought current	100.0%	13.1%
12) Counseled and referred for legal assistance	100.0%	15.4%
13) Currently receiving counseling	100.0%	20.9%
14) Withdrew from counseling	100.0%	16.4%
15) Other	100.0%	9.7%
Section 7c Sub-total:	100.0%	14.3%
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	100.0%	16.5%
2) Obtained temporary rental relief	100.0%	25.3%
3) Counseled and referred to agency with rental assistance program	100.0%	22.8%
4) Advised on recertification for HUD/other subsidy program	100.0%	26.3%
5) Counseled and referred to other social service agency	100.0%	18.7%
6) Counseled and referred to legal aid agency for fair housing assistance	100.0%	15.9%
7) Counseled and referred to legal aid agency for assistance with eviction	100.0%	11.4%
8) Found alternative rental housing	100.0%	18.8%
9) Decided to remain in current housing situation	100.0%	17.1%
10) Resolved issue in current tenancy	100.0%	14.4%
11) Entered debt management/repayment plan	100.0%	19.8%
12) Counseled and utilities brought current	100.0%	14.1%
13) Resolved security deposit dispute	100.0%	10.0%
14) Currently receiving counseling	100.0%	14.4%
15) Withdrew from counseling	100.0%	17.7%
16) Other	100.0%	16.7%
Section 7d Sub-total:	100.0%	17.1%
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	100.0%	24.7%
2) Occupied transitional housing	100.0%	13.3%
3) Occupied permanent housing with rental assistance	100.0%	22.3%
4) Occupied permanent housing without rental assistance	100.0%	16.9%
5) Counseled Referred to other social service agency	100.0%	15.6%
6) Remained homeless	100.0%	17.4%
7) Currently receiving counseling	100.0%	24.5%
8) Withdrew from counseling	100.0%	30.9%
9) Other	100.0%	14.6%
Section 7e Sub-total:	100.0%	21.8%
Individual Counseling / Section 7 a-e Total:	100.0%	16.3%
Total Counseling / Section 6 and 7 Total:	100.0%	15.9%

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$41,502,773.55

Figure 62. GTR – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – HUD Grants as a Percentage of All Activities Report

7.3 Grants

The U.S. Department of Housing and Urban Development (HUD) administers a comprehensive housing counseling program and provides grants through competitive awards to approved local housing counseling agencies, national and regional intermediaries, and state housing finance agencies. Using the HCS **Grant Processing** feature, you can: Setup Grant Applications: The Setup Grant Applications function sets up grant applications.

- **Scoring:** The Scoring function rates and ranks grant applications.

- **Final Scoring for Primary Reviewers:** This sorts the scoring out by the reviewers for each application.
- **Calculate Recommended Awards:** This calculates and submits the recommended awards.
- **Input Awards/Sub Allocations:** This allows you to input awards and sub allocations based on sub-agencies.

While logged in as a GTR, you will see the following Grants Processing menu of options:

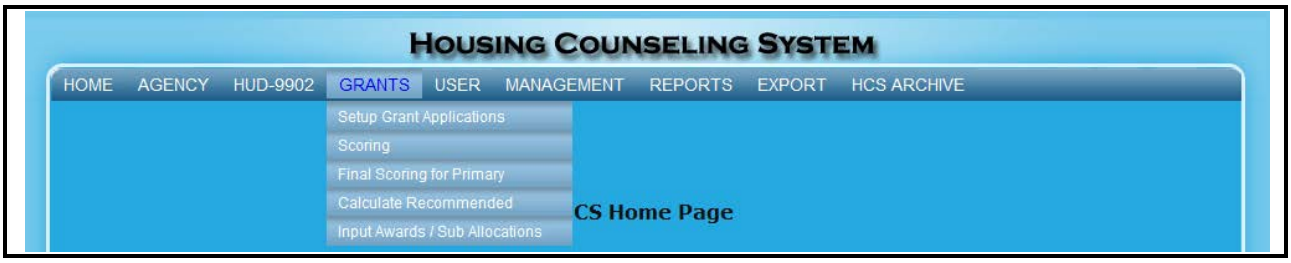


Figure 63. GTR – Grants: Grants Menu

7.3.1 Grant Application Process

The Grant Application Process sets up the HCS system for the entire year. The Grant Application Process involves:

- **Setup Grant Applications**
- **Scoring**
- **Final Scoring for Primary Reviewers**
- **Calculate Recommended Awards**
- **Input Awards/Sub Allocations**

The sections below explain each grant applications step in detail.

7.3.2 Setup Grant Application

As a GTR, you can setup grant applications for the agencies you are in charge of. To setup a grant application follow the steps below.

1. From the upper navigation menu, click the **Setup Grant Application** hyperlink. The *Setup Grant Applications for FY 20XX* screen appears, displaying a list of existing grant applications based on your HUD Office.

2. To view specific grant applications, by agency, select a grant type as illustrated in Figure 64.

Setup Grant Applications - for FY 2010

Denver (HOC) office view

Grant Application by Office	Grant Type	# of Apps	# of Agency
Denver (HOC) GTR REVIEWER RULE:	LHCA-COMP	0	0
	LHCA-HECM	0	
	LHCA-MMSA	0	
	MSO-COMP	0	
	MSO-HECM	0	
	SHFA-COMP	0	
	SHFA-HECM	0	
Total Applications	146		
Total Agencies	0		

Figure 64. GTR – Grants: Grant Applications by HUD Office for FY 20XX

3. Click an agency name in the Agency Name column to update an existing grant application. The Agency and applicable (HOC) screen appears.

Denver

Instructions: Click on **Agency Name** title hyperlink to list the agencies in Agency Name and HUD Office order. Click on **Agency ID** title hyperlink to list the agencies in Agency ID and HUD Office order. Click on **Agency Type** title hyperlink to list the agencies in Agency Type, Agency Name, and HUD Office order. Click on **Address** title hyperlink to list the agencies in State, Agency Name, HUD Office, and Appl ID order. Click on **HUD Office** title hyperlink to list the agencies in HUD Office and Appl ID, that is the Application ID, order.

New Application...

Agency Name	Agency ID	Agency Type	Grant Type	Address	HUD Office	Appl ID	Awarded FY 2005	Awarded FY 2006	Awarded FY 2007	Delete
JUSTINE PETERSEN HOUSING AND REINVESTMENT COR	81462	LHCA	REVERSE MORTGAGE COUNSELI	1023 N. Grand Blvd. St. Louis, MO 63106	0892	001				
LEGAL AID OF WESTERN MISSOURI	82416	LHCA	REVERSE MORTGAGE COUNSELI	1125 Grand Boulevard Kansas City, MO 64106	0892	002				
HIGH PLAINS COMMUNITY DEVELOPMENT, CORP.	81530	LHCA	REVERSE MORTGAGE COUNSELI	130 E. 2nd Street Chadron, NE 69337-2329	0892	004				
CITY OF FORT WORTH HOUSING DEPARTMENT	81140	LHCA	REVERSE MORTGAGE COUNSELI	1000 Throckmorton St Fort Worth, TX 76102	0892	005				
CCCS OF N CENTRAL TEXAS	80946	LHCA	REVERSE MORTGAGE COUNSELI	901 N. McDonald, Suite 600 McKinney, TX 75069	0892	006				
SCI-TECH DEVELOPMENT, INC. (SDI) DBA SDI	83920	LHCA	REVERSE MORTGAGE COUNSELI	5401 North 76th Street Milwaukee, WI 53218	0892	007				
EL PASO COMMUNITY ACTION PROGRAM, PROJECT BRAVO, INC.	81154	LHCA	REVERSE MORTGAGE COUNSELI	4838 Montana Ave El Paso, TX 79903	0892	008				
COMMUNITY ACTION PARTNERSHIP OF SUBURBAN HENNEPIN	80662	LHCA	REVERSE MORTGAGE COUNSELI	33 10th Ave South Hopkins, MN 55343-1303	0892	009				
COMMUNITY ACTION SERVICES	80228	LHCA	REVERSE MORTGAGE COUNSELI	815 South Freedom Blv., Suite 100 Provo, UT 84601	0892	010				

Figure 65. GTR – Grants: Grant Applications for FY 20XX

4. Edit the desired fields on the Grant Application page, and once completed select **OK** to save any changes. Select **Cancel** to go back to previous page without saving any changes.

Setup Grant Application for FY 2008

Instructions: Fill out the form below, review your information for accuracy, and click the OK button.
Projected Next Fiscal Year Enter the number of clients the agency plans to service from their grant request.
Adjusted Projections This is an automated adjustment to the Projected number of clients based on the grant amount awarded. This is provided as a reference in order to enter a realistic Committed Projections.
Committed Projections Enter the final number of clients the agency should service based on their final grant award.
* indicates required information.

Agency Name:	JUSTINE PETERSEN HOUSING AND REINVESTMENT COR	**Agency ID:**	81462	**Agency Type:**	LHCA
Fed Tax ID Num:	43-1769074	**DUNS Num:**	090336228	**Address:**	1023 N. Grand Blvd. St. Louis, MO 63106
HUD Office:	Denver (HOC)	**Application ID:**	0892 - 001	**Grant Type:**	REVERSE MORTGAGE COUNSELI

Client Outcome Projections	**Projected Next FY**	**Adjusted Projections**	**Committed Projections**
Factor 3			
Projected # of Clients that will be served			
Factor 5			
Projected # of Clients of Pre-Purchase Counseling that will purchase home			
Projected # of Clients of Pre-Purchase Counseling that are working and will become mortgage ready			
Projected # of Clients of Pre-Purchase Counseling that will not purchase a home			
Projected # of Clients of Default Counseling successfully avoiding foreclosure			
Projected # of Clients of Rental Counseling			
Factor 5 - Predatory Lending Applicants Only			
Projected # of Predatory Lending Counsel that have their mortgage modify, refinanced, or other to avoid foreclosure			

Eligibility Requirements	Delinquent in Federal Debt? ☐ **Yes**	**HUD Office GTR:**	Saddler, DeLois
Primary Reviewer:	Spragg, Diana (Inactive)	**Secondary Reviewer 1:**	Vaughn, Nanci (Inactive)
Secondary Reviewer 2:	Heiser, Patricia E	**Secondary Reviewer 3:**	(select one)

Clients Serviced Last FY: 0

Requested: $ 15000.00 *

Recommended: $ 15000.00

Prev. FY Funding: $ 0.00

2-YR Review: No

Prev. Yr. Draws: No

OK Cancel

Figure 66. GTR – Grants: Setup Grant Application for FY 20XX – Agency Detail

5. To create a new grant application for an agency, click **New Application.** The *Agency* screen appears.

Agency: Denver (HOC)

(Select One)

OK Cancel

Figure 67.A. GTR – Grants: Setup Grant Application for FY 20XX – New Application Agency Select

6. Click the drop-down arrow and select an agency for the new application.

Note: You must select an application before you click **OK**. Or, to cancel this new application, click **Cancel**.

7. Click **OK**. The *Setup Grant Application for FY 20XX* screen appears.

Setup Grant Application for FY 2008

Instructions: Fill out the form below, review your information for accuracy, and click the OK button.
Projected Next Fiscal Year □ Enter the number of clients the agency plans to service from their grant request.
Adjusted Projections □ This is an automated adjustment to the Projected number of clients based on the grant amount awarded. This is provided as a reference in order to enter a realistic Committed Projections.
Committed Projections □ Enter the final number of clients the agency should service based on their final grant award.
* indicates required information.

Agency Name:	AFFORDABLE HOUSING OF PARKER COUNTY	**Agency ID:**	83495	**Agency Type:**	LHCA
Fed Tax ID Num:	75-2946623	**DUNS Num:**	000000000	**Address:**	101 Swan Court Springtown, TX 76082
HUD Office:		**Grant Type:**			
Eligibility Requirements	Delinquent in Federal Debt? ☐ **Yes**		**HUD Office GTR:**	Massengale, Alice	
Primary Reviewer:	(select one)		**Secondary Reviewer 1:**	(select one)	
Secondary Reviewer 2:	(select one)		**Secondary Reviewer 3:**	(select one)	
2-YR Review: No					
Prev. Yr. Draws: No					

OK Cancel

Figure 67.B. GTR – Grants: Setup Grant Application for FY 20XX

7.3.3 Scoring

As a GTR you can score grant applications. This section describes how to review, edit, or delete grant application scores.

1. From the upper navigation menu, click the **Scoring** hyperlink. The *Application Scoring List Search for Fiscal Year 20XX* screen appears.

2. From here you will be able to edit your search criteria based on:
   a. Agency ID
   b. Agency Name
   c. Reviewer
   d. Application ID

3. Once you have narrowed down your search click the **Search** button to retrieve those results, or **Clear** to erase what was put into each field.

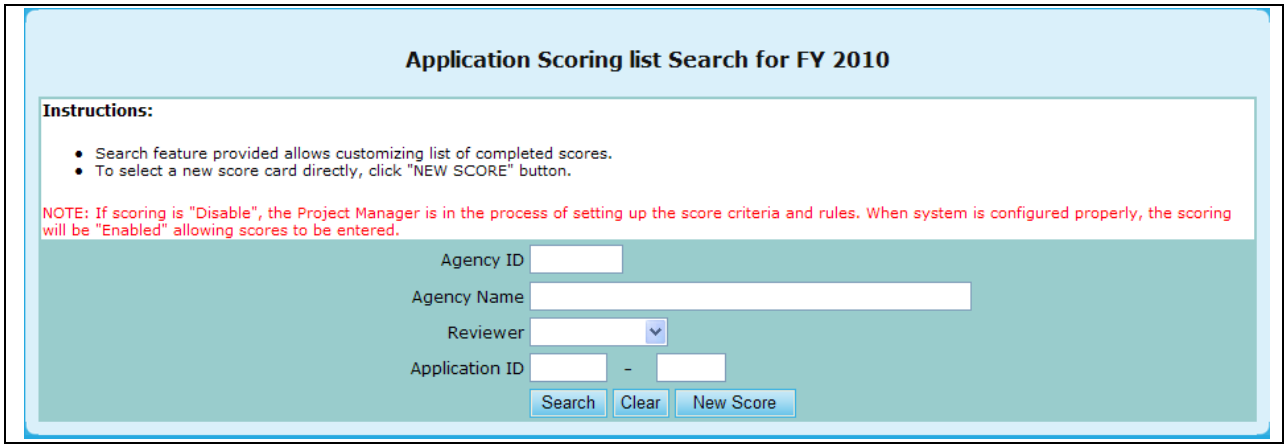


Figure 68. GTR – Scoring: Application Scoring List Search for FY 20XX

4. You will be prompted to your search results, which you can sort based off of the following criteria:
    a. Agency Name
    b. Agency ID
    c. Agency Type
    d. Application ID
    e. Reviewer

5. To open a specific scorecard, click the hyperlink under Agency Name that you would like to view.

Note: to Delete or add New Score skip to step 9.

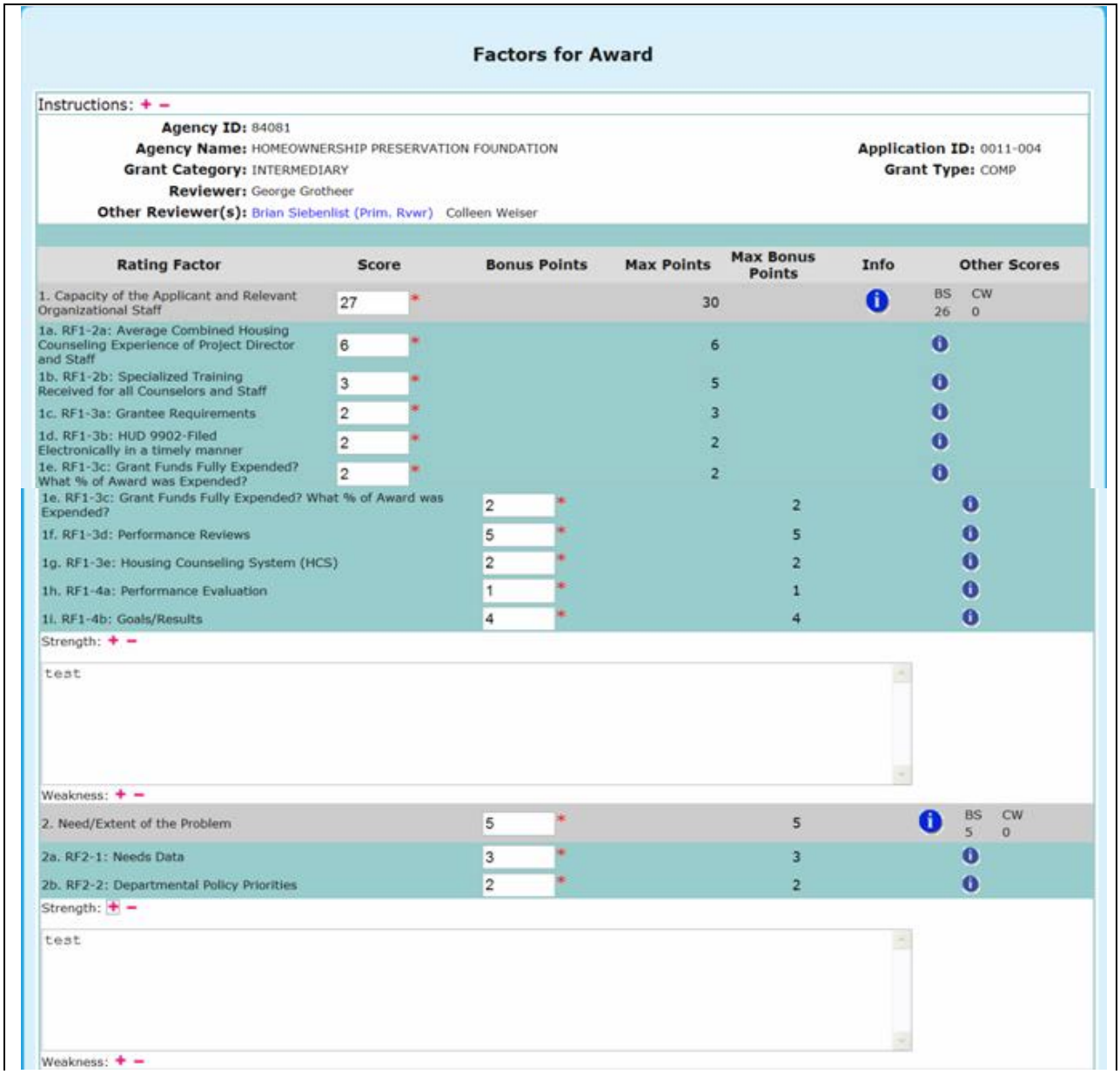
Agency Name	Agency ID	Agency Type	Grant Type	Application ID	Reviewer	Total Score	Delete
HOMEOWNERSHIP PRESERVATION FOUNDATION	84081	National Intermediary	COMP	0011-004	Grotheer, George	92	
NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS	84539	National Intermediary	COMP	0011-006	Grotheer, George	93	
NATIONAL URBAN LEAGUE	81639	National Intermediary	COMP	0011-013	Grotheer, George	89	
CCCS OF GREATER ATLANTA - MAIN OFFICE	84538	National Intermediary	COMP	0011-015	Grotheer, George	95	
CCCS OF GREATER ATLANTA - MAIN OFFICE	84538	National Intermediary	HECM	0012-002	Grotheer, George	94	

Figure 69. GTR – Scoring: Application(s) Scored for Fiscal Year 2010

6. Once you have chosen your desired Agency, you will be prompted to the *Factors For Award* scorecard.
    a. Check agency information for accuracy to ensure you are evaluating the correct score card.
    b. Other Reviewers assigned to this application are posted for reference.
    c. All sub-factor scores when listed must be scored. Major Factor scores cannot be over written when sub-factors are listed. Major Factor scores will automatically sum the scores of its sub-factors. If no sub-factors are listed, the score for the Major Factor can be entered directly.

d. If applicable, instructions to each sub-factor are provided by selecting the Blue Information icon.
e. **Bonus Points** are shown if applicable. Combine the Factor scores plus Bonus Points to determine Total Score.

7. When all scores have been entered, click the **OK** button on the bottom to save the score card, or **Cancel** to erase changes.



Factors for Award

Instructions: + −

Agency ID: 84081
Agency Name: HOMEOWNERSHIP PRESERVATION FOUNDATION
Grant Category: INTERMEDIARY
Reviewer: George Grotheer
Other Reviewer(s): Brian Siebenlist (Prim. Rvwr) Colleen Weiser
Application ID: 0011-004
Grant Type: COMP

Rating Factor	Score	Bonus Points	Max Points	Max Bonus Points	Info	Other Scores
1. Capacity of the Applicant and Relevant Organizational Staff	27 *		30			BS 26 CW 0
1a. RF1-2a: Average Combined Housing Counseling Experience of Project Director and Staff	6 *		6			
1b. RF1-2b: Specialized Training Received for all Counselors and Staff	3 *		5			
1c. RF1-3a: Grantee Requirements	2 *		3			
1d. RF1-3b: HUD 9902-Filed Electronically in a timely manner	2 *		2			
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?	2 *		2			
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?		2 *		2		
1f. RF1-3d: Performance Reviews		5 *		5		
1g. RF1-3e: Housing Counseling System (HCS)		2 *		2		
1h. RF1-4a: Performance Evaluation		1 *		1		
1i. RF1-4b: Goals/Results		4 *		4		

Strength: + −

test

Weakness: + −

2. Need/Extent of the Problem		5 *		5		BS 5 CW 0
2a. RF2-1: Needs Data		3 *		3		
2b. RF2-2: Departmental Policy Priorities		2 *		2		

Strength: + −

test

Weakness: + −

1f. RF1-3d: Performance Reviews	5	*	5			
1g. RF1-3e: Housing Counseling System (HCS)	2	*	2			
1h. RF1-4a: Performance Evaluation	1	*	1			
1i. RF1-4b: Goals/Results	4	*	4			
Strength: + − Weakness: + −						
2. Need/Extent of the Problem	5	*	5		BS 5	CW 0
2a. RF2-1: Needs Data	3	*	3			
2b. RF2-2: Departmental Policy Priorities	2	*	2			
Strength: + − Weakness: + −						
3. Soundness of Approach/Scope of Housing Counseling Services	40	*	45		BS 0	CW 0
3a. RF3-1a: Average Number of Hours per Client/per Counseling Type	0	*	2			
3b. RF3-1b: Types of Counseling	4	*	4			
3c. RF3-1c: Group vs One-on-One	1	*	1			
3d. RF3-1d: Marketing and Outreach	1	*	1			
3e. RF3-2a: Cost Per Client	6	*	6			
3f. RF3-2b: Capacity	1	*	1			
3g. RF3-2c: Training Expenditures	0	*	2			
3h. RF3-2d: Percentage of Grant Funding Passed Through	1	*	1			
3v. RF3-6a: Percent of Grant Funding to be Passed Through	2	*	3			
3w. RF3-6b: Capacity	1	*	1			
Strength: + − Weakness: + −						
4. Leveraging Resources	10	*	10		BS 10	CW 0
Strength: + − Weakness: + −						
5. Achieving Results and Program Evaluation	10	*	10		BS 0	CW 0
5a. RF5-1a: Outputs/Services	3	*	3			
5b. RF5-1b: Outcomes	3	*	3			
5c. RF5-1c: Logic Model Projections	3	*	3			
5d. RF5-1d: Evaluation Tools	1	*	1			
Strength: + − Weakness: + −						
Total	92		100	0	BS 41	CW 0

OK Cancel

Figure 70.A. GTR – Scoring: Application(s) Scored for Fiscal Year 2010

8. If you click **OK**, and there are errors associated with your scoring you will prompted to various messages.
    a. If the number you input is larger than the Max Points, a error message will pop-up
    b. If the number you input is not a whole number, a error message will pop-up
    c. If the number you input is not a positive number, a error message will pop-up

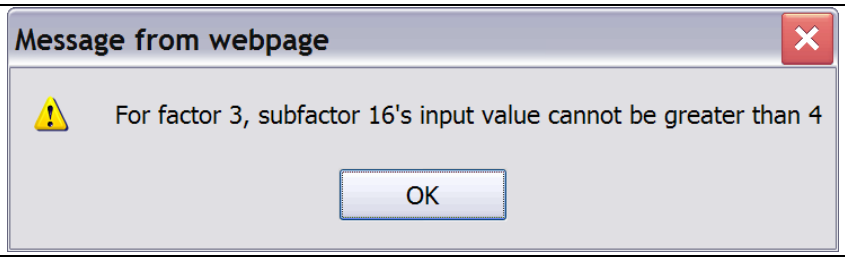


Figure 70.B. GTR – Scoring: Message from webpage (Step 8.a)

Figure 70.C. GTR – Scoring: Message from webpage (Step 8.b)

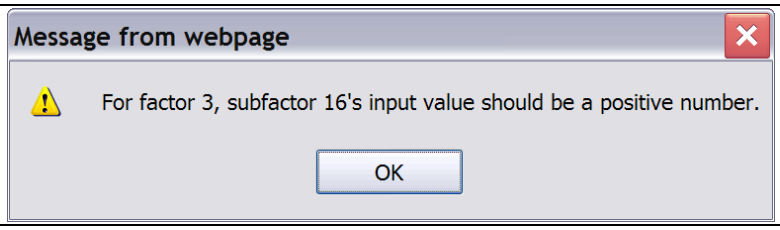


Figure 70.D. GTR – Scoring: Message from webpage (Step 8.c)

9. To delete a score, click the *X* button found under the delete column on the *Application(s) Scored for Fiscal Year 2010*.

Agency Name	Agency ID	Agency Type	Grant Type	Application ID	Reviewer	Total Score	Delete
HOMEOWNERSHIP PRESERVATION FOUNDATION	84081	National Intermediary	COMP	0011-004	Grotheer, George	92	
NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS	84539	National Intermediary	COMP	0011-006	Grotheer, George	93	
NATIONAL URBAN LEAGUE	81639	National Intermediary	COMP	0011-013	Grotheer, George	89	
CCCS OF GREATER ATLANTA - MAIN OFFICE	84538	National Intermediary	COMP	0011-015	Grotheer, George	95	
CCCS OF GREATER ATLANTA - MAIN OFFICE	84538	National Intermediary	HECM	0012-002	Grotheer, George	94	

Figure 71. GTR – Scoring: Application(s) Scored for Fiscal Year 2010

10. A message will be prompted prior to finalizing your action. Click **OK** to delete the score, or **Cancel** to return back to the *Application(s) Scored for Fiscal Year 2010* page.

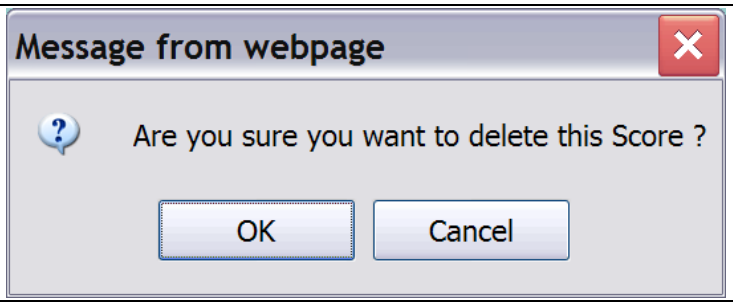


Figure 72. GTR – Scoring: Message from webpage Delete a Score

11. To add a New Score, click the **New Score** button located above and below the Agency Name column.

12. This will prompt you to a list of scorecards that are awaiting your review, similar to Figure 71.

13. The scorecard, and process, will be the same as previously described in Steps 6 and 7.

You have now finished using the HCS **Scoring** feature.

7.3.4 Final Scoring for Primary Reviewer

You can complete the final scoring for primary reviewers by searching for an agency, reviewer name, or application ID.

1. From the top navigation menu, click the **Final Scoring for Primary Reviewers** hyperlink. The *Final Scoring for Primary Reviewers Search for FY 20XX* screen appears.

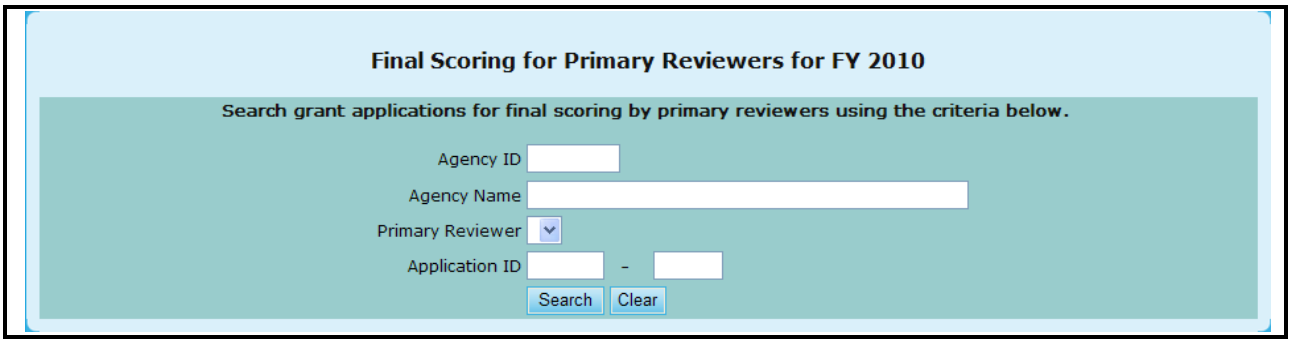


Figure 73. GTR – Grants: Final Scoring for Primary Reviewers Search for FY 20XX

2. Search for the final scoring for primary reviewers by using any combination of the search criteria to filter the list of applications that require a final score.
   a. Enter the agency ID you are searching for in the **Agency ID** field.
   b. Enter the agency‟s name in the **Agency Name** field.
   c. Click the drop-down box next to the **Primary Reviewer** field and select the primary reviewer for this scoring.
   d. Enter the application‟s ID in the **Application ID** field.

3. Click **Search**. The *Final Scoring List for Fiscal Year 20XX* search results screen appears displaying the search results the HCS system finds based on your search criteria:

Final Scoring List for Fiscal Year 2008

Search Criteria: • Agency Name: national foundation for credit counseling

Appl. ID	Agency Name	Reviewer	Factor No. 1	2	3	4	5	Total
0000-008	NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	Roman, Ruth	No Review					
		Cromwell, Betsy	26.00	10.00	33.00	10.00	12.00	91.00
		Siebenlist, Brian (Prime Rvwr)	No Review					
		Average Score:	26.00	10.00	33.00	10.00	12.00	91.00
		Final Score:	29.00	10.00	35.00	10.00	12.00	96.00
0094-002	NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	Roman, Ruth	No Review					
		Cromwell, Betsy	26.00	10.00	33.00	10.00	12.00	91.00
		Siebenlist, Brian (Prime Rvwr)	No Review					
		Average Score:	26.00	10.00	33.00	10.00	12.00	91.00
		Final Score:	29.00	10.00	35.00	10.00	12.00	96.00

Figure 74. GTR – Grants: Final Scoring List for Fiscal Year 20XX

4. To view or edit the final scoring for a specific agency, Click the agency's name in the **Agency's Name** column. The *Final Scoring for Primary Reviewer* screen appears.

5. Review the form; edit the final score by typing in the **Final Score** fields.

6. Click **OK** to save your changes or **Cancel** to exit the screen.

Final Scoring for Primary Reviewer

Instructions: Fill out the form below, review your information for accuracy, and click the **OK** button. The Average Score is based on scores submitted.

Agency Name: NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.

Application ID: 0000-008 **Grant Category:** Intermediary **Grant Type:** Comprehensive

Primary Reviewer: Brian Siebenlist

Rating Factor	Max Points	Max Bonus Points	Brian Siebenlist	Betsy Cromwell	Ruth Roman	Average Score	Final Score
1. Capacity of the Applicant and Relevant Organizational Staff	30.00	0.00	0.00	26.00	0.00	26.00	
2. Need/Extent of the Problem	10.00	0.00	0.00	10.00	0.00	10.00	
3. Soundness of Approach/Scope of Housing Counseling Services	38.00	0.00	0.00	33.00	0.00	33.00	
4. Leveraging Resources	10.00	0.00	0.00	10.00	0.00	10.00	
5. Achieving Results and Program Evaluation	12.00	0.00	0.00	12.00	0.00	12.00	
Total	100.00	0.00	0.00	91.00	0.00	91.00	NaN

OK Cancel

Figure 75. GTR – Grants: Final Scoring for Primary Reviewer – Agency Details

You have now used the HCS Search for **Final Scoring for Primary Reviewers** feature.

7.3.5 Calculate Recommended Award

As a GTR you can view the Recommended Awards that were calculated for a given year.

1. From the top navigation menu, click the **Calculate Recommended Award** hyperlink. The *Recommended Awards Calculation for FY 20XX* screen appears.

Recommended Awards Calculation for Fiscal Year 2008

Instructions: Activating each Grant Type below will generate HCS to calculate a recommended award for all applications that have a Final Score assigned to that Grant Type. Applications are ready to be calculated using this feature when the number under '# Calculated' is less than the number under '# Final Score'. To execute Recommended Award:

1. Select the HUD Office application is processing under.
2. Click on the Grant Type that describes the application you wish to calculate recommended award amounts. This will take you to another page to perform the calculation.
3. Go to bottom of the calculation page and click the 'Save' button to save the recommended awards to database. Calculated applications will be reflected under '# Calculated' column.
4. Monitor the # Calculated for it to equal the # Applied to determine when all applications have been calculated. All applications applied must be calculated to get an accurate Recommended Award for each application.
5. Recommended Award amount should equal Allocated amount when all applications are calculated.

Grant Type	Allocated	Recommended Award	Requested Funds	# Applied	# Final Scored	# Calculated	% Completed
SHFA							
Comprehensive	$2,580,000.00	$2,579,999.98	$5,267,090.36	19	19	19	100.00%
Intermediary							
REVERSE MORTGAGE COUNSELI	$3,559,450.00	$3,559,450.00	$6,252,000.00	3	3	3	100.00%
Comprehensive	$24,002,500.00	$24,002,500.00	$39,080,528.97	21	21	21	100.00%
LHCA							
REVERSE MORTGAGE COUNSELI	$440,550.00	$440,550.00	$468,050.00	29	29	29	100.00%
Comprehensive	$15,867,932.59	$15,975,043.84	$31,005,291.71	431	431	429	99.54%
LOAN DOCUMENT REVIEW COUN	$575,000.00	$575,000.00	$575,000.00	1	1	0	0.00%
HUD Total:	$47,025,432.59	$47,132,543.82	$82,647,961.04	504	504	501	99.40%

Figure 76. GTR – Grants: Recommended Awards Calculation by Grant Category

7.3.6 Input Award/Sub Allocations

As a GTR you can input awards and sub-allocations. The list of applications is dependent on the type of funding allocations chosen by HUD and described in Calculate Recommended Awards above. Follow these steps to input/review the awards and sub-allocations when the funding allocations chosen by HUD is Grant Category and Housing Office Center:

1. From the upper navigation menu, click the **Input Awards/Sub Allocations** hyperlink. The *Input Awards for FY 20XX* screen appears, displaying the available HUD Offices, and the allocated funds, amount awarded, and the grant type for each office.

2. Click the **HUD Office** hyperlink for the HUD Office that you"d like to input/review awards. The *Select a Grant Application to Award for FY 20XX* screen appears.

Denver (HOC) Office View

Input Awards for FY 2009

Instructions: List of grant applications for awards input will be displayed by clicking on corresponding **Grant Applicant Category**.

Grant Type		Allocated	Awarded
COMP	INTERMEDIARY	$0.00	$0.00
	LHCA	$0.00	$3,736,178.00
	MSO	$0.00	$250,625.00
	SHFA	$0.00	$770,673.00
FLMF		Allocated	Awarded
	INTERMEDIARY	$0.00	$0.00
LDRC		Allocated	Awarded
	INTERMEDIARY	$0.00	$0.00
	LHCA	$0.00	$160,428.00
	MSO	$0.00	$50,000.00
	SHFA	$0.00	$69,689.00
HECM		Allocated	Awarded
	INTERMEDIARY	$0.00	$0.00
	LHCA	$0.00	$197,700.00
	MSO	$0.00	$0.00
TRNG		Allocated	Awarded
	INTERMEDIARY	$0.00	$0.00
	Grand Total:	$62,850,000.00	$5,235,293.00

Figure 77. GTR – Grants: Input Awards for FY 20XX

3. To sort this list: Click the **Agency Name** button to list the agencies in Agency Name order. Click the **Application ID** button to list the agencies in Application ID order. Click the **–Agency Type** button to sort by agency type and Agency Name order. Click the hyperlink for the agency that you wish to grant an award.

4. To select a grant application from a specific agency, click the hyperlink for the agency"s name in the **Agency Name** column. The *Input Awards for FY 20XX* screen appears.

Select a Grant Application to Award for FY 2009

Instructions: + –

Agency Name	Agency ID	Agency Type	Grant Type	HUD office	City/State	Application ID	Sub-Allocated	Awarded
NEW YORK CITY COMMISSION ON HUMAN RIGHTS	80439	LHCA	COMP	Philadelphia (LHCA - COMP)	New York, NY	0321-001	N	$0.00
YWCA DELAWARE	80961	LHCA	COMP	Philadelphia (LHCA - COMP)	Newark, DE	0321-002	N	$20,000.00
UNIVERSITY LEGAL SERVICES	80219	LHCA	COMP	Philadelphia (LHCA - COMP)	Washington, DC	0321-003	N	$0.00
NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC	80570	LHCA	COMP	Philadelphia (LHCA - COMP)	Dover, DE	0321-004	N	$46,220.00
CHRISTIAN ACTIVITIES COUNCIL	84173	LHCA	COMP	Philadelphia (LHCA - COMP)	Hartford, CT	0321-005	N	$32,236.00
OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.	84654	LHCA	COMP	Philadelphia (LHCA - COMP)	New London, CT	0321-006	N	$0.00
MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS	84534	LHCA	COMP	Philadelphia (LHCA - COMP)	New Haven, CT	0321-007	N	$0.00
CHELSEA RESTORATION CORPORATION	84144	LHCA	COMP	Philadelphia (LHCA - COMP)	Chelsea, MA	0321-008	N	$21,748.00
GREATER BOSTON LEGAL SERVICES	80563	LHCA	COMP	Philadelphia (LHCA - COMP)	Boston, MA	0321-009	N	$30,488.00
PRO-HOME, INC.	81747	LHCA	COMP	Philadelphia (LHCA - COMP)	Taunton, MA	0321-010	N	$35,732.00
COMMUNITY SERVICE NETWORK, INC.	81850	LHCA	COMP	Philadelphia (LHCA - COMP)	Stoneham, MA	0321-011	N	$23,496.00

Figure 78. GTR – Grants: Select a Grant Application to Award for FY 20XX

5. Complete the form; enter the amount awarded in whole dollars (format: 9999999) and make sure the number of zero (0)s are correct. The amount awarded should not exceed the agency"s requested amount.

Input Awards for FY 2009

Instructions: Fill out the form below, review your information for accuracy, and click the **OK** button to save results.
Click the 'Sub-Agency Allocation' button to access screen to distribute funds to sub-agencies.
* indicates required information.

Agency Name:	NEW YORK CITY COMMISSION ON HUMAN RIGHTS (0321-001)		
Address:	40 Rector Street, 10th Floor New York, NY 10006		
Requested:	$28,369.00	**Grant Category:**	LHCA
Recommended:	$0.00	**Grant Type:**	COMP
Awarded:	$ 0.00 *	Enter the Amount Awarded in whole dollars (format: 99999999.99). The Amount Awarded should not exceed the Agency's Requested Amount. If the recommended Award Amount is greater than Amount Remaining (below) contact the system administrator for guidance.	
		HUD Office Responsible for Awarding Grant:	Philadelphia (LHCA - COMP)
		Amount Allocated:	$17,111,728.00
		The Amount Awarded to Date excluding this Agency:	$17,111,728.00
		The Amount cannot exceed the Amount Remaining:	$0.00

OK | Cancel | Agency/Sub-Agency Allocation

Figure 79.A. GTR – Grants: Input Award (by Agency)

6. To sub-allocate funds to any associated sub-agencies, click **Agency/Sub-Agency Allocation**. The *Sub-Agency Grant Allocations* screen appears.

7. Complete the form and fill in any sub-agency funding information. To allocate the funds evenly, click **Allocate Evenly**. To allocate by # of counselors, click **Allocate by # of Counselors**. To allocate by # of clients, click **Allocate by # of Counselors.**

Agency Grant Allocation

Instructions: + –

Parent Agency Name: **YWCA DELAWARE**
HUD Office: **Philadelphia (HOC)**
Application ID: **0321-002**
Parent Agency ID: 80961
Parent Agency Type: **LHCA**
Grant Type: **COMPREHENSIVE COUNSELING**

Grant Awarded: $ 20,000.00
Administrative Allocation: -$ 5,000.00
Indirect Cost: -$ 0.00
Available Funds: $ 15,000.00

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

Submit | Print | Export | Cancel | Close this window

Sub-Agency	Agency ID	Agency Type	# of Counselors	# of Projected Clients	Sub-Allocation
YWCA DELAWARE	80961	LHCA	10	250	$ 15,000.00
ALLOCATION TOTALS:	1		10	250	$15,000.00
BALANCE:					$0.00

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

Submit | Print | Export | Cancel | Close this window

Figure 79.B. GTR – Grants: Agency Grant Allocation

8. Review the form for accuracy and take one of the following actions: To print, click **Print** and follow the instructions in the *Print* dialog box. To export to Microsoft Excel, click **Export** and follow the instructions in the *File Download* dialog box. To cancel the sub-allocations, click **Cancel**. To save the allocations, click **Save**. The screen refreshes and includes confirmation messages.

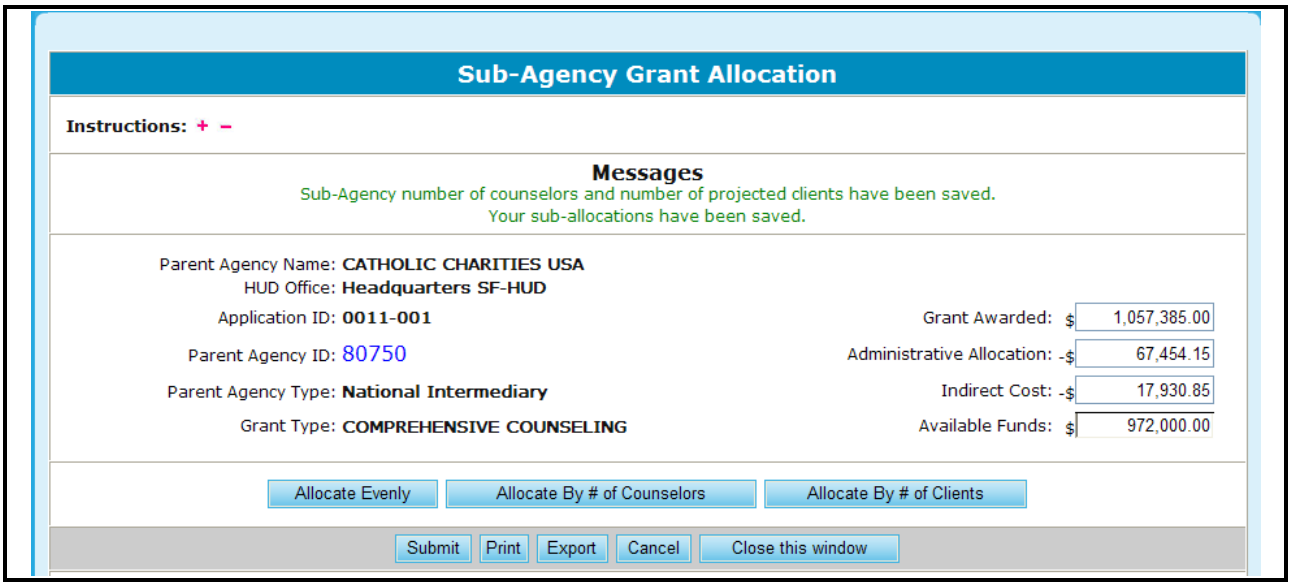


Figure 79.C. GTR – Grants: Sub-Agency Grant Allocation – Save Message

7.4 ARM Submission Verification

1. From the ARM Management Menu, select the Reports Submission Verification hyperlink.

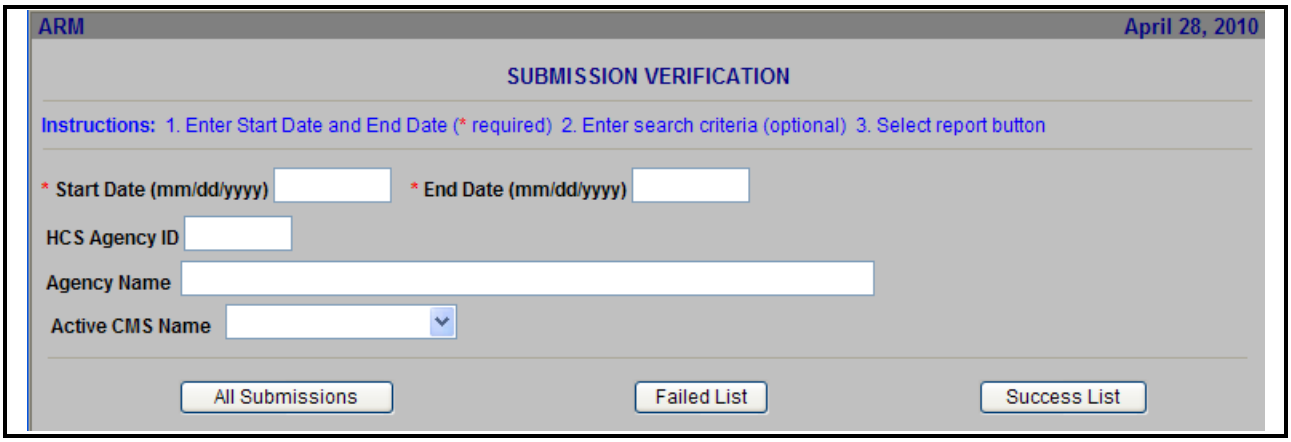


Figure 80. GTR – Submission Verification: ARM Submission Verification

2. Upon narrowing down your search criteria, you have three types of submission reports to choose from:
   a. All Submission: This will provide you a full list of submissions; the ones that failed and the ones that were successful
   b. Failed List: This will provide a list of only the submissions that failed.
   c. Success List: This will provide you a list of only the submissions that were successful.

ARM April 28, 2010

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) 01/01/2009 * End Date (mm/dd/yyyy) 05/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: All Submissions Total: 66

Date	Status	HCS Agency Id	Agency Name	CMS Name
Apr 27 2010 11:55	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:13	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:12	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 26 2010 2:41	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 23 2010 12:03	Successful	83530	HORIZONS, A FAMILY SERVICE ALLIANCE (HORIZONS CCCS)	Paragon
Apr 20 2010 11:19	Successful	80640	SUREPATH FINANCIAL SOLUTIONS	CPR
Apr 19 2010 5:49	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:48	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:47	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:45	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR

Figure 81.A. GTR – Submission Verification: ARM Submission Verification Results

ARM April 28, 2010

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) 01/01/2009 * End Date (mm/dd/yyyy) 05/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: Failed List Total: 13

Date	Status	HCS Agency Id	Agency Name	CMS Name
Apr 19 2010 5:45	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:42	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:40	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 10:09	Failed	83279	CCCS OF NH & VT	CPR
Apr 16 2010 10:53	Failed	80727	CONSUMER CREDIT COUNSELING SERVICE	CPR
Apr 14 2010 4:17	Failed	83279	CCCS OF NH & VT	CPR
Mar 18 2010 4:03	Failed	83279	CCCS OF NH & VT	CPR
Mar 17 2010 12:22	Failed	83279	CCCS OF NH & VT	CPR
Mar 17 2010 12:21	Failed	83279	CCCS OF NH & VT	CPR
Mar 9 2010 4:49	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Mar 9 2010 4:47	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Mar 9 2010 4:31	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Feb 1 2010 12:06	Failed	80949	Catholic Charities of Chicago	HCS

Figure 81.B. GTR – Submission Verification: ARM Submission Verification – Failed List

* Start Date (mm/dd/yyyy) 06/01/2009 * End Date (mm/dd/yyyy) 06/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: Success List Total: 56

Date	Status	HCS Agency Id	Agency Name	CMS Name
May 3 2010 2:28	Successful	80244	CCCS OF NORTH CENTRAL WEST VIRGINA	Paragon
Apr 30 2010 2:16	Successful	80941	CCCS OF DELAWARE VALLEY, INC.	CPR
Apr 30 2010 12:12	Successful	80727	CONSUMER CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:13	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:12	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 26 2010 2:41	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 23 2010 12:03	Successful	83530	HORIZONS, A FAMILY SERVICE ALLIANCE (HORIZONS CCCS)	Paragon
Apr 20 2010 11:19	Successful	80640	SUREPATH FINANCIAL SOLUTIONS	CPR
Apr 19 2010 5:49	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:48	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:47	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 12:42	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 12:38	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:48	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:33	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:31	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 16 2010 3:48	Successful	82951	CCCS, A DIVISION OF TRIANGLE FAMILY SERVICES, INC.	Paragon
Apr 16 2010 2:22	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 16 2010 2:17	Successful	80949	Catholic Charities of Chicago	CCARM

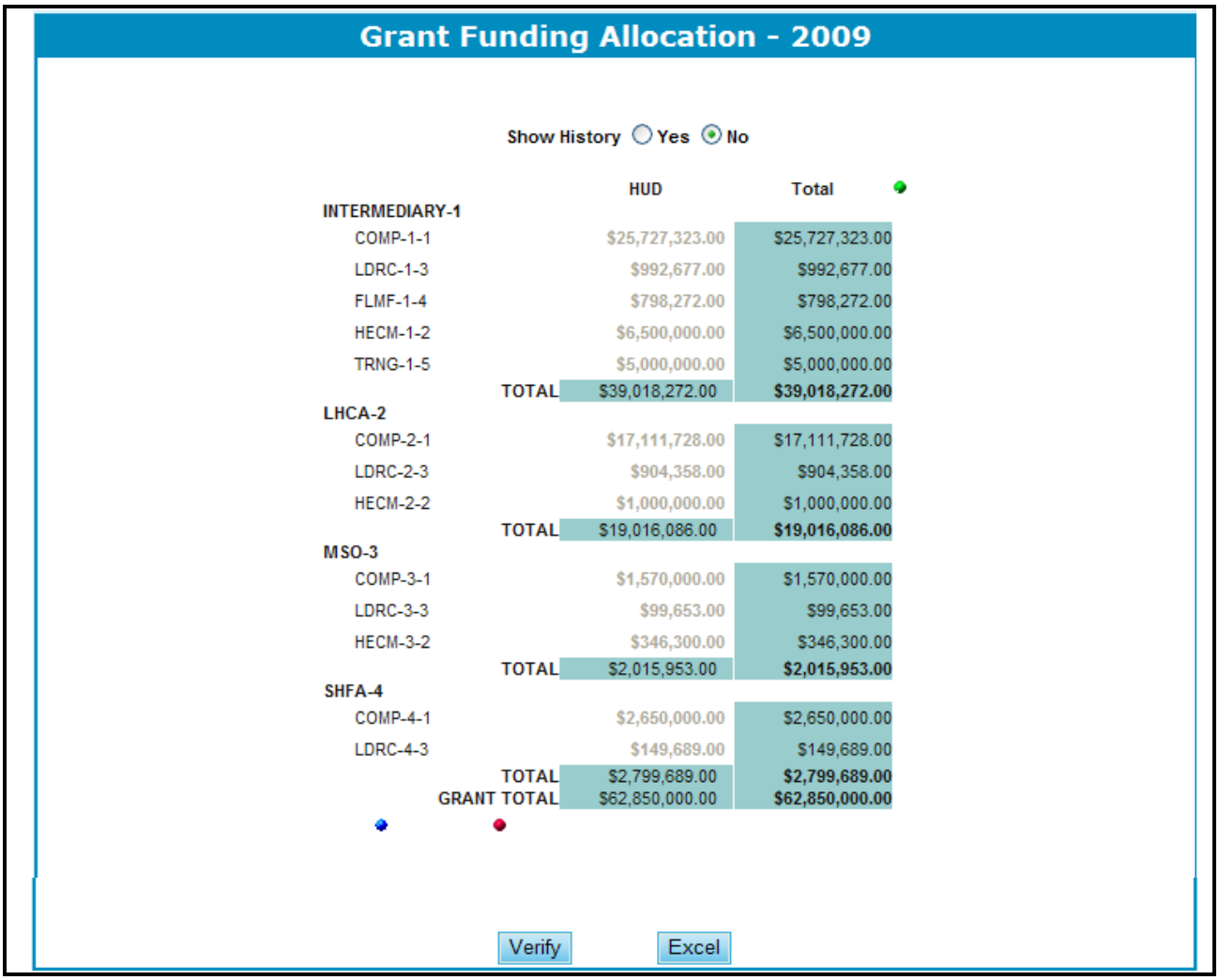
Figure 81.C. GTR – Submission Verification: ARM Submission Verification – Successful List

You have successfully viewed the ARM Submission Verification.

7.5 Funding Allocations

The Program Manager at HQ enters all of the funding allocations. HCS supports two methods of allocating funds. The first method allocates by grant type only. The second method used in previous fiscal years is according to grant type and HUD office. Depending on which method used by HQ, the funding allocation information available to a GTR is different.

1. From the upper navigation menu, click the **Funding Allocation** hyperlink. The *Grant Funding Allocation – 20XX* screen appears.



Grant Funding Allocation - 2009

Show History Yes No

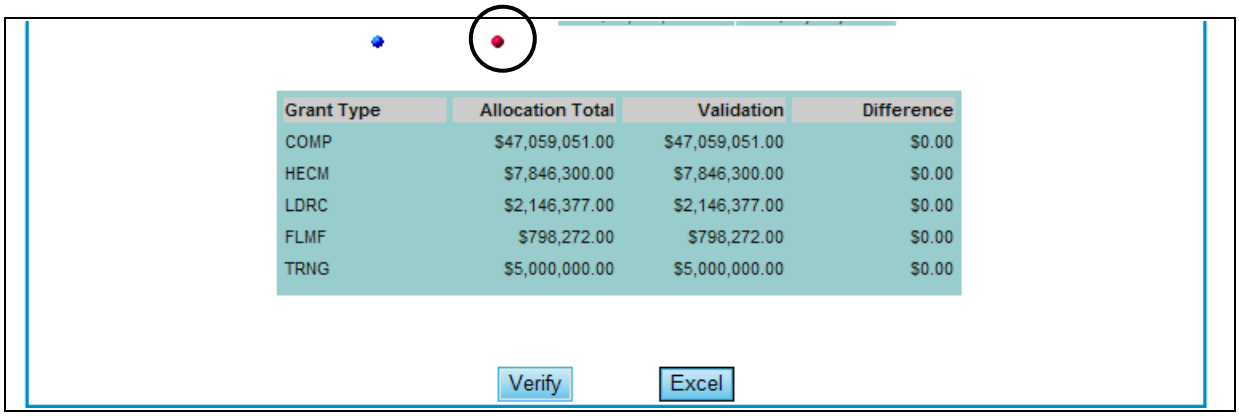
		HUD	Total
INTERMEDIARY-1			
COMP-1-1		$25,727,323.00	$25,727,323.00
LDRC-1-3		$992,677.00	$992,677.00
FLMF-1-4		$798,272.00	$798,272.00
HECM-1-2		$6,500,000.00	$6,500,000.00
TRNG-1-5		$5,000,000.00	$5,000,000.00
	TOTAL	$39,018,272.00	$39,018,272.00
LHCA-2			
COMP-2-1		$17,111,728.00	$17,111,728.00
LDRC-2-3		$904,358.00	$904,358.00
HECM-2-2		$1,000,000.00	$1,000,000.00
	TOTAL	$19,016,086.00	$19,016,086.00
MSO-3			
COMP-3-1		$1,570,000.00	$1,570,000.00
LDRC-3-3		$99,653.00	$99,653.00
HECM-3-2		$346,300.00	$346,300.00
	TOTAL	$2,015,953.00	$2,015,953.00
SHFA-4			
COMP-4-1		$2,650,000.00	$2,650,000.00
LDRC-4-3		$149,689.00	$149,689.00
	TOTAL	$2,799,689.00	$2,799,689.00
	GRANT TOTAL	$62,850,000.00	$62,850,000.00

Verify Excel

Figure 82.A. GTR – Funding Allocations: Funding Allocation by Grant Category

2. When the method of allocating funds is according to grant type only, The Funding Allocation 20XX by Grant Category is displayed.

3. To view the allocations described by Grant Type, click the red dot circled below.

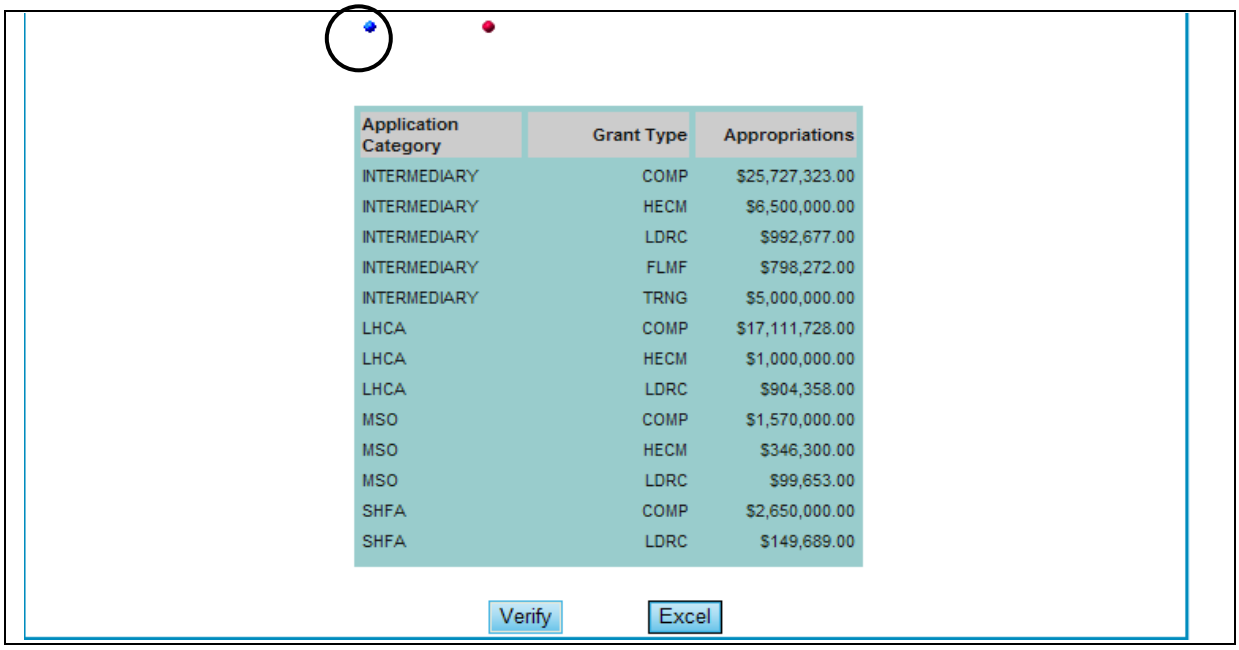


Grant Type	Allocation Total	Validation	Difference
COMP	$47,059,051.00	$47,059,051.00	$0.00
HECM	$7,846,300.00	$7,846,300.00	$0.00
LDRC	$2,146,377.00	$2,146,377.00	$0.00
FLMF	$798,272.00	$798,272.00	$0.00
TRNG	$5,000,000.00	$5,000,000.00	$0.00

Verify Excel

Figure 82.B. GTR – Funding Allocations: Funding Allocation By Grant Type

4. To view the Grant information in matrix form, click the blue dot, as depicted below.



Application Category	Grant Type	Appropriations
INTERMEDIARY	COMP	$25,727,323.00
INTERMEDIARY	HECM	$6,500,000.00
INTERMEDIARY	LDRC	$992,677.00
INTERMEDIARY	FLMF	$798,272.00
INTERMEDIARY	TRNG	$5,000,000.00
LHCA	COMP	$17,111,728.00
LHCA	HECM	$1,000,000.00
LHCA	LDRC	$904,358.00
MSO	COMP	$1,570,000.00
MSO	HECM	$346,300.00
MSO	LDRC	$99,653.00
SHFA	COMP	$2,650,000.00
SHFA	LDRC	$149,689.00

Verify Excel

Figure 82.C. GTR – Funding Allocations: Funding Allocation Grant Matrix Validation

5. To see additional information (such as the validation or difference), click the green dot. Those two fields will be displayed.

Show History ○ Yes ◉ No

	HUD	Total	Validation	Difference
INTERMEDIARY-1				
COMP-1-1	$25,727,323.00	$25,727,323.00		
LDRC-1-3	$992,677.00	$992,677.00		
FLMF-1-4	$798,272.00	$798,272.00		
HECM-1-2	$6,500,000.00	$6,500,000.00		
TRNG-1-5	$5,000,000.00	$5,000,000.00		
TOTAL	$39,018,272.00	**$39,018,272.00**	$39,018,272.00	$0.00
LHCA-2				
COMP-2-1	$17,111,728.00	$17,111,728.00		
LDRC-2-3	$904,358.00	$904,358.00		
HECM-2-2	$1,000,000.00	$1,000,000.00		
TOTAL	$19,016,086.00	**$19,016,086.00**	$19,016,086.00	$0.00
MSO-3				
COMP-3-1	$1,570,000.00	$1,570,000.00		
LDRC-3-3	$99,653.00	$99,653.00		
HECM-3-2	$346,300.00	$346,300.00		
TOTAL	$2,015,953.00	**$2,015,953.00**	$2,015,953.00	$0.00
SHFA-4				
COMP-4-1	$2,650,000.00	$2,650,000.00		
LDRC-4-3	$149,689.00	$149,689.00		
TOTAL	$2,799,689.00	**$2,799,689.00**	$2,799,689.00	$0.00
GRANT TOTAL	$62,850,000.00	**$62,850,000.00**	$62,850,000.00	$0.00

Verify Excel

Figure 82.D. GTR – Funding Allocations: Funding Allocation Additional Information

6. To see the history of this funding allocation, click **Yes** next to **Show History**. The history appears at the bottom of the screen.

TOTAL	$2,015,953.00	**$2,015,953.00**
SHFA-4		
COMP-4-1	$2,650,000.00	$2,650,000.00
LDRC-4-3	$149,689.00	$149,689.00
TOTAL	$2,799,689.00	**$2,799,689.00**
GRANT TOTAL	$62,850,000.00	**$62,850,000.00**

Show History

Allocation History -
No information available

Figure 82.E. GTR – Funding Allocations: Funding Allocation Show History

7. To verify the funding allocation, click **Verify**. A confirmation message appears.

Figure 83. GTR – Funding Allocations: Funding Allocation Verification Message

8. You have now verified this information. Click **OK**.

9. To export this Funding Allocation information into an Excel spreadsheet, click **Excel**. When the following dialog box appears, decide whether to **Open**, **Save**, or **Cancel** the spreadsheet.

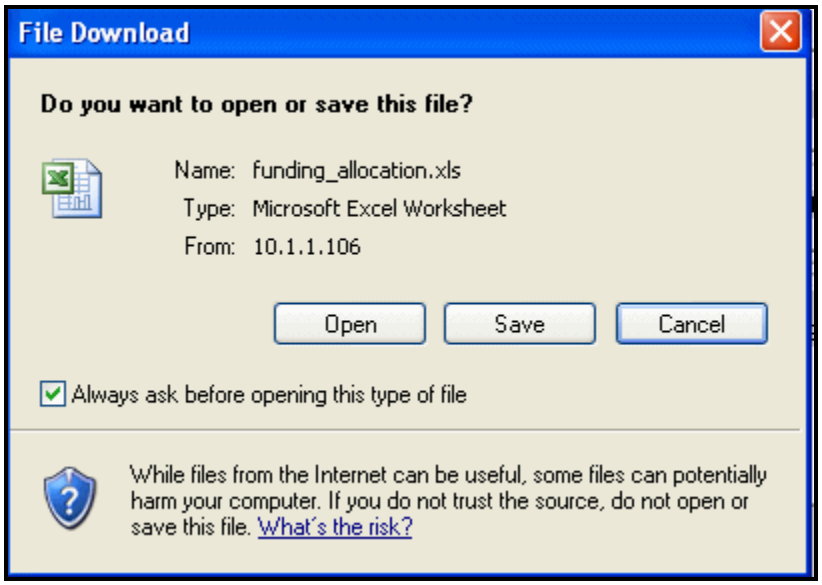


Figure 84. GTR – Funding Allocations: Funding Allocation Export to Excel

You have now finished using the HCS system"s **Funding Allocation** feature.

7.6 Reports

The HCS system comes with a variety of reports. These reports can be viewed, printed, and exported to Excel spreadsheet. These reports provide management with a view of the application process. Also, these reports are excellent views of the post-processing results. Below are instructions on how to generate, print, and export reports. Also, the sections below show a sample of each report and details about what information each report contains.

7.6.1 Viewing Reports

To view any of the HCS system reports, take the following steps:

1. From the upper navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click **Application Progress Status** hyperlink from the menu, the *Application Status for FY 20XX* screen appears.

Application Status for FY 2009

Total 790 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 85. GTR – Reports: Applications Status for FY 20XX

7.6.1.1 *Printing Reports*

You can print any of the HCS system reports by following these steps:

1. From the top navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click **Application Progress Status** hyperlink from menu, the *Application Status for FY 20XX* screen appears.

Application Status for FY 2009

Total 790 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 86. GTR – Reports: Application Progress Status for FY 20XX

2. Click the **Print** button. The *Print* dialog box similar to follow appears. Once you have selected your printing criteria, click **Print** to have a printout of the document.

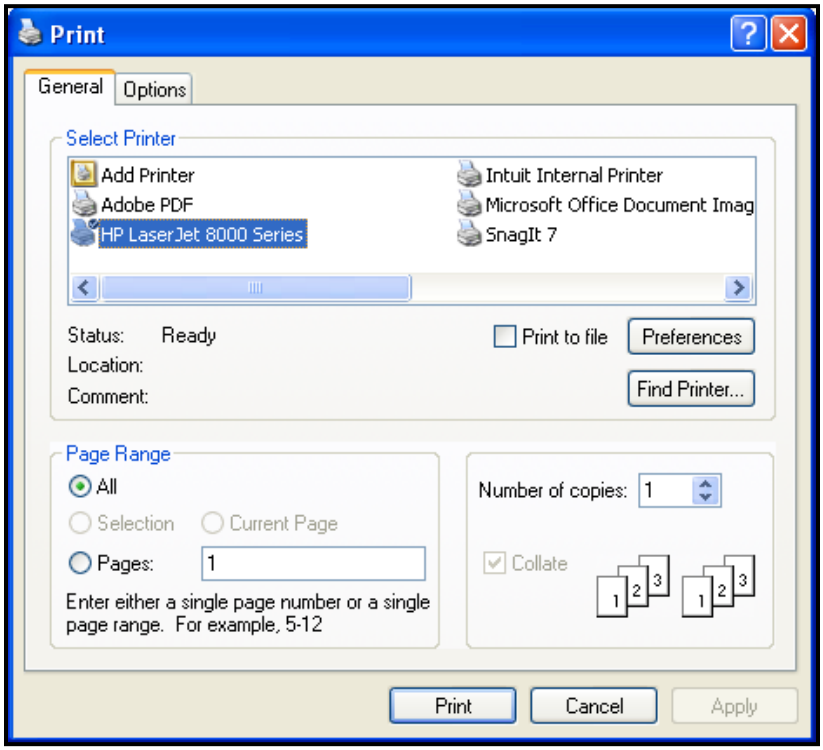


Figure 87. GTR – Reports: Print Dialog Box.

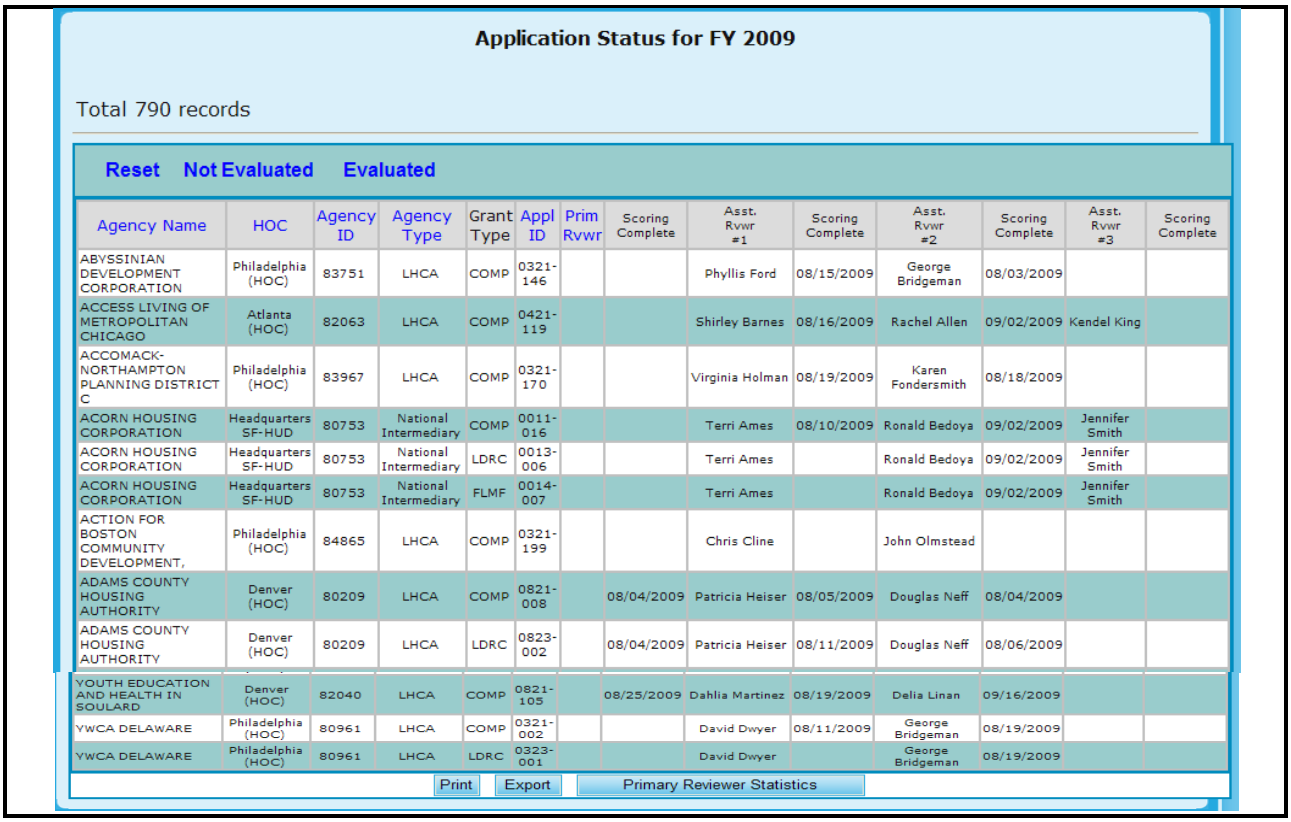
You have now successfully printed a report. Repeat these steps to print any of the other reports available.

7.6.1.2 *Exporting Reports*

You can export any of the HCS system reports to Excel spreadsheet by following these steps:

1. From the top navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click the **Applications Progress Status** hyperlink from the menu, the Applications Status for FY 20XX screen appears.

2. Click the **Export** button. The *File Download* dialog box appears.



Application Status for FY 2009

Total 790 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 88. GTR – Reports: Application Progress Status for FY 20XX

3. Click the **Open** button to open the spreadsheet in HCS web page. Or, click the **Save** button and follow the instruction to save the report to a Microsoft Excel file.

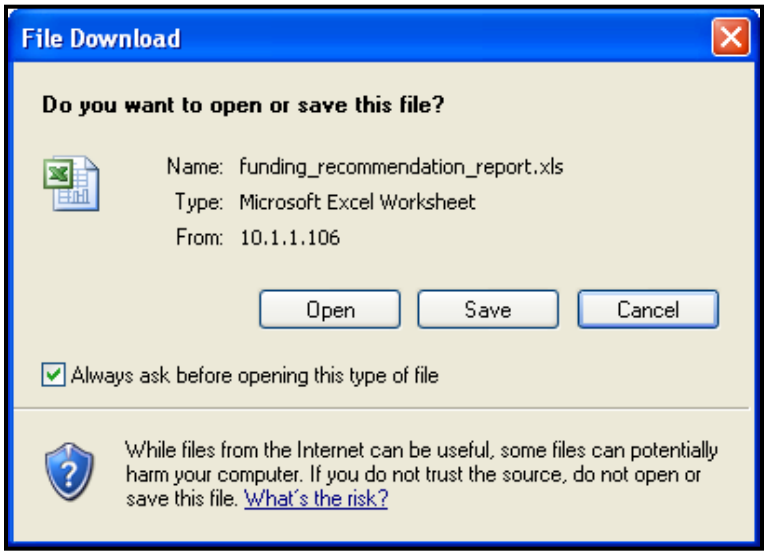


Figure 89. GTR – Reports: File Download Dialog Box.

You have now exported an HCS system report. Follow these steps again to export any of the other reports.

7.6.2 Report Examples

7.6.2.1 *Application Progress Status*

Application Progress Status report shows the dates when each assigned reviewer and primary reviewer completed their evaluation.

1. From the upper navigation menu, under **Reports** sub-menu, click **Application Progress Status** hyperlink, the Grant *Applications Status Search* screen appears. Enter the criteria that you would like to search for and click the **Search** button to retrieve your results, or **Clear** to erase the data you had input.

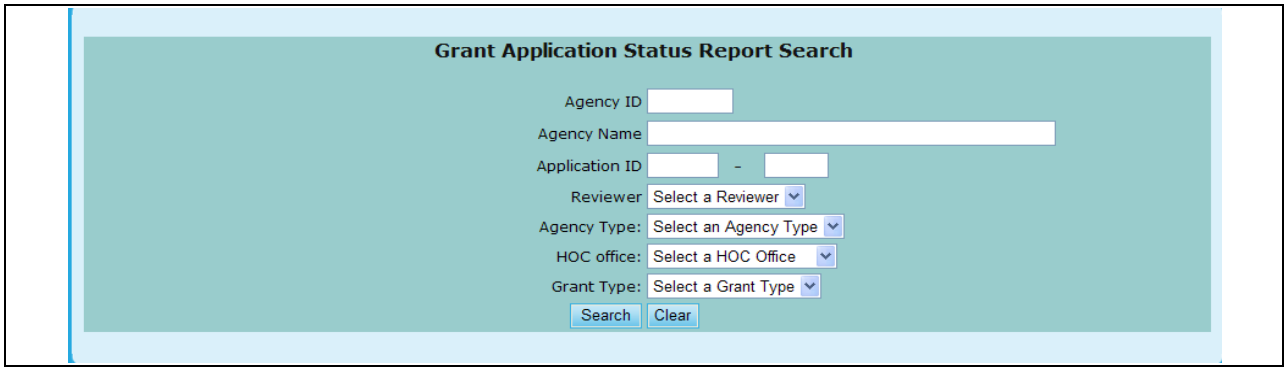


Figure 90. GTR – Reports: Application Progress Status Search

2. To sort this list:
   a. Click the **Agency Name** hyperlink will sort the list first in Agency Name order, and then in TIN number and Application ID order.
   b. Click the **TIN** hyperlink will sort the list first in TIN number order, and then in Agency Name and Application ID order.

c. Click the **Appl ID** hyperlink will sort the list first in Application ID order, and then in Agency Name and TIN number order.

d. Click the **Prim Rvwr** hyperlink will sort the list first in Primary Reviewer"s last name and first name order, and then in Agency Name, TIN number, and Application ID order.

Application Status for FY 2009

Total 790 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 91.A. GTR – Reports: Application Progress Status for FY 20XX

3. Click the **Primary Reviewer Statistics** button on the report, the *Primary Reviewers Statistics for FY 20XX* screen appears.

Primary Reviewers Statistics for FY 2009

Primary Reviewer		# of Applications	# of Incomplete	# of Complete	% in HUD Office
First Name	Last Name				
Brian	Siebenlist	49	48	1	98%
Ruth	Roman	1	1	0	2%
Headquarters SF-HUD Totals:		50	49	1	100%
Annette	Panasiuk	39	35	4	14%
Beth	Eilers	2	0	2	1%
Elizabeth	Cahall	35	26	9	12%
Glen	Stopera	25	0	25	9%
Janice	Skinner	30	30	0	11%
Jennifer	Sica	23	0	23	8%
John	Niebieszczanski	12	10	2	4%
Maryanne	Daniel	30	3	27	11%
Robert	Wright	31	31	0	11%
Sharon	Farrow	23	0	23	8%
Tamie	Contois	31	31	0	11%
Philadelphia (HOC) Totals:		281	166	115	100%
Jason	Willey	85	85	0	35%
Kendel	King	3	3	0	1%
Tracy	Fields	65	65	0	27%
Vivien	King	88	88	0	37%
Atlanta (HOC) Totals:		241	241	0	100%
Donna	Martin	5	0	5	7%
Gail	Osgood	6	0	6	8%
Kristin	Johnsen	9	0	9	13%
Lorraine	Griscavage-Frisbee	7	1	6	10%
Mark	Escalante	8	0	8	11%
Marykay	Kelley	8	0	8	11%
Myrna	Pascual	7	0	7	10%
Pauline	Louie	6	6	0	8%
William	McKee	9	0	9	13%
dawn	golik	7	2	5	10%
Santa Ana (HOC) Totals:		72	9	63	100%
Grand Totals:		790	465	325	

Print Export

Figure 91.B. GTR – Reports: Primary Reviewers Statistics for FY 20XX

4. To view the list of applications which evaluations have not been completed yet, click **Not Evaluated** button. The *Application Status for FY 20XX (Not Evaluated)* page is displayed. Any application that has one or more scores missing is listed.

Application Status for FY 2009

Total 592 records

Reset **Not Evaluated** **Evaluated**

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADMINISTRATION OF RESOURCES AND CHOICES	Santa Ana (HOC)	81052	LHCA	COMP	0921-024			Joy Padiernos	09/11/2009	Marisabel Almer		Lawrence Roselle	
ADMINISTRATION OF RESOURCES AND CHOICES	Santa Ana (HOC)	81052	LHCA	HECM	0922-005		08/24/2009	Joy Padiernos	09/11/2009	Marisabel Almer		Lawrence Roselle	
ADMINISTRATION OF RESOURCES AND CHOICES	Santa Ana (HOC)	81052	LHCA	LDRC	0923-011		08/23/2009	Joy Padiernos		Marisabel Almer	08/27/2009	Lawrence Roselle	

Figure 91.C. GTR – Reports: Application Status for FY 20XX (Not Evaluated)

5. To view the list of applications which evaluations have been completed, click **Evaluated** button. The *Application Status for FY 20XX (Evaluated)* page is displayed. Applications with all scores posted are listed.

Application Status for FY 2009

Total 198 records

Reset **Not Evaluated** **Evaluated**

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
ALLIED CHURCHES TEACHING SELF-EMPOWERMEN	Denver (HOC)	84715	LHCA	COMP	0821-062		08/07/2009	Patricia Heiser	08/07/2009	Douglas Neff	08/07/2009		
ANOKA COUNTY COMMUNITY ACTION PROGRAM, I	Denver (HOC)	81092	LHCA	COMP	0821-074		08/27/2009	Sharon Hebenstreit	08/11/2009	Julie Rice	08/19/2009		
ARROWHEAD ECONOMIC OPPORTUNITY AGENCY, I	Denver (HOC)	84091	LHCA	COMP	0821-075		08/10/2009	Sharon Hebenstreit	08/13/2009	Julie Rice	09/14/2009		
ASIAN INCORPORATED	Santa Ana (HOC)	82197	LHCA	COMP	0921-002		08/21/2009	Felicidad Rodarte	08/27/2009	Chandeng Hour	08/28/2009	Christopher Taliaferro	08/27/2009
ASIAN INCORPORATED	Santa Ana (HOC)	82197	LHCA	LDRC	0923-004		08/21/2009	Felicidad Rodarte	08/26/2009	Chandeng Hour	08/28/2009	Christopher Taliaferro	08/24/2009
ASSIST AGENCY	Denver (HOC)	84801	LHCA	COMP	0821-029		08/11/2009	Dahlia Martinez	08/18/2009	Delia Linan	08/19/2009		
AUSTIN TENANTS' COUNCIL	Denver (HOC)	80543	LHCA	COMP	0821-041		08/13/2009	Gifford Dunn	08/10/2009	John Thorston	08/13/2009		

Figure 91.D. GTR – Reports: Applications Status for FY 20XX (Evaluated)

7.6.2.2 *Application Score Status*

This report lists all the scores for each application for a comprehensive view of on all applications that were processed.

1. From the upper navigation menu, under **Reports** sub-menu, click the **Scores Status** hyperlink. The *Scores Status Report for Fiscal Year 20XX* screen appears. Enter the criteria that you would like to search for and click the **Search** button to retrieve your results, or **Clear** to erase the data you had input.

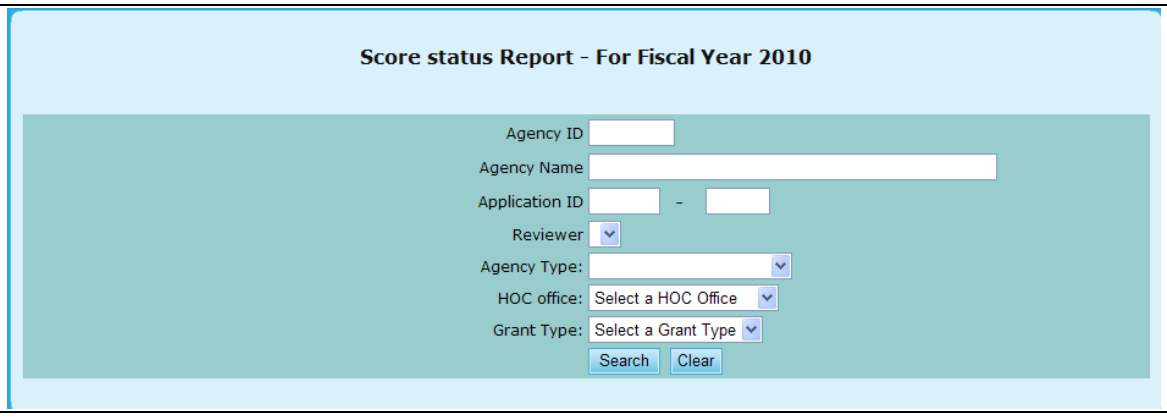
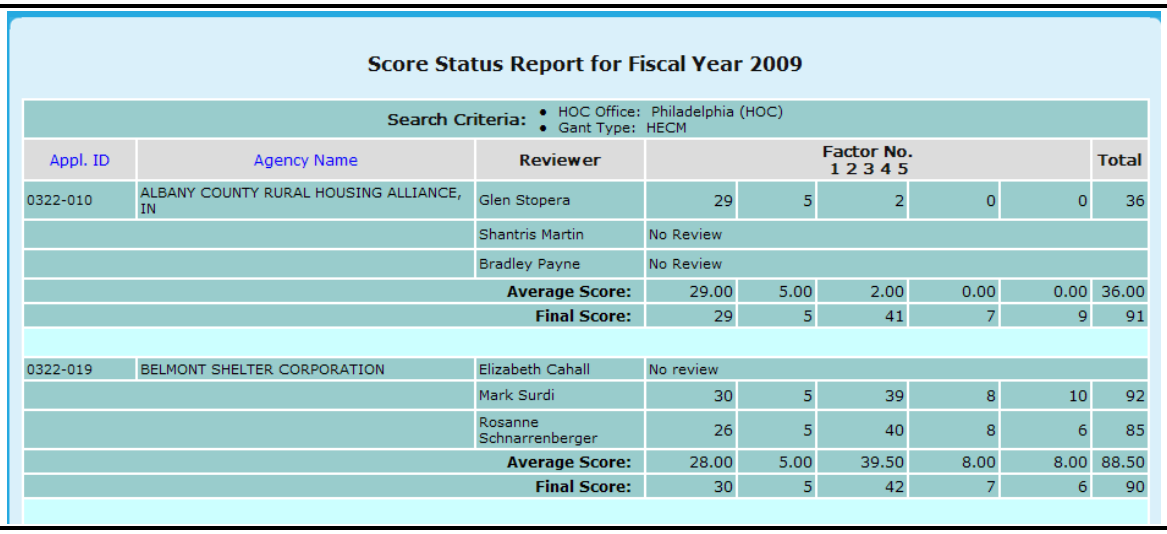


Figure 92. GTR – Reports: Scores Status Search

Note: Provided below is an example of a search result.



Score Status Report for Fiscal Year 2009

Search Criteria: • HOC Office: Philadelphia (HOC) • Gant Type: HECM

Appl. ID	Agency Name	Reviewer	Factor No. 1	2	3	4	5	Total
0322-010	ALBANY COUNTY RURAL HOUSING ALLIANCE, IN	Glen Stopera	29	5	2	0	0	36
		Shantris Martin	No Review					
		Bradley Payne	No Review					
		Average Score:	29.00	5.00	2.00	0.00	0.00	36.00
		Final Score:	29	5	41	7	9	91
0322-019	BELMONT SHELTER CORPORATION	Elizabeth Cahall	No review					
		Mark Surdi	30	5	39	8	10	92
		Rosanne Schnarrenberger	26	5	40	8	6	85
		Average Score:	28.00	5.00	39.50	8.00	8.00	88.50
		Final Score:	30	5	42	7	6	90

Figure 93. GTR – Reports: Scores Status

7.6.2.3 *Awards Recommendation*

This report provides a view of Final scores, Recommended awards and Requested grant amount.

1. From the top navigation menu, under the **Reports** sub-menu, Click the **Funding Recommendation** hyperlink, the *Funding Recommendation Report for Fiscal Year 20XX* appears.

AWARDS RECOMMENDATION REPORT
For Fiscal Year 2009

Agency Name(Application ID)	Final Score	Recommended	Requested
CATHOLIC CHARITIES USA (0011-001)	87.00	$2,147,090.28	$2,147,090.28
STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO (0011-002)	94.00	$2,499,995.00	$2,499,995.00
MON VALLEY INITIATIVE (0011-003)	88.00	$855,000.00	$855,000.00
HOMEOWNERSHIP PRESERVATION FOUNDATION (0011-004)	93.00	$2,700,000.00	$2,700,000.00
CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC. (0011-005)	90.00	$1,431,926.00	$1,431,926.00
NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS (0011-006)	85.00	$1,113,528.00	$1,113,528.00
NEIGHBORHOOD REINVESTMENT CORPORATION (0011-007)	88.00	$2,700,000.00	$2,700,000.00
NATIONAL COUNCIL OF LA RAZA (0011-008)	88.00	$2,700,000.00	$2,700,000.00
HOUSING PARTNERSHIP NETWORK (0011-009)	98.00	$2,675,123.00	$2,675,123.00
NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC (0011-010)	79.00	$1,200,000.00	$1,200,000.00
THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC. (0011-011)	75.00	$300,000.00	$2,346,655.00
WEST TENNESSEE LEGAL SERVICES, INCORPORATED (0011-012)	88.00	$2,700,000.00	$2,700,000.00
NATIONAL URBAN LEAGUE (0011-013)	90.00	$2,700,000.00	$2,700,000.00
HOMEFREE - U S A (0011-014)	88.00	$1,995,000.00	$1,995,000.00
CCCS OF GREATER ATLANTA - MAIN OFFICE (0011-015)	90.00	$2,700,000.00	$2,700,000.00
ACORN HOUSING CORPORATION (0011-016)	96.00	$2,700,000.00	$2,700,000.00
NACA (NEIGHBORHOOD ASSISTANCE CORPORATION OF AMERICA) (0011-017)	90.00	$2,700,000.00	$2,700,000.00
NUEVA ESPERANZA (0011-018)	75.00	$300,000.00	$1,927,498.00
MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE (0011-019)	75.00	$300,000.00	$1,300,000.00
MISSION OF PEACE (0011-020)	84.00	$1,600,000.00	$1,600,000.00
NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC. (0011-021)	95.00	$2,700,000.00	$2,700,000.00
CLEARPOINT FINANCIAL SOLUTIONS, INC. (0011-022)	80.00	$2,700,000.00	$2,700,000.00
RURAL COMMUNITY ASSISTANCE CORPORATION (0011-023)	86.00	$1,215,966.00	$1,215,966.00
MONEY MANAGEMENT INTERNATIONAL INC. (0011-024)	85.00	$2,700,000.00	$2,700,000.00
Santa Ana (SHFA - COMP) Total:		$237,896.46	$773,695.00
WASHINGTON STATE HOUSING FINANCE COMMISSION (0943-001)	83.00	$29,999.80	$30,000.00
Santa Ana (SHFA - LDRC) Total:		$29,999.80	$30,000.00

Print Export

Figure 94. GTR – Reports: Funding Recommendation Report

7.6.2.4 *Awards Report*

This report compares Allocated funds against Awarded funds at the grant category level showing balance to check that all grant funds have been allocated.

1. From the top navigation menu, under **Reports** sub-menu, click the **Awards Report** hyperlink, and the *Funding Report for Fiscal Year 20XX appears.*

FUNDING REPORT
For Fiscal Year 2009

Office Name	Requested	Allocated	Awarded	To be Returned
INTERMEDIARY				
Intermediary (COMP)	$53,474,994.28	$25,727,323.00	$25,727,323.00	$0.00
Intermediary (HECM)	$8,580,390.00	$6,500,000.00	$6,500,000.00	$0.00
Intermediary (LDRC)	$1,209,220.00	$992,677.00	$992,677.00	$0.00
Intermediary (FLMF)	$6,410,896.00	$798,272.00	$798,272.00	$0.00
Intermediary (TRNG)	$8,000,000.00	$5,000,000.00	$5,000,000.00	$0.00
INTERMEDIARY Totals:	$77,675,500.28	$39,018,272.00	$39,018,272.00	$0.00
LHCA				
Philadelphia (LHCA - COMP)	$15,746,509.33	$17,111,728.00	$6,082,506.00	$11,029,222.00
Philadelphia (LHCA - HECM)	$331,077.00	$1,000,000.00	$281,077.00	$718,923.00
Philadelphia (LHCA - LDRC)	$923,396.80	$904,358.00	$289,322.00	$615,036.00
Atlanta (LHCA - COMP)	$13,697,823.00	$0.00	$5,899,008.00	- $5,899,008.00
Atlanta (LHCA - HECM)	$452,000.00	$0.00	$322,342.00	- $322,342.00
Atlanta (LHCA - LDRC)	$971,721.00	$0.00	$332,743.00	- $332,743.00
Denver (LHCA - COMP)	$8,751,328.00	$0.00	$3,736,178.00	- $3,736,178.00
Denver (LHCA - HECM)	$230,508.00	$0.00	$197,700.00	- $197,700.00
Denver (LHCA - LDRC)	$416,720.00	$0.00	$160,428.00	- $160,428.00
Santa Ana (LHCA - COMP)	$4,168,568.61	$0.00	$1,394,036.00	- $1,394,036.00
Santa Ana (LHCA - HECM)	$198,881.00	$0.00	$198,881.00	- $198,881.00
Santa Ana (LHCA - LDRC)	$385,102.00	$0.00	$121,865.00	- $121,865.00
LHCA Totals:	$46,273,634.74	$19,016,086.00	$19,016,086.00	$0.00
SHFA				
Philadelphia (SHFA - COMP)	$2,342,638.39	$2,650,000.00	$1,218,439.00	$1,431,561.00
Philadelphia (SHFA - LDRC)	$50,000.00	$149,689.00	$50,000.00	$99,689.00
Atlanta (SHFA - COMP)	$790,000.00	$0.00	$460,643.00	- $460,643.00
Atlanta (SHFA - LDRC)	$0.00	$0.00	$0.00	$0.00
Denver (SHFA - COMP)	$1,081,034.63	$0.00	$770,673.00	- $770,673.00
Denver (SHFA - LDRC)	$69,689.20	$0.00	$69,689.00	- $69,689.00
Santa Ana (SHFA - COMP)	$773,695.00	$0.00	$200,245.00	- $200,245.00
Santa Ana (SHFA - LDRC)	$30,000.00	$0.00	$30,000.00	- $30,000.00
SHFA Totals:	$5,137,057.22	$2,799,689.00	$2,799,689.00	$0.00
Grand Totals:	$132,397,227.24	$62,850,000.00	$62,850,000.00	$0.00

Print Export

Figure 95. GTR – Reports: Funding Report

7.6.2.5 *Awards Report by Agency*

This report provides an excellent summary of awards using drill down screens. The initial screen provides a comprehensive summary of the grant processing year at one glance, providing number of agencies applying, those awarded and comparing awards with Requested and Recommended Awards. This shows all application results regardless of if they are awarded or not.

1. From the top navigation menu, under **Reports** sub-menu, Click the **Awards Report by Agency** hyperlink, the *Awards Report by Agency* appears. This statistic matrix displays awards and related information in each HUD office, and HUD totals. The data shown in **# Agencies** column is the number of HUD-Approved Independent Agencies who are qualified to apply for grant in the fiscal year.

2. Click HUD office name hyperlink, the report is drilled down to HUD office level. For example, click **HOC 2 – Atlanta** hyperlink, a list of agencies applied for grants and their relevant data are displayed in agency name order.

AWARDS REPORT BY AGENCY For Fiscal Year 2009

Office	# Agencies	# Agencies Applying	# Agencies Awarded	# Sub Agencies Funded	# Applications Awarded	Amount Allotted	Amount Requested	Amount Recommended	Amount Awarded
HQ	24	25	25	837	43	$ 39,018,272.00	$ 77,675,500.28	$ 59,381,231.28	$ 39,018,272.00
HOC 1 - Philadelphia	357	211	179	119	238	$ 0.00	$ 20,368,621.52	$ 2,392,638.39	$ 8,628,011.00
HOC 2 - Atlanta	334	178	153	39	206	$ 0.00	$ 15,911,544.00	$- 1,011,569.47	$ 7,014,736.00
HOC 3 - Denver	230	111	101	25	135	$ 0.00	$ 11,274,279.83	$ 1,200,723.82	$ 5,235,293.00
HOC 4 - Santa Ana	85	44	41	44	67	$ 0.00	$ 7,167,281.61	$ 663,849.26	$ 2,953,688.00
TOTAL	1030	569	499	1064	689	$ 62,850,000.00	$132,397,227.24	$ 62,626,873.28	$ 62,850,000.00

Print Export

Figure 96.A. GTR – Reports: Awards Report by Agency

3. To sort the list of agencies in HUD office level:
   a. Click the **Agency** hyperlink will sort the list in Agency Name order.
   b. Click the **Agency ID** hyperlink will sort the list in Agency ID order.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY AGENCY For Fiscal Year 2009

Office: HOC 2 - Atlanta	Total Agencies Applying: 178	Total Agencies Awarded: 153
Amount Allotted: $ 0.00	Amount Requested: $ 15,911,544.00	Total Awarded: $ 7,014,736.00

Agency Search Print Export Back

Agency	Agency ID	# Sub Agencies Funded	Office	Grant Category	Grant Types	Requested	Recommended	Awarded
ACCESS LIVING OF METROPOLITAN CHICAGO	82063	0	HOC 2 - Atlanta	LHCA	COMP	$ 45,000.00	$ 0.00	$ 45,000.00
AFFORDABLE HOUSING CORPORATION	81929	0	HOC 2 - Atlanta	LHCA, LHCA	COMP, LDRC	$ 86,000.00	$ 0.00	$ 65,960.00
AFFORDABLE HOUSING ENTERPRISES, INC.	82241	0	HOC 2 - Atlanta	LHCA	COMP	$ 30,000.00	$ 0.00	$ 30,000.00
ALABAMA COUNCIL ON HUMAN RELATIONS, INC	80576	0	HOC 2 - Atlanta	LHCA	COMP	$ 30,000.00	$ 0.00	$ 30,000.00
ALLIANCE CREDIT COUNSELING	84342	0	HOC 2 - Atlanta	LHCA	COMP	$ 151,712.00	$ 0.00	$ 0.00
APPALACHIAN HOUSING AND REDEVELOPMENT CORPORATION	81266	0	HOC 2 - Atlanta	LHCA	COMP	$ 46,963.00	$ 0.00	$ 42,724.00
AREA COMMITTEE TO IMPROVE OPPORTUNITIES NOW, INC.	82510	0	HOC 2 - Atlanta	LHCA	COMP	$ 52,862.00	$ 0.00	$ 42,724.00
B & D TRAINING SERVICES	83806	0	HOC 2 - Atlanta	LHCA, LHCA	COMP, LDRC	$ 125,000.00	$ 0.00	$ 43,085.00
BRIGHTON CENTER, INCORPORATED	80145	0	HOC 2 - Atlanta	LHCA, LHCA, LHCA	COMP, HECM, LDRC	$ 109,250.00	$ 0.00	$ 86,131.00
BROWARD COUNTY HOUSING AUTHORITY	80586	0	HOC 2 - Atlanta	LHCA	COMP	$ 76,250.00	$ 0.00	$ 40,976.00
CAMPBELLSVILLE HOUSING AND REDEVELOPMENT AUTHORITY	80146	0	HOC 2 - Atlanta	LHCA	COMP	$ 23,479.00	$ 0.00	$ 23,479.00
WILSON COMMUNITY IMPROVEMENT ASSOCIATION, INC.	80957	0	HOC 2 - Atlanta	LHCA	COMP	$ 50,000.00	$ 0.00	$ 50,000.00
WOODBINE COMMUNITY ORGANIZATION	81758	0	HOC 2 - Atlanta	LHCA, LHCA, LHCA	COMP, HECM, LDRC	$ 98,000.00	$ 0.00	$ 47,197.00
ALL			HOC 2 - Atlanta					

Figure 96.B. GTR – Reports: Awards Report by Agency

4. From the *Awards Report by Agency* in HUD Office level, as shown in Figure 96.B., click an agency name hyperlink under **Agency** column. The award report for the selected agency is displayed.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY AGENCY

For Fiscal Year 2009

Back

Agency	Agency ID	HOC	Agency Type	Appl ID	Grant Type	Requested	Recommended	Awarded	Difference
ACCESS LIVING OF METROPOLITAN CHICAGO	82063	HOC 2 - Atlanta	LHCA	0421-119	COMP	$ 45,000.00	$ 0.00	$ 45,000.00	0.00
			TOTAL		1	$ 45,000.00	$ 0.00	$ 45,000.00	$ 0.00

Print Export Save Back

Figure 96.C. GTR – Reports: Awards Report by Agency: for One Selected Agency

5. To search for a particular agency or multiple agencies, click the **Agency Search** button at the bottom of the *Awards Report by Agency* page. The *Awards Report by Agency: Agency Search* page appears.

6. In Agency Search page, key in search criteria and click the **Search** button. For example, key in „ADVANC" to Agency Name field and click the **Search** button (see Figure 96.D.). A list of agencies that contain „ADVANC" in their agency name are displayed (see Figure 96.E.). Notice that in Figure 250, the Awards Report is drilled down to agency level. It lists all the grant types available for the fiscal year you are working on, and displays data of the grant type(s) that is/are applicable to each agency in the list. For the grant type(s) the agency didn"t apply, zero dollar amount is shown.

Awards Report by Agency for FY 2010 - Agency Search
HQ

Search for Agency ID and Name using the criteria below.	
Agency ID	
Application ID	-
Agency Name	advanc
Agency List	Select Agency
Grant Applicant Type	☐ INTERMEDIARY ☐ LHCA ☐ MSO ☐ SHFA
Grant Type	☐ COMP ☐ HECM ☐ LDRC ☐ FLMF ☐ TRNG ☐ MMSA
Search Clear Cancel	

Figure 96.D. GTR – Reports: Awards Report by Agency: Agency Search for Agency Name 'ADVANC'

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY AGENCY

For Fiscal Year 2009

Back

Agency	Agency ID	HOC	Agency Type	Appl ID	Grant Type	Requested	Recommended	Awarded	Difference
PHILADELPHIA COUNCIL FOR COMMUNITY ADVANCEMENT	80072	HOC 1 - Philadelphia	LHCA	0321-092	COMP	$ 75,000.00	$ 0.00	$ 37,480.00	- 37,520.00
				0322-008	HECM	$ 5,000.00	$ 0.00	$ 5,000.00	0.00
			TOTAL		2	$ 80,000.00	$ 0.00	$ 42,480.00	$- 37,520.00

Print Export Save Back

Figure 96.E. GTR – Reports: Awards Report by Agency: Result of Agency Search for Agency Name 'ADVANC'

7.6.2.6 *Awards Report by Office*

This report lists agencies that are awarded a grant and listed in respective of their assigned HUD office.

1. From the top navigation menu, under **Reports** sub-menu, click **Awards Report by Office** hyperlink, the *Awards Report by Office for Fiscal Year 20XX appears.*

AWARDS REPORT BY OFFICE
For Fiscal Year 2009

Appl. ID	Agency Name	Requested	Recommended	Awarded
0821-002	CRAWFORD SEBASTIAN COMMUNITY DEVELOPMENT COUNCIL	$37,824.00	$0.00	$28,740.00
0821-003	JONESBORO URBAN RENEWAL AND HOUSING AUTHORITY HOUSING AND COMMUNITY DEVELOPMENT ORGANIZATION (JURHA HCDO)	$61,291.00	$0.00	$42,724.00
0821-004	SOUTH ARKANSAS COMMUNITY DEVELOPMENT	$50,000.00	$0.00	$42,724.00
0821-006	SOUTHERN GOOD FAITH FUND	$51,850.00	$0.00	$42,724.00
0821-007	UNIVERSAL HOUSING DEVELOPMENT CORPORATION	$93,474.00	$0.00	$39,228.00
0821-008	ADAMS COUNTY HOUSING AUTHORITY	$170,000.00	$0.00	$46,220.00
0821-009	BOULDER COUNTY HOUSING AUTHORITY	$155,000.00	$0.00	$42,724.00
0821-010	BROTHERS REDEVELOPMENT, INC.	$30,000.00	$0.00	$30,000.00
0821-011	CITY OF AURORA COMMUNITY DEVELOPMENT DIVISION	$100,000.00	$0.00	$42,724.00
0821-012	COLORADO COALITION FOR THE HOMELESS	$105,116.00	$0.00	$32,236.00
0821-013	COLORADO HOUSING ASSISTANCE CORPORATION	$65,000.00	$0.00	$47,968.00
0821-014	COLORADO RURAL HOUSING DEVELOPMENT CORP.	$85,000.00	$0.00	$46,220.00
0821-015	DENVER HOUSING AUTHORITY	$76,031.00	$0.00	$21,748.00
0821-016	DOUGLAS COUNTY HOUSING PARTNERSHIP	$57,000.00	$0.00	$32,236.00
0821-017	HOUSING SOLUTIONS FOR THE SOUTHWEST	$95,811.00	$0.00	$42,724.00
0821-018	NEIGHBOR TO NEIGHBOR	$68,425.00	$0.00	$51,464.00
0821-019	NORTHEAST DENVER HOUSING CENTER	$60,000.00	$0.00	$25,244.00
0821-020	PARTNERS IN HOUSING, INC.	$50,000.00	$0.00	$26,992.00
0821-021	UPPER ARKANSAS AREA COUNCIL OF GOVERNMENTS	$31,790.00	$0.00	$28,740.00
0821-022	SOUTHWEST IMPROVEMENT COUNCIL	$80,047.00	$0.00	$35,732.00
0821-023	CENTER FOR SIOUXLAND	$75,000.00	$0.00	$60,204.00
	Denver (MSO - LDRC) Totals:	$50,000.00	$50,000.00	$50,000.00
0841-001	MONTANA BOARD OF HOUSING	$200,000.00	$200,000.00	$170,297.00
0841-002	NORTH DAKOTA HOUSING FINANCE AGENCY	$226,249.00	$226,249.00	$136,881.00
0841-003	NEW MEXICO MORTGAGE FINANCE AUTHORITY	$169,683.00	$169,683.00	$169,683.00
0841-004	IOWA FINANCE AUTHORITY	$221,051.63	$221,051.63	$123,515.00
0841-005	SOUTH DAKOTA HOUSING DEVELOPMENT AUTHORITY	$264,051.00	$264,050.99	$170,297.00
	Denver (SHFA - COMP) Totals:	$1,081,034.63	$1,081,034.62	$770,673.00
0843-001	IOWA FINANCE AUTHORITY	$25,335.20	$25,335.20	$25,335.00
0843-002	NEW MEXICO MORTGAGE FINANCE AUTHORITY	$44,354.00	$44,354.00	$44,354.00
	Denver (SHFA - LDRC) Totals:	$69,689.20	$69,689.20	$69,689.00
	Grand Totals:	$10,600,639.83	$1,200,723.82	$5,235,293.00

Print Export

Figure 97. GTR – Reports: Awards Report by Office

7.6.2.7 *Awards Report by State*

This report groups all agencies that are awarded a grant in respective to their State they are located in.

1. From the top navigation menu, under **Reports** sub-menu, click the **Awards Report by State** hyperlink, the *Awards Report by State for Fiscal Year 20XX* appears.

AWARDS REPORT BY STATE
For Fiscal Year 2009

City/State	Agency Name(Application ID)	Awarded
Auburn, AL	ALABAMA COUNCIL ON HUMAN RELATIONS, INC (0421-011)	$30,000.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0421-007)	$39,228.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0423-039)	$9,314.00
Birmingham, AL	JEFFERSON COUNTY HOUSING AUTHORITY (0421-008)	$26,992.00
Decatur, AL	COMMUNITY ACTION PARTNERSHIP OF NORTH ALABAMA, INC. (0421-004)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0421-002)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0422-001)	$47,671.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0423-001)	$7,745.00
Huntsville, AL	COMMUNITY ACTION PARTNERSHIP, HUNTSVILLE/MADISON & LIMESTONE COUNTIES, INC (0421-006)	$20,000.00
Huntsville, AL	FAMILY SERVICES CENTER, INC. (0421-001)	$51,750.00
Mobile, AL	MOBILE HOUSING BOARD (0421-003)	$53,500.00
Mobile, AL	MOBILE HOUSING BOARD (0422-008)	$10,000.00
Mobile, AL	MOBILE HOUSING BOARD (0423-037)	$7,000.00
Troy, AL	ORGANIZED COMMUNITY ACTION PROGRAM, INC (0421-009)	$30,488.00
Tuscaloosa, AL	COMMUNITY SERVICE PROGRAMS OF WEST ALABAMA, INC. (0421-005)	$40,976.00
	State Total:	$446,128.00
Casper, WY	INTERFAITH OF NATRONA COUNTY, INCORPORATED (0821-070)	$20,000.00
Casper, WY	WYOMING HOUSING NETWORK, INC. (0821-071)	$51,464.00
	State Total:	$71,464.00
	Grand Total:	$62,850,000.00

Print Export

Select a State Go

Figure 98.A. GTR – Reports: Awards Report by State

2. To search for agency/agencies locate in a state, select the specific state from the **Select a State** dropdown at the bottom of the page, and click the **Go** button. A list of agency/agencies awarded in the selected state is displayed.

AWARDS REPORT BY STATE (AL)
For Fiscal Year 2009

City/State	Agency Name(Application ID)	Awarded
Auburn, AL	ALABAMA COUNCIL ON HUMAN RELATIONS, INC (0421-011)	$30,000.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0421-007)	$39,228.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0423-039)	$9,314.00
Birmingham, AL	JEFFERSON COUNTY HOUSING AUTHORITY (0421-008)	$26,992.00
Decatur, AL	COMMUNITY ACTION PARTNERSHIP OF NORTH ALABAMA, INC. (0421-004)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0421-002)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0422-001)	$47,671.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0423-001)	$7,745.00
Huntsville, AL	COMMUNITY ACTION PARTNERSHIP, HUNTSVILLE/MADISON & LIMESTONE COUNTIES, INC (0421-006)	$20,000.00
Huntsville, AL	FAMILY SERVICES CENTER, INC. (0421-001)	$51,750.00
Mobile, AL	MOBILE HOUSING BOARD (0421-003)	$53,500.00
Mobile, AL	MOBILE HOUSING BOARD (0422-008)	$10,000.00
Mobile, AL	MOBILE HOUSING BOARD (0423-037)	$7,000.00
Troy, AL	ORGANIZED COMMUNITY ACTION PROGRAM, INC (0421-009)	$30,488.00
Tuscaloosa, AL	COMMUNITY SERVICE PROGRAMS OF WEST ALABAMA, INC. (0421-005)	$40,976.00
	State Total:	$446,128.00
	Grand Total:	$446,128.00

Print Export

AL - Alabama Go

Figure 98.B. GTR – Reports: Awards Report by State – Result Page of State Search

7.6.2.8 *Funding Report Search*

This report lists agencies that are awarded a grant and listed in respective of their assigned HUD office.

1. From the top navigation menu, under **Reports** sub-menu, click the **Funding Report by Filter** hyperlink, the *Funding Report Search for Fiscal Year 20XX appears.*

Note: The search screen will allow you to narrow down your results based on the following criteria:

- Agency ID
- HOC Office
- Agency Name
- Agency Type
- Counseling Services
- City
- State
- Zip Code

2. Once you have entered your criteria click the **Search** button to retrieve your results, the **Clear** button to erase the information already type in, or **Cancel** to return to Awards Report by Agency.

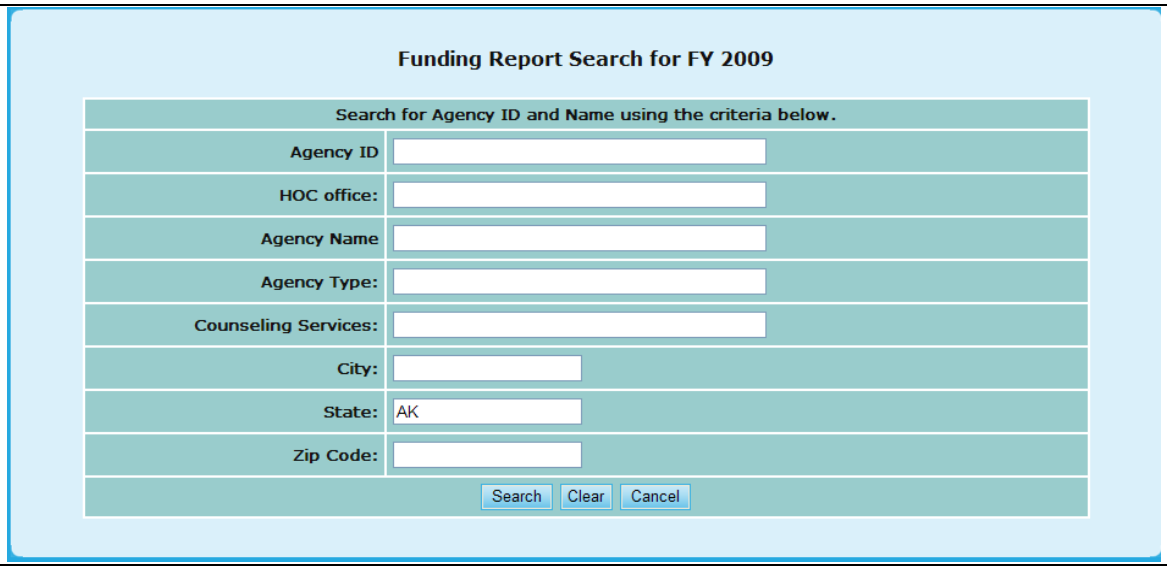


Figure 99. GTR – Reports: Funding Report by Filter – Search

3. From this screen you will also be able to view this information in Excel form, by clicking the **Excel Format** hyperlink, or return back to the search function, but clicking **Search Again**.

FUNDING REPORT SEARCH FOR FISCAL YEAR 2009

Search Criteria: • State: AK

5 Record(s) Found

Excel Format

Agency ID	Agency Name	Agency type	Total Awarded	Total Funding			Grant Type	City/State
				Admin. Allocation	Indirect Cost	Allocation		
80206	ALASKA COMMUNITY DEVELOPMENT CORPORATION	Sub Grantee	$0.00	$0.00	$0.00	$22,276.00	INTERMEDIARY - COMP	PALMER - AK
80207	NEIGHBORWORKS ANCHORAGE FORMERLY ANCHORAGE NEIGHBORHOOD HOUSING SERVICES	Sub Grantee	$0.00	$0.00	$0.00	$11,409.09	INTERMEDIARY - COMP	Anchorage - AK
80208	CCCS OF ALASKA	LHCA	$0.00	$0.00	$0.00	$3,416.67	INTERMEDIARY - LDRC	Anchorage - AK
80208	CCCS OF ALASKA	LHCA	$0.00	$0.00	$0.00	$23,603.44	INTERMEDIARY - COMP	Anchorage - AK
81107	FAIRBANKS NEIGHBORHOOD HOUSING SERVICES, INC	Sub Grantee	$0.00	$0.00	$0.00	$11,409.09	INTERMEDIARY - COMP	Fairbanks - AK
		Total:	$0.00	$0.00	$0.00	$72,114.29		

SEARCH AGAIN

Figure 100. GTR – Reports: Funding Report by Filter – Results

7.6.2.9 *Reviewers Final Report*

1. From the top navigation menu, under **Reports** sub-menu, click the **Reviewers Final Report** hyperlink, the Select a Grant Application for Fiscal Year 20XX appears.

2. This will prompt you to a list of Grant Applications arranged by Agency. To view an Agency report, click the hyperlink for that Agency under the **Agency Name** column.

Select a Grant Application for FY 2009

Instructions: Click on the Agency Name that you wish to generate the report.

Agency ID	Application ID	Agency Name (Application ID)
80750	0011-001	CATHOLIC CHARITIES USA
82359	0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO
80084	0011-003	MON VALLEY INITIATIVE
84081	0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION
81504	0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.
84539	0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS
80989	0011-009	HOUSING PARTNERSHIP NETWORK
81639	0011-013	NATIONAL URBAN LEAGUE
84538	0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0011-016	ACORN HOUSING CORPORATION
84546	0011-018	NUEVA ESPERANZA
82507	0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE
81276	0011-020	MISSION OF PEACE
82559	0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION
84538	0012-002	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0013-006	ACORN HOUSING CORPORATION
80753	0014-007	ACORN HOUSING CORPORATION
80961	0321-002	YWCA DELAWARE
80219	0321-003	UNIVERSITY LEGAL SERVICES
80570	0321-004	NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC
84173	0321-005	CHRISTIAN ACTIVITIES COUNCIL
84654	0321-006	OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.
84534	0321-007	MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS
82095	0321-012	BERKSHIRE COUNTY REGIONAL HOUSING AUTHORITY-H

Figure 101.A. GTR – Reports: Reviewers Final Report

Note: Provided below is an example of a Final Reviewer Report.

Under each Factor, there are six places for comments based on the following criteria:

- Primary R. Strength
- Reviewers Strength
- Final Primary Reviewer Strength

- Primary R. Weakness
- Reviewers Weakness
- Final Primary Reviewer Weakness

Primary Reviewer Final Comment - Chairman Reports

Instructions: + –

Agency ID:	82456		
Agency Name:	HRS	**Application ID:**	0321-030
Grant Category:	LHCA	**Grant Type:**	COMP
Reviewer:	Maryanne Daniel (Prim. Rvwr)		
Reviewer(s):	Tom Hardy David Gallian		

Rating Factor	Score	Bonus Points	Max Points	Max Bonus Points	Other Scores	
1. Capacity of the Applicant and Relevant Organizational Staff	27	0	30	2	**TH** 0	**DG** 26
1a. RF1-2a: Average Combined Housing Counseling Experience of Project Director and Staff	6		6		0	6
1b. RF1-2b: Specialized Training Received for all Counselors and Staff	5		5		0	3
1c. RF1-3a: Grantee Requirements	2		3		0	1
1d. RF1-3b: HUD 9902-Filed Electronically in a timely manner	1		2		0	0
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?	2		2		0	3
1f. RF1-3d: Performance Reviews	5		5		0	0
1g. RF1-3e: Housing Counseling System (HCS)	2		2		0	0
1h. RF1-4a: Performance Evaluation	0		1		0	0
1i. RF1-4b: Goals/Results	4		4		0	0

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

2. Need/Extent of the Problem	4	0	5		**TH** 0	**DG** 4
2a. RF2-1: Needs Data	3		3		0	6
2b. RF2-2: Departmental Policy Priorities	1		2		0	3

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

3. Soundness of Approach/Scope of Housing Counseling Services	37	0	45		**TH** 0	**DG** 39
3a. RF3-1a: Average Number of Hours per Client/per Counseling Type	1		2		0	6
3b. RF3-1b: Types of Counseling	4		4		0	3
3c. RF3-1c: Group vs One-on-One	0		1		0	1
3d. RF3-1d: Marketing and Outreach	1		1		0	0
3e. RF3-2a: Cost Per Client	6		6		0	3
3f. RF3-2b: Capacity	1		1		0	0

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

4. Leveraging Resources	10	0	10		TH 0	DG 10

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

5. Achieving Results and Program Evaluation	10	0	10		TH 0	DG 10
5a. RF5-1a: Outputs/Services	3		3		0	6
5b. RF5-1b: Outcomes	3		3		0	3
5c. RF5-1c: Logic Model Projections	3		3		0	1
5d. RF5-1d: Evaluation Tools	1		1		0	0

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

Total	88	0	100	2	TH 0	DG 89

Print

Figure 101.B. GTR – Reports: Reviewers Final Report Result

Note: In order to maximize or minimize these comments either select the + –. Provided below is an example of the comments boxes maximized in order to read the comments by those who reviewed this agency‟s request.

Primary R. Strength: + –

2 bilingual counselors on staff; no performanc review conducted last year. Director has more than 8 yrs of experience. Most of the counselors have certifications.

Reviewers Strength: + –

this rating factor was well organized and easy to read. applicant addressed most of the questions.

Final Primary Reviewer Strength: + –

Primary R. Weakness: + –

Lost point for timeliness of 9902

Figure 101.C. GTR – Reports: Reviewers Final Report Result – Strengths and Weaknesses

Note: If a primary reviewer has not reviewed a specific application, you will see the following message at the top of a report.

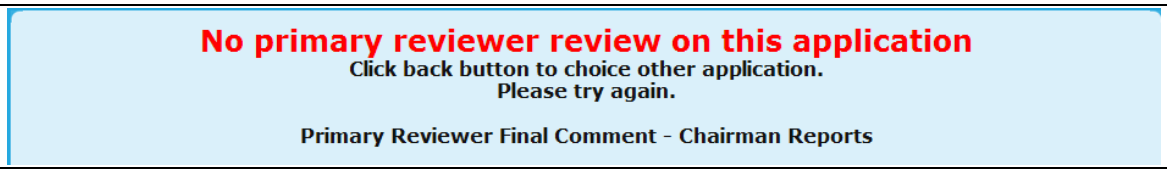


Figure 101.D. GTR – Reports: Reviewers Final Report Result – No Review Alert

7.6.2.10 *Reviewers Report*

1. From the top navigation menu, under **Reports** sub-menu, click **Reviewers Report** hyperlink, following prompt appears. If **OK** button is clicked, the Strength and Weakness comments will be included in the report. If **Cancel** button is clicked, the Strength and Weakness comments will not be included in the report.

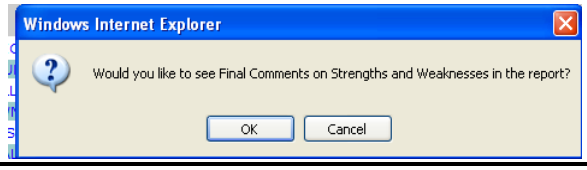
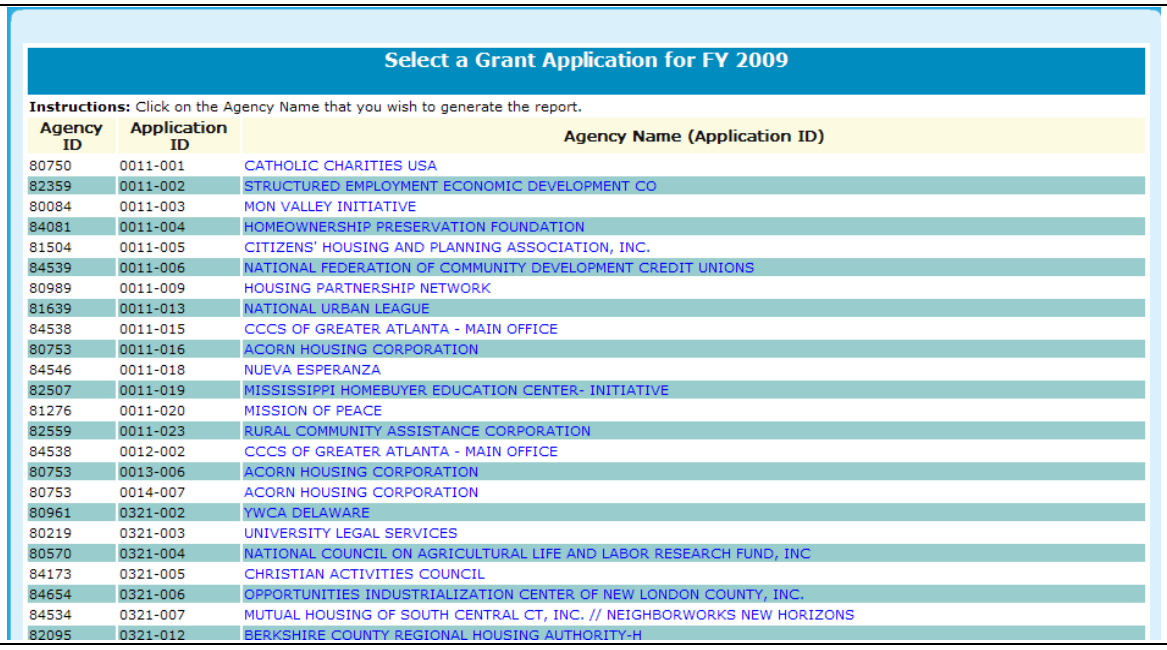


Figure 102. GTR – Reports: Reviewers Report – Whether to Show Strengths and Weaknesses in the Report Prompt

2. Upon selecting **OK** or **Cancel**, you will be prompted to the Select a Grant Application for FY 20XX screen. From here, like in Final Reviewers Report, you have the ability to choose a report based on an Agency.



Select a Grant Application for FY 2009

Instructions: Click on the Agency Name that you wish to generate the report.

Agency ID	Application ID	Agency Name (Application ID)
80750	0011-001	CATHOLIC CHARITIES USA
82359	0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO
80084	0011-003	MON VALLEY INITIATIVE
84081	0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION
81504	0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.
84539	0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS
80989	0011-009	HOUSING PARTNERSHIP NETWORK
81639	0011-013	NATIONAL URBAN LEAGUE
84538	0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0011-016	ACORN HOUSING CORPORATION
84546	0011-018	NUEVA ESPERANZA
82507	0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE
81276	0011-020	MISSION OF PEACE
82559	0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION
84538	0012-002	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0013-006	ACORN HOUSING CORPORATION
80753	0014-007	ACORN HOUSING CORPORATION
80961	0321-002	YWCA DELAWARE
80219	0321-003	UNIVERSITY LEGAL SERVICES
80570	0321-004	NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC
84173	0321-005	CHRISTIAN ACTIVITIES COUNCIL
84654	0321-006	OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.
84534	0321-007	MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS
82095	0321-012	BERKSHIRE COUNTY REGIONAL HOUSING AUTHORITY-H

Figure 103.A. GTR – Reports: Reviewers Report – Select a Grant Application for FY 20XX

3. Once you have selected the agency to review you will be prompted to the *Reviewer Scoring and Comment Summary Report*. In order to view a specific Reviewers report, you will have to choose a name that has a hyperlink attached. This can be found in the Other Reviewers row.

Reviewer Scoring and Comment Summary Report

Agency ID:	80753		
Agency Name:	ACORN HOUSING CORPORATION	**Application ID:**	0011-016
Grant Category:	INTERMEDIARY	**Grant Type:**	COMP
Reviewer:	Ronald Bedoya		
Other Reviewer(s):	Brian Siebenlist (Prim. Rvwr) Terri Ames Jennifer Smith		

Rating Factor	Scored	Bonus Points	Max Points	Max Bonus Points
1. Capacity of the Applicant and Relevant Organizational Staff	28		30	
1a. RF1-2a: Average Combined Housing Counseling Experience of Project Director and Staff	5		6	
1b. RF1-2b: Specialized Training Received for all Counselors and Staff	5		5	
1c. RF1-3a: Grantee Requirements	3		3	
1d. RF1-3b: HUD 9902-Filed Electronically in a timely manner	2		2	
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?	2		2	
1f. RF1-3d: Performance Reviews	4		5	
1g. RF1-3e: Housing Counseling System (HCS)	2		2	
1h. RF1-4a: Performance Evaluation	1		1	
1i. RF1-4b: Goals/Results	4		4	
Strength: + −				
Weakness: + −				
2. Need/Extent of the Problem	5		5	
2a. RF2-1: Needs Data	3		3	
2b. RF2-2: Departmental Policy Priorities	2		2	
Strength: + −				
Weakness: + −				
3. Soundness of Approach/Scope of Housing Counseling Services	44		45	
3a. RF3-1a: Average Number of Hours per Client/per Counseling Type	2		2	
3b. RF3-1b: Types of Counseling	4		4	
3c. RF3-1c: Group vs One-on-One	1		1	
3d. RF3-1d: Marketing and Outreach	1		1	
3e. RF3-2a: Cost Per Client	6		6	
3f. RF3-2b: Capacity	1		1	
3g. RF3-2c: Training Expenditures	2		2	
3h. RF3-2d: Percentage of Grant Funding Passed Through	1		1	
3i. RF3-2e: Geographic Coverage, # of States	0		1	
3j. RF3-3a: Types of Counseling and Eduction Services	5		5	
3k. RF3-3b: Average Number of Hours per Client/per Counseling Type	2		2	
3l. RF3-3c: Sufficient Staff to Carry Out Proposed Activities & Number of Clients	0		1	
3m. RF3-3d: Training	1		1	
3n. RF3-3e: Plans to Effectively Serve and/or Communicate with Persons with Limited English and Disabilities	1		1	
3o. RF3-3f: Budget Explanation	1		1	
3p. RF3-4a: Cost per Client	4		4	
3q. RF3-4b: Projected Performance - Group Education and One-on-One Counseling	1		2	
3r. RF3-4c: Marketing and Outreach	2		2	
3s. RF3-5a: Partnerships and Efforts to Coordinate Proposed Activities	2		2	
3t. RF3-5b: Complementing Other HUD Programs	2		2	
3u. RF3-5c: Plans to Avoid Conflicts of Interest	2		2	
3v. RF3-6a: Percent of Grant Funding to be Passed Through	2		3	
3w. RF3-6b: Capacity	1		1	
Strength: + −				
Weakness: + −				
4. Leveraging Resources	10		10	
Strength: + −				
Weakness: + −				
5. Achieving Results and Program Evaluation	9		10	
5a. RF5-1a: Outputs/Services	2		3	
5b. RF5-1b: Outcomes	3		3	
5c. RF5-1c: Logic Model Projections	3		3	
5d. RF5-1d: Evaluation Tools	1		1	
Strength: + −				
Weakness: + −				
Total	96		100	0

Print

Figure 103.B. GTR – Reports: Reviewers Report – Reviewer Scoring and Comment Summary Report

7.6.2.11 *Application Number Reference*

This report breaks down the Office ID, Office Name, and whether or not a table exists for this application.

1. From the top navigation menu, under **Reports** sub-menu, click the **Application Number Reference** hyperlink, the Grant Application Number Reference – for Fiscal Year 20XX appears.

Grant Application Number Reference - for FY 2009

Instructions: This page allows for viewing of which offices have or have not been created from the Funding Appropriation page.

Office ID	Office Name	Exists In Table
0011	Intermediary (COMP)	YES
0013	Intermediary (LDRC)	YES
0014	Intermediary (FLMF)	YES
0012	Intermediary (HECM)	YES
0015	Intermediary (TRNG)	YES
0321	Philadelphia (LHCA - COMP)	YES
0323	Philadelphia (LHCA - LDRC)	YES
0322	Philadelphia (LHCA - HECM)	YES
0331	Philadelphia (MSO - COMP)	YES
0333	Philadelphia (MSO - LDRC)	YES
0332	Philadelphia (MSO - HECM)	YES
0341	Philadelphia (SHFA - COMP)	YES
0343	Philadelphia (SHFA - LDRC)	YES
0421	Atlanta (LHCA - COMP)	YES
0423	Atlanta (LHCA - LDRC)	YES
0422	Atlanta (LHCA - HECM)	YES
0431	Atlanta (MSO - COMP)	YES
0433	Atlanta (MSO - LDRC)	YES
0432	Atlanta (MSO - HECM)	YES
0441	Atlanta (SHFA - COMP)	YES
0443	Atlanta (SHFA - LDRC)	YES
0821	Denver (LHCA - COMP)	YES
0823	Denver (LHCA - LDRC)	YES
0822	Denver (LHCA - HECM)	YES
0831	Denver (MSO - COMP)	YES
0833	Denver (MSO - LDRC)	YES
0832	Denver (MSO - HECM)	YES

Figure 104. GTR – Reports: Application Number Reference

8.0 OFFICE MANAGER

8.0 OFFICE MANAGER

The HUD Office Manager"s role within HCS also provides the ability to oversee the business process of the HUD-9902 submissions and the Grants Process. In addition to the rights and capabilities of the HUD GTR, the Office Manager also has the capability to view User Information and perform some Management Functions. Within HCS, the HUD Office Manager has the ability to:

- Submit/Review **Agency** information
- Submit/Review **HUD-9902** forms
- Enter the **Grants** Processing section of HCS to:
  - Setup Grant Applications
  - Score Grant Applications
  - View Final Scoring
  - Calculate Recommended Awards
  - Input Awards and Sub-Allocations
- Manage HCS **User** Information
- Perform some **Management** Functions
- View **Reports**
- Export Data
- Access information in the **HCS Archive**

Upon logging into the system as an *Office Manager,* you will see the following screen:

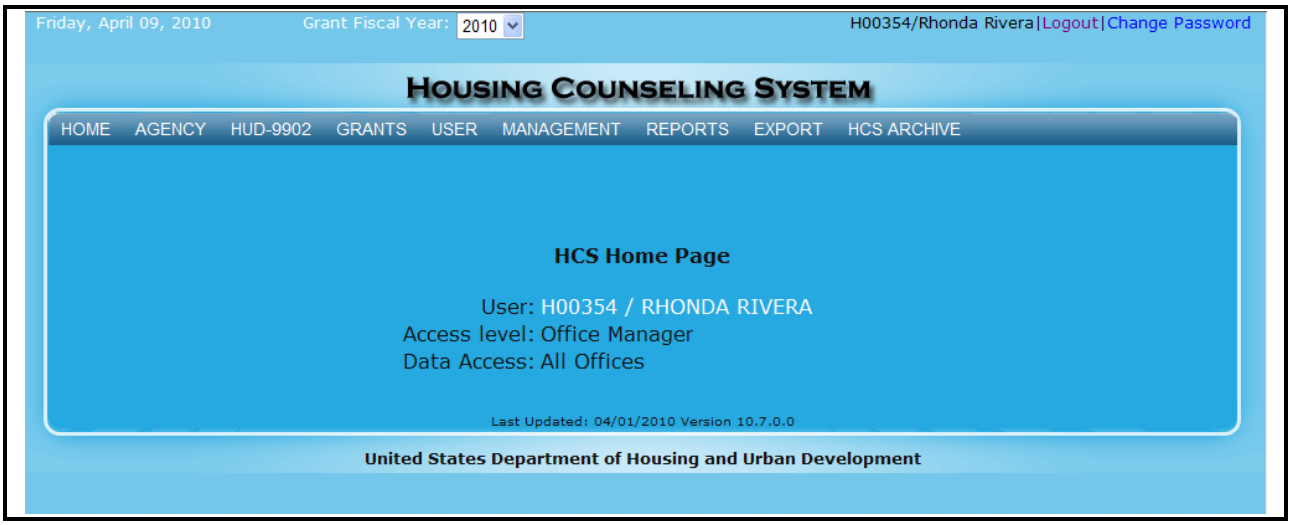


Figure 105. Office Manager: HCS Home Page

8.1 Agency

As an Office Manager, you can also review or submit information about the agencies that you are involved with.

8.1.1 Agency Search

1. From the top navigation menu, click the **Agency** hyperlink**.** The *Agency Search* screen appears. You can also access this from the **Agency Search** sub-menu option.

2. Click the dropdown box to select the fiscal year you wish to search for, and click **Go** button.

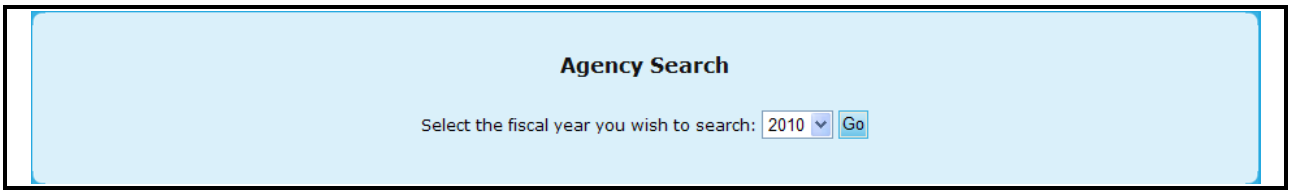


Figure 106.A. OM – Agency: Agency Search

3. The *Agency Search for FY 20XX* screen appears. From here you will be able to perform a Basic Search, or perform an Advanced Search. To go to the Advanced Search click the **Go to advanced agency search** hyperlink.

4. On the *Agency Search* page, the following listed search criteria have multiple selection enabled controls. Users can click the field to display choices and select multiple items, or select one field to search. You can also enter values with comma to delimit list of values.
   a. Agency Information
   b. HUD Office & GTR
   c. Agency Location
   d. Agency Type & Services
   e. Agency Status & Validation
   f. Grant & 9902 Information

5. Fill out the form and click the **Search** button. The *Agency List* screen appears.

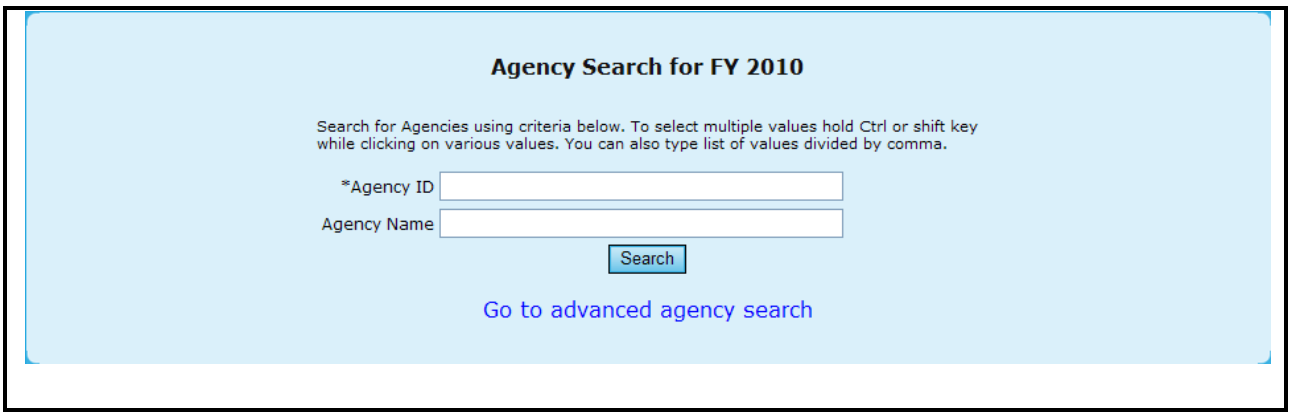


Figure 106.B. OM – Agency: Basic Agency Search for FY 20XX

Advanced Agency Search for FY 2010

Back to simple agency search

Search for Agencies using criteria below. To select multiple values hold Ctrl or shift key while clicking on various values. You can also type list of values divided by comma.

Search

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

Search by Agency Information

* Agency ID | Agency Name

Sub-Agencies List of Parent Agency

Has Sub-Agencies | * CMS Submission

Search by HUD Office and GTR

* HUD Office

GTR Assigned | GTR Name

Search by Agency Location

City | * State | * Zip Code

Search by Agency Type and Services

* Agency Type | * Counseling Services Provided

Search by Agency Status and Validation

* Status | Validated

Last Update Date Between and

Validated Date Validated Date Between and

Active Status Expiration | Expiration within: days after today's date | Active Status Expired or Will Expire Between and

Previous dates shows agencies that already expired; future dates shows agencies about to expire.

Search by Agency Grant and 9902 Information

Submitted 9902 | * You must select 9902 report period when you selected "Yes" or "No" from submitted 9902

HUD 9902 Report Period

Individual 9902 Submission Required

Delinquent in Federal Debt

Applied for Grant

Grant Funded Last Year

* Grant Type

* You must select "Grant Funded Last Year" when you selected "Grant Type"

Search | Clear the Search Criteria

Figure 106.C. OM – Agency: Agency Search for FY 20XX

Note: Provided below is an example of an Agency List Search result.

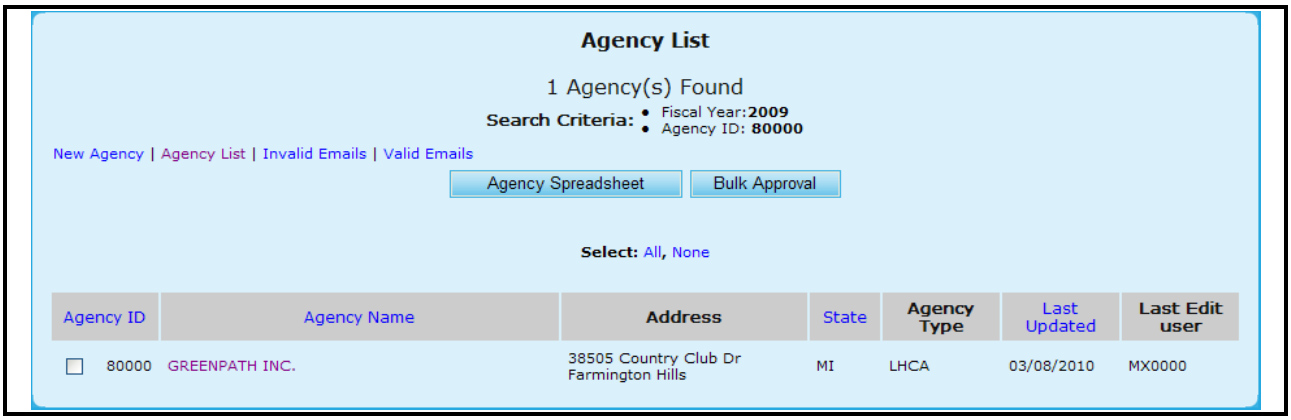


Figure 107.A. OM – Agency: Agency List

6. To retrieve a list of email addresses for the agencies listed, click the **Valid Emails** hyperlink. A list of valid email addresses is listed from which an exported file can be generated.

Figure 107.B. OM – Agency: Agency List Valid Emails

7. To view a list of agencies that do not have a valid email address, click the **Invalid Emails** hyperlink. A list of agencies that do not have a valid email address is listed. From this list, you can edit or enter a valid email address for the agency.
    a. To edit or enter a valid email address for the agency, click the email text in the Invalid Email Address column.
    b. An input box with an Update and Cancel button appears.
    c. Enter a valid email address and click the Update button to save or Cancel to undo.
    d. Once Updated with a valid email address, the agency is removed from the current list and added to the Valid Emails list.

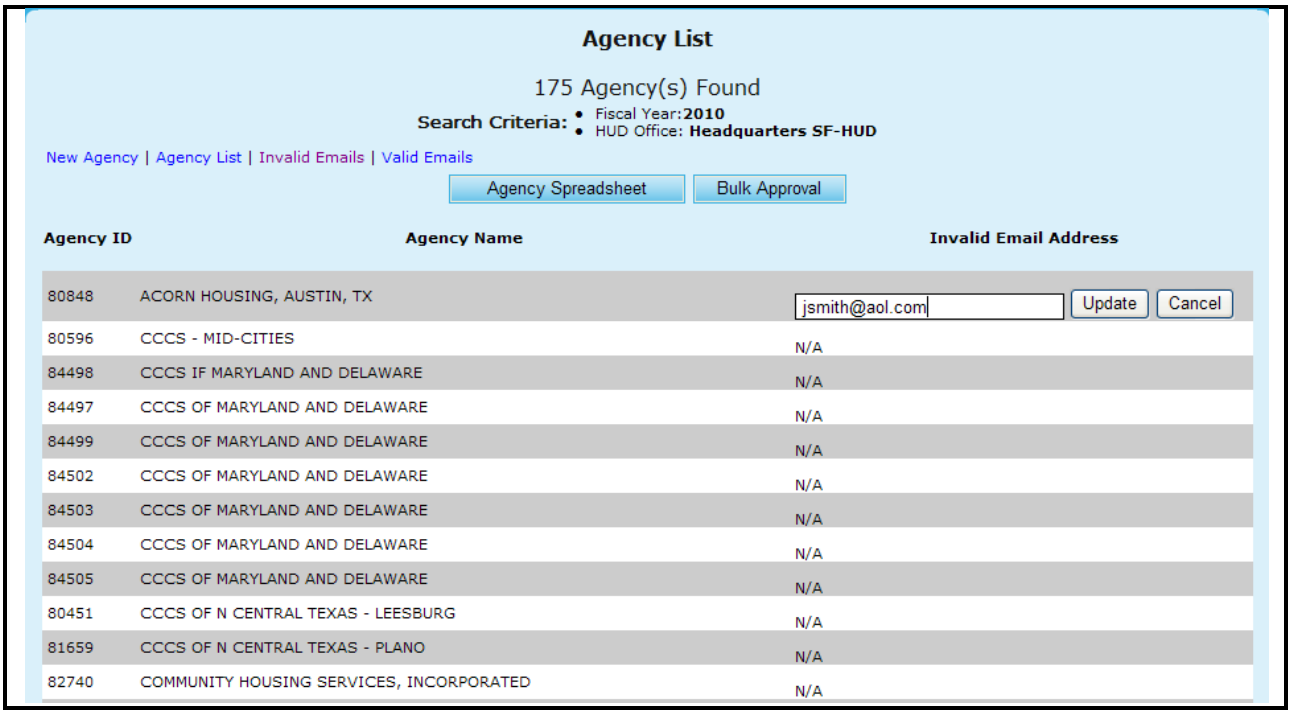


Figure 107.C. OM – Agency: Agency List Invalid Emails

8. If you want to export the agency list to an Excel spreadsheet, Click the **Agency Spreadsheet** button. The *File Download* dialog box appears.

9. Select to either **Open** or **Save** the file and then return to Agency List screen.

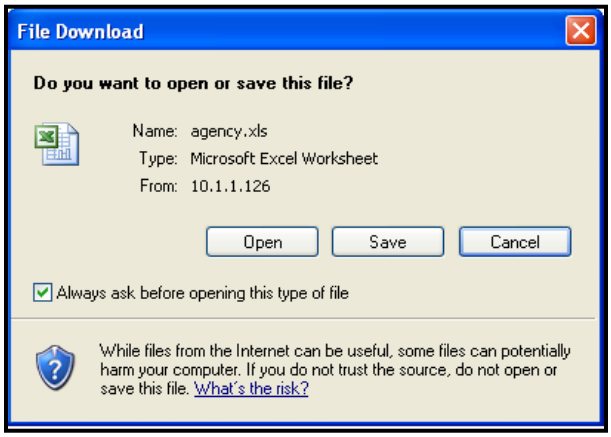


Figure 108. OM – Agency: Agency List File Download Dialog Box.

10. To view more information about or to update data of an agency listed in the *Agency List* page, click the agency"s name hyperlink in the **Agency Name** column. The *Agency Summary* screen for that agency appears.

11. From the Agency Summary screen, you have six tabs to choose from to view more detailed information regarding that specific agency. You can view information on:
    a. Agency Summary
    b. Agency Information
    c. Personnel

d. Contact Information
e. HUD Affiliation
f. Counselor/Client

Note: You will be able to edit some information found in these tabs; however the edit function is not available in all fields.

12. From the **Agency Summary** you are able to add and delete HUD Comments.

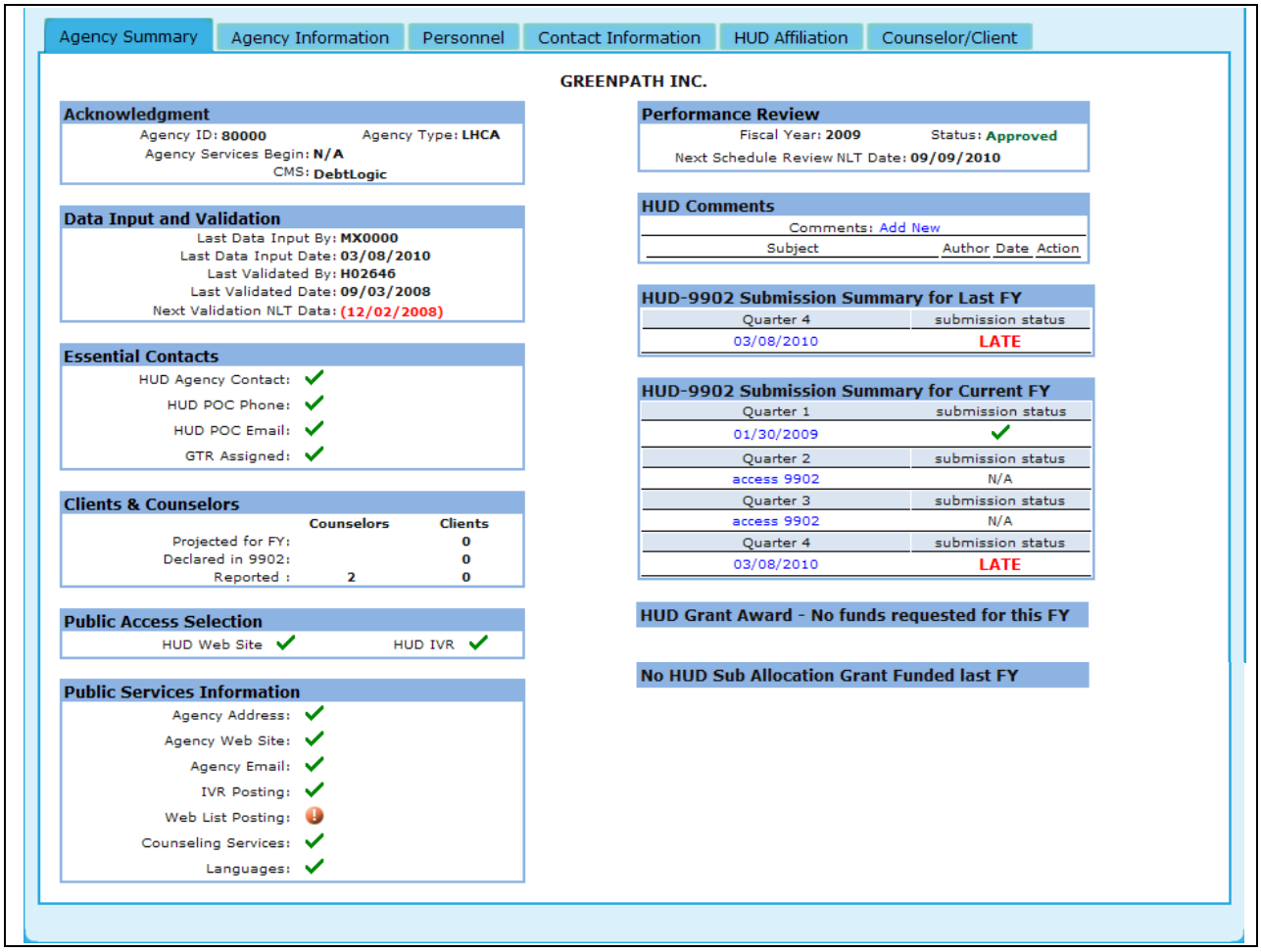


Figure 109.A. OM – Agency: Agency Summary

12. To add a HUD Comment, click the **Add New** hyperlink found next to comments in the HUD Comments box.

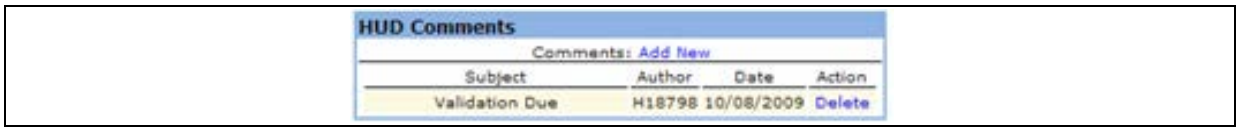


Figure 109.B.1. OM – Agency: Agency Summary – HUD Comments

13. Enter the Subject and your comment, and click **Save**, to save the comment, or **Cancel** to close the Comment box.

Figure 109.B.2. OM – Agency: Agency Summary – Add New HUD Comment

14. To delete a comment, click the **Delete** hyperlink located under the Action column.

15. Under the **Agency Information** you are unable to alter any of the information provided.

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

Agency ID: **80000**

Validated?

Last Validated on **09/03/2008** (Next Validation Required by 12/02/2008)

Agency Name: **GREENPATH INC.**

Agency Designations

Faith Base:N Colonials: N Migrant Workers:N

Number of Counselors: **0** Number of Projected Clients: **0**

Housing Counseling Services Provided as of:

Delinquent in Federal Debt? **No**

Federal Tax ID Number (TIN):
38-6142925

DUNS Number:
172773500
For information about obtaining a DUNS number, please refer to
http://smallbusiness.dnb.com or call 866-705-5711

Education/Group Sessions

Session Title **Session Date** **Attendees**

Additional Languages Provided:

English
Spanish

OK | Cancel | Sub-Agency(s) | Associated Applications:

Figure 109.C. OM – Agency: Agency Information

16. Under the **Personnel** tab, you will be able to edit the information in fields where a drop-down option is available, as highlighted with a circle.

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

Agency ID: **80000**

Validated?

Last Validated on **09/03/2008** (Next Validation Required by 12/02/2008)

Agency Name: **GREENPATH INC.**

Agency Manager:

Salutation --select-- User ID: **MX0000** Business Title HUD Contact

Setina Briggs

Agency Senior Executive:

Salutation: --select-- Business Title: HUD Contact

Setina Briggs

Agency Senior Executive Phone:
248-553-5400

Agency Contact for HUD Use

Salutation: --select-- Business Title: HUD Contact

Setina Briggs

Agency POC Phone:
248-553-5400

Agency POC Email:
sbriggs@greenpath.com

OK | Cancel | Sub-Agency(s) | Associated Applications:

Figure 109.D. OM – Agency: Personnel

17. Under the **Contact Information** you are unable to alter any of the information.

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

Agency ID: **80000**

Validated?
Last Validated on **09/03/2008** (Next Validation Required by 12/02/2008)

Agency Name: **GREENPATH INC.**

Physical address:

38505 Country Club Dr
Suite 210

City: Farmington Hills
State: Michigan *
Zip: 48331
Please check the box if agency mailing address is the same of agency physical address

Mailing address:

City:
State: Not Selected *
Zip:

Agency Contact:

Phone:
248-553-5400

Fax:
248-553-8970

Toll Free Phone:
888-860-4167

Email:
N/A

Web URL:
http://www.greenpath.com

OK | Cancel | Sub-Agency(s) | Associated Applications:

Figure 109.E. OM – Agency: Contact Information

18. Under the **HUD Affiliation** tab you will be able to edit all information found on that page. This includes:
    a. Agency Name
    b. Type of Agency
    c. Status (Further information can be found in Section 8.2.2.1.).
    d. HUD Office GTR
    e. GTR Phone Number
    f. HUD Office Assigned to
    g. Types of Counseling Services
    h. Zip Codes Affiliation(By pressing the Add Another Zip Code hyperlink, an input box will appear which will allow you to insert a new zip code)
    i. State Affiliations (By pressing the Add Another State hyperlink, a drop-down box will appear as demonstrated in the figure below, and circled in Red)
    j. Allow for Public Access

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

Agency ID: 80000

Validated?
Last Validated on 09/03/2008 (Next Validation Required by 12/02/2008)

Agency Name:
GREENPATH INC.

Status: Approved As Of: 09/09/2008 Up To: 09/09/2010 Change | View History

Type of Agency: LHCA
Parent Org:
Temporary Affiliate

HUD Office GTR: Stopera, Glen
GTR Phone: 518 - 464 - 4200 x 2824

HUD Office assigned to: Philadelphia (HOC)

Types of Counseling Services:

- [ ] DFC - Mortgage Delinquency and Default Resolution Counseling
- [x] FHA - Fair Housing Assistance
- [x] HEP - Homebuyer Education Programs
- [ ] HOM - Services for Homeless
- [x] MDM - Money Debt Management
- [x] PC - Prepurchase Counseling
- [x] PRL - Predatory Lending
- [ ] DRC - Mobility and Relocation Counseling
- [x] HEC - Home Equity Conversion Mortgage Counseling
- [x] HIR - Home Improvement and Rehabilitation Counseling
- [ ] LM - Loss Mitigation
- [ ] MOI - Marketing and Outreach Initiatives
- [x] PPC - Postpurchase Counseling
- [x] RC - Renters Assistance

Zip Code Affiliations:
Default Affiliation: 48331

12167	12406	12421	12430	12434
12438	12455	12459	12474	13731
13737	13740	13750	13751	13752
13753	13754	13755	13756	13757
13775	13782	13783	13786	13788
13789	13804	13805	13806	13820
13838	13839	13846	13847	13856
20816				

Add Another Zip Code

State Affiliations:
Default Affiliation: Michigan
Maryland
New York

Add Another State

Public display options
- [x] Allow for public access?
  - [x] Allow public access through Zip Code Affiliations?
  - [x] Allow public access through State Affiliations?

OK | Cancel | Sub-Agency(s)

Figure 109.F. OM – Agency: HUD Affiliation

19. Under the **Counselor/Client** tab, you will be prompted to a list of counselors that are under each specific agency. From this tab, you can also perform a **Counselor search**, **Add Counselor**, and perform a **Client search**.

20. Provided below is the screen that you will be prompted to for Counselor Search. This is further explained in Section 8.2.3.

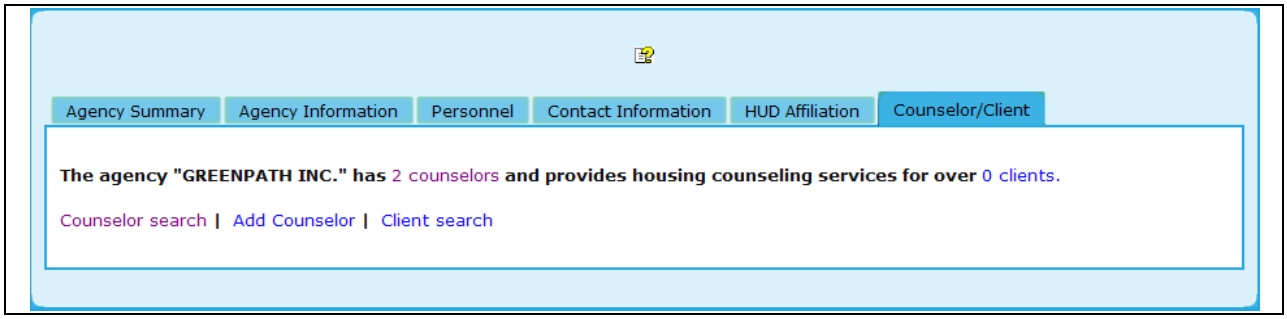


Figure 109.G.1. OM – Agency: Counselor/Client

21. To add a new counselor, click the **Add Counselor** hyperlink, and you will be prompted to a form which needs to be completed prior to officially adding that counselor. An example of this is provided below. Once you have completed the necessary fields, click **Add New** to save this counselor, or **Clear**, to erase previously input data.

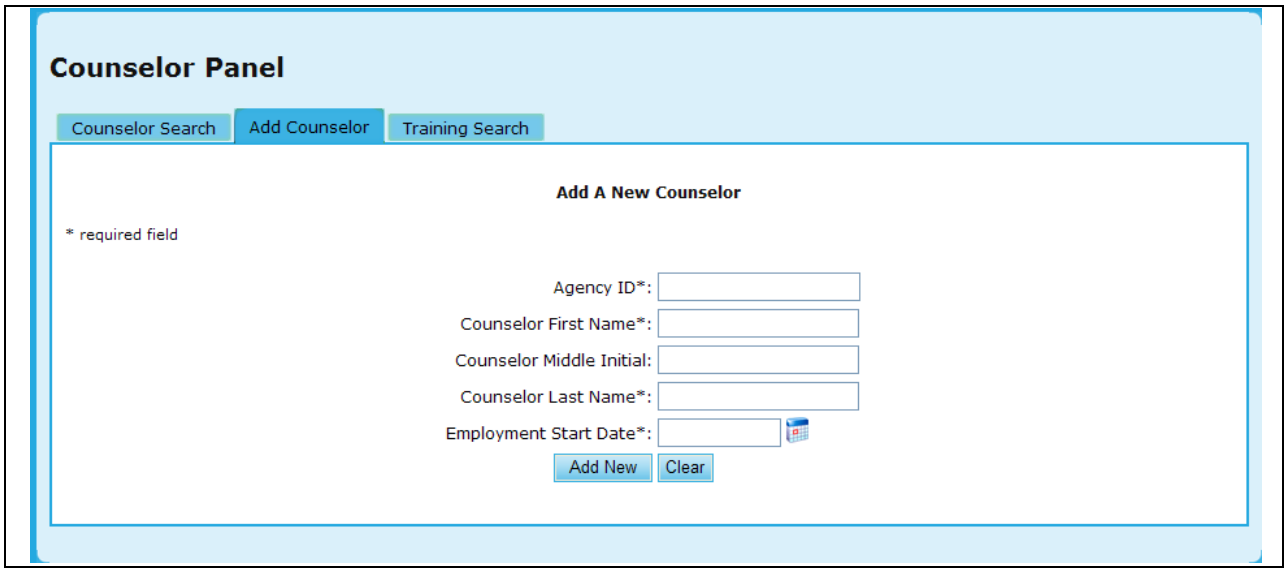


Figure 109.G.2. OM – Agency: Add Counselor

22. To perform a Counselor Training Search, click the **Training Search** hyperlink, and you will be prompted to a search which will allow you to narrow down your results. An example of this is provided below. Once you have completed your criteria, click **Search** to retrieve results, or **Clear** to erase previously input data.

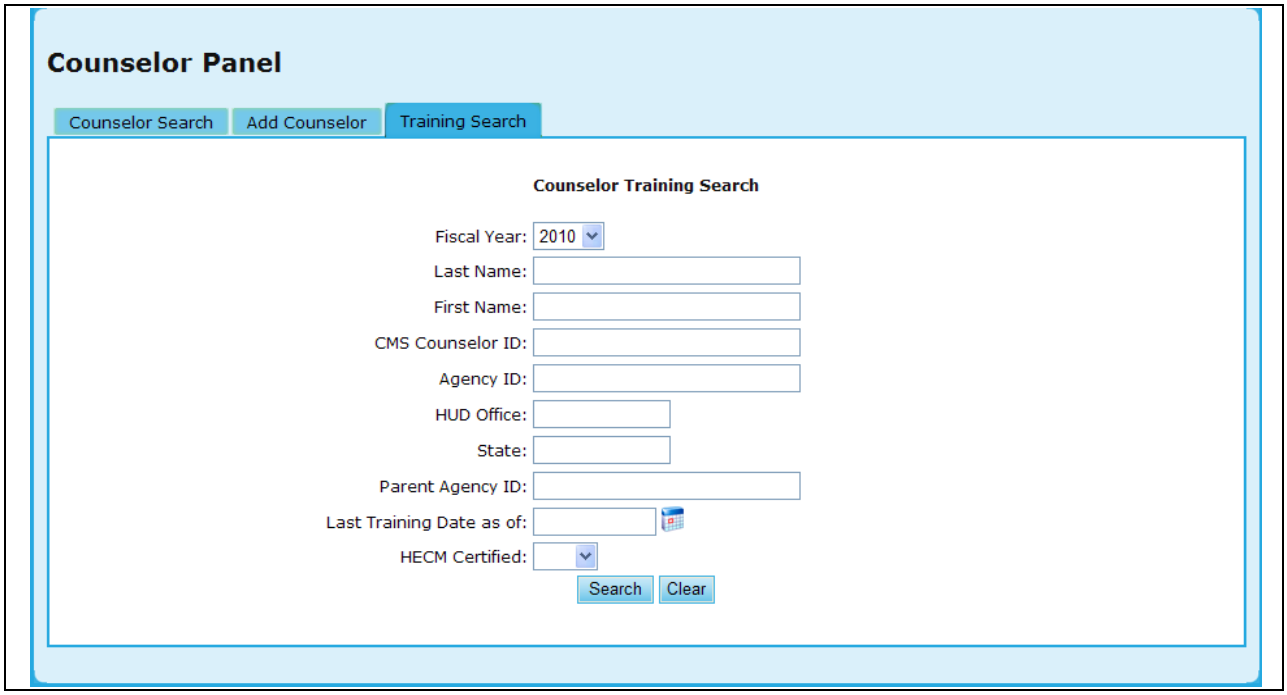


Figure 109.G.3. OM – Agency: Counselor Training Search

23. By clicking the hyperlink under the name, you will be prompted to the Counselor Profile.

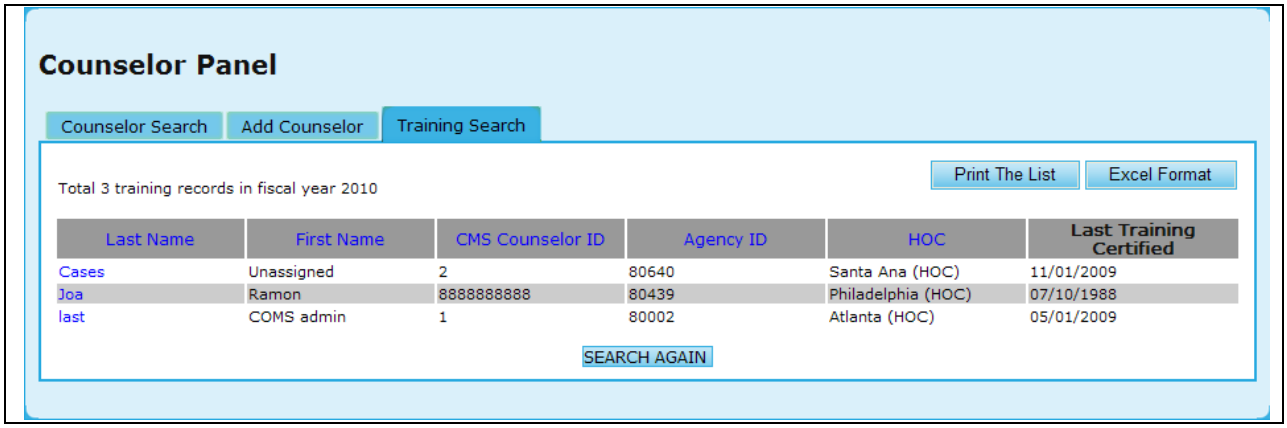


Figure 109.G.4. OM – Agency: Training Search Results

24. If you desire to update this profile, edit the information you desire and click **Update info** to save those changes, or **Clear** to remove that information.

Counselor Search | Add Counselor | Training Search | Counselor Profile

Counselor Profile

* required field

First Name*: Facilitator
Middle Init:
Last Name*: Workshop
CMS Counselor ID: 122
Agency ID: 80727
Agency Name: CONSUMER CREDIT COUNSELING SERVICE
Agency Type: LHCA
Last Training Date: 01/01/2010
Employment Start Date*: 01/26/2010
Employment End Date:
HECM Certified: No

Update info | Clear

Counselor Training Info

Training Title:	Training Date:	Training Organization:	Other Training Organization:	Training Sponsor:
New Counselor Training	01/01/2010	Other	CCCS of LSS in SD	N/A

Figure 109.G.5. OM – Agency: Agency Counselor/Client – Training Search – Counselor Profile

8.1.1.1 *Agency Status Update*

MANUAL STATUS CHANGING

Status changes are available only to HUD users. They are made either directly in the agency‟s profile or from the results of a search feature that lists agencies.

PROFILE

The agency‟s status is reflected in a HUD write protected section in the profile. The start and end dates are shown. When an agency is terminated, there will not be an end date since the Terminated status is indefinite until it is manually changed. In the status section are two action links; Change / View History. Select the Change action to initiate a change in the agency‟s status. The status entry is a dropdown menu allowing the HUD user to make the appropriate selection. The HUD user will also record the reason for the status change in the available comment box labeling an appropriate subject for quick reference. Status start dates cannot be a future date but the current date or a previous date. The HUD user and the date/time the status change is made will be recorded.

AGENCY LIST

To make multiple Approval changes when several agencies are about to be terminated, HCS allows mass approval to be made. From the desired list of agencies, at the top of the list are action items. Make a mark in the boxes at the left edge of the agency list for all the agencies you want to Re-approve. Individual agencies can be manually marked or selecting „ALL" will mark all boxes automatically. Select the „Bulk Approval‟ item and all the marked boxes will re-approve the applied agencies.

You should notice that not all agencies have a box along the left edge. Keep in mind only LHCA, Intermediaries and SHFA can be approved (participating for SHFA).

VIEW STATUS HISTORY

Each profile now shows the history of the status changes. The status history is for HUD use only to better understand the agencies circumstances in the program. The agency can only view their current status. If the dates or comments need to be corrected, simply Click the desired history status to edit the information. The status cannot be changed. The current status will be reflected in the agency spreadsheet; not the history statuses.

8.1.1.2 *Update Status from Agency List*

Agency Search results provide an option to update multiple agencies‟ statuses with a single start date. The duration of the approval period is determined according to the rules specified above.
To update the active status of multiple agencies follow the steps below:

1. From the Agency Search for FY 2XXX page, select the criteria you wish to find agencies with.
   a. The System displays a list of agencies that match your criteria.
   b. Note the check boxes that appear next to some of the agencies listed. Only LHCA‟s, SHFA‟s, Intermediaries, and Multi-State Organizations are permitted to have their statuses updated from the search results page.
   c. You can click the "All" hyperlink next to Select to check all checkable agencies in the list. You can also click the "None" hyperlink next to Select to uncheck all agencies in the list.

2. After checking the agencies you want to update, click the Bulk Approve button.

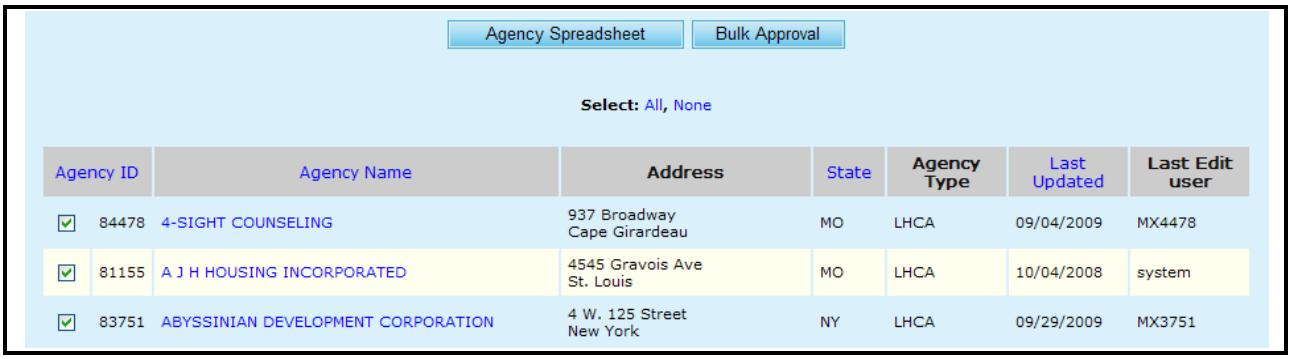


Figure 110.A. OM – Agency: Update Agency Status Bulk Approve

3. Enter the Approval effective date and click the **Apply** button to apply status change. If you wish not to change the statuses, click the **Cancel** button or the Close button.

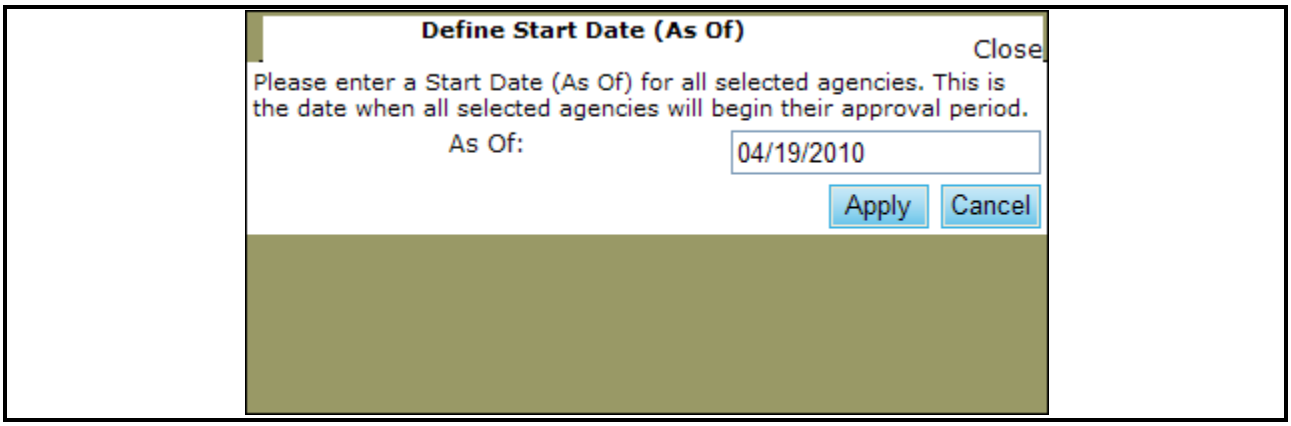


Figure 110.B. OM – Agency: Update Agency Status – Bulk Approve

8.1.1.3 *Update Status from Information*

To update the status for a single agency, go to the agency profile for the agency you wish to update and following the steps below:

1. Under the HUD Affiliation tab, you will see Status, with the option to either **Change** or **View History**. Figure 111.A. demonstrates the View History, and once in view mode, you have the option to select **Hide History**.

Status: **Participating** As Of: **10/01/2009** Up To: **09/30/2010** Change | Hide History

Reason	As Of	Up To	Author	Date	Status
Parent Agency:84539 status was changed.	10/01/2009	09/30/2010	H13932	11/02/2009	Participating
Status updated due to expiration of previous statu	10/01/2009	10/31/2009	SYSTEM	10/01/2009	Conditional
Parent Agency:84539 status was changed.	10/01/2009	10/31/2009	SYSTEM	10/01/2009	Conditional
	01/06/2009	09/30/2009	H13932	01/06/2009	Participating

Figure 111.A. OM – Agency: Update Agency Status – Agency Profile – View History

2. In the Status Change pop up box, you can change the following information:
   a. Status – the Status options listed reflect only those statuses an agency type can have. Please refer to Section 8.2.1.1. concerning active statuses. Changing statuses creates a new status history record.
   b. For – This option is only available for Conditional and Inactive statuses. It is used to auto-calculate the Up To date.
   c. Renew – This creates a new status history record instead of overwriting the current status record. Renew is only applicable if the status has not changed but the As Of and Up To dates have changed. If Status has changed, the Renew checkbox is ignored.
   d. Status As Of Date – The effective date of the status
   e. Status Up To Date – The last day on which the selected status is effective
   f. Reason – A brief description for the reasoning behind updating the status
   g. Comment – A longer description for the reasoning behind updating the status

3. Click the **Apply** button to save the status update.

4. After clicking the **Apply** button, the pop up box is closed and the updated status information is displayed on the Agency Profile. You do not need to click the **OK** button to save the status change as it has already been saved.

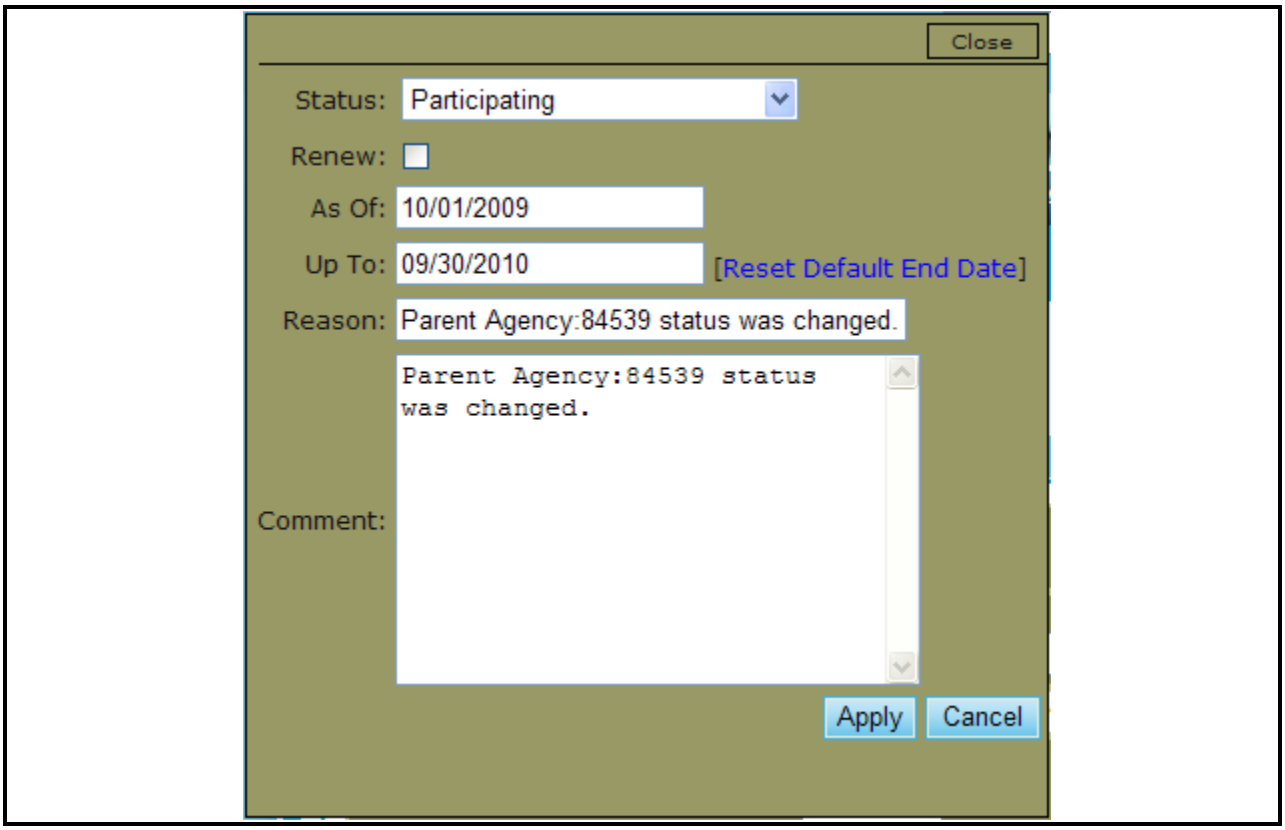


Figure 111.B. OM – Agency: Update Agency Status – Agency Profile – Change

8.1.2 Add New Agency

You can click the **Add New Agency** button from *Agency Search* page or from *Agency List* page to add a new agency to the HCS system.

1. From the upper navigation menu, scroll over the **Agency** hyperlink**.** And select the **Add New Agency** button.

2. Complete all of the required fields that are marked with *. Fields that are not marked with * are not mandatory. Following are the *Agency Profile* required fields.
   a. Agency Name
   b. Type of Agency: Following are the options of type of agency shown in the dropdown list.
   c. HUD Office GTR: The GTR assigned to this agency, as well as their contact number and office location.
   d. Agency Manager: The Point of Contact for the newly formed Agency.
   e. Physical Address: What is required is the City, State, and Zip Code of the Agency Office location.
      i. State: Select a state from the dropdown list where the agency physically resides in. System automatically assigns a HUD Office to the agency based on the State selected.
   f. Fiscal Year: The fiscal year the new agency profile is being created for. The options are „This Year" and „Next Year".
   g. Federal Tax ID Number (TIN): This is agency"s federal employer identification number. The system defaults its value to "00-0000000". If user leaves the default value unchanged,

following warning message appears when the **OK** button is clicked by user to save data. Click the OK button from the warning message window to continue the process.

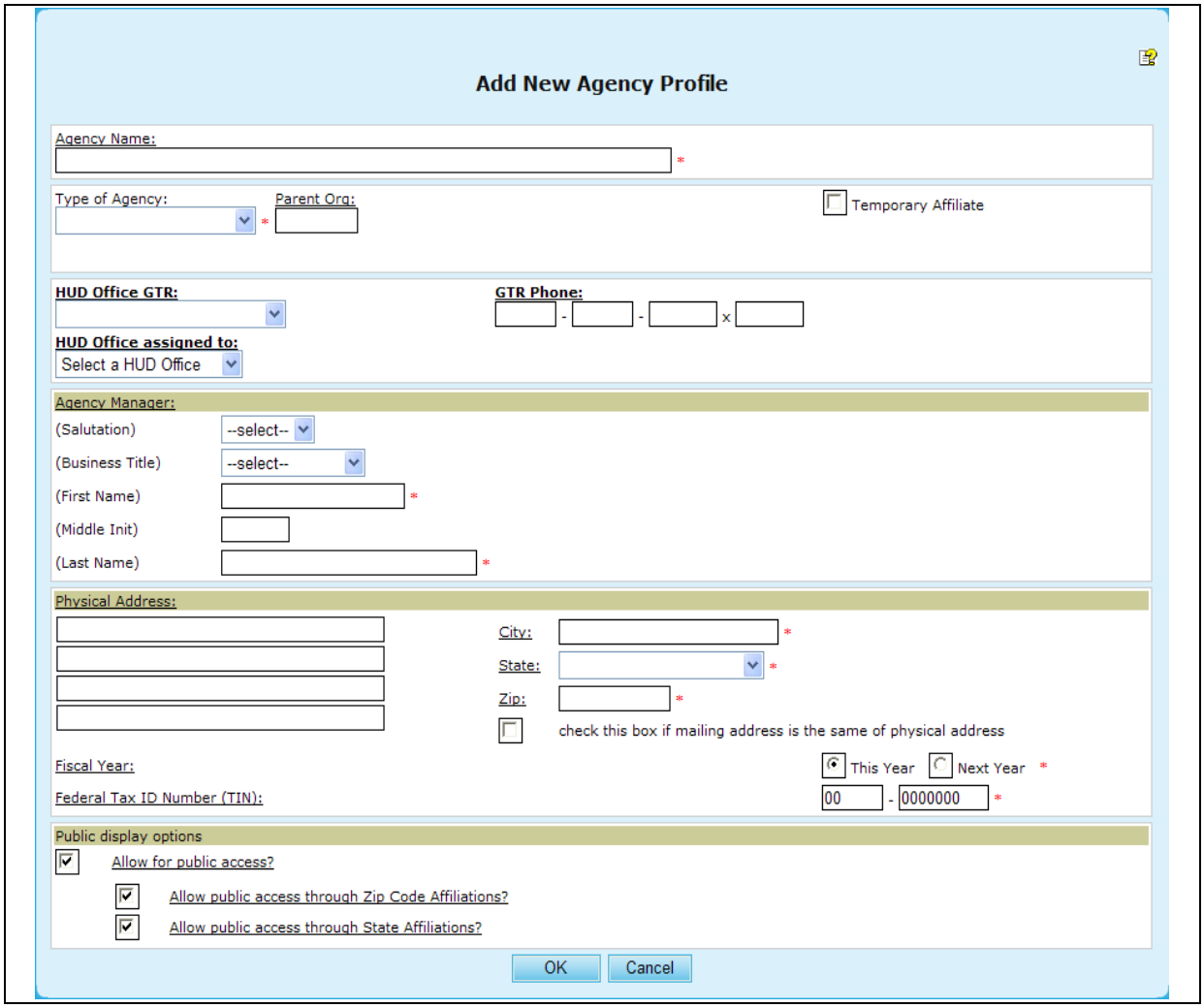


Figure 112.A. OM – Agency: Add New Agency Profile

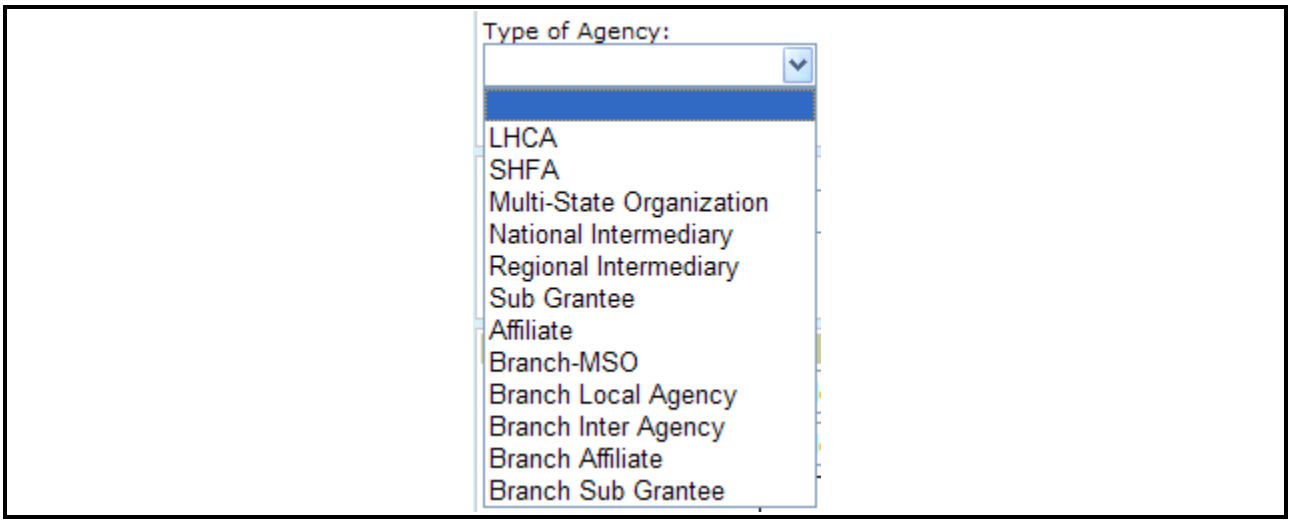


Figure 112.B. OM – Agency: Type of Agency Dropdown List

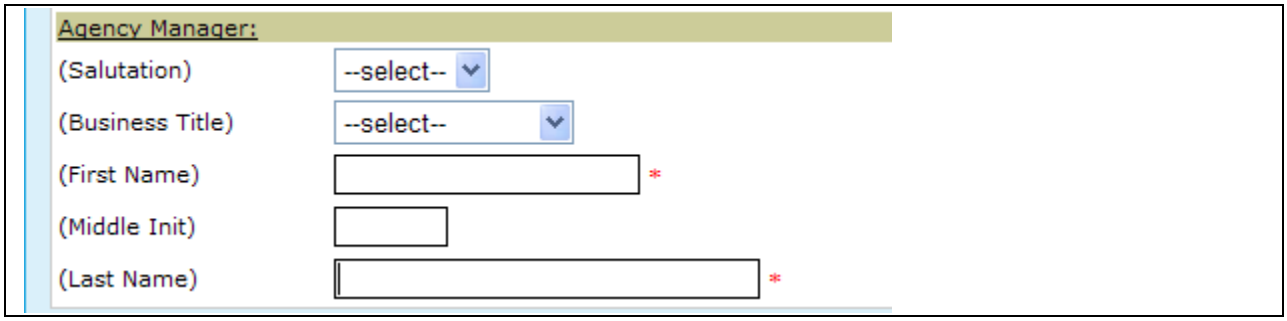


Figure 112.C. OM – Agency: Agency Manager

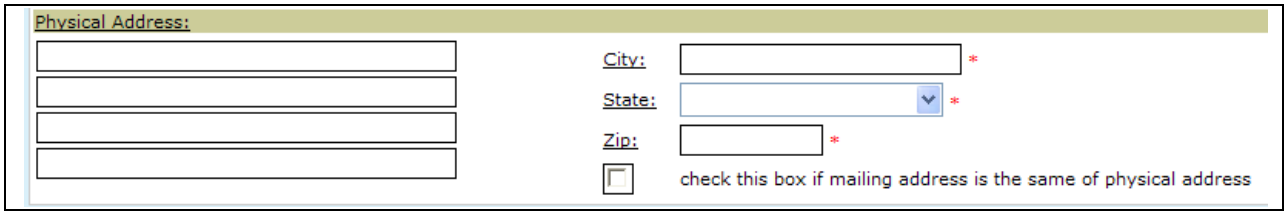


Figure 112.D. OM – Agency: Agency Physical Address

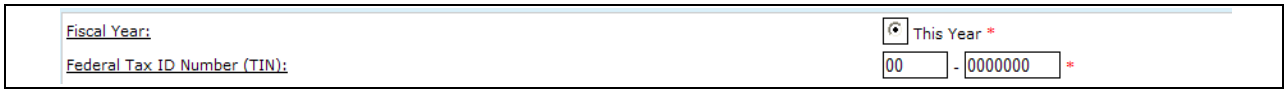


Figure 112.E. OM – Agency: Fiscal Year and Federal Tax ID Number

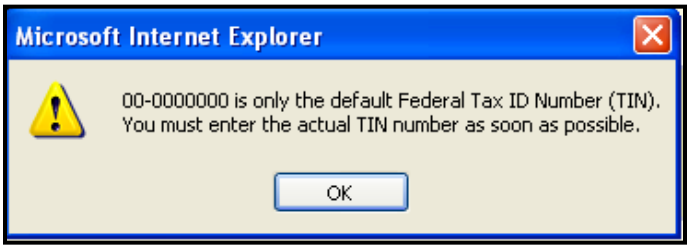


Figure 112.F. OM – Agency: Default TIN Number Warning Message

3. Complete the form. To save, click **OK** button. To exit without saving, click **Cancel** button. Screen returns to previous page.

8.1.3 Counselor Information

1. From the upper navigation menu, scroll over the **Agency** hyperlink**, a**nd select the **Counselor Information** button.

2. Once you have completed your criteria, click **Search** to retrieve results, or **Clear** to erase previously input data.

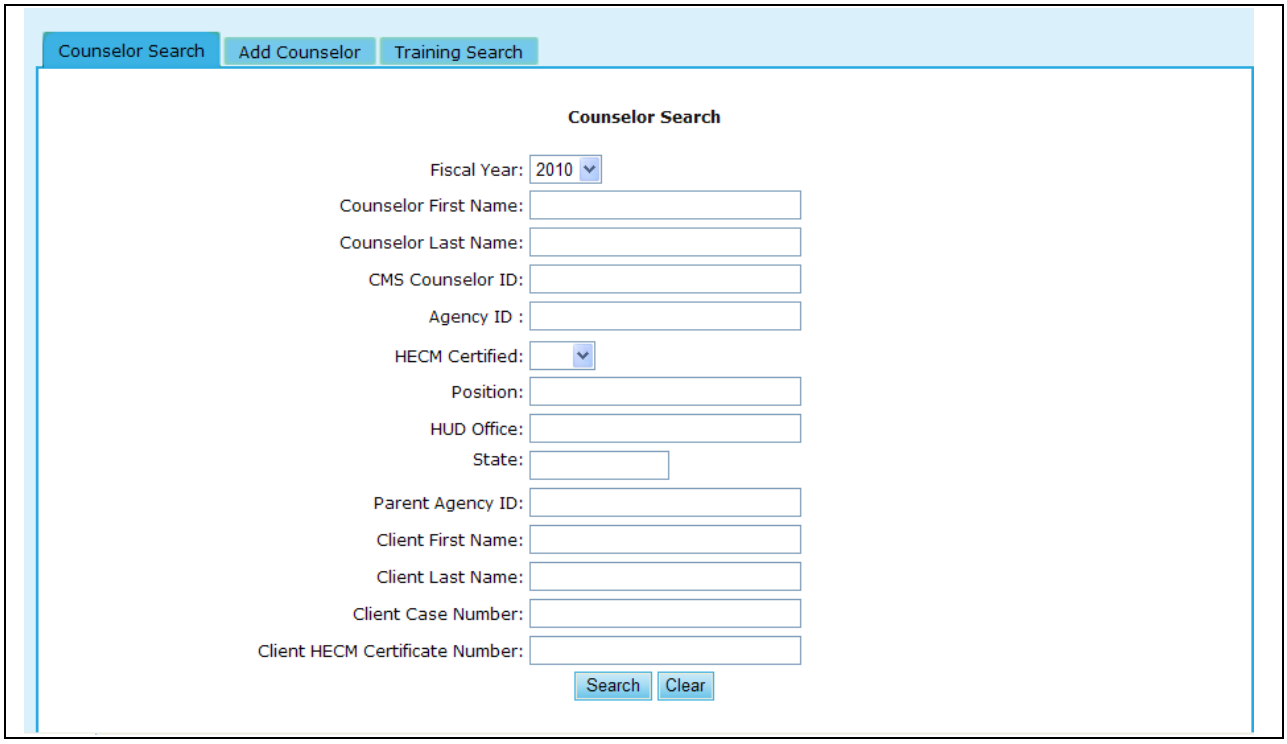


Figure 113.A. OM – Agency: Agency Counselor/Client Counselor Search

3. Provided below is an example of the search results retrieved while performing a counselor search.

4. To view further information on a counselor, click the hyperlink found in the Last Name column. By clicking the hyperlink under the name, you will be prompted to the Counselor Profile.

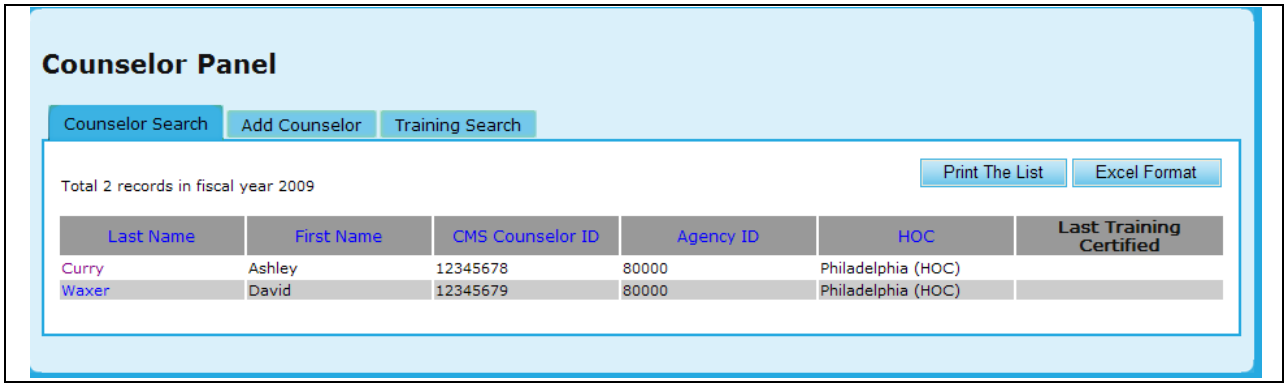


Figure 113.B. OM – Agency: Counselor Search

5. If you desire to update this profile, edit the information you desire and click **Update Profile** to save those changes, or **Clear** to remove that information.

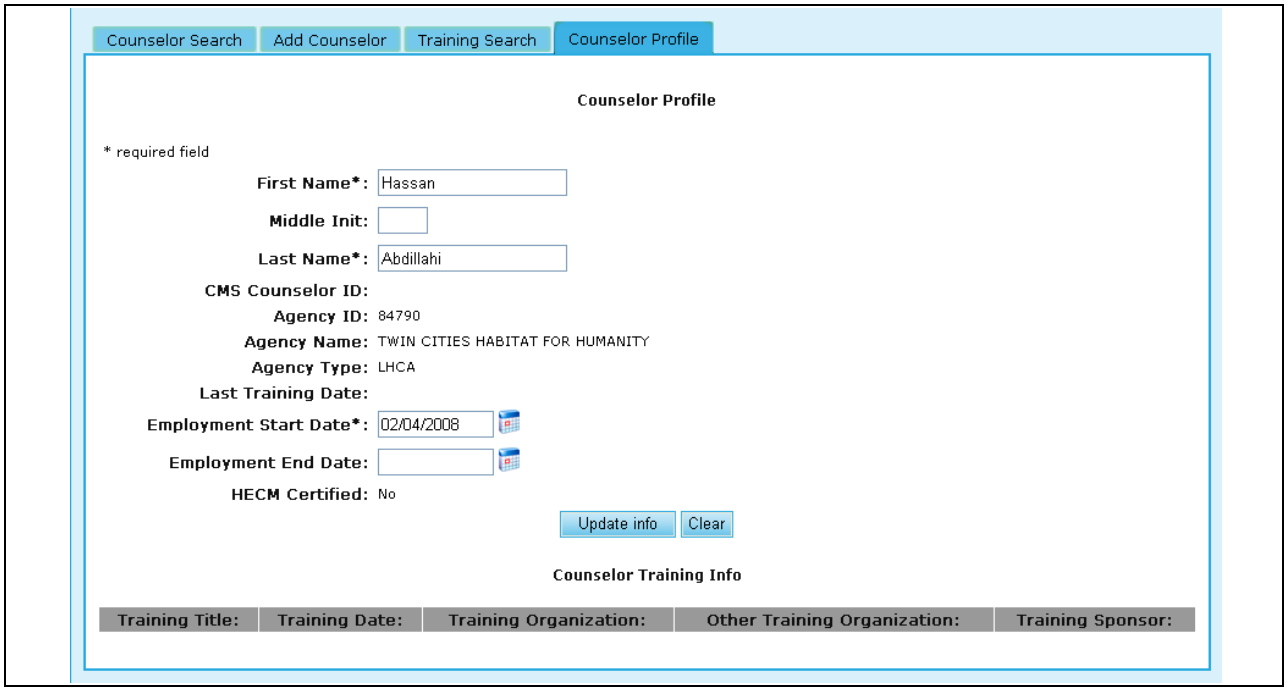


Figure 113.C. OM – Agency: Agency Counselor/Client Counselor Profile

8.1.4 Client Information

Client Information under the **Agency** tab provides the same options as demonstrated under the **Agency Search** function (Section 8.2.2).

1. From the upper navigation menu, scroll over the **Agency** hyperlink**.** And select the **Client Search** button.

2. Select the criteria in which you would like to search for, and click **Search** to retrieve those results, or **Clear**, to erase what was previously typed.

Client Search

Client Search

** To select multiple values at once hold the Ctrl or Shift key while clicking on various items

Fiscal Year: 2010

Client info

Case Number:

Client ID:

Client First Name:

Client Last Name:

**State: Alaska, Alabama, Arkansas

Counselor Info

CMS Counselor ID :

Counselor First Name:

Counselor Last Name:

Case Completed:

Agency Info

Agency ID:

Parent ID:

HOC Info

**HUD Funded: Other HUD Program, Place Based Rental Assistance, Purchase REO Property, Rental Voucher

**HOC: Atlanta (HOC), Denver (HOC), Headquarters SF-HUD

9902 Info

Ethnicity:

Race:

**Income Group: a. < 50% of Area Median Income (AMI), b. 50 - 79% of AMI, c. 80 - 100% of AMI

**Workshop/Seminar: a. Pre-Purchase Homebuyer Education, b. Financial Literacy, c. Resolve or Prevent Mortgage Delinquency

Service category:

Service Outcome:

HECM Info

HECM Certified:

Client HECM Certificate Number:

Search Clear

Figure 114.A. OM – Agency: Client Search Options

3. To view further detail, click the hyperlink found under the Case Number column. This will prompt you to the following screen.

Client List

Total 463 records in fiscal year 2010

Print The List | Excel Format

Next 200 records

Case Number	Last Name	First Name	City	State	Agency ID	HOC	Service	CMS Counselor ID
1141179	ABRAHAM	SARAH	TULSA	OK	80724	Denver (HOC)		274
1141886	ALFRED	SARAH	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	191
1142306	ALLEN	LUTISHA	OKLAHOMA CITY	OK	80724	Denver (HOC)		7
1142287	ALYEA	CHRISTINA	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	15
1141840	ANDERSON	CONNIE	HASKELL	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	209
1142447	ANDERSON	CAROL	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	191
1142240	ANDERSON	KENYATTA	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	191
1141258	AZLIN	JIMMY	WEWOKA	OK	80724	Denver (HOC)		7
1888466	Adams	Tracy	Sicklerville	NJ	80941	Philadelphia (HOC)		102
1860964	Aleogena	Irene	Williamstown	NJ	80941	Philadelphia (HOC)		102
22114	Algee	Mary	Dayton	OH	84573	Philadelphia (HOC)		122
1780781	Antonucci	Michael	West Chester	PA	80941	Philadelphia (HOC)		13

Figure 114.B. OM – Agency: Client Search Results

Note: Provided below is an example of the Client Profile.

Client Search | Client Profile

Client Profile

First Name: SARAH
Middle Name: A
Last Name: ABRAHAM
Address1: 1616 W 47TH ST
Address2:
City: TULSA
State: OK
Zip: 74107
Phone: 918-447-7776
Case Number: 1141179
Service:

Figure 114.C. OM – Agency: Client Search Client Detail

8.2 HUD-9902

As an Office Manager, you can submit and review HUD-9902 forms. To do so, you must first search for the HUD-9902 form that you want to review or submit.

8.2.1 9902 Data Reporting Status Inquiry

This feature is primarily a tool to track agencies that are required to submit their 9902 reports.

To view/update the HUD-9902 form, you must perform a 9902 Data Reporting Status Inquiry.

1. From the upper navigation menu, click **HUD-9902 Processing** hyperlink**.** The *9902 Data Reporting Status Inquiry* page appears.

2. In the drop-down box, select the fiscal year and reporting period that you wish to search. Then click **Continue**. The *9902 Data Reporting Status Inquiry for FY 20XX* screen appears.

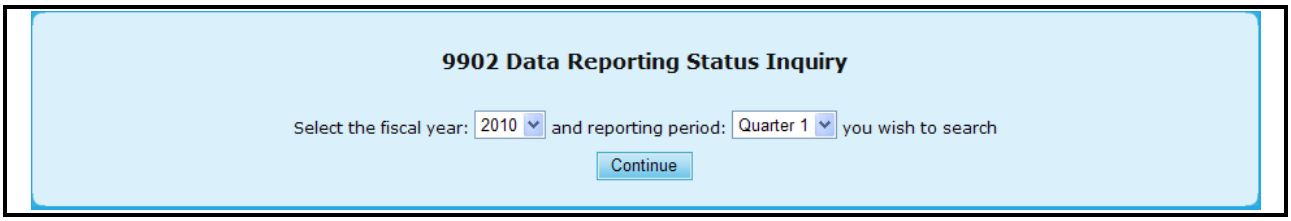


Figure 115. OM – HUD-9902: 9902 Data Reporting Status Inquiry Fiscal Year Selection

3. To enter a single agency‟s 9902 report, enter Agency ID in the upper section in 9902 Data Reporting Status Inquiry page. Click the **Submit Inquiry** button, and 9902 form is displayed.

4. Complete all of the fields you want to search for or just leave the fields blank to retrieve all the reported HUD-9902 forms. Click **Submit Inquiry**. The inquired 9902 result screen appears.
   a. Agency ID – Allows you to extract information based on a particular Agency‟s ID number.
   b. GTR Name – Allows a search to be performed based off of a particular Government Technical Officer.
   c. Agency Type – Allows a search to be made on an individual or multiple agency types.
   d. Grant Awardees – This enables you to narrow down your results based on whether an agency was awarded a grant.
   e. Have Reported Individual 9902 – This enables you to narrow down your results based on whether a particular Agency and individually reported their 9902.
   f. Reported on Time – Along the lines of the 9902, this helps in determining if it was reported on time.
   g. Reported Data are Validated – Allows a search to be made on whether or not reported data has been validated.
   h. CMS – Allows you to perform a search based on various Client Management Systems.

5. To get online help instructions for Form-9902, click the FAQ button found on the Search page.

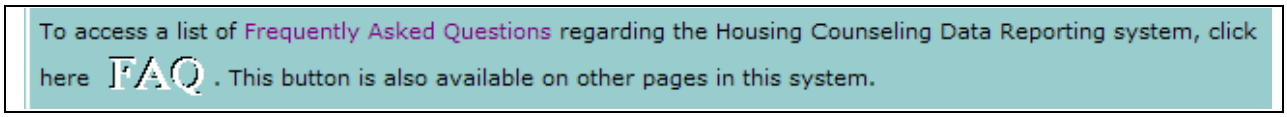


Figure 116.A. OM – HUD-9902: 9902 Processing – FAQ

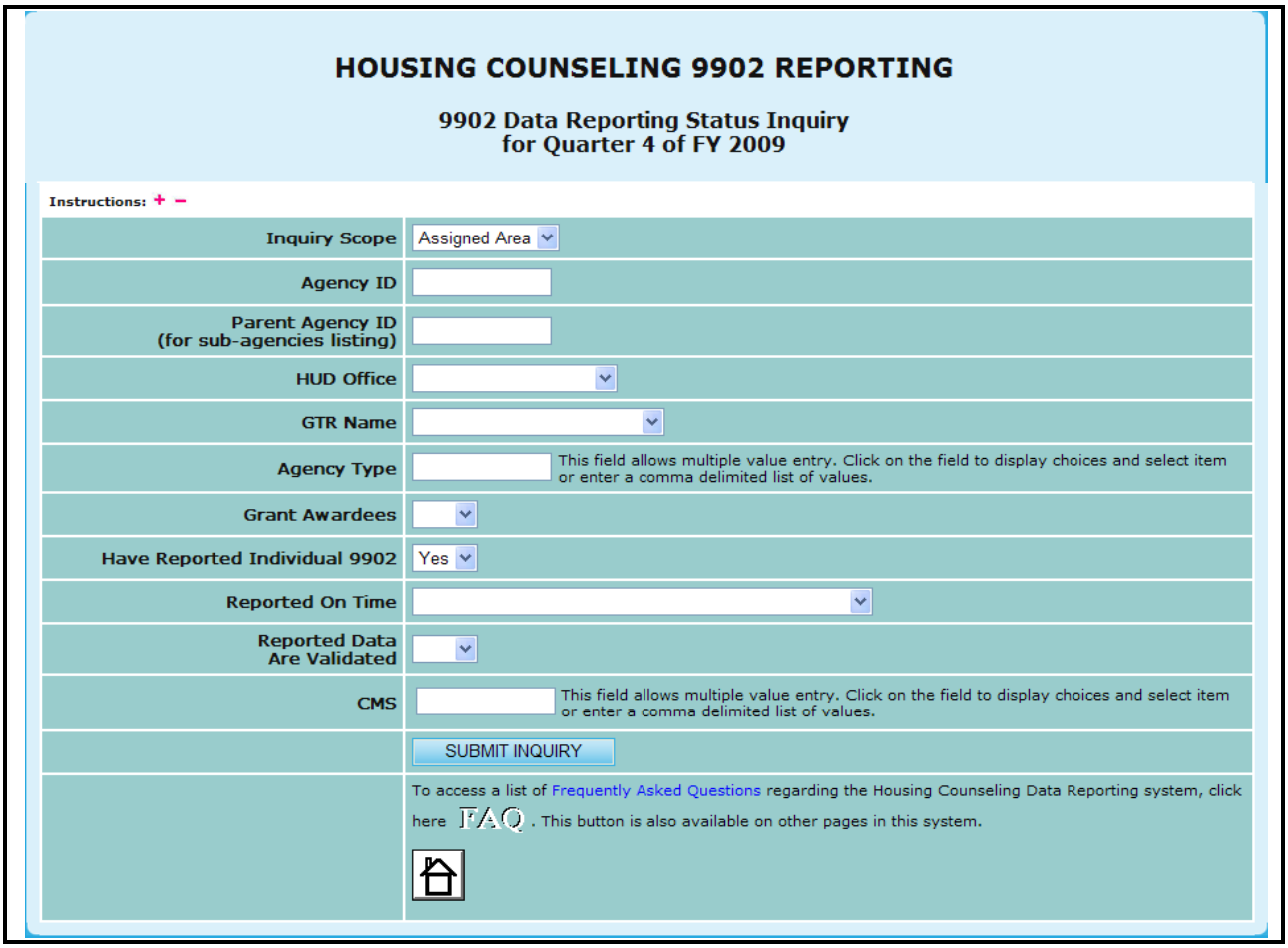


Figure 116.B. OM – HUD-9902: 9902 Data Reporting Status Inquiry Criteria Screen

6. Upon the retrieval of your search criteria, you can view the details of a 9902 form for any Agency represented. This is done by clicking the **9902** hyperlink located under the **Details** header.

1809 agency(s) have Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- Have Reported 9902: Yes

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Details
82337	1ST CHOICE CREDIT UNION	Sub Grantee	315 Auburn Avenue Atlanta, GA 30303	404-832-5800 404-607-8252	HCS	9902
83799	28TH LEGISLATIVE DISTRICT COMMUNITY DEVELOPMENT CORPORATION	Sub Grantee	815 N. Hickory Street Chattanooga, TN 37404	423-698-8190 423-698-8191	HCS	9902
84478	4-SIGHT COUNSELING	LHCA	937 Broadway Broadway Plaza, Suite 305 Cape Girardeau, MO 63701	573-334-7995 573-335-8610	HCS	9902
83504	A.G.A.P.E. CDC	Sub Grantee	5205 Capital Boulevard Suite 5293 Raleigh, NC 27616	919-876-1239 888-876-1238	HCS	9902
83502	ABCD INC.	Sub Grantee	1225 Gross Avenue N.E. Canton, OH 44705-1605	330-455-6385 330-456-3913	HCS	9902
83751	ABYSSINIAN DEVELOPMENT CORPORATION	LHCA	4 W. 125 Street New York, NY 10027	646-442-6545 646-442-6598	HCS	9902
80015	ACCESS INCORPORATED	LHCA	3630 Aviation Way PO Box 4666 Medford, OR 97501	541-779-6691 541-779-8886	HCS	9902
84019	YWCA VIRGINIA PENINSULA	Sub Grantee	2702 Orcutt Avenue Newport News, VA 23607	757-245-6026 757-247-6485	HCS	9902
80824	YWCA-CCCS EL PASO DEL NORTE REGION	LHCA	1600 N. Brown St El Paso, TX 79902-4725	915-577-2530 915-533-8132	HCS	9902

Print | Export | Invalid Email List | Email Address List

Figure 117. OM – HUD-9902: 9902 Data Reporting Status Inquiry Criteria Screen

Note: Provided below is an example of a 9902 form report.

Housing Counseling Agency Activity Report

U.S. Department of Housing and Urban Development
Office of Housing
Federal Housing Commissioner

OMB Approval No. 2502-0261
(Exp. 3/28/2009)

1. Counseling Agency Name		**2. Reporting Period and Budget**	
Agency Name NORTHEAST DENVER HOUSING CENTER		Reporting Period:	Quarter 1
		Fiscal Year:	2010
Agency ID:	80213	From:	10/01/2009
Agency Type:	LHCA	To:	12/31/2009
Address: 1735 Gaylord St Denver, CO 80206-1208		Initial Submission Date:	01/27/2010
		Date Updated:	01/27/2010
Parent Agency Name(if applicable)		Total Annual Housing Counseling Program Budget, All Sources: $ 214086.00	
Agency ID:		HUD Funded Activity Ratio: 14.13% (0.1413)	
Agency Type:			

Validated: Yes Deadline for late submissions has been extended until 02/28/2010

Last Validated: 02/05/2010 **Validated by:** Gary Thacker

HUD-9902	HUD-9902 (Derived)	Logic Model	
		All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds
3. Ethnicity of Clients (select only one)			
a. Hispanic		35	4.95
b. Not Hispanic		102	14.41
c. Chose not to respond		0	0
	Section 3 Total:	**137**	**19.36**
4. Race of Clients			
Single Race			
a. American Indian/Alaskan Native		0	0
b. Asian		0	0
c. Black or African American		45	6.36
d. Native Hawaiian or Other Pacific Islander		0	0
e. White		52	7.35
Multi-Race			
f. American Indian or Alaska Native *and* White		2	.28
g. Asian *and* White		0	0
h. Black or African American *and* White		2	.28
i. American Indian or Alaska Native *and* Black or African American		0	0
j. Other multiple race		1	.14
k. Chose not to respond		35	4.95
	Section 4 Total:	**137**	**19.36**
5. Income Levels			
a. < 50% of Area Median Income (AMI)		34	4.8
b. 50 - 79% of AMI		40	5.65
c. 80 - 100% of AMI		52	7.35
d. > 100% AMI		11	1.55
e. Chose not to respond		0	0
	Section 5 Total:	**137**	**19.35**
6. Clients Receiving Education/Group Sessions			
a. Completed pre-purchase homebuyer education workshop		8	1.13
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair		0	0
c. Completed resolving or preventing mortgage delinquency workshop		0	0
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners		0	0
e. Completed fair housing workshop		0	0
f. Completed predatory lending workshop		0	0
g. Completed rental workshop		0	0
h. Other workshop		0	0
	Group Session / Section 6 Total:	**8**	**1.13**

7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	5	.71
2) Client will be mortgage ready within 90 days	0	0
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	0	0
4) Receiving long term pre-purchase counseling	7	.99
5) Entered lease purchase program	0	0
6) Decided Not to purchase housing; no further effort to prepare needed	2	.28
7) Withdrew from counseling	0	0
8) Other	0	0
Section 7a Sub-total:	**14**	**1.98**
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	4	.57
2) Mortgage refinanced	0	0
3) Mortgage modified	5	.71
4) Received second mortgage	0	0
5) Initiated forbearance agreement/repayment plan	0	0
6) Executed a deed-in-lieu	0	0
7) Sold property/chose alternative housing solution	1	.14
8) Pre-forclosure sale	1	.14
9) Mortgage foreclosed	6	.85
10) Counseled and referred to another social service or emergency assistance agency	0	0
11) Obtained partial claim loan from FHA lender	0	0
12) Bankruptcy	1	.14
13) Entered debt management plan	0	0
14) Counseled and referred for legal assistance	0	0
15) Currently receiving foreclosure prevention/budget counseling	53	7.49
16) Withdrew from counseling	0	0
17) Other	6	.85
Section 7b Sub-total:	**77**	**10.89**
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	31	4.38
2) Counseled on HECM; decided not to obtain mortgage	5	.71
3) Obtained a non-FHA reverse mortgage	0	0
4) Received home equity or home improvement loan or other home repair assistance	0	0
5) Received consumer loan (unsecured)	0	0
6) Mortgage refinanced	0	0
7) Counseled and referred to other social service agency	0	0
8) Sold house/chose alternative housing solution	0	0
9) Completed financial management/budget counseling	0	0
10) Completed home maintenance counseling	0	0
11) Counseled and utilities brought current	0	0
12) Counseled and referred for legal assistance	0	0
13) Currently receiving counseling	0	0
14) Withdrew from counseling	0	0
15) Other	2	.28
Section 7c Sub-total:	**38**	**5.37**

d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	0	0
2) Obtained temporary rental relief	0	0
3) Counseled and referred to agency with rental assistance program	0	0
4) Advised on recertification for HUD/other subsidy program	0	0
5) Counseled and referred to other social service agency	0	0
6) Counseled and referred to legal aid agency for fair housing assistance	0	0
7) Counseled and referred to legal aid agency for assistance with eviction	0	0
8) Found alternative rental housing	0	0
9) Decided to remain in current housing situation	0	0
10) Resolved issue in current tenancy	0	0
11) Entered debt management/repayment plan	0	0
12) Counseled and utilities brought current	0	0
13) Resolved security deposit dispute	0	0
14) Currently receiving counseling	0	0
15) Withdrew from counseling	0	0
16) Other	0	0
Section 7d Sub-total:	**0**	**0**
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	0	0
2) Occupied transitional housing	0	0
3) Occupied permanent housing with rental assistance	0	0
4) Occupied permanent housing without rental assistance	0	0
5) Counseled Referred to other social service agency	0	0
6) Remained homeless	0	0
7) Currently receiving counseling	0	0
8) Withdrew from counseling	0	0
9) Other	0	0
Section 7e Sub-total:	**0**	**0**
Individual Counseling / Section 7 a-e Total:	**129**	**18.24**
Total Counseling / Section 6 and 7 Total:	**137**	**19.37**

8. HUD Housing Counseling Grant(s)-Summary Data

HUD Housing Counseling Grant or Sub-grant Number/Source	Grant Type	HUD Housing Counseling Grant Amount
0821-019	COMP	$25,244.00
0823-018	LDRC	$5,000.00
	Section 8 Totals:	$30,244.00

9. Authorization:

Input Official		**Agency Official**	
First Name:	Tracy	First Name:	Tracy
Last Name:	Smith	Last Name:	Smith
Title:		Title:	Agency Manager
Phone:		Phone:	

Send | Help | Reload | Back | PDF Version

Figure 118.A. OM – HUD-9902: 9902 form.

7. Complete all fields. Steps 8-14 explain important aspects of the HUD-9902 form.

8. In the **Counseling Agency Name & Address** area, keep the following information in mind:
   a. Although the address shown may be modified on-line through the Agency Information page of HCS, Housing Counseling Agencies should notify their respective HUD Homeownership Center (HOC) of any address changes.
   b. Reference to HUD HOC offices can be found at: http://www.hud.gov/offices/hsg/sfh/hoc/hsghocs.cfm
   c. Affiliates/branches are required to enter their Intermediary ID in the appropriate box on the Agency Information page of HCS.

9. In the **Reporting Period and Budget** section, remember that this is an accumulating quarterly report. All activities that took place from the first day of the fiscal year to the last day of the reporting period should be included in the report. Quarter 4 Reporting Period is the same as an annual report because it covers the entire fiscal year. Grant reporting period report are required for those agencies who have a grant agreement with HUD and should specify the starting date and ending date of the Grant reporting period.

10. Complete the Ethnicity of Clients, Race of Clients, Income Levels, and Number of Clients Receiving Educational/Outreach Services sections.

Note: The report contains two data columns for all sections of the HUD-9902 form:

- **All Counseling and Education Activities** – Enter data covering all housing counseling activities, including those performed under one or more HUD housing counseling grants.
- **Counseling and Education Activities attributed to HUD Housing Counseling Grant Funds** – Starting in FY 2007 the HUD Grant Activities are automatically calculated based on the HUD Funded Activity Ratio in Section 2. This ratio is determined by the total HUD grant awards in Section 8 divided by the Total Annual Housing Counseling Program Budget in Section 2. These data elements are recalculated when you enter a value into the All Counseling Activities column or when the Total Annual Housing Counseling Program Budget is changed.

11. For the **Number of Clients Counseled, by Purpose of Visit and Results** section, keep the following information in mind:
    a. Enter the number of clients to whom you provided counseling during the report period. This might include clients who entered your workload the previous report period but you carried over into and counseled during the current report period.
    b. You are not reporting the number of individual persons you counseled. Examples: A husband and wife or a brother and sister or three friends who are mortgagors under the same note count as one client. Three renting families who experience the same problem with the same landlord and come to your agency together for assistance count as one client.
    c. **Seeking Shelter or Services for the Homeless** – A client reported on this line must meet the definition for "homeless" or "homeless individual" set forth in Section 103, General Definition of Homeless Individual, of the Stewart B. McKinney Homeless Assistance Act (Public Law 100-77). Instructions / Guidance and FAQ – The following hyperlink will take you to the appropriate HUD website for form HUD-9902 instructions and FAQs. At the top of the site under INDEX, select "reports (PDF page)" and you will be directed to the proper location. Scroll down for further information at this location. http://www.hud.gov/offices/hsg/sfh/hcc/hc_faq.cfm

12. For **HUD Housing Counseling Grant Summary Data,** Section 8 of the form HUD-9902. This section is automatically calculated and shows the awards that were granted by HUD.

13. For **HUD Housing Counseling Grant Summary Data,** Section 8 of the form HUD-9902. This section is automatically calculated and shows the awards that were granted by HUD.

14. For the **Authorization** section, the first and last name of the user logged into HCS who completes this form is automatically entered for the Input Official when the Send button is clicked. The Agency Official is the Director first name and last name from the Agency Information page of HCS.

15. Starting in January of 2008, agencies can submit their client level data through a CMS system. The HUD 9902 Form provides an automated tool that generates the HUD 9902 Form and Logic Model from the client level data submitted. To view the client level data derived HUD 9902 Form and Logic Model Click the HUD 9902 (Derived) and Logic Model tabs respectively

The HUD 9902 (Derived) provides a features which overrides the permanent HUD 9902 Form. To use the client level data derived HUD 9902 Form as your permanent HUD 9902 Form click the Commit Data button. This causes the System to overwrite the regular HUD 9902 Form.

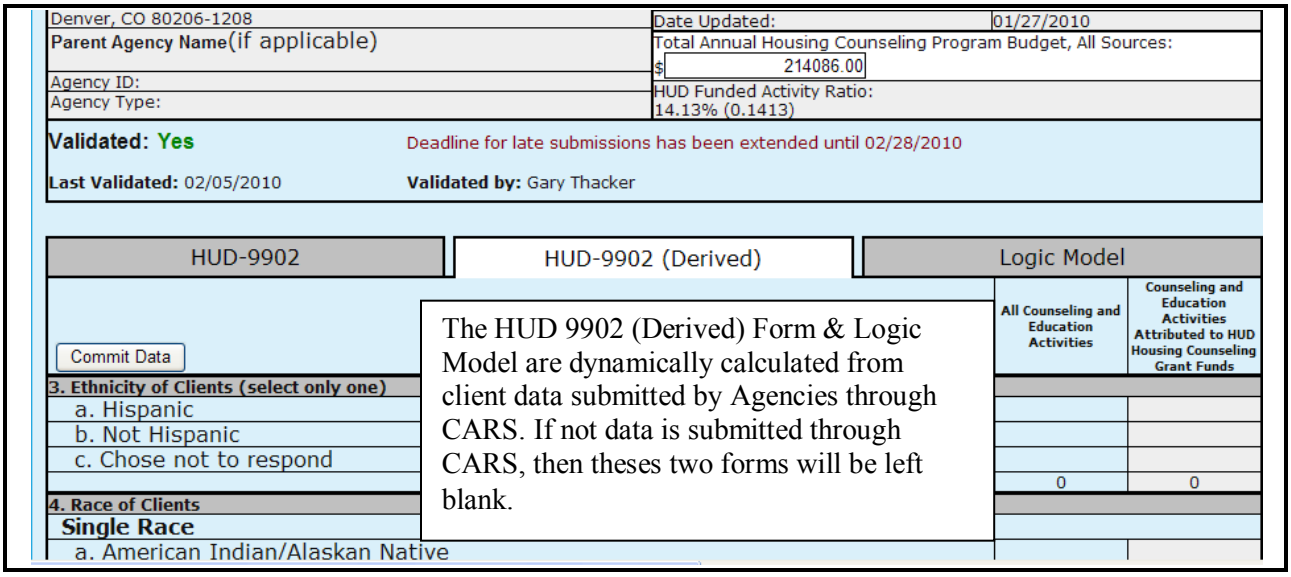
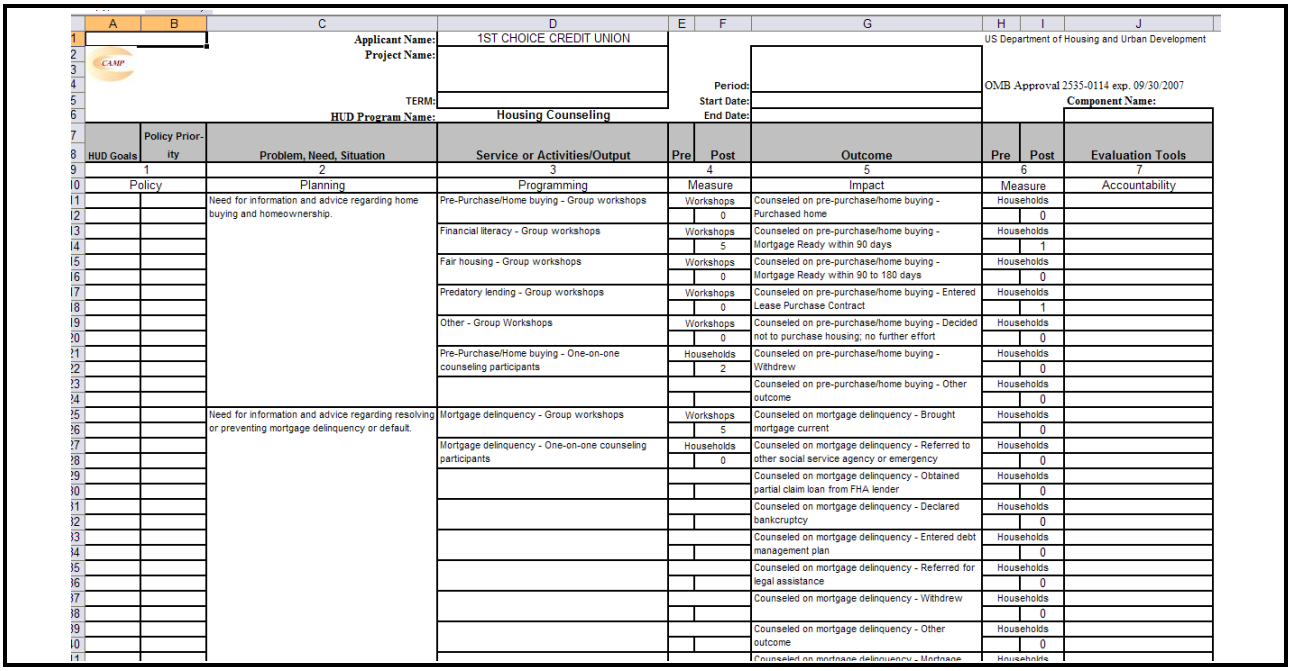


Figure 118.B. OM – HUD-9902: 9902 (Derived)

16. To view the Logic Model, Click the **Logic Model** tab and a new window is displayed that show the Logic Model filled out with the client level data submitted through the CMS systems.



Applicant Name: 1ST CHOICE CREDIT UNION
Project Name:
TERM:
HUD Program Name: Housing Counseling
Period:
Start Date:
End Date:
US Department of Housing and Urban Development
OMB Approval 2535-0114 exp. 09/30/2007
Component Name:

HUD Goals	Policy Priority	Problem, Need, Situation	Service or Activities/Output	Pre	Post	Outcome	Pre	Post	Evaluation Tools
1		2	3	4		5	6		7
Policy		Planning	Programming	Measure		Impact	Measure		Accountability
		Need for information and advice regarding home buying and homeownership.	Pre-Purchase/Home buying - Group workshops	Workshops	0	Counseled on pre-purchase/home buying - Purchased home	Households	0	
			Financial literacy - Group workshops	Workshops	5	Counseled on pre-purchase/home buying - Mortgage Ready within 90 days	Households	1	
			Fair housing - Group workshops	Workshops	0	Counseled on pre-purchase/home buying - Mortgage Ready within 90 to 180 days	Households	0	
			Predatory lending - Group workshops	Workshops	0	Counseled on pre-purchase/home buying - Entered Lease Purchase Contract	Households	1	
			Other - Group Workshops	Workshops	0	Counseled on pre-purchase/home buying - Decided not to purchase housing; no further effort	Households	0	
			Pre-Purchase/Home buying - One-on-one counseling participants	Households	2	Counseled on pre-purchase/home buying - Withdrew	Households	0	
						Counseled on pre-purchase/home buying - Other outcome	Households	0	
		Need for information and advice regarding resolving or preventing mortgage delinquency or default.	Mortgage delinquency - Group workshops	Workshops	5	Counseled on mortgage delinquency - Brought mortgage current	Households	0	
			Mortgage delinquency - One-on-one counseling participants	Households	0	Counseled on mortgage delinquency - Referred to other social service agency or emergency	Households	0	
						Counseled on mortgage delinquency - Obtained partial claim loan from FHA lender	Households	0	
						Counseled on mortgage delinquency - Declared bankcruptcy	Households	0	
						Counseled on mortgage delinquency - Entered debt management plan	Households	0	
						Counseled on mortgage delinquency - Referred for legal assistance	Households	0	
						Counseled on mortgage delinquency - Withdrew	Households	0	
						Counseled on mortgage delinquency - Other outcome	Households	0	

Figure 118.C OM – HUD-9902: Logic Model

17. When you finish completing this form, click **Send**. A message appears at the top of your screen.

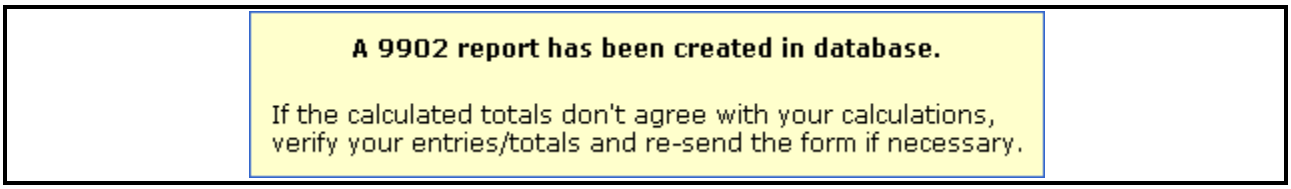


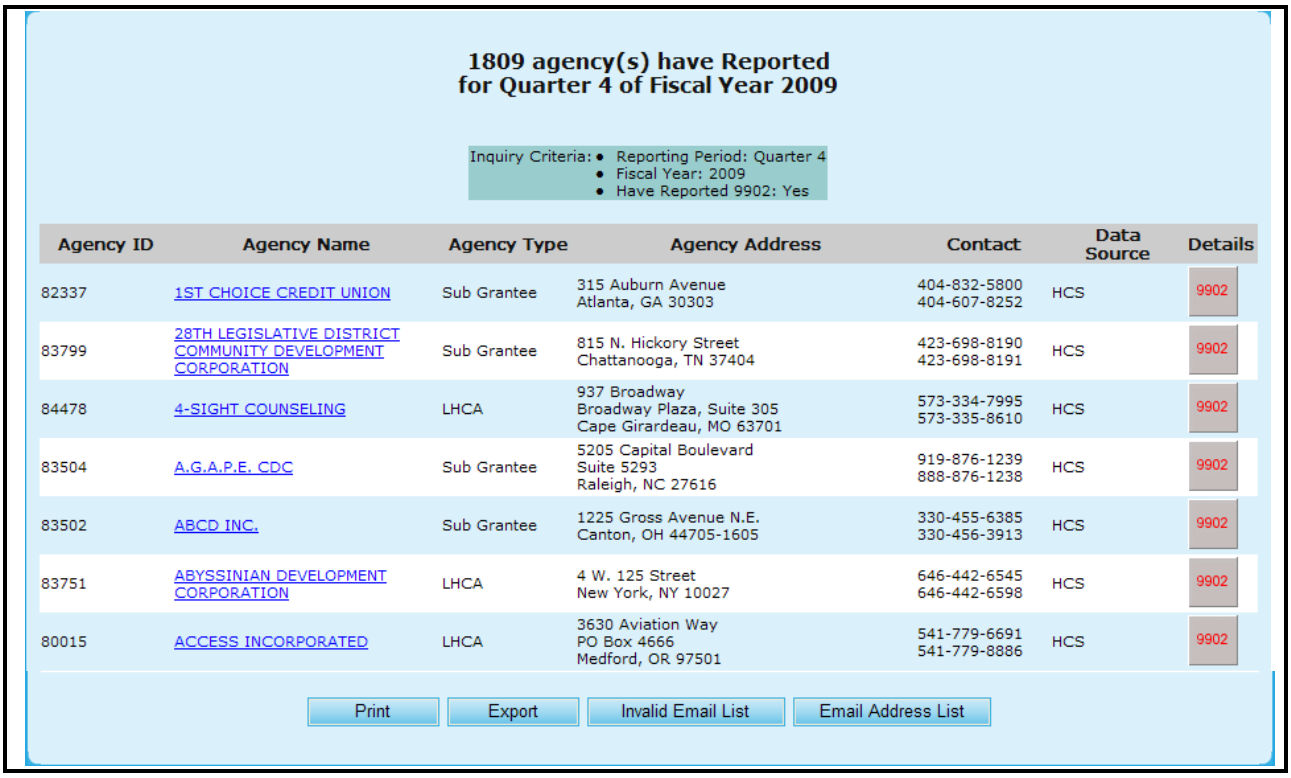
Figure 119. OM – HUD-9902: Database Updated Message

You have now successfully completed a HUD-9902 form.

There are other dynamics associated with the Data Reporting Status Inquiry, which are found at the bottom of your returned search.

18. To print this list, click **Print**. A print dialog box appears allowing you to print the search results.

19. To export this list to Microsoft Excel, click **Export**. A File Download dialog box appears allowing you to save or open the search results using Microsoft Excel.



1809 agency(s) have Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- Have Reported 9902: Yes

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Details
82337	1ST CHOICE CREDIT UNION	Sub Grantee	315 Auburn Avenue Atlanta, GA 30303	404-832-5800 404-607-8252	HCS	9902
83799	28TH LEGISLATIVE DISTRICT COMMUNITY DEVELOPMENT CORPORATION	Sub Grantee	815 N. Hickory Street Chattanooga, TN 37404	423-698-8190 423-698-8191	HCS	9902
84478	4-SIGHT COUNSELING	LHCA	937 Broadway Broadway Plaza, Suite 305 Cape Girardeau, MO 63701	573-334-7995 573-335-8610	HCS	9902
83504	A.G.A.P.E. CDC	Sub Grantee	5205 Capital Boulevard Suite 5293 Raleigh, NC 27616	919-876-1239 888-876-1238	HCS	9902
83502	ABCD INC.	Sub Grantee	1225 Gross Avenue N.E. Canton, OH 44705-1605	330-455-6385 330-456-3913	HCS	9902
83751	ABYSSINIAN DEVELOPMENT CORPORATION	LHCA	4 W. 125 Street New York, NY 10027	646-442-6545 646-442-6598	HCS	9902
80015	ACCESS INCORPORATED	LHCA	3630 Aviation Way PO Box 4666 Medford, OR 97501	541-779-6691 541-779-8886	HCS	9902

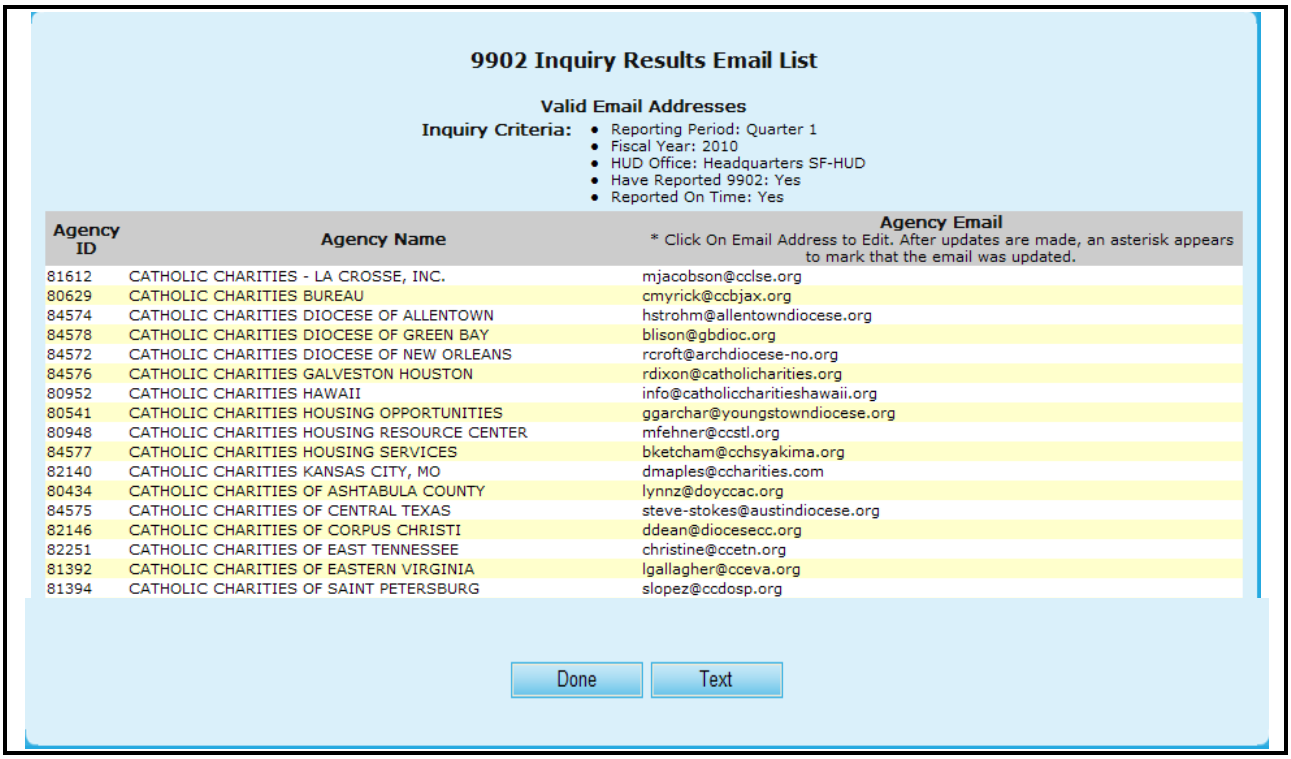
Print | Export | Invalid Email List | Email Address List

Figure 120. OM – HUD-9902: 9902 Data Reporting Status Inquiry Results

20. To view the e-mail list for this agency, click **Email Address List**. The *9902 Inquiry Results Email List* screen appears.

21. To save the email list as a text file, click **Text**. A File Download dialog box appears; click **Save** or **Open**.

22. When you are done reviewing the **Email List**, click **Done**. You return to the *9902 Inquiry Search Results List* screen



9902 Inquiry Results Email List

Valid Email Addresses

Inquiry Criteria:
- Reporting Period: Quarter 1
- Fiscal Year: 2010
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: Yes
- Reported On Time: Yes

Agency ID	Agency Name	Agency Email * Click On Email Address to Edit. After updates are made, an asterisk appears to mark that the email was updated.
81612	CATHOLIC CHARITIES - LA CROSSE, INC.	mjacobson@cclse.org
80629	CATHOLIC CHARITIES BUREAU	cmyrick@ccbjax.org
84574	CATHOLIC CHARITIES DIOCESE OF ALLENTOWN	hstrohm@allentowndiocese.org
84578	CATHOLIC CHARITIES DIOCESE OF GREEN BAY	blison@gbdioc.org
84572	CATHOLIC CHARITIES DIOCESE OF NEW ORLEANS	rcroft@archdiocese-no.org
84576	CATHOLIC CHARITIES GALVESTON HOUSTON	rdixon@catholicharities.org
80952	CATHOLIC CHARITIES HAWAII	info@catholiccharitieshawaii.org
80541	CATHOLIC CHARITIES HOUSING OPPORTUNITIES	ggarchar@youngstowndiocese.org
80948	CATHOLIC CHARITIES HOUSING RESOURCE CENTER	mfehner@ccstl.org
84577	CATHOLIC CHARITIES HOUSING SERVICES	bketcham@cchsyakima.org
82140	CATHOLIC CHARITIES KANSAS CITY, MO	dmaples@ccharities.com
80434	CATHOLIC CHARITIES OF ASHTABULA COUNTY	lynnz@doyccac.org
84575	CATHOLIC CHARITIES OF CENTRAL TEXAS	steve-stokes@austindiocese.org
82146	CATHOLIC CHARITIES OF CORPUS CHRISTI	ddean@diocesecc.org
82251	CATHOLIC CHARITIES OF EAST TENNESSEE	christine@ccetn.org
81392	CATHOLIC CHARITIES OF EASTERN VIRGINIA	lgallagher@cceva.org
81394	CATHOLIC CHARITIES OF SAINT PETERSBURG	slopez@ccdosp.org

Done Text

Figure 121. OM – HUD-9902: Inquiry Results Email List

23. To view the missing and invalid e-mail address(es) for this agency, click **Invalid Email List**. The *9902 Inquiry Results Email List* screen appears.

9902 Inquiry Results Email List

Missing/Invalid Email Addresses

Inquiry Criteria:
- Reporting Period: Quarter 1
- Fiscal Year: 2010
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: Yes
- Reported On Time: Yes

Agency ID	Agency Name	Agency Email * Click On Email Address to Edit. After updates are made, an asterisk appears to mark that the email was updated.
82259	HOUSING EDUCATION RESOURCE CENTER	N/A
84287	SOUTHSIDE COMM DEVEL & HOUSING	N/A
84437	METROPOLITAN MILWAUKEE FAIR HOUSING COUNCIL	N/A
80604	CENTRO DE APOYO FAMILIAR (CAF)	N/A
80605	COMMUNITY HOUSING WORKS	N/A
84330	HARVEST AMERICA	N/A
80627	IN CHARGE DEBT SOLUTIONS	N/A
84684	PATH STONE	N/A
80628	SOUTHWEST KEY PROGRAMS, INC.	n/a
81001	NEIGHBORWORKS HOME RESOURCES	N/A
82812	CALIFORNIA RURAL LEGAL ASSISTANCE	N/A
82810	CALIFORNIA RURAL LEGAL ASSISTANCE-MARYSVILLE OFFICE	N/A
81240	ASSOCIATION HOUSE	N/A
84558	BROOKLYN HOUSING AND FAMILY SERVICES	N/A
84211	CENTER FOR WORKING FAMILIES	N/A
81238	HUMBOLDT PARK SOCIAL SERVICES	N/A
81261	NEAR WESTSIDE COMMUNITY DEVELOPMENT CORPROATION	N/A
81239	SOUTHEAST CHICAGO DEVELOPMENT COMMISSION	N/A
83795	ST NICHOLAS NEIGHBORHOOD PRESERVATION CORPORATION	N/A
84219	UNIVERSITY SETTLEMENT	N/A
82987	WEST JACKSON CDC	N/A

Done

Figure 122.A. OM – HUD-9902: 9902 Inquiry Results Invalid Email List

a. To update the invalid email address, Click the invalid email address text under Agency Email.
b. An input box appears with two buttons, **Update** and **Cancel**.
c. Enter a valid email address and click the **Update** button to save.

9902 Inquiry Results Email List

Missing/Invalid Email Addresses

Inquiry Criteria:
- Reporting Period: Quarter 1
- Fiscal Year: 2010
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: Yes
- Reported On Time: Yes

Agency ID	Agency Name	Agency Email * Click On Email Address to Edit. After updates are made, an asterisk appears to mark that the email was updated.
82259	HOUSING EDUCATION RESOURCE CENTER	testing@aol.com Update Cancel
84287	SOUTHSIDE COMM DEVEL & HOUSING	N/A
84437	METROPOLITAN MILWAUKEE FAIR HOUSING COUNCIL	N/A

Done

Figure 122.B. OM – HUD-9902: 9902 Inquiry Results Invalid Email List – Edit

24. When you are finished reviewing this list, click **Done** to be returned back to the 9902 Inquiry Results list screen.

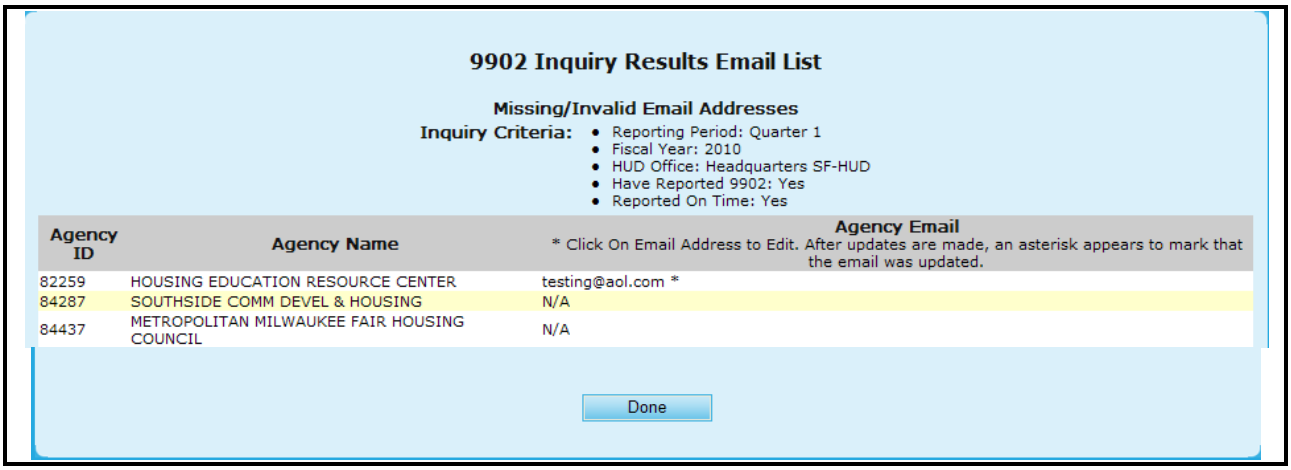


Figure 122.C OM – HUD-9902: 9902 Inquiry Results Invalid Email List – Saved

25. To view more information about an agency listed on the agency search list, select an agency by clicking the hyperlink under the **Agency Name** column. The *Agency Summary* screen appears, as depicted in Section 8.2.1.

26. To view the HUD-9902 form for an agency, click the **9902** hyperlink. The HUD-9902 form appears.

27. If you key in a parent agency ID to the **Agency ID** field in *9902 Data Report Status Inquiry* criteria page, you will get a consolidated non-editable 9902 data report.

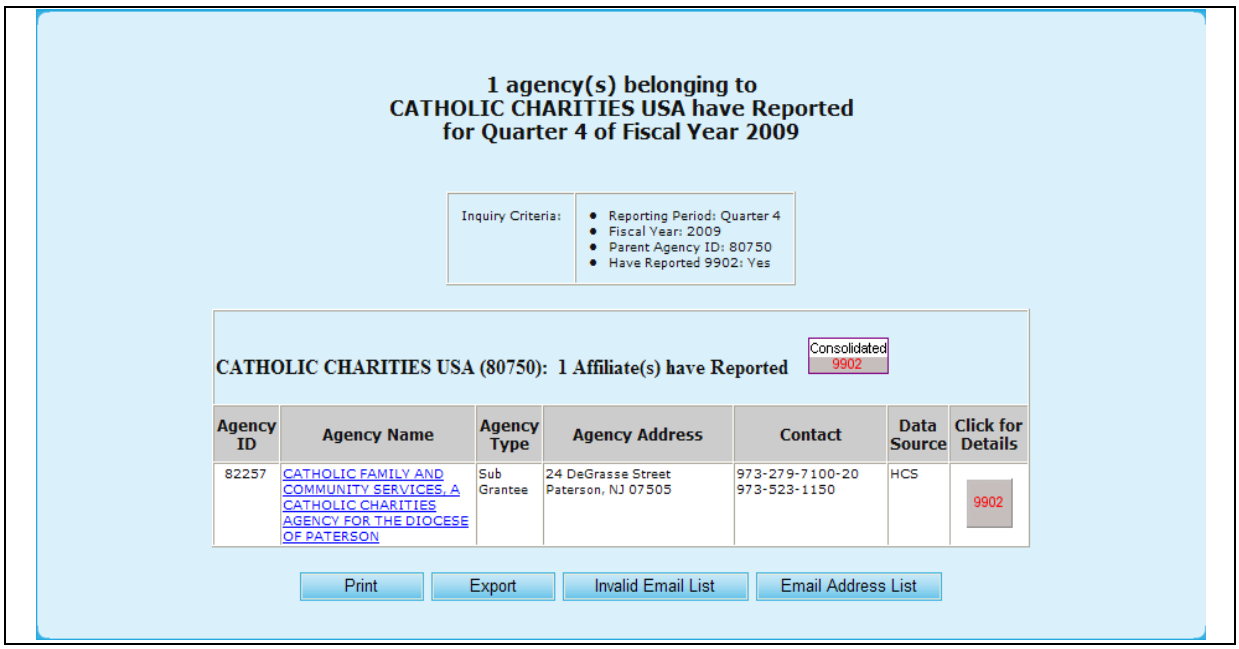


Figure 123.A. OM – HUD-9902: 9902 Processing – Report of Affiliates Belonging to A Parent Agency Have Reported 9902 Data

28. Upon selecting Consolidated 9902 you will be prompted to the report, presented as followed.

Totals for Sub-Agencies of

CATHOLIC CHARITIES USA

Agency ID: 80750
Agency Type: National Intermediary
HUD Office GTR: Ronald Bedoya
Number of Sub-Agencies Reported: 1
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	130	70.17
b. Not Hispanic	141	76.11
c. Chose not to respond	0	0.00
Section 3 Total:	271	146.28
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0	0.00
b. Asian	0	0.00
c. Black or African American	87	46.96
d. Native Hawaiian or Other Pacific Islander	0	0.00
e. White	184	99.32
Multi-Race		
f. American Indian or Alaska Native and White	0	0.00
g. Asian and White	0	0.00
h. Black or African American and White	0	0.00
i. American Indian or Alaska Native and Black or African American	0	0.00
j. Other multiple race	0	0.00
k. Chose not to respond	0	0.00
Section 4 Total:	271	146.28
5. Income Levels		
a. < 50% of Area Median Income (AMI)	19	10.26
b. 50 - 79% of AMI	76	41.02
c. 80 - 100% of AMI	103	55.60
d. > 100% AMI	73	39.41
e. Chose not to respond	0	0.00
Section 5 Total:	271	146.29
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	0	0.00
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	0	0.00
c. Completed resolving or preventing mortgage delinquency workshop	0	0.00
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0.00
e. Completed fair housing workshop	0	0.00
f. Completed predatory lending workshop	0	0.00
g. Completed rental workshop	0	0.00
h. Other workshop	0	0.00
Group Session / Section 6 Total:	0	0.00
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	0	0.00
2) Client will be mortgage ready within 90 days	0	0.00
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	0	0.00
4) Receiving long term pre-purchase counseling	0	0.00
5) Entered lease purchase progra	0	0.00
6) Decided Not to purchase housing; no further effort to prepare needed	0	0.00
7) Withdrew from counseling	0	0.00
8) Other	0	0.00
Section 7a Sub-total:	0	0.00
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	0	0.00
2) Mortgage refinanced	0	0.00

3) Mortgage modified	0	0.00
4) Received second mortgage	0	0.00
5) Initiated forbearance agreement/repayment plan	4	2.16
6) Executed a deed-in-lieu	0	0.00
7) Sold property/chose alternative housing solution	1	0.54
8) Pre-forclosure sale	0	0.00
9) Mortgage foreclosed	0	0.00
10) Counseled and referred to another social service or emergency assistance agency	0	0.00
11) Obtained partial claim loan from FHA lender	0	0.00
12) Bankruptcy	0	0.00
13) Entered debt management plan	0	0.00
14) Counseled and referred for legal assistance	0	0.00
15) Currently receiving foreclosure prevention/budget counseling	0	0.00
16) Withdrew from counseling	0	0.00
17) Other	0	0.00
Section 7b Sub-total:	5	2.70
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	0	0.00
2) Counseled on HECM; decided not to obtain mortgage	0	0.00
3) Obtained a non-FHA reverse mortgage	0	0.00
4) Received home equity or home improvement loan or other home repair assistance	0	0.00
5) Received consumer loan (unsecured)	0	0.00
6) Mortgage refinanced	0	0.00
7) Counseled and referred to other social service agency	0	0.00
8) Sold house/chose alternative housing solution	0	0.00
9) Completed financial management/budget counseling	0	0.00
10) Completed home maintenance counseling	0	0.00
11) Counseled and utilities brought current	8	4.32
12) Counseled and referred for legal assistance	0	0.00
13) Currently receiving counseling	0	0.00
14) Withdrew from counseling	0	0.00
15) Other	0	0.00
Section 7c Sub-total:	8	4.32
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	0	0.00
2) Obtained temporary rental relief	80	43.18
3) Counseled and referred to agency with rental assistance program	0	0.00
4) Advised on recertification for HUD/other subsidy program	0	0.00
5) Counseled and referred to other social service agency	0	0.00
6) Counseled and referred to legal aid agency for fair housing assistance	0	0.00
7) Counseled and referred to legal aid agency for assistance with eviction	0	0.00
8) Found alternative rental housing	0	0.00
9) Decided to remain in current housing situation	0	0.00
10) Resolved issue in current tenancy	0	0.00
11) Entered debt management/repayment plan	0	0.00
12) Counseled and utilities brought current	111	59.92
13) Resolved security deposit dispute	0	0.00
14) Currently receiving counseling	0	0.00
15) Withdrew from counseling	0	0.00
16) Other	0	0.00
Section 7d Sub-total:	191	103.10
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	67	36.17
2) Occupied transitional housing	0	0.00
3) Occupied permanent housing with rental assistance	0	0.00
4) Occupied permanent housing without rental assistance	0	0.00
5) Counseled Referred to other social service agency	0	0.00
6) Remained homeless	0	0.00
7) Currently receiving counseling	0	0.00
8) Withdrew from counseling	0	0.00
9) Other	0	0.00
Section 7e Sub-total:	67	36.17
Individual Counseling / Section 7 a-e Total:	271	146.29
Total Counseling / Section 6 and 7 Total:	271	146.29

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$1,056,325.88

Figure 123.B. OM – HUD-9902: 9902 Processing – Consolidated 9902 Report

29. If you select „Headquarters SF-HUD" from **HUD Office** dropdown, select „No" from **Have Reported Individual 9902** dropdown, and click **Submit Inquiry** button. The following report appears. In this report, name of parent agency, count and information of affiliates that have not reported 9902 data, links to agency profile(s) and individual 9902 report(s) are available and are grouped by parent agency name. You may click the individual 9902 report link to input 9902 data, or click agency name link to view or edit agency profile data.

926 agency(s) belonging to the Headquarters SF-HUD have Not Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: No

2 Agency(s) Having No Current Association

83453	HOPE HOUSING COUNSELING AGENCY	Affiliate	315 E. 7th Street Lawrence, KS 66049	785-856-4444 785-749-0095	HCS	9902
80920	NEIGHBORHOOD HOUSING SERVICES OF NORTH TEXAS (FORMERLY NHS OF FORT WORTH)	Sub Grantee	2315 N Main St Ste 401 Fort Worth, TX 76106	817-624-9454 817-624-0860	HCS	9902

ACORN HOUSING CORPORATION (80753): 39 Affiliate(s) have Not Reported

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Details
83075	ACORN HOUSING , ORLANDO, FL	Sub Grantee	120 E. Colonial Dr. Orlando, FL 32801	407-254-5974 407-254-0841	HCS	9902
84343	ACORN HOUSING BATON ROUGE, LA	Branch Inter Agency	5177 Greenwell Spring Road Baton Rounge, LA 70806	225-925-0937	HCS	9902

Figure 124. OM – HUD-9902: 9902 Processing – Report of Agencies Associated with Intermediaries in HQ Have Not Reported 9902 Data

8.2.2 Analysis Report Inquiry

As an Office Manager, you can perform an Analysis Reports Inquiry. The Analysis Reports Inquiry is used to organize and/or retrieve 9902 information. It can be exported into Excel spreadsheet in order to manipulate the data for other purpose.

1. From the top navigation menu, click **Analysis Reports Inquiry** hyperlink**.** The *9902 Data Analysis Reports Inquiry* page appears.

2. Complete all appropriate search fields in second half of the inquiry page and click the **Submit Inquiry** button.

Note: To view the differences in Analysis Type options, skip to Step 5.

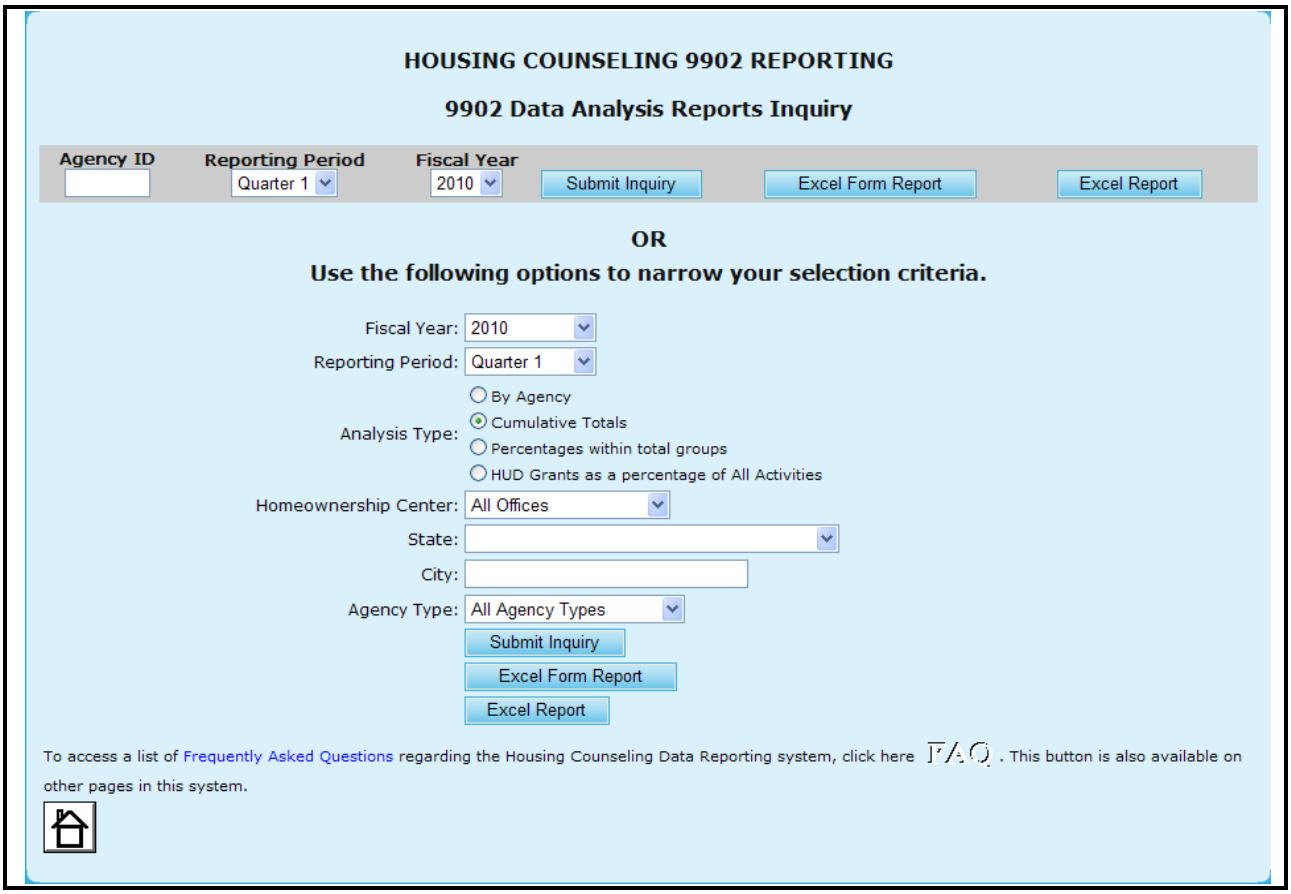


Figure 125.A. OM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry

3. Key in agency ID into **Agency ID** field and click the **Submit Inquiry** button, a read-only 9902 report appears. If a non-parent agency ID is keyed in, an individual 9902 report is displayed. Otherwise, a consolidated 9902 report will be displayed.

4. Key in agency ID into **Agency ID** field and click the **Excel Report** button, the *File Download* window appears. Follow the prompt to **Open** or to **Save** 9902 data in Excel spreadsheet.

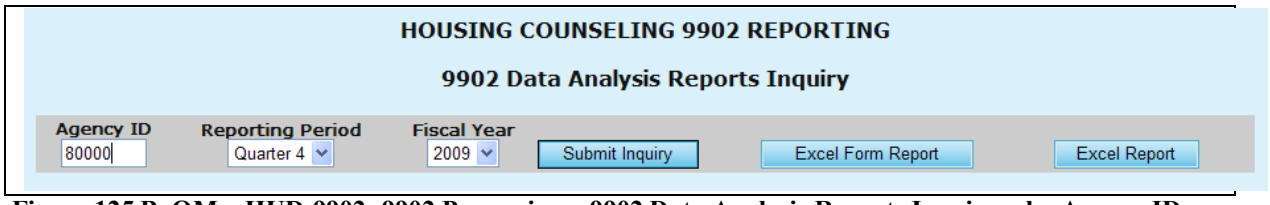


Figure 125.B. OM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – by Agency ID

Note: Provided below is an example of a Data Analysis Report when pressing **Submit Inquiry**.

DELAWARE OPPORTUNITIES, INCORPORATED

Agency ID: 80000
Agency Type: LHCA
HUD Office GTR: Glen Stopera
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	4	0.00
b. Not Hispanic	129	0.00
c. Chose not to respond	0	0.00
Section 3 Total:	133	0.00
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0	0.00
b. Asian	1	0.00
c. Black or African American	11	0.00
d. Native Hawaiian or Other Pacific Islander	1	0.00
e. White	118	0.00
Multi-Race		
f. American Indian or Alaska Native and White	0	0.00
g. Asian and White	0	0.00
h. Black or African American and White	1	0.00
i. American Indian or Alaska Native and Black or African American	0	0.00
j. Other multiple race	0	0.00
k. Chose not to respond	1	0.00
Section 4 Total:	133	0.00
5. Income Levels		
a. < 50% of Area Median Income (AMI)	14	0.00
b. 50 - 79% of AMI	85	0.00
c. 80 - 100% of AMI	34	0.00
d. > 100% AMI	0	0.00
e. Chose not to respond	0	0.00
Section 5 Total:	133	0.00
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	3	0.00
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	2	0.00
c. Completed resolving or preventing mortgage delinquency workshop	0	0.00
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0.00
e. Completed fair housing workshop	0	0.00
f. Completed predatory lending workshop	0	0.00
g. Completed rental workshop	0	0.00
h. Other workshop	0	0.00
Group Session / Section 6 Total:	5	0.00
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	3	0.00
2) Client will be mortgage ready within 90 days	5	0.00
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	0	0.00
4) Receiving long term pre-purchase counseling	1	0.00
5) Entered lease purchase progra	0	0.00
6) Decided Not to purchase housing; no further effort to prepare needed	1	0.00
7) Withdrew from counseling	1	0.00
8) Other	0	0.00
Section 7a Sub-total:	11	0.00

b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	0	0.00
2) Mortgage refinanced	0	0.00
3) Mortgage modified	0	0.00
4) Received second mortgage	0	0.00
5) Initiated forbearance agreement/repayment plan	0	0.00
6) Executed a deed-in-lieu	0	0.00
7) Sold property/chose alternative housing solution	0	0.00
8) Pre-forclosure sale	0	0.00
9) Mortgage foreclosed	0	0.00
10) Counseled and referred to another social service or emergency assistance agency	0	0.00
11) Obtained partial claim loan from FHA lender	0	0.00
12) Bankruptcy	0	0.00
13) Entered debt management plan	0	0.00
14) Counseled and referred for legal assistance	0	0.00
15) Currently receiving foreclosure prevention/budget counseling	0	0.00
16) Withdrew from counseling	0	0.00
17) Other	0	0.00
Section 7b Sub-total:	0	0.00
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	115	0.00
2) Counseled on HECM; decided not to obtain mortgage	2	0.00
3) Obtained a non-FHA reverse mortgage	0	0.00
4) Received home equity or home improvement loan or other home repair assistance	0	0.00
5) Received consumer loan (unsecured)	0	0.00
6) Mortgage refinanced	0	0.00
7) Counseled and referred to other social service agency	0	0.00
8) Sold house/chose alternative housing solution	0	0.00
9) Completed financial management/budget counseling	0	0.00
10) Completed home maintenance counseling	0	0.00
11) Counseled and utilities brought current	0	0.00
12) Counseled and referred for legal assistance	0	0.00
13) Currently receiving counseling	0	0.00
14) Withdrew from counseling	0	0.00
15) Other	0	0.00
Section 7c Sub-total:	117	0.00
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	0	0.00
2) Obtained temporary rental relief	0	0.00
3) Counseled and referred to agency with rental assistance program	0	0.00
4) Advised on recertification for HUD/other subsidy program	0	0.00
5) Counseled and referred to other social service agency	0	0.00
6) Counseled and referred to legal aid agency for fair housing assistance	0	0.00
7) Counseled and referred to legal aid agency for assistance with eviction	0	0.00
8) Found alternative rental housing	0	0.00
9) Decided to remain in current housing situation	0	0.00
10) Resolved issue in current tenancy	0	0.00
11) Entered debt management/repayment plan	0	0.00
12) Counseled and utilities brought current	0	0.00
13) Resolved security deposit dispute	0	0.00
14) Currently receiving counseling	0	0.00
15) Withdrew from counseling	0	0.00
16) Other	0	0.00
Section 7d Sub-total:	0	0.00
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	0	0.00
2) Occupied transitional housing	0	0.00
3) Occupied permanent housing with rental assistance	0	0.00
4) Occupied permanent housing without rental assistance	0	0.00
5) Counseled Referred to other social service agency	0	0.00
6) Remained homeless	0	0.00
7) Currently receiving counseling	0	0.00
8) Withdrew from counseling	0	0.00
9) Other	0	0.00
Section 7e Sub-total:	0	0.00
Individual Counseling / Section 7 a-e Total:	128	0.00
Total Counseling / Section 6 and 7 Total:	133	0.00

8. HUD Housing Counseling Grant(s) Data		
HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$0.00

Figure 126.A. OM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – Individual 9902 Report

Note: Provided below is an example of a Data Analysis Report when pressing the **Excel Form Report** button.

A1 DELAWARE OPPORTUNITIES, INCORPORATED

	A	B	C	D	E
1	**DELAWARE OPPORTUNITIES, INCORPORATED**				
2	**Agency ID:** 80000				
3	**Report Period:** HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009				
4	**Fiscal Year:** 2009				
5		All Counseling and	Counseling and Education Activities Attributed to HUD Housing Counseling		
6		Education Activities	Grant		
7	3. Ethnicity of Clients (select only one)				
8	a. Hispanic	4	0		
9	b. Not Hispanic	129	0		
10	c. Chose not to respond	0	0		
11	Section 3 Total:	133	0		
12	4. Race of Clients				
13	**Single Race**				
14	a. American Indian/Alaskan Native	0	0		
15	b. Asian	1	0		
16	c. Black or African American	11	0		
17	d. Native Hawaiian or Other Pacific Islander	1	0		
18	e. White	118	0		
19	**Multi-Race**				
20	f. American Indian or Alaska Native and White	0	0		
21	g. Asian and White	0	0		
22	h. Black or African American and White	1	0		
23	i. American Indian or Alaska Native and Black or African American	0	0		
24	j. Other multiple race	0	0		
25	k. Chose not to respond	1	0		
26	Section 4 Total:	133	0		

Figure 126.B. OM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry –9902 Excel Form Report Spreadsheet

Note: Provided below is an example of a Data Analysis Report when pressing the **Excel Report** button.

A1 DELAWARE OPPORTUNITIES, INCORPORATED

	A	B	C	D	E
1	**DELAWARE OPPORTUNITIES, INCORPORATED**				
2	**Agency ID:** 80000				
3	**Report Period:** HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009				
4	**Fiscal Year:** 2009				
5					
6	Agency ID	Ethnicity_Clients_Counseling_Hispanic_all	Ethnicity_Clients_Counseling_Hispanic_hud	Ethnicity_Clients_Counseling_Non_Hispanic_all	Ethnicity_Clients_Counseling_hud
7	80000	4	0	129	
8					

(data abbreviated)

Figure 126.C. OM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry –9902 Excel Report Spreadsheet

5. If the default **Cumulative Totals** criteria is chosen for Analysis Type, the *Cumulative Totals* report will be prompted, as depicted below. By pressing either the **Excel Form Report** or **Excel Report** buttons, you will be prompted to similar reports as illustrated in Step 4.

Cumulative Totals

HOC: All Offices
Agency Type: All Agency Types
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	498,079	59,425.51
b. Not Hispanic	2,061,154	278,568.97
c. Chose not to respond	430,677	33,571.67
Section 3 Total:	2,989,910	371,566.15
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	24,729	4,616.63
b. Asian	68,199	6,206.53
c. Black or African American	846,978	117,424.24
d. Native Hawaiian or Other Pacific Islander	14,912	1,794.28
e. White	1,310,642	181,519.80
Multi-Race		
f. American Indian or Alaska Native and White	6,236	931.13
g. Asian and White	4,106	501.93
h. Black or African American and White	19,785	2,591.11
i. American Indian or Alaska Native and Black or African American	2,968	422.22
j. Other multiple race	192,178	18,566.43
k. Chose not to respond	505,379	37,422.81
Section 4 Total:	2,996,112	371,997.11
5. Income Levels		
a. < 50% of Area Median Income (AMI)	1,070,242	158,837.61
b. 50 - 79% of AMI	619,615	88,735.09
c. 80 - 100% of AMI	283,499	35,948.79
d. > 100% AMI	335,236	32,513.20
e. Chose not to respond	678,008	54,911.26
Section 5 Total:	2,986,600	370,945.95
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	186,377	37,950.50
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	124,537	20,107.26
c. Completed resolving or preventing mortgage delinquency workshop	54,274	9,106.57
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	14,801	2,902.63
e. Completed fair housing workshop	12,361	1,730.57
f. Completed predatory lending workshop	14,989	2,218.11
g. Completed rental workshop	20,207	5,694.89
h. Other workshop	337,180	24,526.38
Group Session / Section 6 Total:	764,726	104,236.91
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	34,168	7,312.68
2) Client will be mortgage ready within 90 days	67,330	13,031.85
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	35,399	7,659.90
4) Receiving long term pre-purchase counseling	48,509	9,993.02
5) Entered lease purchase progra	607	104.34
6) Decided Not to purchase housing; no further effort to prepare needed	6,740	1,372.07
7) Withdrew from counseling	24,389	3,498.80
8) Other	16,873	3,204.65
Section 7a Sub-total:	234,015	46,177.31

b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	41,170	4,338.38
2) Mortgage refinanced	13,599	917.72
3) Mortgage modified	218,799	18,059.16
4) Received second mortgage	14,017	545.40
5) Initiated forbearance agreement/repayment plan	80,715	7,528.13
6) Executed a deed-in-lieu	3,892	235.31
7) Sold property/chose alternative housing solution	9,829	681.13
8) Pre-forclosure sale	27,011	1,356.88
9) Mortgage foreclosed	18,408	1,722.50
10) Counseled and referred to another social service or emergency assistance agency	83,169	5,764.14
11) Obtained partial claim loan from FHA lender	2,649	286.87
12) Bankruptcy	43,129	3,638.79
13) Entered debt management plan	18,265	1,909.95
14) Counseled and referred for legal assistance	21,295	2,700.70
15) Currently receiving foreclosure prevention/budget counseling	528,677	47,816.46
16) Withdrew from counseling	74,659	5,710.59
17) Other	202,909	17,545.51
Section 7b Sub-total:	1,402,192	120,757.62
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	116,647	15,653.38
2) Counseled on HECM; decided not to obtain mortgage	23,162	2,577.15
3) Obtained a non-FHA reverse mortgage	502	71.34
4) Received home equity or home improvement loan or other home repair assistance	6,880	1,538.77
5) Received consumer loan (unsecured)	402	80.63
6) Mortgage refinanced	1,703	214.64
7) Counseled and referred to other social service agency	7,471	1,236.24
8) Sold house/chose alternative housing solution	1,650	101.63
9) Completed financial management/budget counseling	24,393	3,420.69
10) Completed home maintenance counseling	4,513	589.00
11) Counseled and utilities brought current	10,417	1,367.82
12) Counseled and referred for legal assistance	7,201	1,110.38
13) Currently receiving counseling	32,791	6,856.23
14) Withdrew from counseling	6,596	1,078.75
15) Other	19,897	1,935.51
Section 7c Sub-total:	264,225	37,832.16
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	35,366	5,817.78
2) Obtained temporary rental relief	19,078	4,834.89
3) Counseled and referred to agency with rental assistance program	11,070	2,527.34
4) Advised on recertification for HUD/other subsidy program	16,738	4,394.14
5) Counseled and referred to other social service agency	13,180	2,467.68
6) Counseled and referred to legal aid agency for fair housing assistance	3,280	522.73
7) Counseled and referred to legal aid agency for assistance with eviction	17,041	1,940.27
8) Found alternative rental housing	9,173	1,728.94
9) Decided to remain in current housing situation	29,942	5,133.64
10) Resolved issue in current tenancy	23,810	3,418.16
11) Entered debt management/repayment plan	7,898	1,562.10
12) Counseled and utilities brought current	26,052	3,662.19
13) Resolved security deposit dispute	5,827	585.61
14) Currently receiving counseling	43,308	6,246.32
15) Withdrew from counseling	6,310	1,118.38
16) Other	35,865	5,982.83
Section 7d Sub-total:	303,938	51,943.00
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	25,979	6,420.77
2) Occupied transitional housing	4,098	546.15
3) Occupied permanent housing with rental assistance	8,014	1,788.51
4) Occupied permanent housing without rental assistance	2,932	496.03
5) Counseled Referred to other social service agency	4,836	755.84
6) Remained homeless	3,148	547.89
7) Currently receiving counseling	7,089	1,734.12
8) Withdrew from counseling	1,316	406.81
9) Other	2,166	316.56
Section 7e Sub-total:	59,578	13,012.68
Individual Counseling / Section 7 a-e Total:	2,263,948	269,722.77
Total Counseling / Section 6 and 7 Total:	3,028,674	373,959.68

8. HUD Housing Counseling Grant(s) Data		
HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$41,502,773.55

Figure 127. OM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – Cumulative Totals Report

6. If the default **By Agency** criteria is chosen for Analysis Type, the *By Agency* report will be prompted, as depicted below. By pressing either the **Excel Form Report** or **Excel Report** buttons, you will be prompted to similar reports as illustrated in Step 4.

Reporting Period: HUD-9902 Data from Oct 1, 2009 to Dec 31, 2009
Fiscal Year: 2010

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	15,563	1,978.90
b. Not Hispanic	61,932	12,318.99
c. Chose not to respond	19,267	558.22
Section 3 Total:	96,762	14,856.11
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	427	113.36
b. Asian	1,320	156.63
c. Black or African American	29,370	6,911.16
d. Native Hawaiian or Other Pacific Islander	169	28.13
e. White	44,754	6,630.25
Multi-Race		
f. American Indian or Alaska Native and White	135	17.71
g. Asian and White	83	10.96
h. Black or African American and White	638	140.25
i. American Indian or Alaska Native and Black or African American	51	6.31
j. Other multiple race	4,033	390.16
k. Chose not to respond	15,994	487.42
Section 4 Total:	96,974	14,892.34
5. Income Levels		
a. < 50% of Area Median Income (AMI)	37,313	7,400.64
b. 50 - 79% of AMI	22,147	3,721.23
c. 80 - 100% of AMI	9,956	1,772.53
d. > 100% AMI	9,392	1,064.57
e. Chose not to respond	18,044	852.74
Section 5 Total:	96,852	14,811.71

6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	7,638	1,529.39
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	11,019	1,143.23
c. Completed resolving or preventing mortgage delinquency workshop	1,518	202.76
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	501	204.05
e. Completed fair housing workshop	156	67.72
f. Completed predatory lending workshop	229	31.45
g. Completed rental workshop	546	250.17
h. Other workshop	5,568	395.40
Group Session / Section 6 Total:	27,175	3,824.17
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	1,418	266.96
2) Client will be mortgage ready within 90 days	1,854	395.64
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	1,523	345.40
4) Receiving long term pre-purchase counseling	2,845	685.05
5) Entered lease purchase progra	22	15.76
6) Decided Not to purchase housing; no further effort to prepare needed	273	61.38
7) Withdrew from counseling	535	85.69
8) Other	536	104.44
Section 7a Sub-total:	9,006	1,960.32
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	1,908	119.95
2) Mortgage refinanced	875	30.72
3) Mortgage modified	5,729	458.46
4) Received second mortgage	2,259	6.92
5) Initiated forbearance agreement/repayment plan	2,731	382.73
6) Executed a deed-in-lieu	368	15.17
7) Sold property/chose alternative housing solution	433	21.31
8) Pre-forclosure sale	257	22.81
9) Mortgage foreclosed	1,033	39.49
10) Counseled and referred to another social service or emergency assistance agency	748	108.54
11) Obtained partial claim loan from FHA lender	160	7.17

12) Bankruptcy	2,875	127.45
13) Entered debt management plan	447	12.77
14) Counseled and referred for legal assistance	691	131.89
15) Currently receiving foreclosure prevention/budget counseling	12,118	2,042.43
16) Withdrew from counseling	2,032	165.95
17) Other	2,092	151.74
Section 7b Sub-total:	36,756	3,845.50
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	5,318	592.52
2) Counseled on HECM; decided not to obtain mortgage	518	49.35
3) Obtained a non-FHA reverse mortgage	37	3.27
4) Received home equity or home improvement loan or other home repair assistance	267	49.29
5) Received consumer loan (unsecured)	16	0.00
6) Mortgage refinanced	270	1.08
7) Counseled and referred to other social service agency	80	21.82
8) Sold house/chose alternative housing solution	6	1.87
9) Completed financial management/budget counseling	718	433.60
10) Completed home maintenance counseling	142	63.97
11) Counseled and utilities brought current	397	107.79
12) Counseled and referred for legal assistance	807	108.87
13) Currently receiving counseling	2,751	706.75
14) Withdrew from counseling	513	71.78
15) Other	2,387	63.76
Section 7c Sub-total:	14,227	2,275.72
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	691	328.39
2) Obtained temporary rental relief	732	165.48
3) Counseled and referred to agency with rental assistance program	260	69.22
4) Advised on recertification for HUD/other subsidy program	952	421.82
5) Counseled and referred to other social service agency	620	164.96
6) Counseled and referred to legal aid agency for fair housing assistance	26	1.40
7) Counseled and referred to legal aid agency for assistance with eviction	61	7.92
8) Found alternative rental housing	297	113.11
9) Decided to remain in current housing situation	563	136.13
10) Resolved issue in current tenancy	946	124.91
11) Entered debt management/repayment plan	113	59.35
12) Counseled and utilities brought current	570	71.71
13) Resolved security deposit dispute	8	23.42
14) Currently receiving counseling	1,697	594.99
15) Withdrew from counseling	154	51.31
16) Other	1,565	208.79
Section 7d Sub-total:	9,255	2,542.91
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	77	13.58
2) Occupied transitional housing	106	40.74
3) Occupied permanent housing with rental assistance	140	103.70
4) Occupied permanent housing without rental assistance	54	20.94
5) Counseled Referred to other social service agency	248	164.96
6) Remained homeless	167	71.09
7) Currently receiving counseling	112	16.51
8) Withdrew from counseling	104	36.74
9) Other	158	26.09
Section 7e Sub-total:	1,166	494.35
Individual Counseling / Section 7 a-e Total:	70,410	11,118.80
Total Counseling / Section 6 and 7 Total:	97,585	14,942.97

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$9,475,101.32

Figure 128. OM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – By Agency Report

7. If the default **Percentages Within Total Group** criteria is chosen for Analysis Type, the *Percentages Within Total Group* report will be prompted, as depicted below. By pressing either the Excel Form Report or Excel Report buttons, you will be prompted to similar reports as illustrated in Step 4.

Percentages Within Total Groups

HOC: All Offices
Agency Type: All Agency Types
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	16.7%	16.0%
b. Not Hispanic	68.9%	75.0%
c. Chose not to respond	14.4%	9.0%
Section 3 Total:	100.0%	100.0%
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0.8%	1.2%
b. Asian	2.3%	1.7%
c. Black or African American	28.3%	31.6%
d. Native Hawaiian or Other Pacific Islander	0.5%	0.5%
e. White	43.7%	48.8%
Multi-Race		
f. American Indian or Alaska Native and White	0.2%	0.3%
g. Asian and White	0.1%	0.1%
h. Black or African American and White	0.7%	0.7%
i. American Indian or Alaska Native and Black or African American	0.1%	0.1%
j. Other multiple race	6.4%	5.0%
k. Chose not to respond	16.9%	10.1%
Section 4 Total:	100.0%	100.0%
5. Income Levels		
a. < 50% of Area Median Income (AMI)	35.8%	42.8%
b. 50 - 79% of AMI	20.7%	23.9%
c. 80 - 100% of AMI	9.5%	9.7%
d. > 100% AMI	11.2%	8.8%
e. Chose not to respond	22.7%	14.8%
Section 5 Total:	100.0%	100.0%
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	24.4%	36.4%
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	16.3%	19.3%
c. Completed resolving or preventing mortgage delinquency workshop	7.1%	8.7%
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	1.9%	2.8%
e. Completed fair housing workshop	1.6%	1.7%
f. Completed predatory lending workshop	2.0%	2.1%
g. Completed rental workshop	2.6%	5.5%
h. Other workshop	44.1%	23.5%
Group Session / Section 6 Total:	100.0%	100.0%
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	14.6%	15.8%
2) Client will be mortgage ready within 90 days	28.8%	28.2%
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	15.1%	16.6%
4) Receiving long term pre-purchase counseling	20.7%	21.6%
5) Entered lease purchase progra	0.3%	0.2%
6) Decided Not to purchase housing; no further effort to prepare needed	2.9%	3.0%
7) Withdrew from counseling	10.4%	7.6%
8) Other	7.2%	6.9%
Section 7a Sub-total:	100.0%	100.0%
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	2.9%	3.6%
2) Mortgage refinanced	1.0%	0.8%
3) Mortgage modified	15.6%	15.0%
4) Received second mortgage	1.0%	0.5%
5) Initiated forbearance agreement/repayment plan	5.8%	6.2%
6) Executed a deed-in-lieu	0.3%	0.2%
7) Sold property/chose alternative housing solution	0.7%	0.6%

8) Other	7.2%	6.9%
Section 7a Sub-total:	100.0%	100.0%
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	2.9%	3.6%
2) Mortgage refinanced	1.0%	0.8%
3) Mortgage modified	15.6%	15.0%
4) Received second mortgage	1.0%	0.5%
5) Initiated forbearance agreement/repayment plan	5.8%	6.2%
6) Executed a deed-in-lieu	0.3%	0.2%
7) Sold property/chose alternative housing solution	0.7%	0.6%
8) Pre-forclosure sale	1.9%	1.1%
9) Mortgage foreclosed	1.3%	1.4%
10) Counseled and referred to another social service or emergency assistance agency	5.9%	4.8%
11) Obtained partial claim loan from FHA lender	0.2%	0.2%
12) Bankruptcy	3.1%	3.0%
13) Entered debt management plan	1.3%	1.6%
14) Counseled and referred for legal assistance	1.5%	2.2%
15) Currently receiving foreclosure prevention/budget counseling	37.7%	39.6%
16) Withdrew from counseling	5.3%	4.7%
17) Other	14.5%	14.5%
Section 7b Sub-total:	100.0%	100.0%
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	44.1%	41.4%
2) Counseled on HECM; decided not to obtain mortgage	8.8%	6.8%
3) Obtained a non-FHA reverse mortgage	0.2%	0.2%
4) Received home equity or home improvement loan or other home repair assistance	2.6%	4.1%
5) Received consumer loan (unsecured)	0.2%	0.2%
6) Mortgage refinanced	0.6%	0.6%
7) Counseled and referred to other social service agency	2.8%	3.3%
8) Sold house/chose alternative housing solution	0.6%	0.3%
9) Completed financial management/budget counseling	9.2%	9.0%
10) Completed home maintenance counseling	1.7%	1.6%
11) Counseled and utilities brought current	3.9%	3.6%
12) Counseled and referred for legal assistance	2.7%	2.9%
13) Currently receiving counseling	12.4%	18.1%
14) Withdrew from counseling	2.5%	2.9%
15) Other	7.5%	5.1%
Section 7c Sub-total:	100.0%	100.0%
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	11.6%	11.2%
2) Obtained temporary rental relief	6.3%	9.3%
3) Counseled and referred to agency with rental assistance program	3.6%	4.9%
4) Advised on recertification for HUD/other subsidy program	5.5%	8.5%
5) Counseled and referred to other social service agency	4.3%	4.8%
6) Counseled and referred to legal aid agency for fair housing assistance	1.1%	1.0%
7) Counseled and referred to legal aid agency for assistance with eviction	5.6%	3.7%
8) Found alternative rental housing	3.0%	3.3%
9) Decided to remain in current housing situation	9.9%	9.9%
10) Resolved issue in current tenancy	7.8%	6.6%
11) Entered debt management/repayment plan	2.6%	3.0%
12) Counseled and utilities brought current	8.6%	7.1%
13) Resolved security deposit dispute	1.9%	1.1%
14) Currently receiving counseling	14.2%	12.0%
15) Withdrew from counseling	2.1%	2.2%
16) Other	11.8%	11.5%
Section 7d Sub-total:	100.0%	100.0%
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	43.6%	49.3%
2) Occupied transitional housing	6.9%	4.2%
3) Occupied permanent housing with rental assistance	13.5%	13.7%
4) Occupied permanent housing without rental assistance	4.9%	3.8%
5) Counseled Referred to other social service agency	8.1%	5.8%
6) Remained homeless	5.3%	4.2%
7) Currently receiving counseling	11.9%	13.3%
8) Withdrew from counseling	2.2%	3.1%
9) Other	3.6%	2.4%
Section 7e Sub-total:	100.0%	100.0%
Individual Counseling / Section 7 a-e Total:	100.0%	100.0%
Total Counseling / Section 6 and 7 Total:	100.0%	100.0%

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$41,502,773.55

Figure 129. OM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – Percentages Within Total Groups Report

8. If the default **HUD Grants as a Percentage of All Activities** criteria is chosen for Analysis Type, the *HUD Grants as a Percentage of All Activities* report will be prompted, as depicted below. By pressing either the Excel Form Report or Excel Report buttons, you will be prompted to similar reports as illustrated in Step 4.

HUD Grants as a Percentage of All Activities

HOC: All Offices
Agency Type: All Agency Types
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	100.0%	11.9%
b. Not Hispanic	100.0%	13.5%
c. Chose not to respond	100.0%	7.8%
Section 3 Total:	100.0%	12.4%
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	100.0%	18.7%
b. Asian	100.0%	9.1%
c. Black or African American	100.0%	13.9%
d. Native Hawaiian or Other Pacific Islander	100.0%	12.0%
e. White	100.0%	13.8%
Multi-Race		
f. American Indian or Alaska Native and White	100.0%	14.9%
g. Asian and White	100.0%	12.2%
h. Black or African American and White	100.0%	13.1%
i. American Indian or Alaska Native and Black or African American	100.0%	14.2%
j. Other multiple race	100.0%	9.7%
k. Chose not to respond	100.0%	7.4%
Section 4 Total:	100.0%	12.4%
5. Income Levels		
a. < 50% of Area Median Income (AMI)	100.0%	14.8%
b. 50 - 79% of AMI	100.0%	14.3%
c. 80 - 100% of AMI	100.0%	12.7%
d. > 100% AMI	100.0%	9.7%
e. Chose not to respond	100.0%	8.1%
Section 5 Total:	100.0%	12.4%
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	100.0%	20.4%
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	100.0%	16.1%
c. Completed resolving or preventing mortgage delinquency workshop	100.0%	16.8%
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	100.0%	19.6%
e. Completed fair housing workshop	100.0%	14.0%
f. Completed predatory lending workshop	100.0%	14.8%
g. Completed rental workshop	100.0%	28.2%
h. Other workshop	100.0%	7.3%
Group Session / Section 6 Total:	100.0%	13.6%
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	100.0%	21.4%
2) Client will be mortgage ready within 90 days	100.0%	19.4%
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	100.0%	21.6%
4) Receiving long term pre-purchase counseling	100.0%	20.6%
5) Entered lease purchase progra	100.0%	17.2%
6) Decided Not to purchase housing; no further effort to prepare needed	100.0%	20.4%
7) Withdrew from counseling	100.0%	14.3%
8) Other	100.0%	19.0%
Section 7a Sub-total:	100.0%	19.7%
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	100.0%	10.5%
2) Mortgage refinanced	100.0%	6.7%
3) Mortgage modified	100.0%	8.3%
4) Received second mortgage	100.0%	3.9%
5) Initiated forbearance agreement/repayment plan	100.0%	9.3%
6) Executed a deed-in-lieu	100.0%	6.0%
7) Sold property/chose alternative housing solution	100.0%	6.9%

8) Pre-forclosure sale	100.0%	5.0%
9) Mortgage foreclosed	100.0%	9.4%
10) Counseled and referred to another social service or emergency assistance agency	100.0%	6.9%
11) Obtained partial claim loan from FHA lender	100.0%	10.8%
12) Bankruptcy	100.0%	8.4%
13) Entered debt management plan	100.0%	10.5%
14) Counseled and referred for legal assistance	100.0%	12.7%
15) Currently receiving foreclosure prevention/budget counseling	100.0%	9.0%
16) Withdrew from counseling	100.0%	7.6%
17) Other	100.0%	8.6%
Section 7b Sub-total:	100.0%	8.6%
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	100.0%	13.4%
2) Counseled on HECM; decided not to obtain mortgage	100.0%	11.1%
3) Obtained a non-FHA reverse mortgage	100.0%	14.2%
4) Received home equity or home improvement loan or other home repair assistance	100.0%	22.4%
5) Received consumer loan (unsecured)	100.0%	20.1%
6) Mortgage refinanced	100.0%	12.6%
7) Counseled and referred to other social service agency	100.0%	16.5%
8) Sold house/chose alternative housing solution	100.0%	6.2%
9) Completed financial management/budget counseling	100.0%	14.0%
10) Completed home maintenance counseling	100.0%	13.1%
11) Counseled and utilities brought current	100.0%	13.1%
12) Counseled and referred for legal assistance	100.0%	15.4%
13) Currently receiving counseling	100.0%	20.9%
14) Withdrew from counseling	100.0%	16.4%
15) Other	100.0%	9.7%
Section 7c Sub-total:	100.0%	14.3%
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	100.0%	16.5%
2) Obtained temporary rental relief	100.0%	25.3%
3) Counseled and referred to agency with rental assistance program	100.0%	22.8%
4) Advised on recertification for HUD/other subsidy program	100.0%	26.3%
5) Counseled and referred to other social service agency	100.0%	18.7%
6) Counseled and referred to legal aid agency for fair housing assistance	100.0%	15.9%
7) Counseled and referred to legal aid agency for assistance with eviction	100.0%	11.4%
8) Found alternative rental housing	100.0%	18.8%
9) Decided to remain in current housing situation	100.0%	17.1%
10) Resolved issue in current tenancy	100.0%	14.4%
11) Entered debt management/repayment plan	100.0%	19.8%
12) Counseled and utilities brought current	100.0%	14.1%
13) Resolved security deposit dispute	100.0%	10.0%
14) Currently receiving counseling	100.0%	14.4%
15) Withdrew from counseling	100.0%	17.7%
16) Other	100.0%	16.7%
Section 7d Sub-total:	100.0%	17.1%
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	100.0%	24.7%
2) Occupied transitional housing	100.0%	13.3%
3) Occupied permanent housing with rental assistance	100.0%	22.3%
4) Occupied permanent housing without rental assistance	100.0%	16.9%
5) Counseled Referred to other social service agency	100.0%	15.6%
6) Remained homeless	100.0%	17.4%
7) Currently receiving counseling	100.0%	24.5%
8) Withdrew from counseling	100.0%	30.9%
9) Other	100.0%	14.6%
Section 7e Sub-total:	100.0%	21.8%
Individual Counseling / Section 7 a-e Total:	100.0%	16.3%
Total Counseling / Section 6 and 7 Total:	100.0%	15.9%

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$41,502,773.55

Figure 130. OM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – HUD Grants as a Percentage of All Activities Report

8.3 Grants

The U.S. Department of Housing and Urban Development (HUD) administers a comprehensive housing counseling program and provides grants through competitive awards to approved local housing counseling agencies, national and regional intermediaries, and state housing finance agencies. Using the HCS **Grant Processing** feature, you can: Setup Grant Applications: The Setup Grant Applications function sets up grant applications.

- **Scoring:** The Scoring function rates and ranks grant applications.

- **Final Scoring for Primary Reviewers:** This sorts the scoring out by the reviewers for each application.
- **Calculate Recommended Awards:** This calculates and submits the recommended awards.
- **Input Awards/Sub Allocations:** This allows you to input awards and sub allocations based on sub-agencies.

While logged in as an Office Manager, you will see the following Grants Processing menu of options:

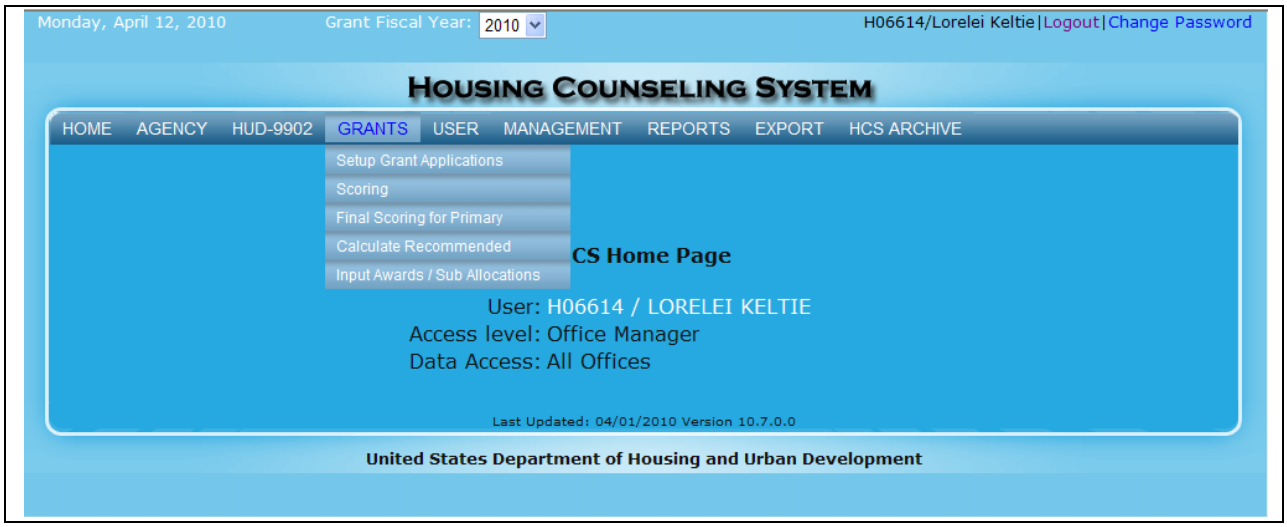


Figure 131. OM – Grants: Grants Menu

8.3.1 Grant Application Process

The Grant Application Process sets up the HCS system for the entire year. The Grant Application Process involves:

- **Setup Grant Applications**
- **Scoring**
- **Final Scoring for Primary Reviewers**
- **Calculate Recommended Awards**
- **Input Awards/Sub Allocations**

The sections below explain each grant applications step in detail.

8.3.2 Setup Grant Applications

As an Office Manager, you can create and update grant applications for the agencies within your Housing Office Center. To update or create grant applications follow the steps below.

1. From the upper navigation menu, click the **Setup Grant Application** hyperlink. The *Setup Grant Applications for FY 20XX* screen appears, displaying a list of existing grant applications based on HUD Offices.

2. To view specific grant applications, by agency, select a grant type as illustrated in Figure 132.

Setup Grant Applications - for FY 2009

Denver (HOC) office view

Grant Application by Office	Grant Type	# of Apps	# of Agency
Denver (HOC) GTR REVIEWER RULE:	LHCA-COMP	105	111
	LHCA-LDRC	20	
	LHCA-HECM	12	
	MSO-COMP	1	
	MSO-LDRC	1	
	MSO-HECM	0	
	SHFA-COMP	5	
	SHFA-LDRC	2	
Total Applications	146		
Total Agencies	111		

Figure 132. OM – Grants: Grant Applications by HUD Office for FY 20XX

3. Click the an agency name in the Agency Name column to update an existing grant application. The Agency and applicable (HOC) screen appears.

Denver

Instructions: Click on **Agency Name** title hyperlink to list the agencies in Agency Name and HUD Office order. Click on **Agency ID** title hyperlink to list the agencies in Agency ID and HUD Office order. Click on **Agency Type** title hyperlink to list the agencies in Agency Type, Agency Name, and HUD Office order. Click on **Address** title hyperlink to list the agencies in State, Agency Name, HUD Office, and Appl ID order. Click on **HUD Office** title hyperlink to list the agencies in HUD Office and Appl ID, that is the Application ID, order.

New Application...

Agency Name	Agency ID	Agency Type	Grant Type	Address	HUD Office	Appl ID	Awarded FY 2005	Awarded FY 2006	Awarded FY 2007	Delete
JUSTINE PETERSEN HOUSING AND REINVESTMENT COR	81462	LHCA	REVERSE MORTGAGE COUNSELI	1023 N. Grand Blvd. St. Louis, MO 63106	0892	001				
LEGAL AID OF WESTERN MISSOURI	82416	LHCA	REVERSE MORTGAGE COUNSELI	1125 Grand Boulevard Kansas City, MO 64106	0892	002				
HIGH PLAINS COMMUNITY DEVELOPMENT, CORP.	81530	LHCA	REVERSE MORTGAGE COUNSELI	130 E. 2nd Street Chadron, NE 69337-2329	0892	004				
CITY OF FORT WORTH HOUSING DEPARTMENT	81140	LHCA	REVERSE MORTGAGE COUNSELI	1000 Throckmorton St Fort Worth, TX 76102	0892	005				
CCCS OF N CENTRAL TEXAS	80946	LHCA	REVERSE MORTGAGE COUNSELI	901 N. McDonald, Suite 600 McKinney, TX 75069	0892	006				
SCI-TECH DEVELOPMENT, INC. (SDI) DBA SDI	83920	LHCA	REVERSE MORTGAGE COUNSELI	5401 North 76th Street Milwaukee, WI 53218	0892	007				
EL PASO COMMUNITY ACTION PROGRAM, PROJECT BRAVO, INC.	81154	LHCA	REVERSE MORTGAGE COUNSELI	4838 Montana Ave El Paso, TX 79903	0892	008				
COMMUNITY ACTION PARTNERSHIP OF SUBURBAN HENNEPIN	80662	LHCA	REVERSE MORTGAGE COUNSELI	33 10th Ave South Hopkins, MN 55343-1303	0892	009				
COMMUNITY ACTION SERVICES	80228	LHCA	REVERSE MORTGAGE COUNSELI	815 South Freedom Blv., Suite 100 Provo, UT 84601	0892	010				

Figure 133. OM – Grants: Grant Applications for FY 20XX

4. Edit the desired fields on the Grant Application page, and once completed select **OK** to save any changes. Select **Cancel** to go back to previous page without saving any changes.

Setup Grant Application for FY 2008

Instructions: Fill out the form below, review your information for accuracy, and click the OK button.
Projected Next Fiscal Year □ Enter the number of clients the agency plans to service from their grant request.
Adjusted Projections □ This is an automated adjustment to the Projected number of clients based on the grant amount awarded. This is provided as a reference in order to enter a realistic Committed Projections.
Committed Projections □ Enter the final number of clients the agency should service based on their final grant award.
* indicates required information.

Agency Name:	JUSTINE PETERSEN HOUSING AND REINVESTMENT COR	**Agency ID:**	81462	**Agency Type:**	LHCA
Fed Tax ID Num:	43-1769074	**DUNS Num:**	090336228	**Address:**	1023 N. Grand Blvd. St. Louis, MO 63106
HUD Office:	Denver (HOC)	**Application ID:**	0892 - 001	**Grant Type:**	REVERSE MORTGAGE COUNSELI

Client Outcome Projections	**Projected Next FY**	**Adjusted Projections**	**Committed Projections**
Factor 3			
Projected # of Clients that will be served			
Factor 5			
Projected # of Clients of Pre-Purchase Counseling that will purchase home			
Projected # of Clients of Pre-Purchase Counseling that are working and will become mortgage ready			
Projected # of Clients of Pre-Purchase Counseling that will not purchase a home			
Projected # of Clients of Default Counseling successfully avoiding foreclosure			
Projected # of Clients of Rental Counseling			
Factor 5 - Predatory Lending Applicants Only			
Projected # of Predatory Lending Counsel that have their mortgage modify, refinanced, or other to avoid foreclosure			

Eligibility Requirements	Delinquent in Federal Debt? ☐ **Yes**	**HUD Office GTR:**	Saddler, DeLois
Primary Reviewer:	Spragg, Diana (Inactive)	**Secondary Reviewer 1:**	Vaughn, Nanci (Inactive)
Secondary Reviewer 2:	Heiser, Patricia E	**Secondary Reviewer 3:**	(select one)

Clients Serviced Last FY: 0

Requested: $ 15000.00 *

Recommended: $ 15000.00

Prev. FY Funding: $ 0.00

2-YR Review: No

Prev. Yr. Draws: No

OK Cancel

Figure 134. OM – Grants: Setup Grant Application for FY 20XX

5. To create a new grant application for an agency, click **New Application.** The *Agency* screen appears.

Agency: Denver (HOC)

(Select One)

OK Cancel

Figure 135.A. OM – Grants: Agency (Select)

6. Click the drop-down arrow and select an agency for the new application.

Note: You must select an application before you click **OK**. To cancel this new application, click **Cancel**.

7. Click **OK**. The *Setup Grant Application for FY 20XX* screen appears displaying the Agency selected.

Setup Grant Application for FY 2008

Instructions: Fill out the form below, review your information for accuracy, and click the OK button.
Projected Next Fiscal Year □ Enter the number of clients the agency plans to service from their grant request.
Adjusted Projections □ This is an automated adjustment to the Projected number of clients based on the grant amount awarded. This is provided as a reference in order to enter a realistic Committed Projections.
Committed Projections □ Enter the final number of clients the agency should service based on their final grant award.
* indicates required information.

Agency Name:	AFFORDABLE HOUSING OF PARKER COUNTY	**Agency ID:**	83495	**Agency Type:**	LHCA
Fed Tax ID Num:	75-2946623	**DUNS Num:**	000000000	**Address:**	101 Swan Court Springtown, TX 76082
HUD Office:		**Grant Type:**			
Eligibility Requirements	Delinquent in Federal Debt? ☐ **Yes**			**HUD Office GTR:**	Massengale, Alice
Primary Reviewer:	(select one)			**Secondary Reviewer 1:**	(select one)
Secondary Reviewer 2:	(select one)			**Secondary Reviewer 3:**	(select one)
2-YR Review: No					
Prev. Yr. Draws: No					

OK Cancel

Figure 135.B. OM – Grants: Setup Grant Application for FY 20XX

8. Complete the form.

9. If the agency is delinquent in Federal debt, click the box next to **Yes** in the **Delinquent in Federal Debt** field.

10. Select a primary and secondary reviewer(s) using the appropriate reviewer drop-down boxes.

11. Select **Yes** or **No** in the **2-YR Review** and **Prev. Yr. Draws** field.

12. To save this new grant application, click **OK**. To cancel this application, click **Cancel**.

You have now completed a new grant application.

8.3.3 Scoring

As an Office Manager you can score grant applications. This section describes how to review, edit, or delete grant application scores.

1. From the upper navigation menu, click the **Scoring** hyperlink. The *Application Scoring List Search for Fiscal Year 20XX* screen appears.

2. From here you will be able to edit your search criteria based on:

a. Agency ID
b. Agency Name
c. Reviewer
d. Application ID

3. Once you have narrowed down your search click the **Search** button to retrieve those results, or **Clear** to erase what was put into each field.

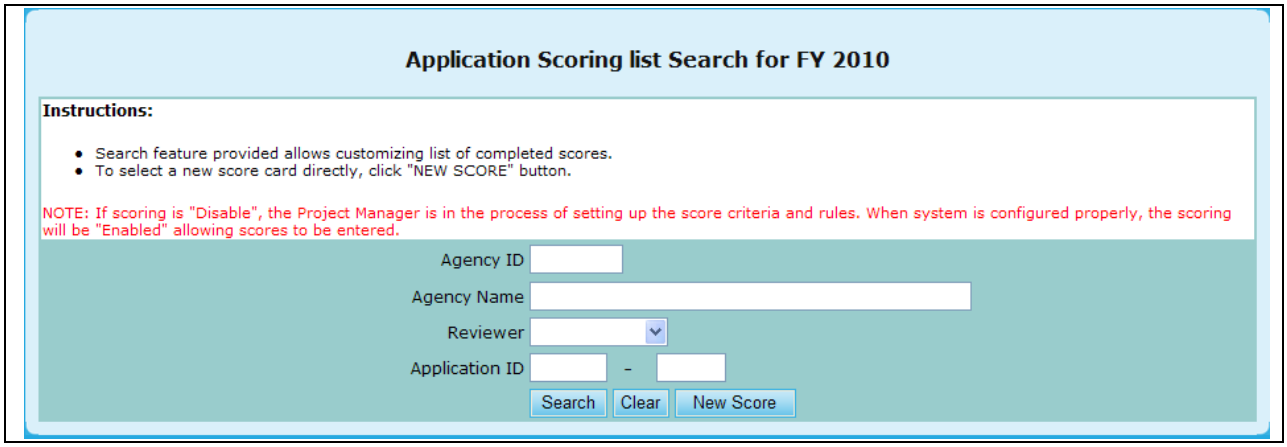


Figure 136. OM – Scoring: Application Scoring List Search for FY 20XX

4. You will be prompted to your search results, which you can sort based off of the following criteria:
   a. Agency Name
   b. Agency ID
   c. Agency Type
   d. Application ID
   e. Reviewer

5. To open a specific scorecard, click the hyperlink under Agency Name that you would like to view.

Note: to Delete or add New Score skip to step 9.

Figure 137. OM – Scoring: Application(s) Scored for Fiscal Year 2010

6. Once you have chosen your desired Agency, you will be prompted to the Factors For Award scorecard.

a. Check agency information for accuracy to ensure you are evaluating the correct score card.
b. Other Reviewers assigned to this application are posted for reference.
c. All sub-factor scores when listed must be scored. Major Factor scores cannot be over written when sub-factors are listed. Major Factor scores will automatically sum the scores of its sub-factors. If no sub-factors are listed, the score for the Major Factor can be entered directly.
d. If applicable, instructions to each sub-factor are provided by selecting the Blue Information icon.
e. **Bonus Points** are shown if applicable. Combine the Factor scores plus Bonus Points to determine Total Score.

7. When all scores have been entered, click the **OK** button on the bottom to save the score card, or **Cancel** to erase changes.

Factors for Award

Instructions: + −

Agency ID: 84081
Agency Name: HOMEOWNERSHIP PRESERVATION FOUNDATION
Grant Category: INTERMEDIARY
Reviewer: George Grotheer
Other Reviewer(s): Brian Siebenlist (Prim. Rvwr) Colleen Weiser

Application ID: 0011-004
Grant Type: COMP

Rating Factor	Score	Bonus Points	Max Points	Max Bonus Points	Info	Other Scores
1. Capacity of the Applicant and Relevant Organizational Staff	27 *		30			BS 26 CW 0
1a. RF1-2a: Average Combined Housing Counseling Experience of Project Director and Staff	6 *		6			
1b. RF1-2b: Specialized Training Received for all Counselors and Staff	3 *		5			
1c. RF1-3a: Grantee Requirements	2 *		3			
1d. RF1-3b: HUD 9902-Filed Electronically in a timely manner	2 *		2			
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?	2 *		2			
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?		2 *		2		
1f. RF1-3d: Performance Reviews		5 *		5		
1g. RF1-3e: Housing Counseling System (HCS)		2 *		2		
1h. RF1-4a: Performance Evaluation		1 *		1		
1i. RF1-4b: Goals/Results		4 *		4		

Strength: + −

test

Weakness: + −

2. Need/Extent of the Problem		5 *		5		BS 5 CW 0
2a. RF2-1: Needs Data		3 *		3		
2b. RF2-2: Departmental Policy Priorities		2 *		2		

Strength: + −

test

Weakness: + −

1f. RF1-3d: Performance Reviews	5	*	5			
1g. RF1-3e: Housing Counseling System (HCS)	2	*	2			
1h. RF1-4a: Performance Evaluation	1	*	1			
1i. RF1-4b: Goals/Results	4	*	4			
Strength: + − Weakness: + −						
2. Need/Extent of the Problem	5	*	5		BS 5	CW 0
2a. RF2-1: Needs Data	3	*	3			
2b. RF2-2: Departmental Policy Priorities	2	*	2			
Strength: + − Weakness: + −						
3. Soundness of Approach/Scope of Housing Counseling Services	40	*	45		BS 0	CW 0
3a. RF3-1a: Average Number of Hours per Client/per Counseling Type	0	*	2			
3b. RF3-1b: Types of Counseling	4	*	4			
3c. RF3-1c: Group vs One-on-One	1	*	1			
3d. RF3-1d: Marketing and Outreach	1	*	1			
3e. RF3-2a: Cost Per Client	6	*	6			
3f. RF3-2b: Capacity	1	*	1			
3g. RF3-2c: Training Expenditures	0	*	2			
3h. RF3-2d: Percentage of Grant Funding Passed Through	1	*	1			
3v. RF3-6a: Percent of Grant Funding to be Passed Through	2	*	3			
3w. RF3-6b: Capacity	1	*	1			
Strength: + − Weakness: + −						
4. Leveraging Resources	10	*	10		BS 10	CW 0
Strength: + − Weakness: + −						
5. Achieving Results and Program Evaluation	10	*	10		BS 0	CW 0
5a. RF5-1a: Outputs/Services	3	*	3			
5b. RF5-1b: Outcomes	3	*	3			
5c. RF5-1c: Logic Model Projections	3	*	3			
5d. RF5-1d: Evaluation Tools	1	*	1			
Strength: + − Weakness: + −						
Total	92		100	0	BS 41	CW 0

OK Cancel

Figure 138.A. OM – Scoring: Application(s) Scored for Fiscal Year 2010

8. If you click **OK**, and there are errors associated with your scoring you will prompted to various messages.
    a. If the number you input is larger than the Max Points, a error message will pop-up
    b. If the number you input is not a whole number, a error message will pop-up
    c. If the number you input is not a positive number, a error message will pop-up

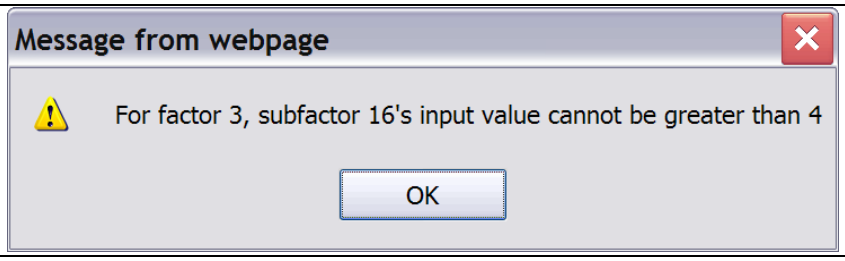


Figure 138.B. OM – Scoring: Message from webpage (Step 8.a)

Figure 138.C. OM – Scoring: Message from webpage (Step 8.b)

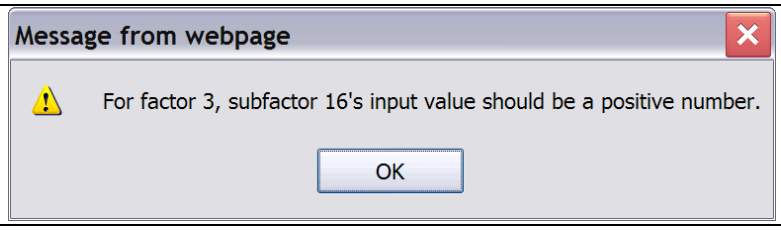


Figure 138.D. OM – Scoring: Message from webpage (Step 8.c)

Agency Name	Agency ID	Agency Type	Grant Type	Application ID	Reviewer	Total Score	Delete
HOMEOWNERSHIP PRESERVATION FOUNDATION	84081	National Intermediary	COMP	0011-004	Grotheer, George	92	
NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS	84539	National Intermediary	COMP	0011-006	Grotheer, George	93	
NATIONAL URBAN LEAGUE	81639	National Intermediary	COMP	0011-013	Grotheer, George	89	
CCCS OF GREATER ATLANTA - MAIN OFFICE	84538	National Intermediary	COMP	0011-015	Grotheer, George	95	
CCCS OF GREATER ATLANTA - MAIN OFFICE	84538	National Intermediary	HECM	0012-002	Grotheer, George	94	

Figure 139. OM – Scoring: Application(s) Scored for Fiscal Year 2010

9. To delete a score, click the *X* button found under the delete column on the *Application(s) Scored for Fiscal Year 2010*.

10. A message will be prompted prior to finalizing your action. Click **OK** to delete the score, or **Cancel** to return back to the *Application(s) Scored for Fiscal Year 2010* page.

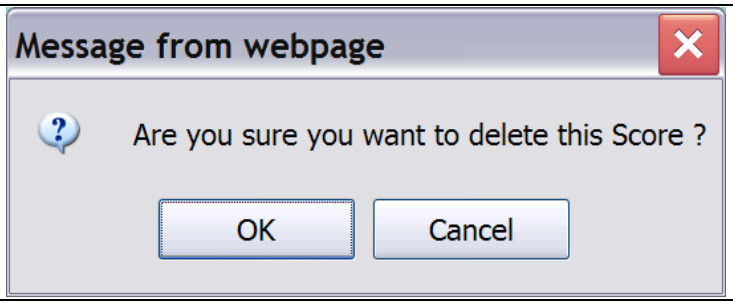


Figure 140. OM – Scoring: Message from webpage Delete a Score

11. To add a New Score, click the **New Score** button located above and below the Agency Name column.

12. This will prompt you to a list of scorecards that are awaiting your review, similar to Figure 139.

13. The scorecard, and process, will be the same as previously described in Steps 6 and 7.

You have now finished using the HCS **Scoring** feature.

8.3.4 Final Scoring for Primary Reviewer

You can complete the final scoring for primary reviewers by searching for an agency, reviewer name, or application ID.

1. From the top navigation menu, click the **Final Scoring for Primary Reviewers** hyperlink. The *Final Scoring for Primary Reviewers Search for FY 20XX* screen appears.

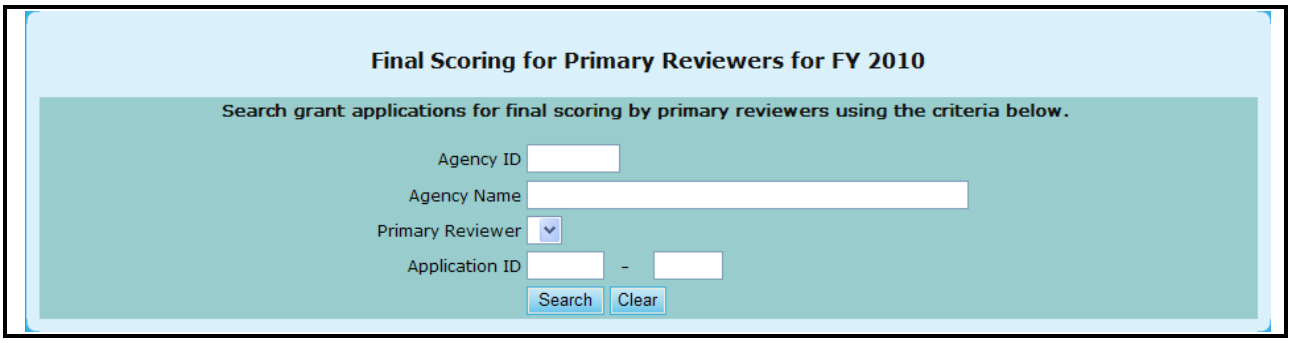


Figure 141. OM – Grants: Final Scoring for Primary Reviewers Search for FY 20XX

2. Search for the final scoring for primary reviewers by using any combination of the search criteria to filter the list of applications that require a final score.
   a. Enter the agency ID you are searching for in the **Agency ID** field.
   b. Enter the agency‟s name in the **Agency Name** field.
   c. Click the drop-down box next to the **Primary Reviewer** field and select the primary reviewer for this scoring.
   d. Enter the application‟s ID in the **Application ID** field.

3. Click **Search**. The *Final Scoring List for Fiscal Year 20XX* search results screen appears displaying the search results the HCS system finds based on your search criteria:

Final Scoring List for Fiscal Year 2008

Search Criteria: • Agency Name: national foundation for credit counseling

Appl. ID	Agency Name	Reviewer	Factor No. 1	2	3	4	5	Total
0000-008	NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	Roman, Ruth	No Review					
		Cromwell, Betsy	26.00	10.00	33.00	10.00	12.00	91.00
		Siebenlist, Brian (Prime Rvwr)	No Review					
		Average Score:	26.00	10.00	33.00	10.00	12.00	91.00
		Final Score:	29.00	10.00	35.00	10.00	12.00	96.00
0094-002	NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	Roman, Ruth	No Review					
		Cromwell, Betsy	26.00	10.00	33.00	10.00	12.00	91.00
		Siebenlist, Brian (Prime Rvwr)	No Review					
		Average Score:	26.00	10.00	33.00	10.00	12.00	91.00
		Final Score:	29.00	10.00	35.00	10.00	12.00	96.00

Figure 142. OM – Grants: Final Scoring List for Fiscal Year 20XX

4. To view or edit the final scoring for a specific agency, Click the agency's name in the **Agency's Name** column. The *Final Scoring for Primary Reviewer* screen appears.

5. Review the form; edit the final score by typing in the **Final Score** fields.

6. Click **OK** to save your changes or **Cancel** to exit the screen.

Final Scoring for Primary Reviewer

Instructions: Fill out the form below, review your information for accuracy, and click the **OK** button. The Average Score is based on scores submitted.

Agency Name: NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.

Application ID: 0000-008 **Grant Category:** Intermediary **Grant Type:** Comprehensive

Primary Reviewer: Brian Siebenlist

Rating Factor	Max Points	Max Bonus Points	Brian Siebenlist	Betsy Cromwell	Ruth Roman	Average Score	Final Score
1. Capacity of the Applicant and Relevant Organizational Staff	30.00	0.00	0.00	26.00	0.00	26.00	
2. Need/Extent of the Problem	10.00	0.00	0.00	10.00	0.00	10.00	
3. Soundness of Approach/Scope of Housing Counseling Services	38.00	0.00	0.00	33.00	0.00	33.00	
4. Leveraging Resources	10.00	0.00	0.00	10.00	0.00	10.00	
5. Achieving Results and Program Evaluation	12.00	0.00	0.00	12.00	0.00	12.00	
Total	100.00	0.00	0.00	91.00	0.00	91.00	NaN

OK Cancel

Figure 143. OM – Grants: Final Scoring for Primary Reviewer – Agency Details

You have now used the HCS Search for **Final Scoring for Primary Reviewers** feature.

8.3.5 Calculate Recommended Award

As an Office Manager you can view the Recommended Awards that were calculated for a given year.

1. From the top navigation menu, click the **Calculate Recommended Award** hyperlink. The *Recommended Awards Calculation for FY 20XX* screen appears.

Recommended Awards Calculation for Fiscal Year 2008

Instructions: Activating each Grant Type below will generate HCS to calculate a recommended award for all applications that have a Final Score assigned to that Grant Type. Applications are ready to be calculated using this feature when the number under '# Calculated' is less than the number under '# Final Score'. To execute Recommended Award:

1. Select the HUD Office application is processing under.
2. Click on the Grant Type that describes the application you wish to calculate recommended award amounts. This will take you to another page to perform the calculation.
3. Go to bottom of the calculation page and click the 'Save' button to save the recommended awards to database. Calculated applications will be reflected under '# Calculated' column.
4. Monitor the # Calculated for it to equal the # Applied to determine when all applications have been calculated. All applications applied must be calculated to get an accurate Recommended Award for each application.
5. Recommended Award amount should equal Allocated amount when all applications are calculated.

Grant Type	Allocated	Recommended Award	Requested Funds	# Applied	# Final Scored	# Calculated	% Completed
SHFA							
Comprehensive	$2,580,000.00	$2,579,999.98	$5,267,090.36	19	19	19	100.00%
Intermediary							
REVERSE MORTGAGE COUNSELI	$3,559,450.00	$3,559,450.00	$6,252,000.00	3	3	3	100.00%
Comprehensive	$24,002,500.00	$24,002,500.00	$39,080,528.97	21	21	21	100.00%
LHCA							
REVERSE MORTGAGE COUNSELI	$440,550.00	$440,550.00	$468,050.00	29	29	29	100.00%
Comprehensive	$15,867,932.59	$15,975,043.84	$31,005,291.71	431	431	429	99.54%
LOAN DOCUMENT REVIEW COUN	$575,000.00	$575,000.00	$575,000.00	1	1	0	0.00%
HUD Total:	$47,025,432.59	$47,132,543.82	$82,647,961.04	504	504	501	99.40%

Figure 144. OM – Grants: Recommended Awards Calculation by Grant Category

8.3.6 Input Award/Sub Allocations

As an Office Manager you can input awards and sub-allocations. The list of applications is dependent on the type of funding allocations chosen by HUD and described in Calculate Recommended Awards above. Follow these steps to input/review the awards and sub-allocations when funding allocations chosen by HUD is Grant Category and Housing Office Center:

1. From the upper navigation menu, click the **Input Awards/Sub Allocations** hyperlink. The *Input Awards for FY 20XX* screen appears, displaying the available HUD Offices, and the allocated funds, amount awarded, and the grant type for each office.

All Offices Office View

Input Awards for FY 2009

Instructions: List of grant applications for awards input will be displayed by clicking on corresponding **Grant Applicant Category**.

Grant Type		Allocated	Awarded
COMP	INTERMEDIARY	$25,727,323.00	$25,727,323.00
	LHCA	$17,111,728.00	$17,111,728.00
	MSO	$1,570,000.00	$1,570,000.00
	SHFA	$2,650,000.00	$2,650,000.00
FLMF		Allocated	Awarded
	INTERMEDIARY	$798,272.00	$798,272.00
LDRC		Allocated	Awarded
	INTERMEDIARY	$992,677.00	$992,677.00
	LHCA	$904,358.00	$904,358.00
	MSO	$99,653.00	$99,653.00
	SHFA	$149,689.00	$149,689.00
HECM		Allocated	Awarded
	INTERMEDIARY	$6,500,000.00	$6,500,000.00
	LHCA	$1,000,000.00	$1,000,000.00
	MSO	$346,300.00	$346,300.00
TRNG		Allocated	Awarded
	INTERMEDIARY	$5,000,000.00	$5,000,000.00
	Grand Total:	$62,850,000.00	$62,850,000.00

Figure 145. OM – Grants: Input Awards for FY 20XX

2. Click the **HUD Office** hyperlink for the HUD Office that you"d like to input/review awards. The *Select a Grant Application to Award for FY 20XX* screen appears.

Select a Grant Application to Award for FY 2009

Instructions: + –

Agency Name	Agency ID	Agency Type	Grant Type	HUD office	City/State	Application ID	Sub-Allocated	Awarded
NEW YORK CITY COMMISSION ON HUMAN RIGHTS	80439	LHCA	COMP	Philadelphia (LHCA - COMP)	New York, NY	0321-001	N	$0.00
YWCA DELAWARE	80961	LHCA	COMP	Philadelphia (LHCA - COMP)	Newark, DE	0321-002	N	$20,000.00
UNIVERSITY LEGAL SERVICES	80219	LHCA	COMP	Philadelphia (LHCA - COMP)	Washington, DC	0321-003	N	$0.00
NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC	80570	LHCA	COMP	Philadelphia (LHCA - COMP)	Dover, DE	0321-004	N	$46,220.00
CHRISTIAN ACTIVITIES COUNCIL	84173	LHCA	COMP	Philadelphia (LHCA - COMP)	Hartford, CT	0321-005	N	$32,236.00
OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.	84654	LHCA	COMP	Philadelphia (LHCA - COMP)	New London, CT	0321-006	N	$0.00
MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS	84534	LHCA	COMP	Philadelphia (LHCA - COMP)	New Haven, CT	0321-007	N	$0.00
CHELSEA RESTORATION CORPORATION	84144	LHCA	COMP	Philadelphia (LHCA - COMP)	Chelsea, MA	0321-008	N	$21,748.00
GREATER BOSTON LEGAL SERVICES	80563	LHCA	COMP	Philadelphia (LHCA - COMP)	Boston, MA	0321-009	N	$30,488.00
PRO-HOME, INC.	81747	LHCA	COMP	Philadelphia (LHCA - COMP)	Taunton, MA	0321-010	N	$35,732.00
COMMUNITY SERVICE NETWORK, INC.	81850	LHCA	COMP	Philadelphia (LHCA - COMP)	Stoneham, MA	0321-011	N	$23,496.00

Figure 146. OM – Grants: Select a Grant Application to Award for FY 20XX

3. To sort this list: Click the **Agency Name** button to list the agencies in Agency Name order. Click the **Application ID** button to list the agencies in Application ID order. Click the **Agency Type** button to sort by agency type and Agency Name order. Click the hyperlink for the agency that you wish to grant an award.

4. To select a grant application from a specific agency, click the hyperlink for the agency‟s name in the **Agency Name** column. The *Input Awards for FY 20XX* screen appears.

5. Complete the form; enter the amount awarded in whole dollars (format: 9999999) and make sure the number of zero (0)s are correct. The amount awarded should not exceed the agency‟s requested amount.

Input Awards for FY 2009

Instructions: Fill out the form below, review your information for accuracy, and click the **OK** button to save results.
Click the 'Sub-Agency Allocation' button to access screen to distribute funds to sub-agencies.
* indicates required information.

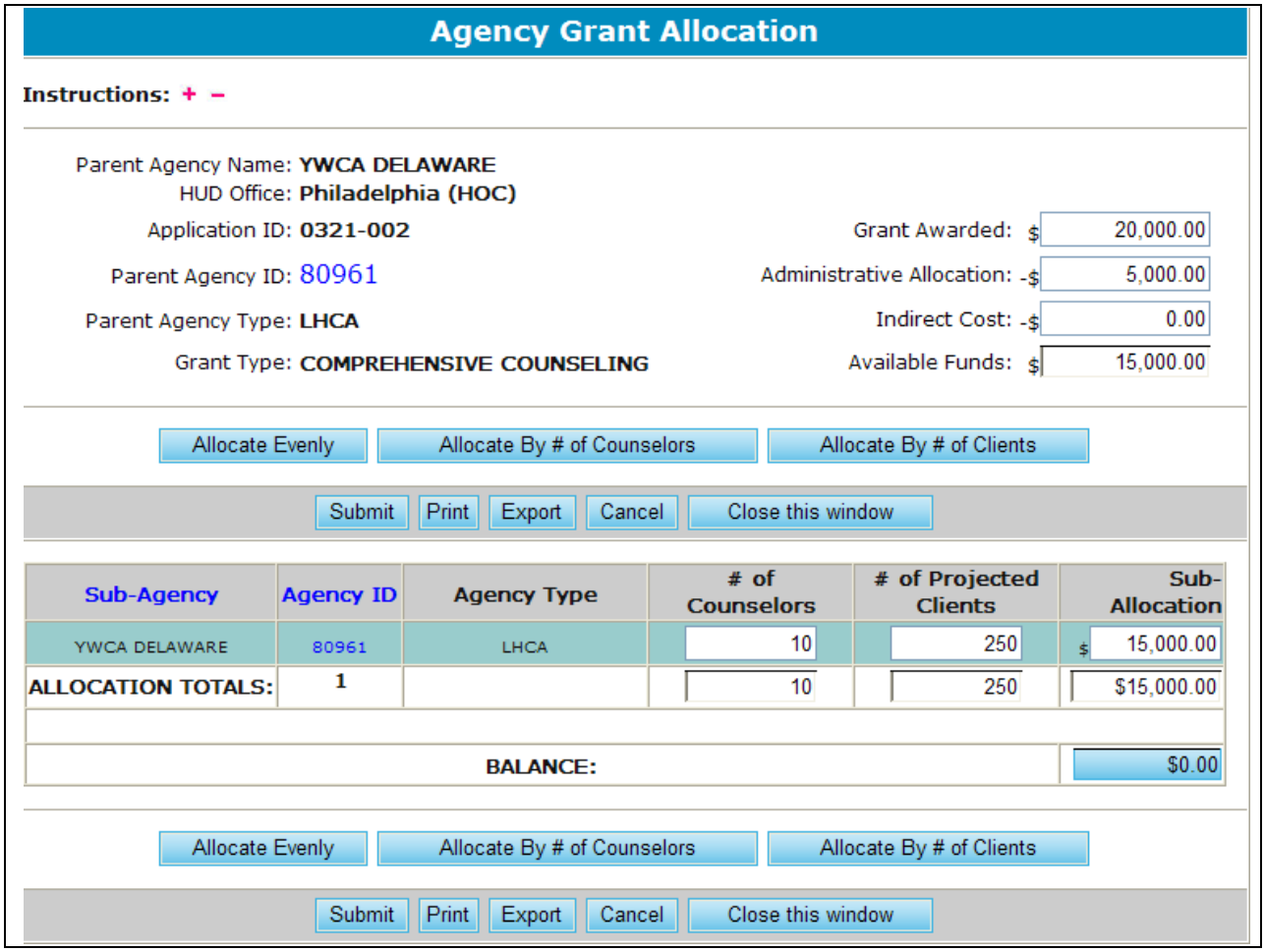
Agency Name:	NEW YORK CITY COMMISSION ON HUMAN RIGHTS (0321-001)		
Address:	40 Rector Street, 10th Floor New York, NY 10006		
Requested:	$28,369.00	**Grant Category:**	LHCA
Recommended:	$0.00	**Grant Type:**	COMP
Awarded:	$ 0.00 *	Enter the Amount Awarded in whole dollars (format: 99999999.99). The Amount Awarded should not exceed the Agency's Requested Amount. If the recommended Award Amount is greater than Amount Remaining (below) contact the system administrator for guidance.	
		HUD Office Responsible for Awarding Grant:	Philadelphia (LHCA - COMP)
		Amount Allocated:	$17,111,728.00
		The Amount Awarded to Date excluding this Agency:	$17,111,728.00
		The Amount cannot exceed the Amount Remaining:	$0.00

OK | Cancel | Agency/Sub-Agency Allocation

Figure 147.A. OM – Grants: Input Award (by Agency)

6. To sub-allocate funds to any associated sub-agencies, click **Agency/Sub-Agency Allocation**. The *Sub-Agency Grant Allocations* screen appears.

7. Complete the form and fill in any sub-agency funding information. To allocate the funds evenly, click **Allocate Evenly**. To allocate by # of counselors, click **Allocate by # of Counselors**. To allocate by # of clients, click **Allocate by # of Counselors.**



Agency Grant Allocation

Instructions: + –

Parent Agency Name: YWCA DELAWARE
HUD Office: Philadelphia (HOC)
Application ID: 0321-002
Parent Agency ID: 80961
Parent Agency Type: LHCA
Grant Type: COMPREHENSIVE COUNSELING

Grant Awarded: $ 20,000.00
Administrative Allocation: -$ 5,000.00
Indirect Cost: -$ 0.00
Available Funds: $ 15,000.00

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

Submit | Print | Export | Cancel | Close this window

Sub-Agency	Agency ID	Agency Type	# of Counselors	# of Projected Clients	Sub-Allocation
YWCA DELAWARE	80961	LHCA	10	250	$ 15,000.00
ALLOCATION TOTALS:	1		10	250	$15,000.00
BALANCE:					$0.00

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

Submit | Print | Export | Cancel | Close this window

Figure 147.B. OM – Grants: Agency Grant Allocation

8. Review the form for accuracy and take one of the following actions: To print, click **Print** and follow the instructions in the *Print* dialog box. To export to Microsoft Excel, click **Export** and follow the instructions in the *File Download* dialog box. To cancel the sub-allocations, click **Cancel**. To save the allocations, click **Save**. The screen refreshes and includes confirmation messages.

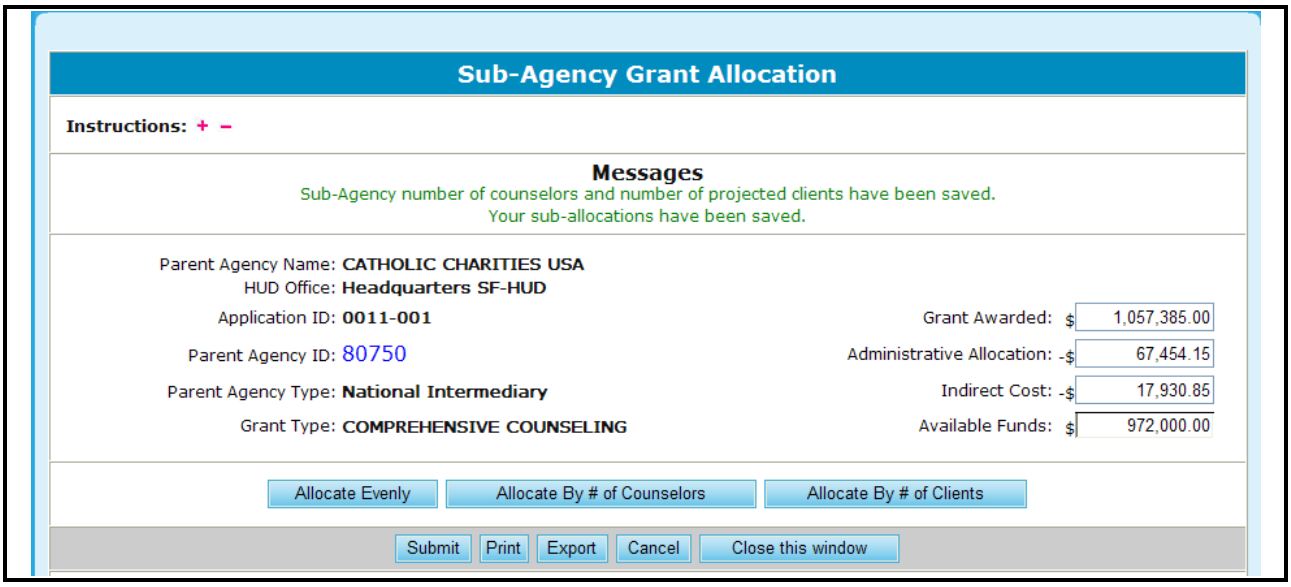


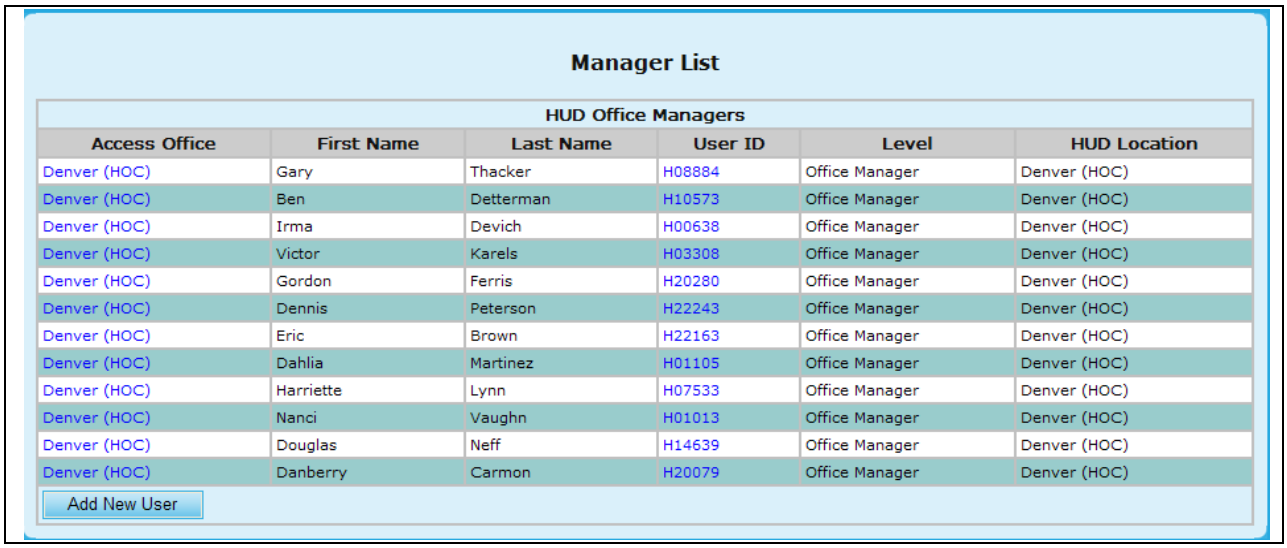
Figure 147.C. OM – Grants: Sub-Agency Grant Allocation – Save Message

8.4 User

This feature manages all HSC users.

1. From the top navigation menu, click the **User** hyperlink. The *Manager List* page appears.

2. To add a user, click **Add New User** button. The *Add a New User* screen appears.



Manager List

HUD Office Managers

Access Office	First Name	Last Name	User ID	Level	HUD Location
Denver (HOC)	Gary	Thacker	H08884	Office Manager	Denver (HOC)
Denver (HOC)	Ben	Detterman	H10573	Office Manager	Denver (HOC)
Denver (HOC)	Irma	Devich	H00638	Office Manager	Denver (HOC)
Denver (HOC)	Victor	Karels	H03308	Office Manager	Denver (HOC)
Denver (HOC)	Gordon	Ferris	H20280	Office Manager	Denver (HOC)
Denver (HOC)	Dennis	Peterson	H22243	Office Manager	Denver (HOC)
Denver (HOC)	Eric	Brown	H22163	Office Manager	Denver (HOC)
Denver (HOC)	Dahlia	Martinez	H01105	Office Manager	Denver (HOC)
Denver (HOC)	Harriette	Lynn	H07533	Office Manager	Denver (HOC)
Denver (HOC)	Nanci	Vaughn	H01013	Office Manager	Denver (HOC)
Denver (HOC)	Douglas	Neff	H14639	Office Manager	Denver (HOC)
Denver (HOC)	Danberry	Carmon	H20079	Office Manager	Denver (HOC)

Add New User

Figure 148. OM – Users: Manager List

3. Complete all of the required fields that are marked with *. Fields that are not marked with * are not mandatory.
   a. Enter a user ID to the **User ID** field.
   b. Enter a first, middle initial and last name, to the **First Name**, **Mid Init**, and **Last Name** fields.

c. Accept the default password that is displayed in the **Password** field or enter a password that is different from the default password.

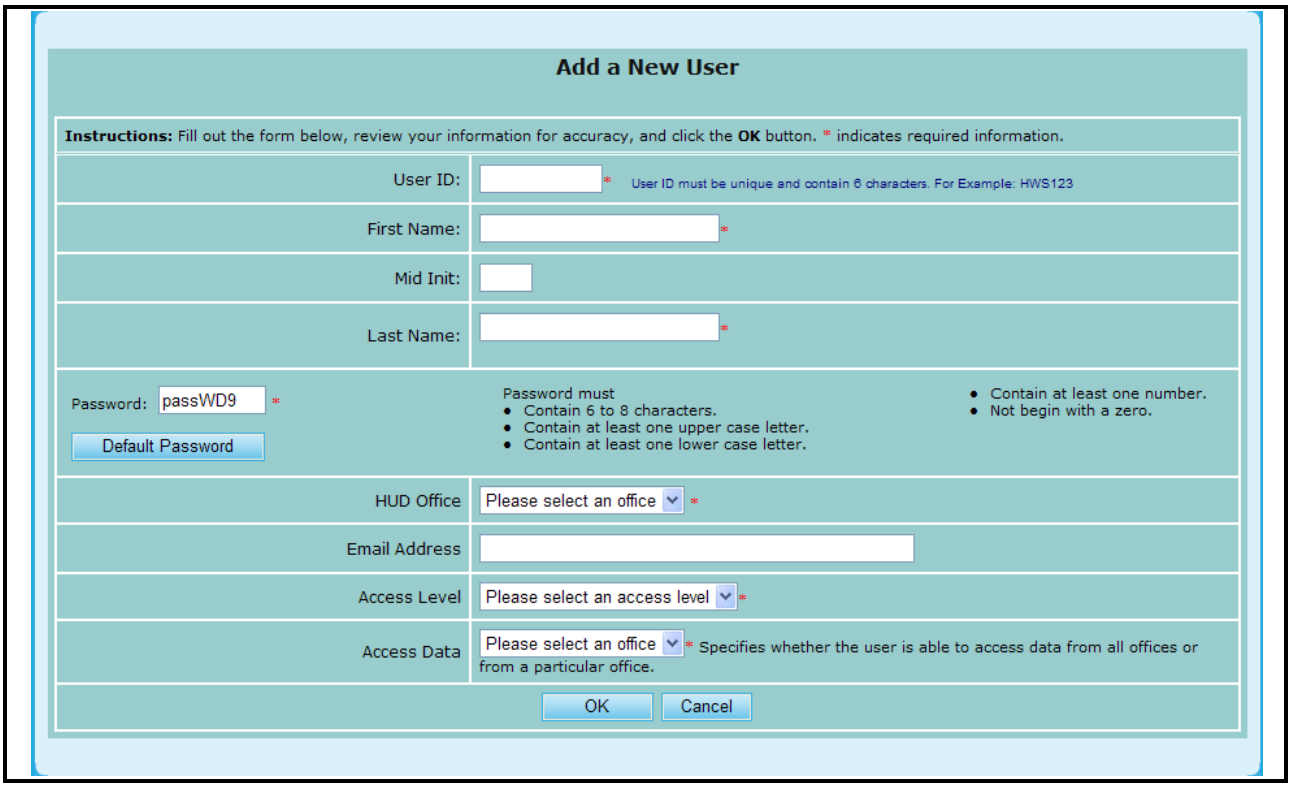


Figure 149.A. OM – User: Add a New User

d. Select a HUD office from the **HUD Office** dropdown list for the office that the new user is assigned to. Enter the email address to the **Email Address** field.

e. Select an access level from the following **Access Level** dropdown list. Users cannot assign an access level that is above their own, i.e., Office Manager cannot assign Program Manager access level to other users. User can be assigned only one Access Level at this time. Future enhancements will expand the user rights/access levels to suit better business requirements. In the mean time, the access levels reflect the current user rights and the functional rights assigned are listed below:

- REVIEWER – a temporary user that normally does not need to access and work in HCS. Assigned to evaluate grant applications. Reviewer will only have access to their assigned grant score card associated to their application. The Reviewer access rights terminate at the end of the fiscal year.
- GTR/USER: a HUD user assigned to manage and assist assigned agencies. User has read/write access only agencies assigned.
- OFFICE MANAGER – a HUD user with managerial responsibilities to oversee all Housing Counseling agencies within their HOC. They have read/write access to all agencies assigned within their HOC area.
- PROGRAM MANAGER – a HUD user with project/program management responsibilities for the entire HUD Housing Counseling program. They have complete read/write access to all data and files. They have special management functions in HCS to setup and manage HCS.

f. Select from the **Access Data** dropdown list the data of that particular office or all offices user has access to. Access data defines the list of files the user can write to. If you have a manager that needs to access files across HOC boundaries, assigned All Offices. Care should be taken to limit access rights to appropriate users to prevent too many users from over writing agency files that can cause confusion.

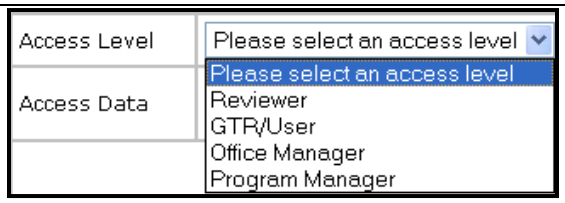


Figure 149.B. OM – User: Access Level Dropdown List

4. When you are finished, click **OK** to save or **Cancel** to cancel; the *Manager List* screen appears.

5. To view an existing user, click the **User ID** hyperlink in the **User ID** column. The *User Profile* screen appears.

6. Edit the fields or view them. When you are finished, click **OK** to save any changes or **Cancel** to close this screen without saving any changes. You are returned to the *Manager List* screen.

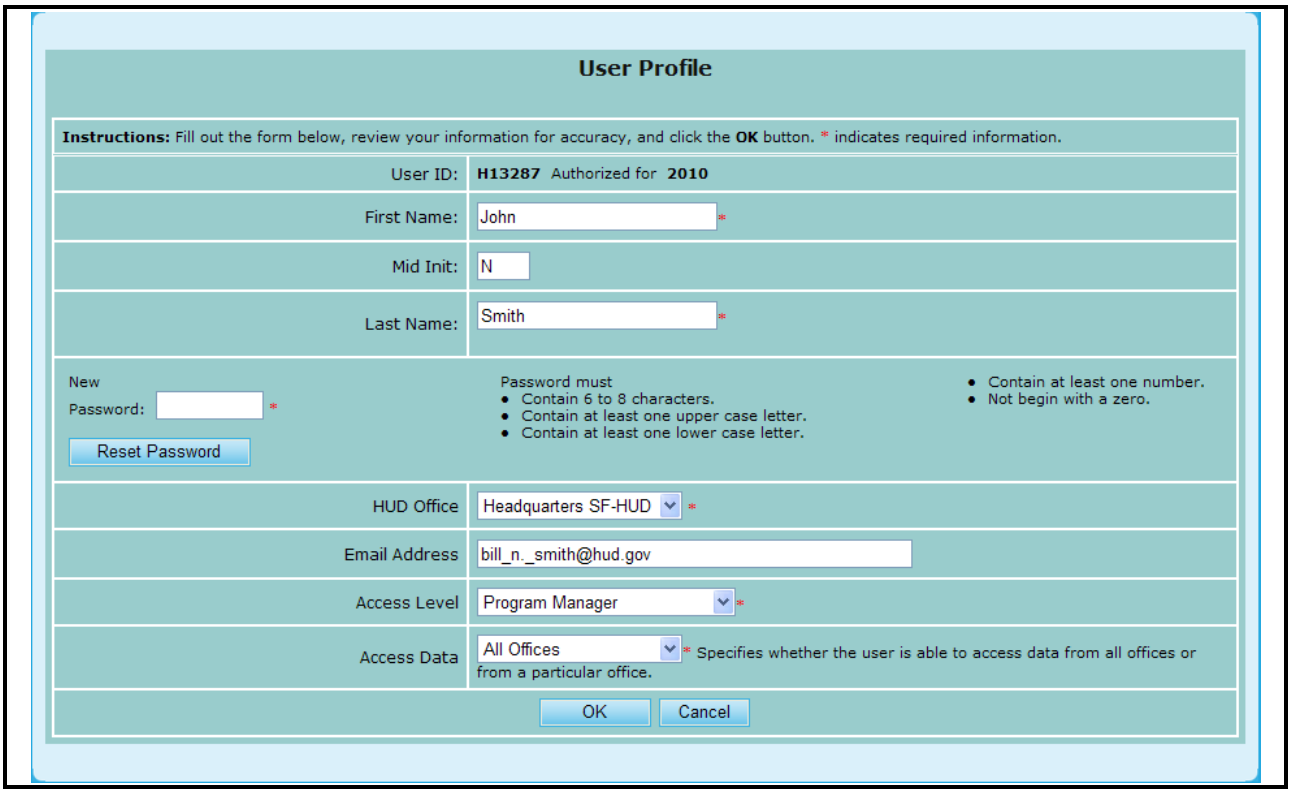
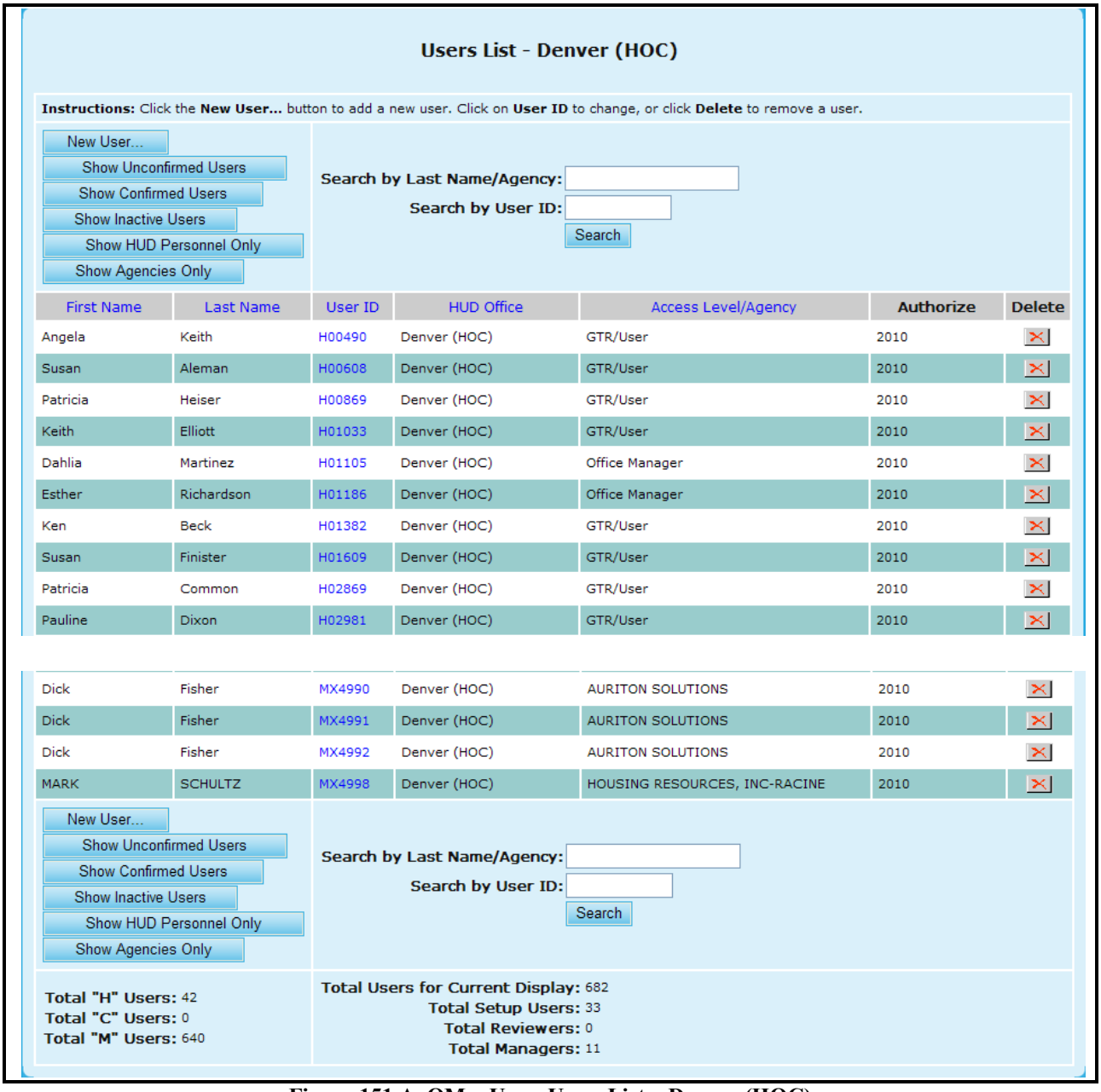


Figure 150. OM – User: User Profile

7. To access more User functions, click a hyperlink under the Access Office list from the main screen. This will prompt you to a complete user list for that office.

8. To view a list of all users for all offices, Click the **HUD Office** dropdown field found in the **Search** function, and select **All**. The *User List – All Offices* screen appears.

9. To sort the list by First Name, click the **First Name** hyperlink. To sort the list by Last Name, click the **Last Name** hyperlink. To sort the list by User ID, click the **User ID** hyperlink. To sort the list by HUD Office, click the **HUD Office** hyperlink. To sort the list by Agency Name and then by Access Level, click the **Access Level/Agency** hyperlink.



First Name	Last Name	User ID	HUD Office	Access Level/Agency	Authorize	Delete
Angela	Keith	H00490	Denver (HOC)	GTR/User	2010	
Susan	Aleman	H00608	Denver (HOC)	GTR/User	2010	
Patricia	Heiser	H00869	Denver (HOC)	GTR/User	2010	
Keith	Elliott	H01033	Denver (HOC)	GTR/User	2010	
Dahlia	Martinez	H01105	Denver (HOC)	Office Manager	2010	
Esther	Richardson	H01186	Denver (HOC)	Office Manager	2010	
Ken	Beck	H01382	Denver (HOC)	GTR/User	2010	
Susan	Finister	H01609	Denver (HOC)	GTR/User	2010	
Patricia	Common	H02869	Denver (HOC)	GTR/User	2010	
Pauline	Dixon	H02981	Denver (HOC)	GTR/User	2010	
Dick	Fisher	MX4990	Denver (HOC)	AURITON SOLUTIONS	2010	
Dick	Fisher	MX4991	Denver (HOC)	AURITON SOLUTIONS	2010	
Dick	Fisher	MX4992	Denver (HOC)	AURITON SOLUTIONS	2010	
MARK	SCHULTZ	MX4998	Denver (HOC)	HOUSING RESOURCES, INC-RACINE	2010	

Figure 151.A. OM – User: Users List – Denver (HOC)

10. To search a user by Last Name or search for an agency by agency name, key in the information and click the **Search** button. The result is displayed.

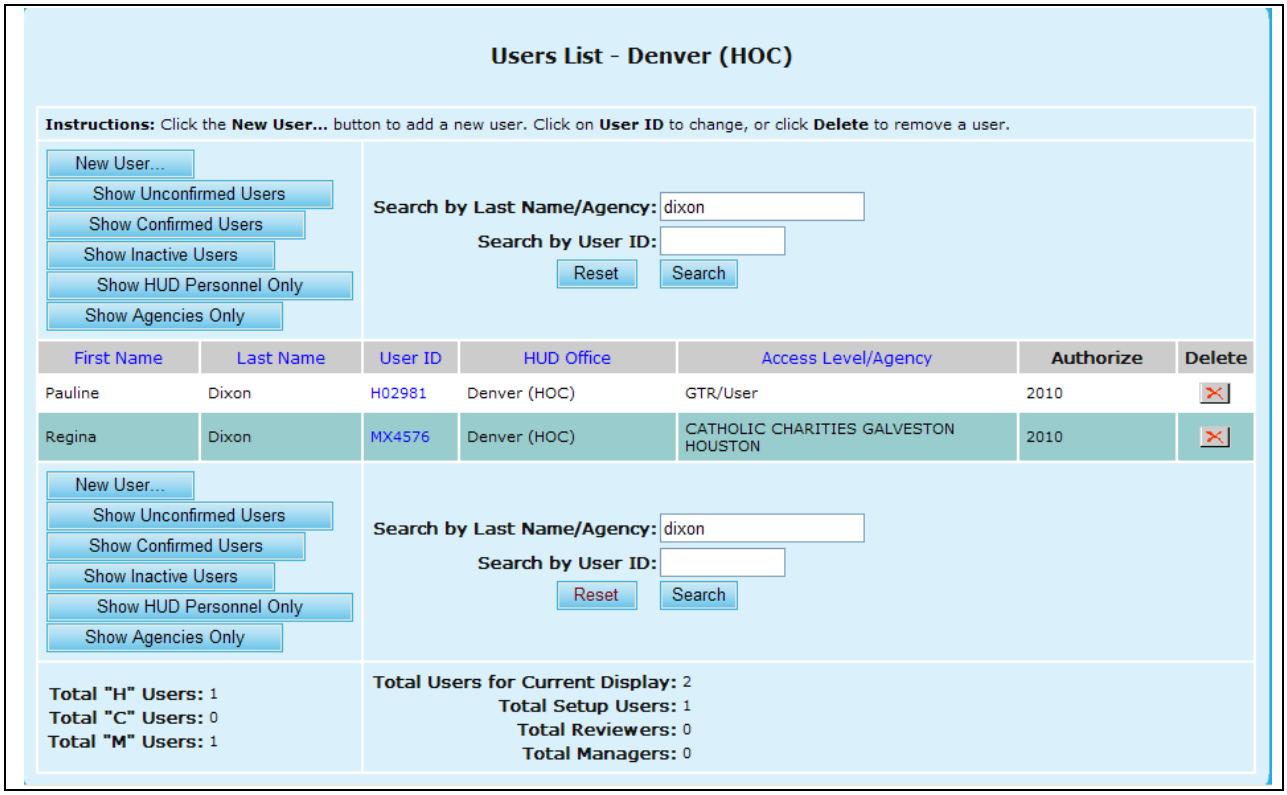


Figure 151.B. OM – User: Search by Last Name Result

11. To search for a user by User ID, key in the ID into **Search by User ID** and click the Search field.

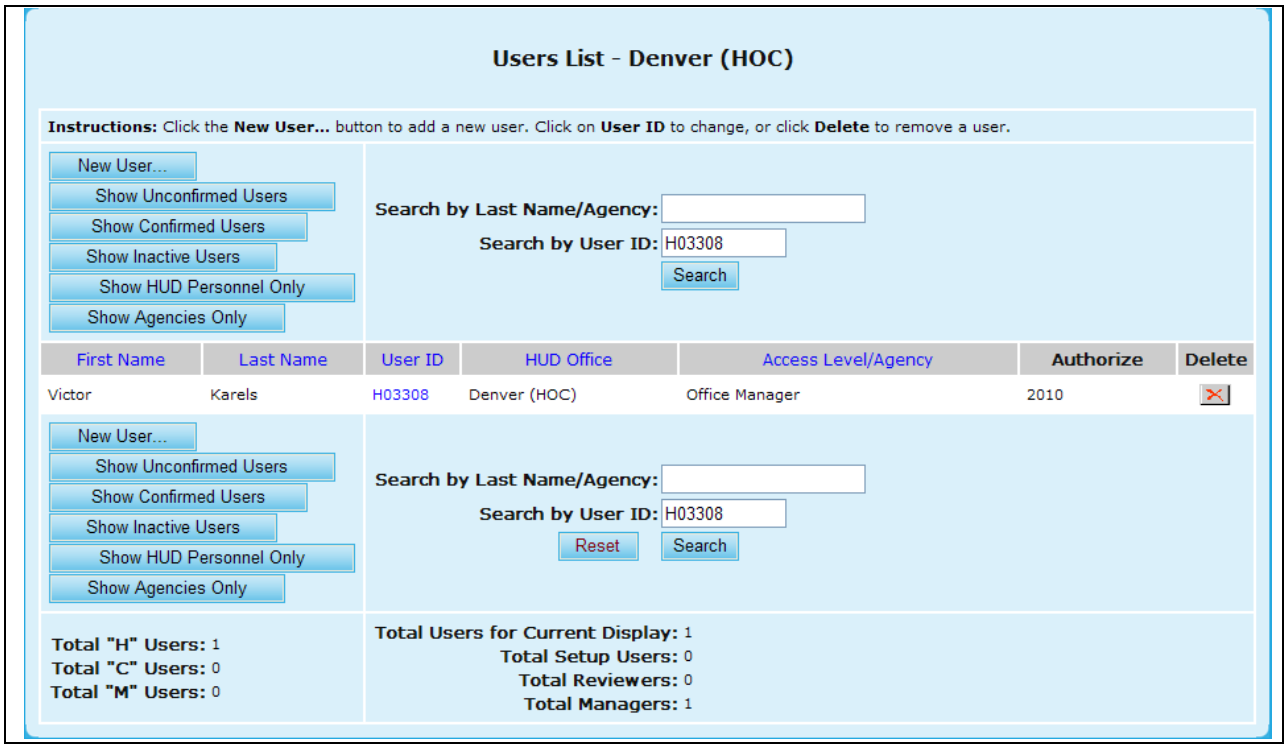


Figure 151.C. OM – User: Search by User ID Result

12. To deactivate a user"s account, click the *X* button under the Delete column. A warning message appears.
    a. If you are sure that you want to delete (deactivate) this user, click **OK**. To cancel, click **Cancel**.

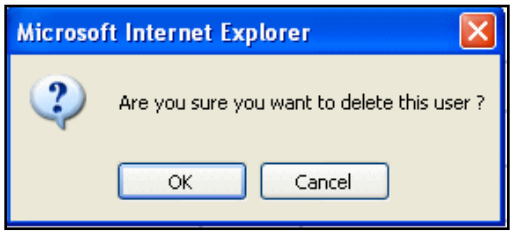


Figure 151.D. OM – User: Confirmation of Delete (Deactivate) Option

13. To list all the unconfirmed users for the specific HUD Office you are in or for all offices, click the **Show Unconfirmed Users** button. A list of unconfirmed users is displayed.

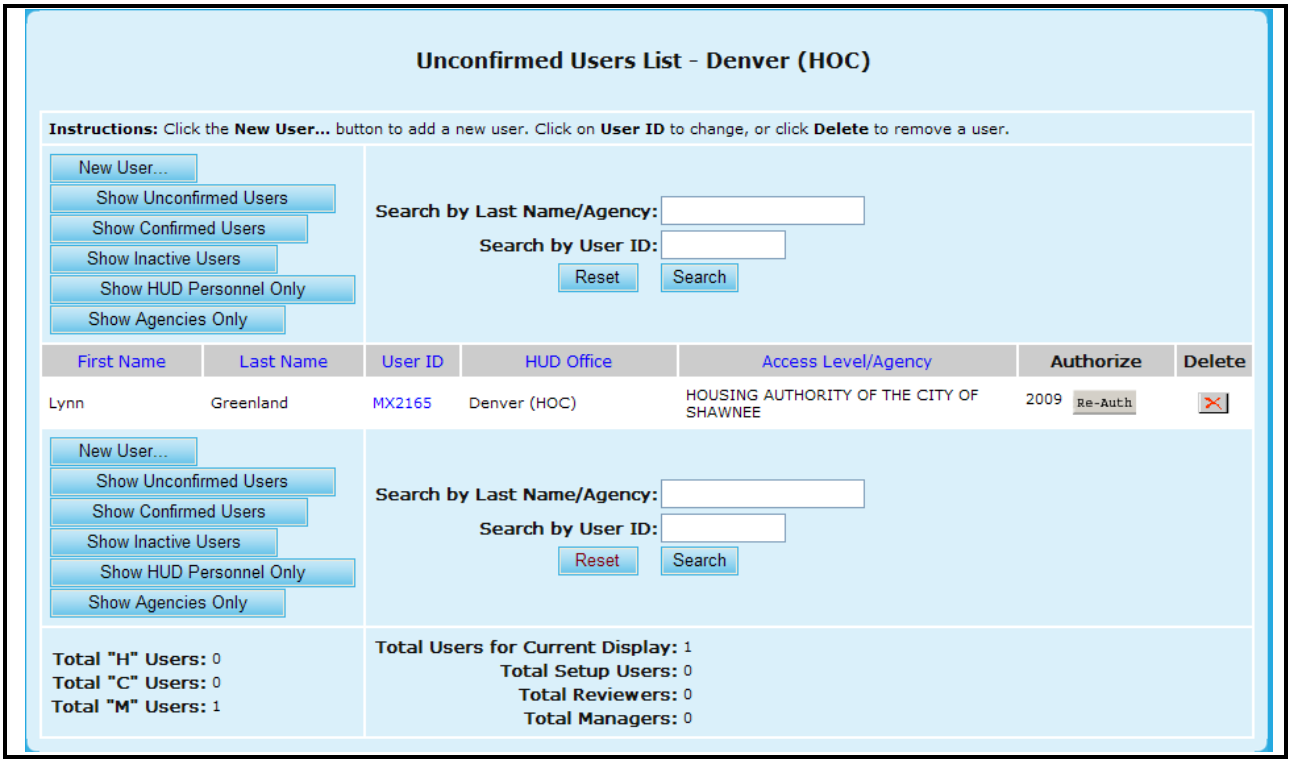
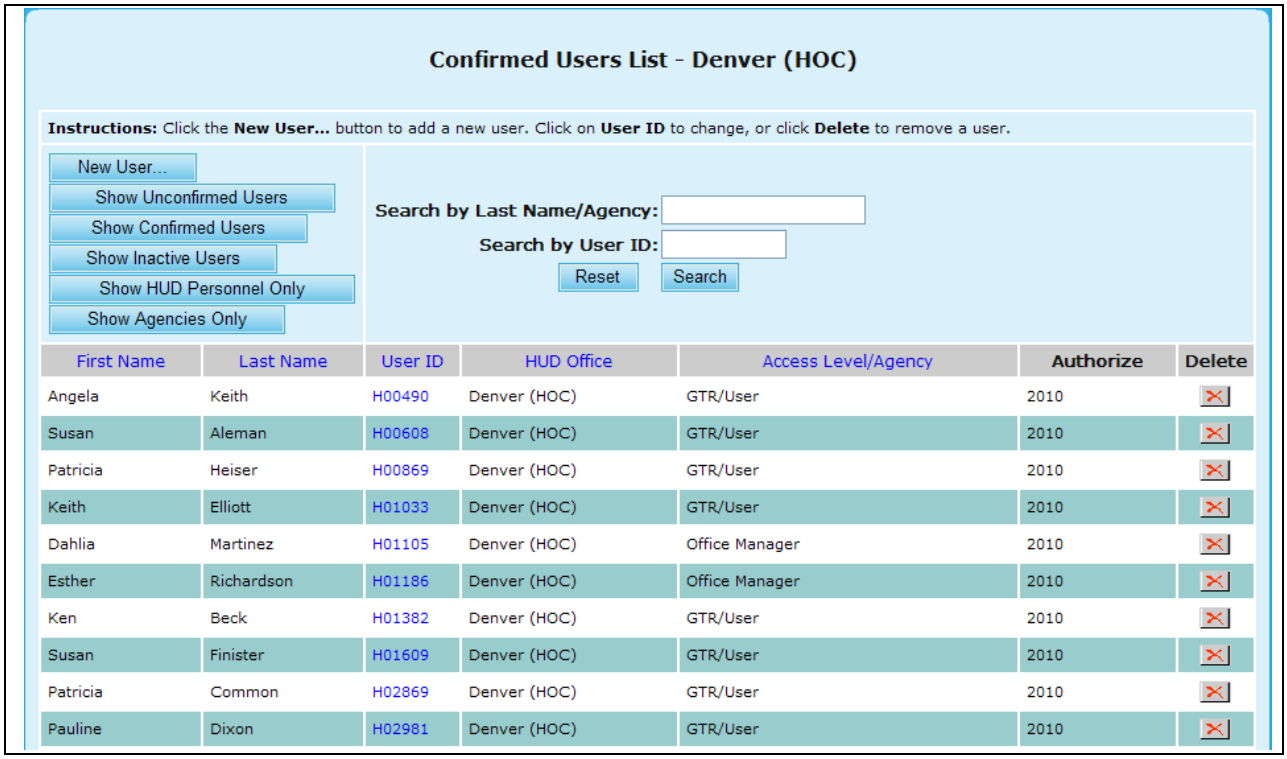


Figure 151.E. OM – User: Unconfirmed Users List – Denver (HOC)

14. To authorize an unconfirmed user that has a **Re-Auth** button shown in the Authorize column, click the **Re-Auth** button to the right of the desired entry, the user will be authorized for the current fiscal year.

15. To list all the confirmed users for the specific HUD Office you are in or for all offices, click the **Show Confirmed Users** button. A list of confirmed users is displayed.



First Name	Last Name	User ID	HUD Office	Access Level/Agency	Authorize	Delete
Angela	Keith	H00490	Denver (HOC)	GTR/User	2010	
Susan	Aleman	H00608	Denver (HOC)	GTR/User	2010	
Patricia	Heiser	H00869	Denver (HOC)	GTR/User	2010	
Keith	Elliott	H01033	Denver (HOC)	GTR/User	2010	
Dahlia	Martinez	H01105	Denver (HOC)	Office Manager	2010	
Esther	Richardson	H01186	Denver (HOC)	Office Manager	2010	
Ken	Beck	H01382	Denver (HOC)	GTR/User	2010	
Susan	Finister	H01609	Denver (HOC)	GTR/User	2010	
Patricia	Common	H02869	Denver (HOC)	GTR/User	2010	
Pauline	Dixon	H02981	Denver (HOC)	GTR/User	2010	

Figure 151.F. OM – User: Confirmed Users List – Denver (HOC)

16. To list all the inactive users for the specific HUD Office you are in or for all offices, click the **Show Inactive Users** button. A list of inactive users is displayed.

17. To activate an inactive user that has a **Re-Activate** button shown in the Authorize column, click the **Re-Activate** button to the right of the desired entry, the user will be activated and authorized for the current fiscal year.

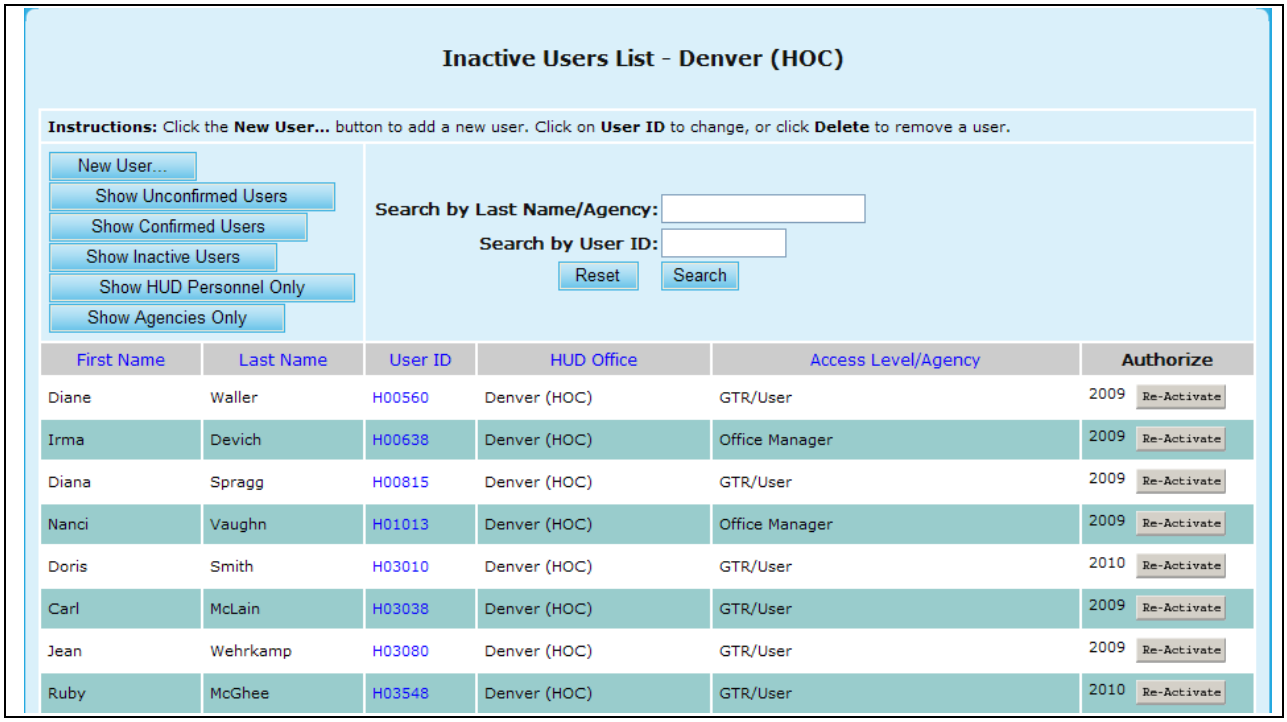


Figure 151.G. OM – User: Inactive Users List – Denver (HOC)

18. To list HUD personnel only for the specific HUD Office you are in or for all offices, click the **Show HUD Personnel Only** button. A list of HUD personnel only users is displayed.

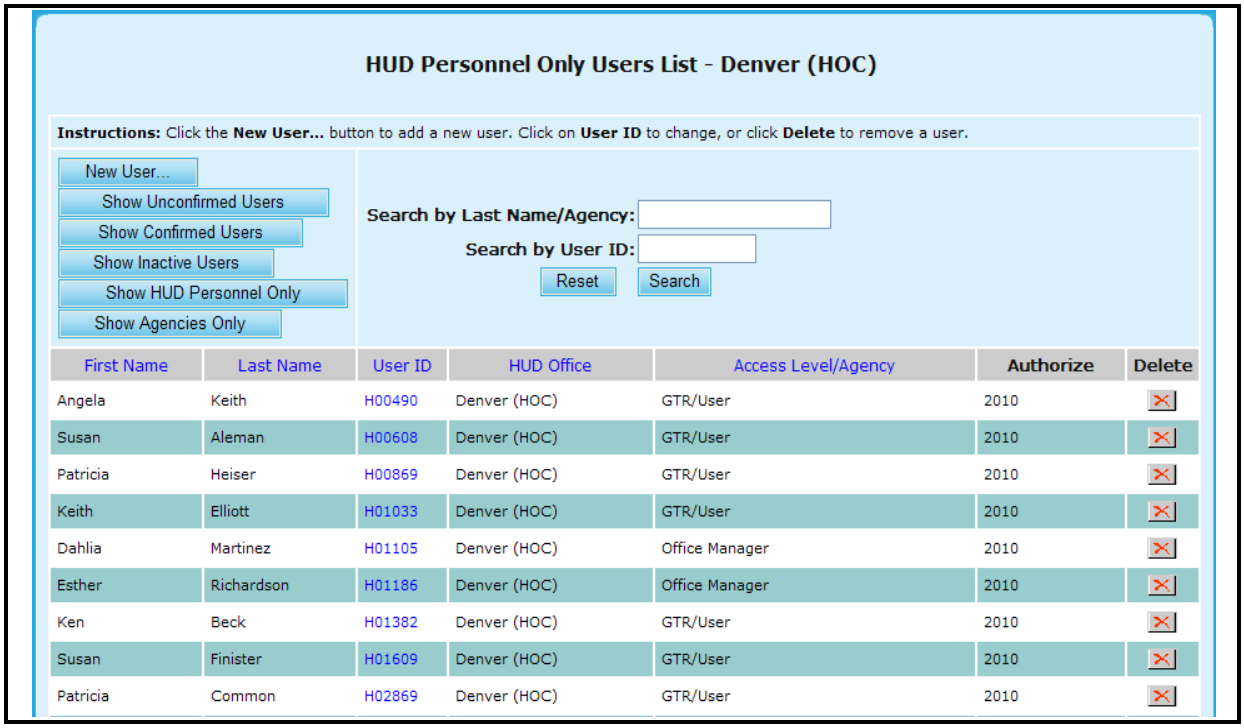


Figure 151.H. OM – User: HUD Personnel Only Users List – Denver (HOC)

19. To list agencies users only for the specific HUD Office you are in or for all offices, click the **Show Agencies Only** button. A list of HUD personnel only users is displayed.

20. To list all users for the specific HUD Office you are in or for all offices, click the **Reset** button.

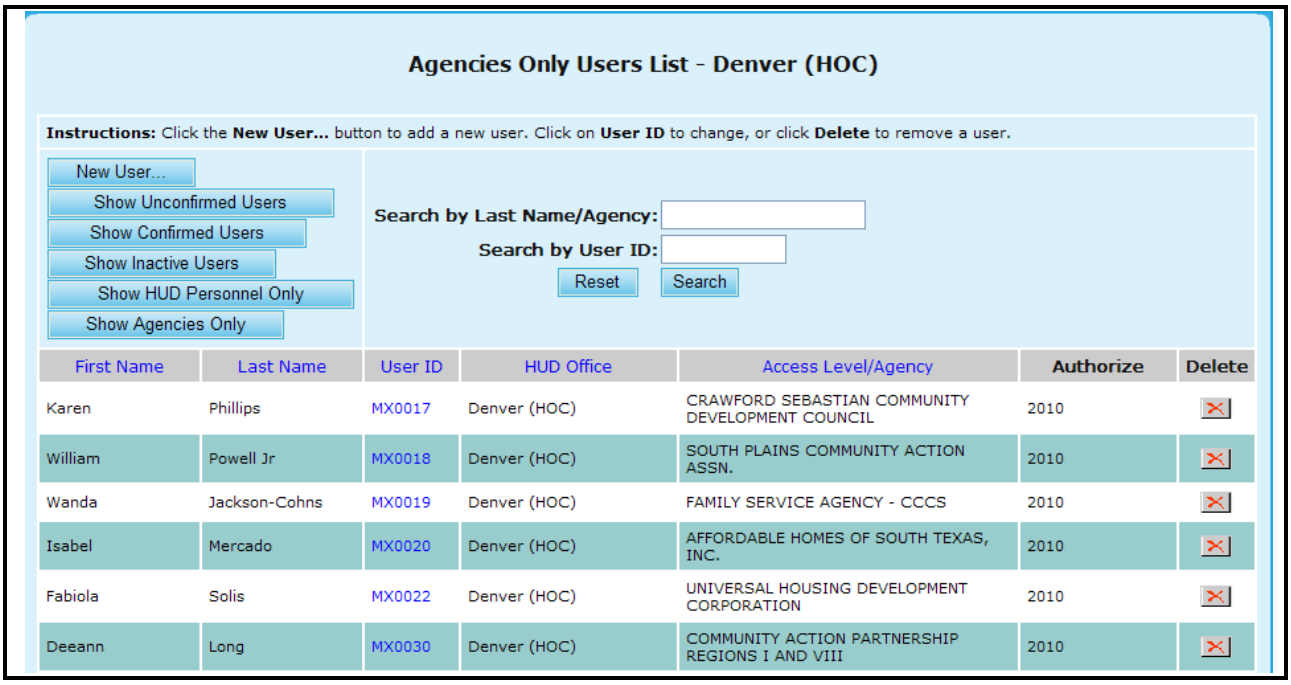


Figure 151.I. OM – User: Agencies Only Users List – Denver (HOC)

8.5 Management

Under the Management hyperlink located in the upper navigation menu you are able to choose from multiple sub-sections:

- Agency Reporting Module
- Funding Applications
- Change Data Defaults

Figure 160. OM – Management

8.5.1 Agency Reporting Module

After selecting **Agency Reporting Module** in the menu dropdown, you are prompted to two options: Reports Submission Verification or CMS Management.

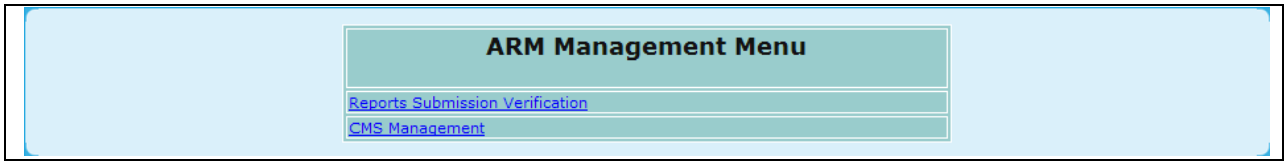


Figure 161. OM – Management: ARM Manage

8.5.1.1 *ARM Submission Verification*

1. From the ARM Management Menu, select the Reports Submission Verification hyperlink.

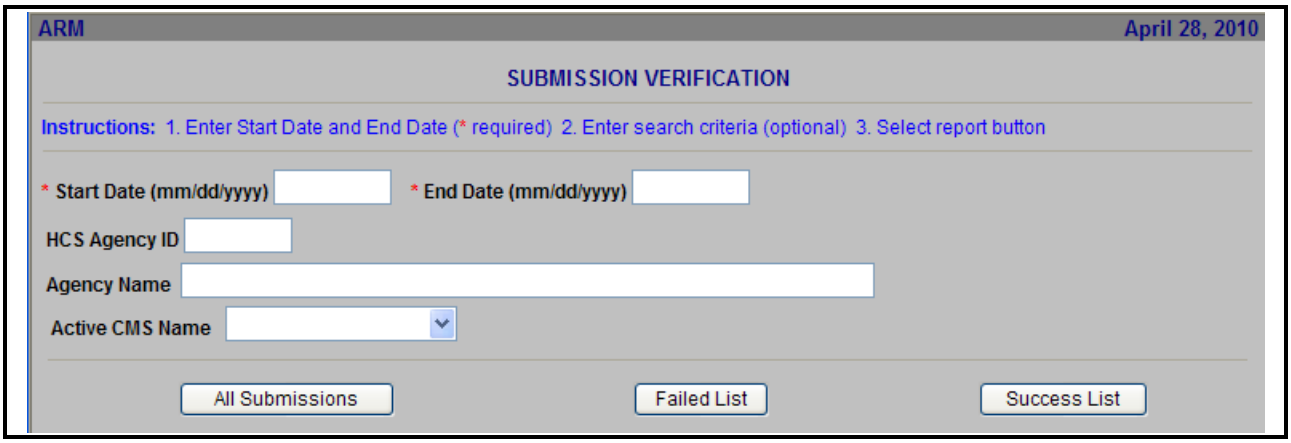


Figure 162. OM – Management: ARM Submission Verification

2. Upon narrowing down your search criteria, you have three types of submission reports to choose from:
   a. All Submission: This will provide you a full list of submissions; the ones that failed and the ones that were successful
   b. Failed List: This will provide a list of only the submissions that failed.
   c. Success List: This will provide you a list of only the submissions that were successful.

ARM April 28, 2010

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) 01/01/2009 * End Date (mm/dd/yyyy) 05/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: All Submissions Total: 66

Date	Status	HCS Agency Id	Agency Name	CMS Name
Apr 27 2010 11:55	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:13	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:12	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 26 2010 2:41	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 23 2010 12:03	Successful	83530	HORIZONS, A FAMILY SERVICE ALLIANCE (HORIZONS CCCS)	Paragon
Apr 20 2010 11:19	Successful	80640	SUREPATH FINANCIAL SOLUTIONS	CPR
Apr 19 2010 5:49	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:48	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:47	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:45	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR

Figure 163.A. OM – Management: ARM Submission Verification Results

ARM April 28, 2010

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) 01/01/2009 * End Date (mm/dd/yyyy) 05/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: Failed List Total: 13

Date	Status	HCS Agency Id	Agency Name	CMS Name
Apr 19 2010 5:45	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:42	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:40	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 10:09	Failed	83279	CCCS OF NH & VT	CPR
Apr 16 2010 10:53	Failed	80727	CONSUMER CREDIT COUNSELING SERVICE	CPR
Apr 14 2010 4:17	Failed	83279	CCCS OF NH & VT	CPR
Mar 18 2010 4:03	Failed	83279	CCCS OF NH & VT	CPR
Mar 17 2010 12:22	Failed	83279	CCCS OF NH & VT	CPR
Mar 17 2010 12:21	Failed	83279	CCCS OF NH & VT	CPR
Mar 9 2010 4:49	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Mar 9 2010 4:47	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Mar 9 2010 4:31	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Feb 1 2010 12:06	Failed	80949	Catholic Charities of Chicago	HCS

Figure 163.B. OM – Management: ARM Submission Verification – Failed List

* Start Date (mm/dd/yyyy) 06/01/2009 * End Date (mm/dd/yyyy) 06/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: Success List Total: 56

Date	Status	HCS Agency Id	Agency Name	CMS Name
May 3 2010 2:28	Successful	80244	CCCS OF NORTH CENTRAL WEST VIRGINA	Paragon
Apr 30 2010 2:16	Successful	80941	CCCS OF DELAWARE VALLEY, INC.	CPR
Apr 30 2010 12:12	Successful	80727	CONSUMER CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:13	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:12	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 26 2010 2:41	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 23 2010 12:03	Successful	83530	HORIZONS, A FAMILY SERVICE ALLIANCE (HORIZONS CCCS)	Paragon
Apr 20 2010 11:19	Successful	80640	SUREPATH FINANCIAL SOLUTIONS	CPR
Apr 19 2010 5:49	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:48	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:47	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 12:42	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 12:38	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:48	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:33	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:31	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 16 2010 3:48	Successful	82951	CCCS, A DIVISION OF TRIANGLE FAMILY SERVICES, INC.	Paragon
Apr 16 2010 2:22	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 16 2010 2:17	Successful	80949	Catholic Charities of Chicago	CCARM

Figure 163.C. OM – Management: ARM Submission Verification – Successful List

You have successfully viewed the ARM Submission Verification.

8.5.1.2 *CMS Management*

1. From the ARM Management Menu, select the CMS Management hyperlink. This will allow you to perform a search based on the following criteria:
    a. Fiscal Year
    b. Agency ID
    c. Agency Type
    d. HOC
    e. CMS

2. Upon selecting your criteria click the **Search** button to retrieve your results.

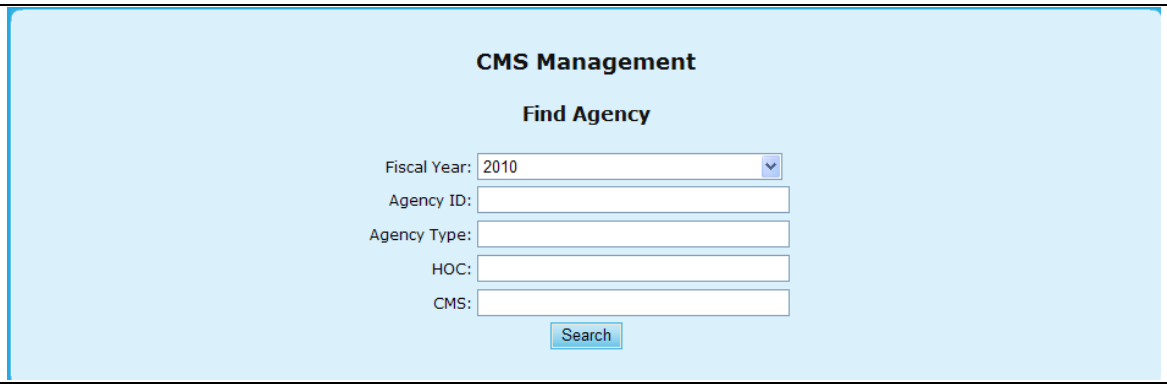
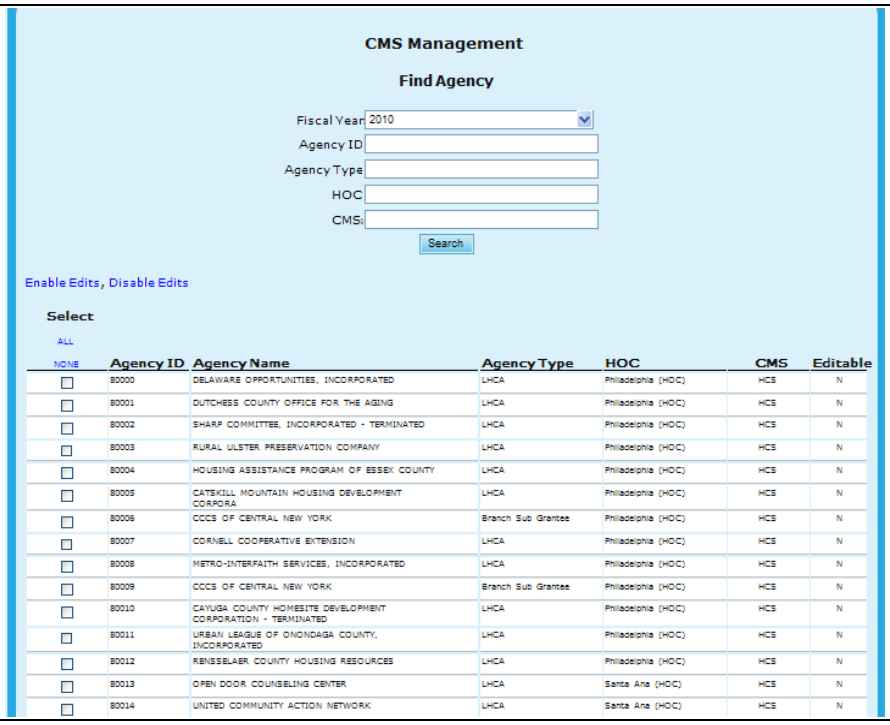


Figure 164. OM – Management: CMS Management Search

3. Once receiving your results, you will be able to see which Agency is using a particular CMS product, as well as if it is editable or not.

4. To edit Enable or Disable Edits, select which agencies you would like, and either click **Enable Edits** or **Disable Edits**.



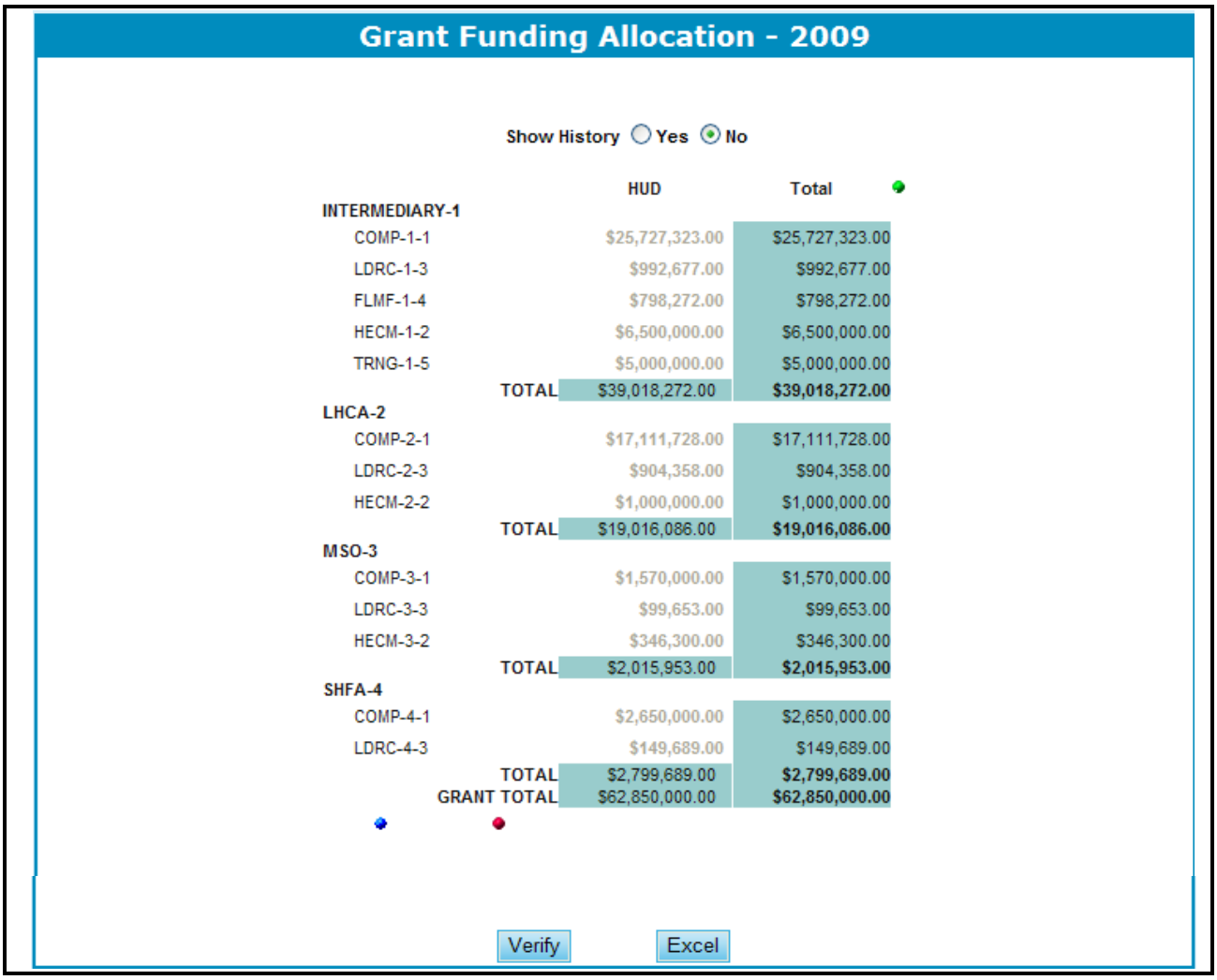
Agency ID	Agency Name	Agency Type	HOC	CMS	Editable
80000	DELAWARE OPPORTUNITIES, INCORPORATED	LHCA	Philadelphia (HOC)	HCS	N
80001	DUTCHESS COUNTY OFFICE FOR THE AGING	LHCA	Philadelphia (HOC)	HCS	N
80002	SHARP COMMITTEE, INCORPORATED - TERMINATED	LHCA	Philadelphia (HOC)	HCS	N
80003	RURAL ULSTER PRESERVATION COMPANY	LHCA	Philadelphia (HOC)	HCS	N
80004	HOUSING ASSISTANCE PROGRAM OF ESSEX COUNTY	LHCA	Philadelphia (HOC)	HCS	N
80005	CATSKILL MOUNTAIN HOUSING DEVELOPMENT CORPORA	LHCA	Philadelphia (HOC)	HCS	N
80006	CCCS OF CENTRAL NEW YORK	Branch Sub Grantee	Philadelphia (HOC)	HCS	N
80007	CORNELL COOPERATIVE EXTENSION	LHCA	Philadelphia (HOC)	HCS	N
80008	METRO-INTERFAITH SERVICES, INCORPORATED	LHCA	Philadelphia (HOC)	HCS	N
80009	CCCS OF CENTRAL NEW YORK	Branch Sub Grantee	Philadelphia (HOC)	HCS	N
80010	CAYUGA COUNTY HOMESITE DEVELOPMENT CORPORATION - TERMINATED	LHCA	Philadelphia (HOC)	HCS	N
80011	URBAN LEAGUE OF ONONDAGA COUNTY, INCORPORATED	LHCA	Philadelphia (HOC)	HCS	N
80012	RENSSELAER COUNTY HOUSING RESOURCES	LHCA	Philadelphia (HOC)	HCS	N
80013	OPEN DOOR COUNSELING CENTER	LHCA	Santa Ana (HOC)	HCS	N
80014	UNITED COMMUNITY ACTION NETWORK	LHCA	Santa Ana (HOC)	HCS	N

Figure 165. OM – Management: CMS Management Results

8.5.2 Funding Allocations

The Program Manager at HQ enters all of the funding allocations. HCS supports two methods of allocating funds. The first method allocates by grant type only. The second method used in previous fiscal years is according to grant type and HUD office. Depending on which method used by HQ, the funding allocation information available to an Office Manager is different.

1. From the upper navigation menu, click the **Funding Allocation** hyperlink. The *Grant Funding Allocation – 20XX* screen appears.

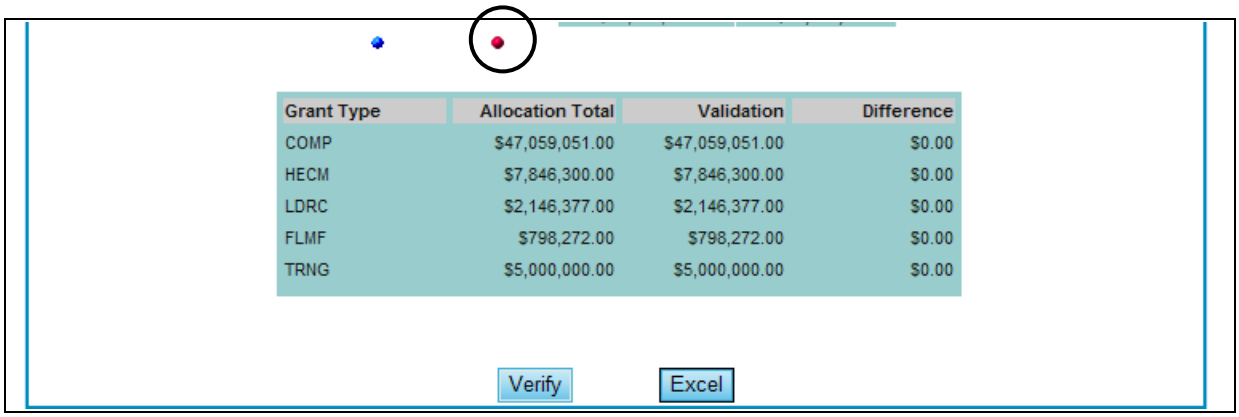


		HUD	Total
INTERMEDIARY-1			
COMP-1-1		$25,727,323.00	$25,727,323.00
LDRC-1-3		$992,677.00	$992,677.00
FLMF-1-4		$798,272.00	$798,272.00
HECM-1-2		$6,500,000.00	$6,500,000.00
TRNG-1-5		$5,000,000.00	$5,000,000.00
	TOTAL	$39,018,272.00	$39,018,272.00
LHCA-2			
COMP-2-1		$17,111,728.00	$17,111,728.00
LDRC-2-3		$904,358.00	$904,358.00
HECM-2-2		$1,000,000.00	$1,000,000.00
	TOTAL	$19,016,086.00	$19,016,086.00
MSO-3			
COMP-3-1		$1,570,000.00	$1,570,000.00
LDRC-3-3		$99,653.00	$99,653.00
HECM-3-2		$346,300.00	$346,300.00
	TOTAL	$2,015,953.00	$2,015,953.00
SHFA-4			
COMP-4-1		$2,650,000.00	$2,650,000.00
LDRC-4-3		$149,689.00	$149,689.00
	TOTAL	$2,799,689.00	$2,799,689.00
	GRANT TOTAL	$62,850,000.00	$62,850,000.00

Figure 166.A OM – Management: Funding Allocation by Grant Category

2. When the method of allocating funds is according to grant type only, The Funding Allocation 20XX by Grant Category is displayed.

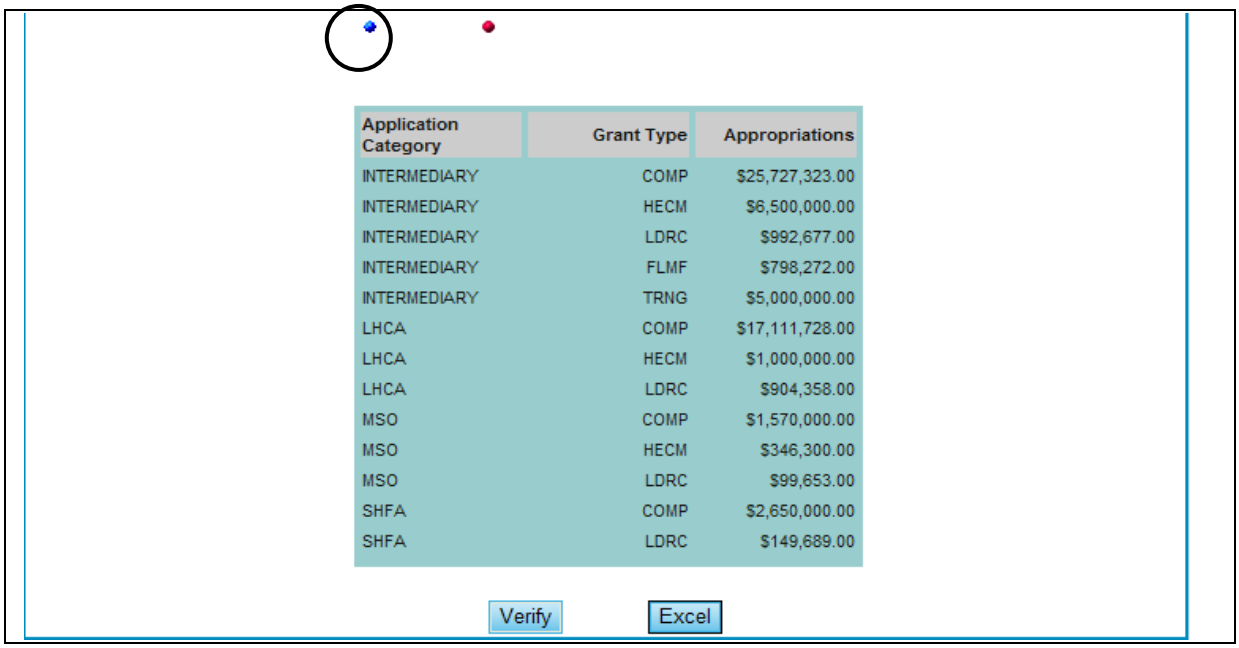
3. To view the allocations described by Grant Type, click the red dot circled below.



Grant Type	Allocation Total	Validation	Difference
COMP	$47,059,051.00	$47,059,051.00	$0.00
HECM	$7,846,300.00	$7,846,300.00	$0.00
LDRC	$2,146,377.00	$2,146,377.00	$0.00
FLMF	$798,272.00	$798,272.00	$0.00
TRNG	$5,000,000.00	$5,000,000.00	$0.00

Figure 166.B. OM – Management: Funding Allocation By Grant Type

4. To view the Grant information in matrix form, click the blue dot, as depicted below.



Application Category	Grant Type	Appropriations
INTERMEDIARY	COMP	$25,727,323.00
INTERMEDIARY	HECM	$6,500,000.00
INTERMEDIARY	LDRC	$992,677.00
INTERMEDIARY	FLMF	$798,272.00
INTERMEDIARY	TRNG	$5,000,000.00
LHCA	COMP	$17,111,728.00
LHCA	HECM	$1,000,000.00
LHCA	LDRC	$904,358.00
MSO	COMP	$1,570,000.00
MSO	HECM	$346,300.00
MSO	LDRC	$99,653.00
SHFA	COMP	$2,650,000.00
SHFA	LDRC	$149,689.00

Figure 166.C. OM – Management: Funding Allocation Grant Matrix Validation

5. To see additional information (such as the validation or difference), click the green dot. Those two fields will be displayed.

Show History ○ Yes ◉ No

	HUD	Total	Validation	Difference
INTERMEDIARY-1				
COMP-1-1	$25,727,323.00	$25,727,323.00		
LDRC-1-3	$992,677.00	$992,677.00		
FLMF-1-4	$798,272.00	$798,272.00		
HECM-1-2	$6,500,000.00	$6,500,000.00		
TRNG-1-5	$5,000,000.00	$5,000,000.00		
TOTAL	$39,018,272.00	$39,018,272.00	$39,018,272.00	$0.00
LHCA-2				
COMP-2-1	$17,111,728.00	$17,111,728.00		
LDRC-2-3	$904,358.00	$904,358.00		
HECM-2-2	$1,000,000.00	$1,000,000.00		
TOTAL	$19,016,086.00	$19,016,086.00	$19,016,086.00	$0.00
MSO-3				
COMP-3-1	$1,570,000.00	$1,570,000.00		
LDRC-3-3	$99,653.00	$99,653.00		
HECM-3-2	$346,300.00	$346,300.00		
TOTAL	$2,015,953.00	$2,015,953.00	$2,015,953.00	$0.00
SHFA-4				
COMP-4-1	$2,650,000.00	$2,650,000.00		
LDRC-4-3	$149,689.00	$149,689.00		
TOTAL	$2,799,689.00	$2,799,689.00	$2,799,689.00	$0.00
GRANT TOTAL	$62,850,000.00	$62,850,000.00	$62,850,000.00	$0.00

Verify Excel

Figure 166.D. OM – Management: Funding Allocation Additional Information

6. To see the history of this funding allocation, click **Yes** next to **Show History**. The history appears at the bottom of the screen.

TOTAL	$2,015,953.00	$2,015,953.00
SHFA-4		
COMP-4-1	$2,650,000.00	$2,650,000.00
LDRC-4-3	$149,689.00	$149,689.00
TOTAL	$2,799,689.00	$2,799,689.00
GRANT TOTAL	$62,850,000.00	$62,850,000.00

Show History

Allocation History -
No information available

Figure 166.E. OM – Management: Funding Allocation Show History

7. To verify the funding allocation, click **Verify**. A confirmation message appears.

Figure 167. OM – Management: Funding Allocation Verification Message

8. You have now verified this information. Click **OK**.

9. To export this Funding Allocation information into an Excel spreadsheet, click **Excel**. When the following dialog box appears, decide whether to **Open**, **Save**, or **Cancel** the spreadsheet.

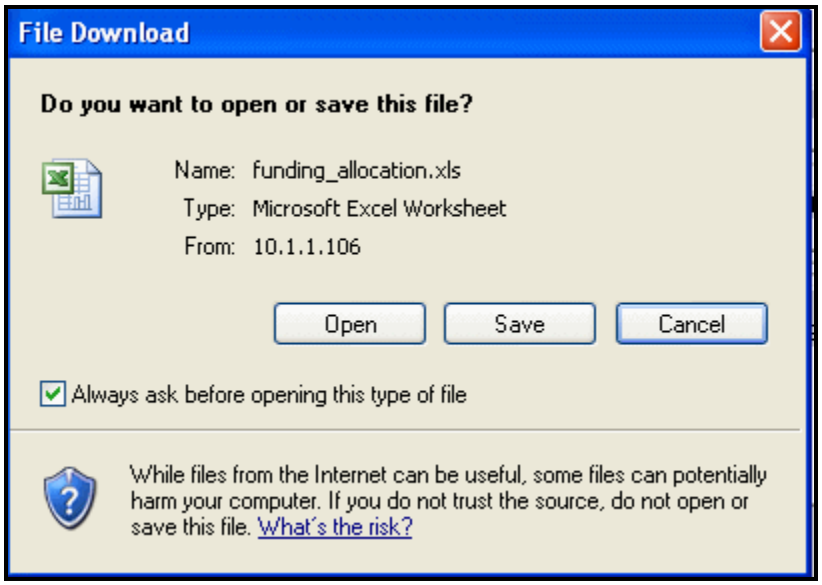


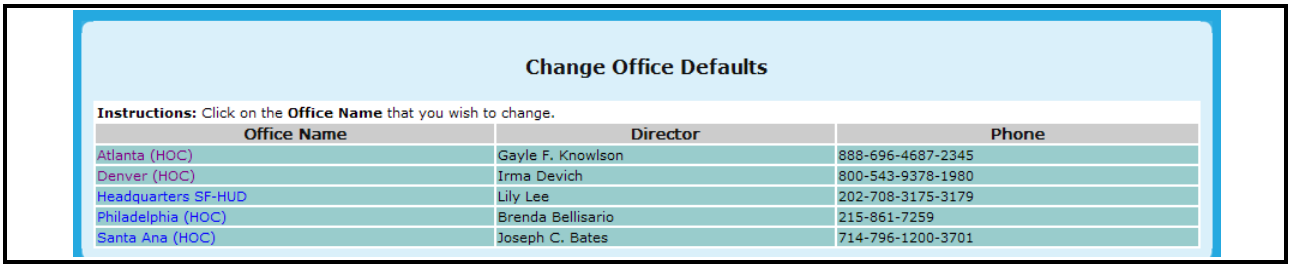
Figure 168. OM – Management: Funding Allocation Export to Excel

You have now finished using the HCS system's **Funding Allocation** feature.

8.5.3 Change Office Default

1. From the Management Functions menu, click the **Change Office Defaults** hyperlink. The *Change Office Defaults* page appears.

2. Click the HUD Office under Office Name column that you wish to change. The *Default Office Information* screen appears.



Change Office Defaults

Instructions: Click on the **Office Name** that you wish to change.

Office Name	Director	Phone
Atlanta (HOC)	Gayle F. Knowlson	888-696-4687-2345
Denver (HOC)	Irma Devich	800-543-9378-1980
Headquarters SF-HUD	Lily Lee	202-708-3175-3179
Philadelphia (HOC)	Brenda Bellisario	215-861-7259
Santa Ana (HOC)	Joseph C. Bates	714-796-1200-3701

Figure 169. OM – Management: Change Office Defaults

3. Fill out all of the fields in the form. Then click **OK** to save or **Cancel** to cancel.

Default Office Information

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

Office Name:	Atlanta (HOC)
Grant Application Review Rules:	
Address: Five Points Plaza; 40 Marietta Street, 10th Floor	**City:** Atlanta; **State:** Georgia; **Zip:** 30303-2806
Director: Liz Henry; **Director's Title:** Director, Program Support Division; **Phone:** 888 - 555 - 4687 x 65	**Program Director:** Liz Henry; **Program Director's Title:** Director, Program Support Division; **Program Director's Phone:** 888 - 555 - 4687 x 65
Program Support Division Director Name: Jen Smith; **Program Support Division Director Title:** Director, Program Support Division; **Program Support Division Director's Phone:** 404 - 556 - 1263 x 23	**Single Family Housing Program Development Director Name:** Jane Doe; **Single Family Housing Program Development Director Title:** Director, Office of SF Program Development; **Single Family Housing Program Development Director's Phone:** 202 - 708 - 2121 x 3989
Email: liz_f._henry@hud.gov	

Figure 170.A. OM – Management: Default Office Information

4. Click the **Validate** button in the States Covered section, a message like following appears. It warns you that the listed states or territories are not assigned to any HOC office.

States Covered:* Validate

☑ Alabama - Atlanta (HOC)	☑ Kentucky - Atlanta (HOC)	☑ Not Selected - Atlanta (HOC)
☑ Alaska - Santa Ana (HOC)	☑ Louisiana - Denver (HOC)	☑ Ohio - Philadelphia (HOC)
☑ American Samoa - Santa Ana (HOC)	☑ Maine - Philadelphia (HOC)	☑ Oklahoma - Denver (HOC)
☑ Arizona - Santa Ana (HOC)	☐ Marshall Islands	☑ Oregon - Santa Ana (HOC)
☑ Arkansas - Denver (HOC)	☑ Maryland - Philadelphia (HOC)	☐ Palau
☑ California - Santa Ana (HOC)	☑ Massachusetts - Philadelphia (HOC)	☑ Pennsylvania - Philadelphia (HOC)
☑ Colorado - Denver (HOC)	☑ Michigan - Philadelphia (HOC)	☑ Puerto Rico - Atlanta (HOC)
☑ Connecticut - Philadelphia (HOC)	☑ Minnesota - Denver (HOC)	☑ Rhode Island - Philadelphia (HOC)
☑ Delaware - Philadelphia (HOC)	☑ Mississippi - Atlanta (HOC)	☑ South Carolina - Atlanta (HOC)
☑ District of Columbia - Philadelphia (HOC)	☑ Missouri - Denver (HOC)	☑ South Dakota - Denver (HOC)
☐ Federated States of Micronesia	☑ Montana - Denver (HOC)	☑ Tennessee - Atlanta (HOC)
☑ Florida - Atlanta (HOC)	☑ Nebraska - Denver (HOC)	☑ Texas - Denver (HOC)
☑ Georgia - Atlanta (HOC)	☑ Nevada - Santa Ana (HOC)	☑ Utah - Denver (HOC)
☑ Guam - Santa Ana (HOC)	☑ New Hampshire - Philadelphia (HOC)	☑ Vermont - Philadelphia (HOC)
☑ Hawaii - Santa Ana (HOC)	☑ New Jersey - Philadelphia (HOC)	☑ Virgin Islands - Atlanta (HOC)
☑ Idaho - Santa Ana (HOC)	☑ New Mexico - Denver (HOC)	☑ Virginia - Philadelphia (HOC)
☑ Illinois - Atlanta (HOC)	☑ New York - Philadelphia (HOC)	☑ Washington - Santa Ana (HOC)
☑ Indiana - Atlanta (HOC)	☑ North Carolina - Atlanta (HOC)	☑ West Virginia - Philadelphia (HOC)
☑ Iowa - Denver (HOC)	☑ North Dakota - Denver (HOC)	☑ Wisconsin - Denver (HOC)
☑ Kansas - Denver (HOC)	☑ Northern Mariana Islands - Santa Ana (HOC)	☑ Wyoming - Denver (HOC)

OK Cancel

Figure 170.B. OM – Management: Change Office Defaults – States Covered

8.6 Reports

The HCS system comes with a variety of reports. These reports can be viewed, printed, and exported to Excel spreadsheets. These reports provide management with a view of the application process. Also, these reports are excellent views of the post-processing results. Below are instructions on how to generate, print, and export reports. Also, the sections below show a sample of each report and details about what information each report contains.

8.6.1 Viewing Reports

To view any of the HCS system reports, take the following steps:

1. From the upper navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click **Application Progress Status** hyperlink from the menu, the *Applications Status for FY 20XX* screen appears.

Application Status for FY 2009

Total 790 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 171. OM – Reports: Application Progress Status for FY 20XX

8.6.1.1 *Printing Reports*

You can print any of the HCS system reports by following these steps:

1. From the top navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click **Applications Progress Status** hyperlink from menu, the Applications Status for FY 20XX screen appears.

Application Status for FY 2009

Total 790 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 172. OM – Reports: Application Status for FY 20XX

2. Click the **Print** button. The *Print* dialog box similar to follow appears. Once you have selected your printing criteria, click **Print** to have a printout of the document.

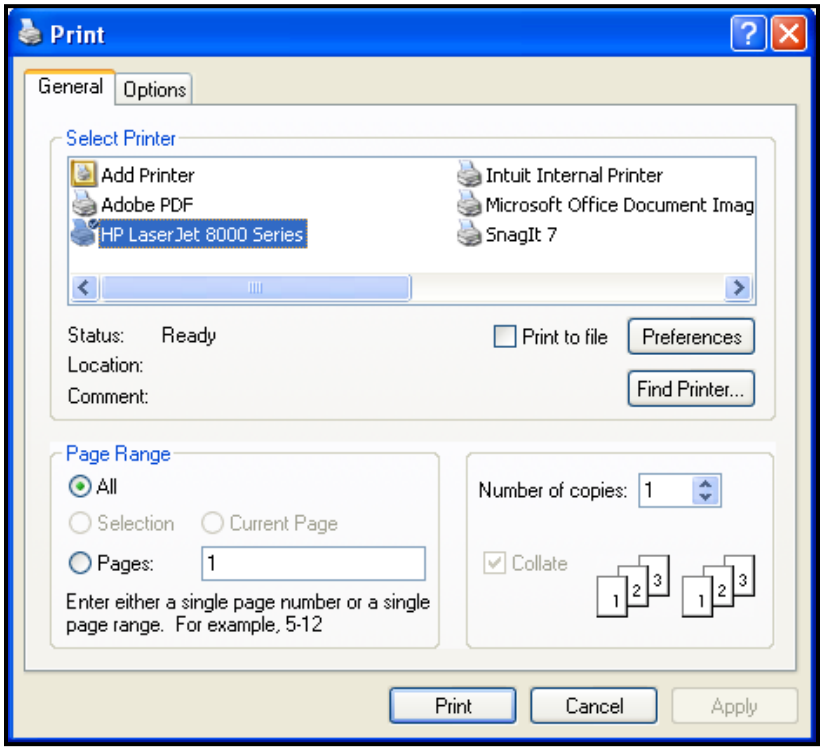


Figure 173. OM – Reports: Print Dialog Box.

You have now successfully printed a report. Repeat these steps to print any of the other reports available.

8.6.1.2 *Exporting Reports*

You can export any of the HCS system reports to Excel spreadsheet by following these steps:

1. From the top navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click the **Applications Progress Status** hyperlink from the menu, the Applications Status for FY 20XX screen appears.

2. Click the **Export** button. The *File Download* dialog box appears.

Application Status for FY 2009

Total 790 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 174. OM – Reports: Application Status for FY 20XX

3. Click the **Open** button to open the spreadsheet in HCS web page. Or, click the **Save** button and follow the instruction to save the report to a Microsoft Excel file.

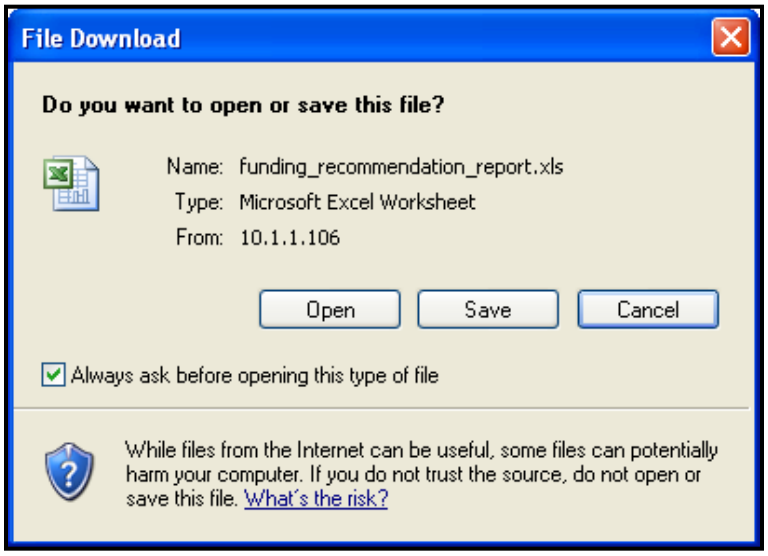


Figure 175. OM – Reports: File Download Dialog Box.

You have now exported an HCS system report. Follow these steps again to export any of the other reports.

8.6.2 Report Examples

8.6.2.1 *Application Status*

Application Progress Status report shows the dates when each assigned reviewer and primary reviewer completed their evaluation.

1. From the upper navigation menu, under **Reports** sub-menu, click **Applications Status** hyperlink, the Grant *Applications Status Search* screen appears. Enter the criteria that you would like to search for and click the **Search** button to retrieve your results, or **Clear** to erase the data you had input.

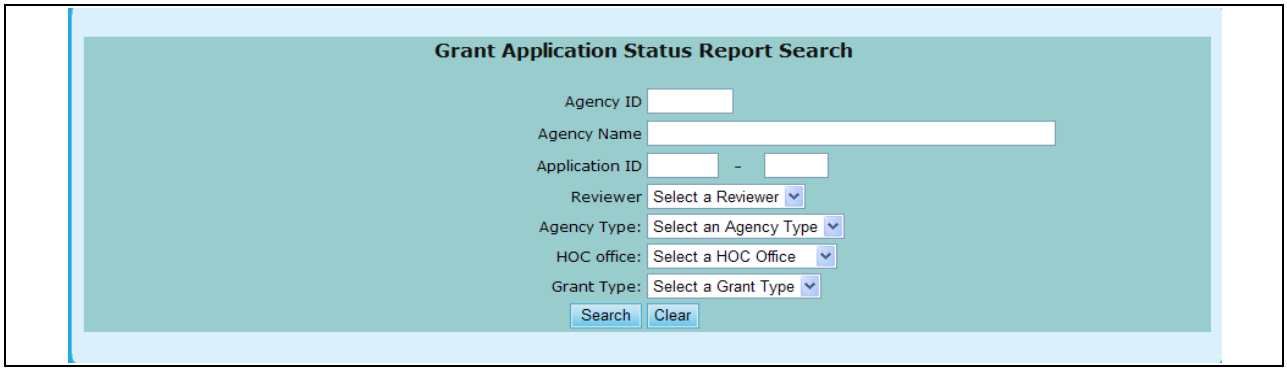


Figure 176. OM – Reports: Applications Status Search

2. To sort this list:
   a. Click the **Agency Name** hyperlink will sort the list first in Agency Name order, and then in TIN number and Application ID order.
   b. Click the **TIN** hyperlink will sort the list first in TIN number order, and then in Agency Name and Application ID order.

c. Click the **Appl ID** hyperlink will sort the list first in Application ID order, and then in Agency Name and TIN number order.

d. Click the **Prim Rvwr** hyperlink will sort the list first in Primary Reviewer"s last name and first name order, and then in Agency Name, TIN number, and Application ID order.

Application Status for FY 2009

Total 790 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 177.A. OM – Reports: Applications Status for FY 20XX

3. Click the **Primary Reviewer Statistics** button on the report, the *Primary Reviewers Statistics for FY 20XX* screen appears.

Primary Reviewers Statistics for FY 2009

Primary Reviewer		# of Applications	# of Incomplete	# of Complete	% in HUD Office
First Name	Last Name				
Brian	Siebenlist	49	48	1	98%
Ruth	Roman	1	1	0	2%
Headquarters SF-HUD Totals:		50	49	1	100%
Annette	Panasiuk	39	35	4	14%
Beth	Eilers	2	0	2	1%
Elizabeth	Cahall	35	26	9	12%
Glen	Stopera	25	0	25	9%
Janice	Skinner	30	30	0	11%
Jennifer	Sica	23	0	23	8%
John	Niebieszczanski	12	10	2	4%
Maryanne	Daniel	30	3	27	11%
Robert	Wright	31	31	0	11%
Sharon	Farrow	23	0	23	8%
Tamie	Contois	31	31	0	11%
Philadelphia (HOC) Totals:		281	166	115	100%
Jason	Willey	85	85	0	35%
Kendel	King	3	3	0	1%
Tracy	Fields	65	65	0	27%
Vivien	King	88	88	0	37%
Atlanta (HOC) Totals:		241	241	0	100%
Donna	Martin	5	0	5	7%
Gail	Osgood	6	0	6	8%
Kristin	Johnsen	9	0	9	13%
Lorraine	Griscavage-Frisbee	7	1	6	10%
Mark	Escalante	8	0	8	11%
Marykay	Kelley	8	0	8	11%
Myrna	Pascual	7	0	7	10%
Pauline	Louie	6	6	0	8%
William	McKee	9	0	9	13%
dawn	golik	7	2	5	10%
Santa Ana (HOC) Totals:		72	9	63	100%
Grand Totals:		790	465	325	

Print Export

Figure 177.B. OM – Reports: Primary Reviewers Statistics for FY 20XX

4. To view the list of applications which evaluations have not been completed yet, click **Not Evaluated** button. The *Application Status for FY 20XX (Not Evaluated)* page is displayed. Any application that has one or more scores missing is listed.

Application Status for FY 2009

Total 592 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADMINISTRATION OF RESOURCES AND CHOICES	Santa Ana (HOC)	81052	LHCA	COMP	0921-024			Joy Padiernos	09/11/2009	Marisabel Almer		Lawrence Roselle	
ADMINISTRATION OF RESOURCES AND CHOICES	Santa Ana (HOC)	81052	LHCA	HECM	0922-005		08/24/2009	Joy Padiernos	09/11/2009	Marisabel Almer		Lawrence Roselle	
ADMINISTRATION OF RESOURCES AND CHOICES	Santa Ana (HOC)	81052	LHCA	LDRC	0923-011		08/23/2009	Joy Padiernos		Marisabel Almer	08/27/2009	Lawrence Roselle	

Figure 177.C. OM – Reports: Applications Status for FY 20XX (Not Evaluated)

5. To view the list of applications which evaluations have been completed, click **Evaluated** button. The *Application Status for FY 20XX (Evaluated)* page is displayed. Applications with all scores posted are listed.

Application Status for FY 2009

Total 198 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
ALLIED CHURCHES TEACHING SELF-EMPOWERMEN	Denver (HOC)	84715	LHCA	COMP	0821-062		08/07/2009	Patricia Heiser	08/07/2009	Douglas Neff	08/07/2009		
ANOKA COUNTY COMMUNITY ACTION PROGRAM, I	Denver (HOC)	81092	LHCA	COMP	0821-074		08/27/2009	Sharon Hebenstreit	08/11/2009	Julie Rice	08/19/2009		
ARROWHEAD ECONOMIC OPPORTUNITY AGENCY, I	Denver (HOC)	84091	LHCA	COMP	0821-075		08/10/2009	Sharon Hebenstreit	08/13/2009	Julie Rice	09/14/2009		
ASIAN INCORPORATED	Santa Ana (HOC)	82197	LHCA	COMP	0921-002		08/21/2009	Felicidad Rodarte	08/27/2009	Chandeng Hour	08/28/2009	Christopher Taliaferro	08/27/2009
ASIAN INCORPORATED	Santa Ana (HOC)	82197	LHCA	LDRC	0923-004		08/21/2009	Felicidad Rodarte	08/26/2009	Chandeng Hour	08/28/2009	Christopher Taliaferro	08/24/2009
ASSIST AGENCY	Denver (HOC)	84801	LHCA	COMP	0821-029		08/11/2009	Dahlia Martinez	08/18/2009	Delia Linan	08/19/2009		
AUSTIN TENANTS' COUNCIL	Denver (HOC)	80543	LHCA	COMP	0821-041		08/13/2009	Gifford Dunn	08/10/2009	John Thorston	08/13/2009		

Figure 177.D. OM – Reports: Applications Status for FY 20XX (Evaluated)

6. If the Applications Status report you are working on is current fiscal year, Primary Reviewer‟s name is a hyperlink.

8.6.2.2 *Application Score Status*

This report lists all the scores for each application for a comprehensive view of on all applications that were processed.

1. From the upper navigation menu, under **Reports** sub-menu, click the **Scores Status** hyperlink. The *Scores Status Report for Fiscal Year 20XX* screen appears. Enter the criteria that you would like to search for and click the **Search** button to retrieve your results, or **Clear** to erase the data you had input.

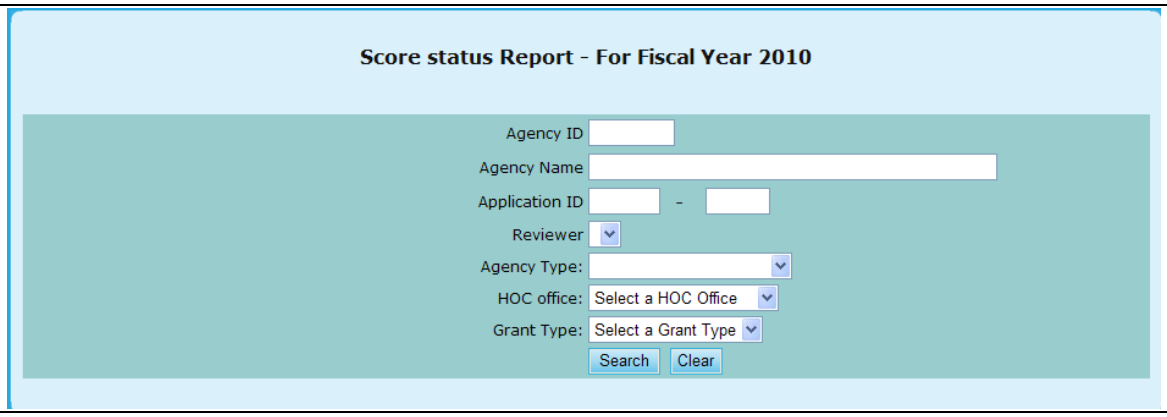
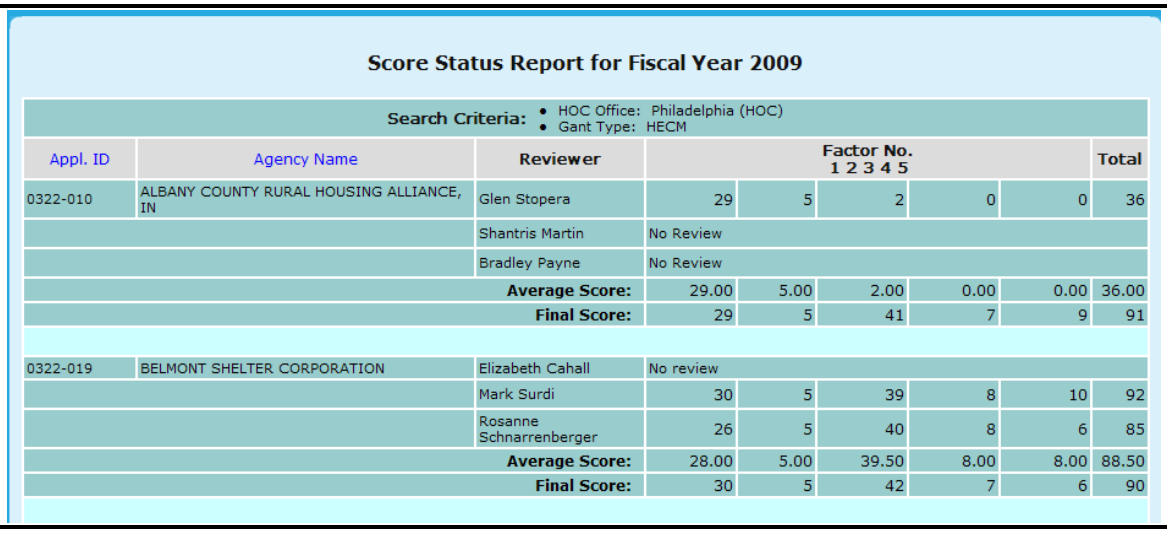


Figure 178. OM – Reports: Scores Status Search

Note: Provided below is an example of a search result.



Score Status Report for Fiscal Year 2009

Search Criteria: • HOC Office: Philadelphia (HOC) • Gant Type: HECM

Appl. ID	Agency Name	Reviewer	Factor No. 1	2	3	4	5	Total
0322-010	ALBANY COUNTY RURAL HOUSING ALLIANCE, IN	Glen Stopera	29	5	2	0	0	36
		Shantris Martin	No Review					
		Bradley Payne	No Review					
		Average Score:	29.00	5.00	2.00	0.00	0.00	36.00
		Final Score:	29	5	41	7	9	91
0322-019	BELMONT SHELTER CORPORATION	Elizabeth Cahall	No review					
		Mark Surdi	30	5	39	8	10	92
		Rosanne Schnarrenberger	26	5	40	8	6	85
		Average Score:	28.00	5.00	39.50	8.00	8.00	88.50
		Final Score:	30	5	42	7	6	90

Figure 179. OM – Reports: Scores Status

8.6.2.3 *Awards Recommendation*

This report provides a view of Final scores, Recommended awards and Requested grant amount.

1. From the top navigation menu, under the **Reports** sub-menu, Click the **Funding Recommendation** hyperlink, the *Funding Recommendation Report for Fiscal Year 20XX* appears.

AWARDS RECOMMENDATION REPORT
For Fiscal Year 2009

Agency Name(Application ID)	Final Score	Recommended	Requested
CATHOLIC CHARITIES USA (0011-001)	87.00	$2,147,090.28	$2,147,090.28
STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO (0011-002)	94.00	$2,499,995.00	$2,499,995.00
MON VALLEY INITIATIVE (0011-003)	88.00	$855,000.00	$855,000.00
HOMEOWNERSHIP PRESERVATION FOUNDATION (0011-004)	93.00	$2,700,000.00	$2,700,000.00
CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC. (0011-005)	90.00	$1,431,926.00	$1,431,926.00
NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS (0011-006)	85.00	$1,113,528.00	$1,113,528.00
NEIGHBORHOOD REINVESTMENT CORPORATION (0011-007)	88.00	$2,700,000.00	$2,700,000.00
NATIONAL COUNCIL OF LA RAZA (0011-008)	88.00	$2,700,000.00	$2,700,000.00
HOUSING PARTNERSHIP NETWORK (0011-009)	98.00	$2,675,123.00	$2,675,123.00
NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC (0011-010)	79.00	$1,200,000.00	$1,200,000.00
THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC. (0011-011)	75.00	$300,000.00	$2,346,655.00
WEST TENNESSEE LEGAL SERVICES, INCORPORATED (0011-012)	88.00	$2,700,000.00	$2,700,000.00
NATIONAL URBAN LEAGUE (0011-013)	90.00	$2,700,000.00	$2,700,000.00
HOMEFREE - U S A (0011-014)	88.00	$1,995,000.00	$1,995,000.00
CCCS OF GREATER ATLANTA - MAIN OFFICE (0011-015)	90.00	$2,700,000.00	$2,700,000.00
ACORN HOUSING CORPORATION (0011-016)	96.00	$2,700,000.00	$2,700,000.00
NACA (NEIGHBORHOOD ASSISTANCE CORPORATION OF AMERICA) (0011-017)	90.00	$2,700,000.00	$2,700,000.00
NUEVA ESPERANZA (0011-018)	75.00	$300,000.00	$1,927,498.00
MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE (0011-019)	75.00	$300,000.00	$1,300,000.00
MISSION OF PEACE (0011-020)	84.00	$1,600,000.00	$1,600,000.00
NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC. (0011-021)	95.00	$2,700,000.00	$2,700,000.00
CLEARPOINT FINANCIAL SOLUTIONS, INC. (0011-022)	80.00	$2,700,000.00	$2,700,000.00
RURAL COMMUNITY ASSISTANCE CORPORATION (0011-023)	86.00	$1,215,966.00	$1,215,966.00
MONEY MANAGEMENT INTERNATIONAL INC. (0011-024)	85.00	$2,700,000.00	$2,700,000.00
Santa Ana (SHFA - COMP) Total:		$237,896.46	$773,695.00
WASHINGTON STATE HOUSING FINANCE COMMISSION (0943-001)	83.00	$29,999.80	$30,000.00
Santa Ana (SHFA - LDRC) Total:		$29,999.80	$30,000.00

Print Export

Figure 180. OM – Reports: Awards Recommendation Report

8.6.2.4 *Awards Report*

This report compares Allocated funds against Awarded funds at the grant category level showing balance to check that all grant funds have been allocated.

1. From the top navigation menu, under **Reports** sub-menu, click **Funding Report** hyperlink, the *Funding Report for Fiscal Year 20XX appears.*

FUNDING REPORT
For Fiscal Year 2009

Office Name	Requested	Allocated	Awarded	To be Returned
INTERMEDIARY				
Intermediary (COMP)	$53,474,994.28	$25,727,323.00	$25,727,323.00	$0.00
Intermediary (HECM)	$8,580,390.00	$6,500,000.00	$6,500,000.00	$0.00
Intermediary (LDRC)	$1,209,220.00	$992,677.00	$992,677.00	$0.00
Intermediary (FLMF)	$6,410,896.00	$798,272.00	$798,272.00	$0.00
Intermediary (TRNG)	$8,000,000.00	$5,000,000.00	$5,000,000.00	$0.00
INTERMEDIARY Totals:	$77,675,500.28	$39,018,272.00	$39,018,272.00	$0.00
LHCA				
Philadelphia (LHCA - COMP)	$15,746,509.33	$17,111,728.00	$6,082,506.00	$11,029,222.00
Philadelphia (LHCA - HECM)	$331,077.00	$1,000,000.00	$281,077.00	$718,923.00
Philadelphia (LHCA - LDRC)	$923,396.80	$904,358.00	$289,322.00	$615,036.00
Atlanta (LHCA - COMP)	$13,697,823.00	$0.00	$5,899,008.00	- $5,899,008.00
Atlanta (LHCA - HECM)	$452,000.00	$0.00	$322,342.00	- $322,342.00
Atlanta (LHCA - LDRC)	$971,721.00	$0.00	$332,743.00	- $332,743.00
Denver (LHCA - COMP)	$8,751,328.00	$0.00	$3,736,178.00	- $3,736,178.00
Denver (LHCA - HECM)	$230,508.00	$0.00	$197,700.00	- $197,700.00
Denver (LHCA - LDRC)	$416,720.00	$0.00	$160,428.00	- $160,428.00
Santa Ana (LHCA - COMP)	$4,168,568.61	$0.00	$1,394,036.00	- $1,394,036.00
Santa Ana (LHCA - HECM)	$198,881.00	$0.00	$198,881.00	- $198,881.00
Santa Ana (LHCA - LDRC)	$385,102.00	$0.00	$121,865.00	- $121,865.00
LHCA Totals:	$46,273,634.74	$19,016,086.00	$19,016,086.00	$0.00
SHFA				
Philadelphia (SHFA - COMP)	$2,342,638.39	$2,650,000.00	$1,218,439.00	$1,431,561.00
Philadelphia (SHFA - LDRC)	$50,000.00	$149,689.00	$50,000.00	$99,689.00
Atlanta (SHFA - COMP)	$790,000.00	$0.00	$460,643.00	- $460,643.00
Atlanta (SHFA - LDRC)	$0.00	$0.00	$0.00	$0.00
Denver (SHFA - COMP)	$1,081,034.63	$0.00	$770,673.00	- $770,673.00
Denver (SHFA - LDRC)	$69,689.20	$0.00	$69,689.00	- $69,689.00
Santa Ana (SHFA - COMP)	$773,695.00	$0.00	$200,245.00	- $200,245.00
Santa Ana (SHFA - LDRC)	$30,000.00	$0.00	$30,000.00	- $30,000.00
SHFA Totals:	$5,137,057.22	$2,799,689.00	$2,799,689.00	$0.00
Grand Totals:	$132,397,227.24	$62,850,000.00	$62,850,000.00	$0.00

Print Export

Figure 181. OM – Reports: Funding Report

8.6.2.5 *Awards Report by Agency*

This report provides an excellent summary of awards using drill down screens. The initial screen provides a comprehensive summary of the grant processing year at one glance, providing number of agencies applying, those awarded and comparing awards with Requested and Recommended Awards. This shows all application results regardless of if they are awarded or not.

1. From the top navigation menu, under **Reports** sub-menu, Click the **Awards Report by Agency** hyperlink, the *Awards Report by Agency* appears. This statistic matrix displays awards and related information in each HUD office, and HUD totals. The data shown in **# Agencies** column is the number of HUD-Approved Independent Agencies who are qualified to apply for grant in the fiscal year.

2. Click HUD office name hyperlink, the report is drilled down to HUD office level. For example, click **HOC 2 – Atlanta** hyperlink, a list of agencies applied for grants and their relevant data are displayed in agency name order.

AWARDS REPORT BY AGENCY For Fiscal Year 2009

Office	# Agencies	# Agencies Applying	# Agencies Awarded	# Sub Agencies Funded	# Applications Awarded	Amount Allotted	Amount Requested	Amount Recommended	Amount Awarded
HQ	24	25	25	837	43	$ 39,018,272.00	$ 77,675,500.28	$ 59,381,231.28	$ 39,018,272.00
HOC 1 - Philadelphia	357	211	179	119	238	$ 0.00	$ 20,368,621.52	$ 2,392,638.39	$ 8,628,011.00
HOC 2 - Atlanta	334	178	153	39	206	$ 0.00	$ 15,911,544.00	$- 1,011,569.47	$ 7,014,736.00
HOC 3 - Denver	230	111	101	25	135	$ 0.00	$ 11,274,279.83	$ 1,200,723.82	$ 5,235,293.00
HOC 4 - Santa Ana	85	44	41	44	67	$ 0.00	$ 7,167,281.61	$ 663,849.26	$ 2,953,688.00
TOTAL	1030	569	499	1064	689	$ 62,850,000.00	$132,397,227.24	$ 62,626,873.28	$ 62,850,000.00

Print Export

Figure 182.A. OM – Reports: Awards Report by Agency

3. To sort the list of agencies in HUD office level:
   a. Click the **Agency** hyperlink will sort the list in Agency Name order.
   b. Click the **Agency ID** hyperlink will sort the list in Agency ID order.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY AGENCY For Fiscal Year 2009

Office: HOC 2 - Atlanta	Total Agencies Applying: 178	Total Agencies Awarded: 153
Amount Allotted: $ 0.00	Amount Requested: $ 15,911,544.00	Total Awarded: $ 7,014,736.00

Agency Search Print Export Back

Agency	Agency ID	# Sub Agencies Funded	Office	Grant Category	Grant Types	Requested	Recommended	Awarded
ACCESS LIVING OF METROPOLITAN CHICAGO	82063	0	HOC 2 - Atlanta	LHCA	COMP	$ 45,000.00	$ 0.00	$ 45,000.00
AFFORDABLE HOUSING CORPORATION	81929	0	HOC 2 - Atlanta	LHCA, LHCA	COMP, LDRC	$ 86,000.00	$ 0.00	$ 65,960.00
AFFORDABLE HOUSING ENTERPRISES, INC.	82241	0	HOC 2 - Atlanta	LHCA	COMP	$ 30,000.00	$ 0.00	$ 30,000.00
ALABAMA COUNCIL ON HUMAN RELATIONS, INC	80576	0	HOC 2 - Atlanta	LHCA	COMP	$ 30,000.00	$ 0.00	$ 30,000.00
ALLIANCE CREDIT COUNSELING	84342	0	HOC 2 - Atlanta	LHCA	COMP	$ 151,712.00	$ 0.00	$ 0.00
APPALACHIAN HOUSING AND REDEVELOPMENT CORPORATION	81266	0	HOC 2 - Atlanta	LHCA	COMP	$ 46,963.00	$ 0.00	$ 42,724.00
AREA COMMITTEE TO IMPROVE OPPORTUNITIES NOW, INC.	82510	0	HOC 2 - Atlanta	LHCA	COMP	$ 52,862.00	$ 0.00	$ 42,724.00
B & D TRAINING SERVICES	83806	0	HOC 2 - Atlanta	LHCA, LHCA	COMP, LDRC	$ 125,000.00	$ 0.00	$ 43,085.00
BRIGHTON CENTER, INCORPORATED	80145	0	HOC 2 - Atlanta	LHCA, LHCA, LHCA	COMP, HECM, LDRC	$ 109,250.00	$ 0.00	$ 86,131.00
BROWARD COUNTY HOUSING AUTHORITY	80586	0	HOC 2 - Atlanta	LHCA	COMP	$ 76,250.00	$ 0.00	$ 40,976.00
CAMPBELLSVILLE HOUSING AND REDEVELOPMENT AUTHORITY	80146	0	HOC 2 - Atlanta	LHCA	COMP	$ 23,479.00	$ 0.00	$ 23,479.00
WILSON COMMUNITY IMPROVEMENT ASSOCIATION, INC.	80957	0	HOC 2 - Atlanta	LHCA	COMP	$ 50,000.00	$ 0.00	$ 50,000.00
WOODBINE COMMUNITY ORGANIZATION	81758	0	HOC 2 - Atlanta	LHCA, LHCA, LHCA	COMP, HECM, LDRC	$ 98,000.00	$ 0.00	$ 47,197.00
ALL			HOC 2 - Atlanta					

Figure 182.B. OM – Reports: Awards Report by Agency

4. From the *Awards Report by Agency* in HUD Office level, as shown in Figure 182.B., click an agency name hyperlink under **Agency** column. The award report for the selected agency is displayed.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY AGENCY

For Fiscal Year 2009

Back

Agency	Agency ID	HOC	Agency Type	Appl ID	Grant Type	Requested	Recommended	Awarded	Difference
ACCESS LIVING OF METROPOLITAN CHICAGO	82063	HOC 2 - Atlanta	LHCA	0421-119	COMP	$ 45,000.00	$ 0.00	$ 45,000.00	0.00
			TOTAL		1	$ 45,000.00	$ 0.00	$ 45,000.00	$ 0.00

Print Export Save Back

Figure 182.C. OM – Reports: Awards Report by Agency: for One Selected Agency

5. To search for a particular agency or multiple agencies, click the **Agency Search** button at the bottom of the *Awards Report by Agency* page. The *Awards Report by Agency: Agency Search* page appears.

6. In Agency Search page, key in search criteria and click the **Search** button. For example, key in „ADVANC" to Agency Name field and click the **Search** button (see Figure 182.D.). A list of agencies that contain „ADVANC" in their agency name are displayed (see Figure 182.E.). Notice that in Figure 250, the Awards Report is drilled down to agency level. It lists all the grant types available for the fiscal year you are working on, and displays data of the grant type(s) that is/are applicable to each agency in the list. For the grant type(s) the agency didn"t apply, zero dollar amount is shown.

Awards Report by Agency for FY 2010 - Agency Search
HQ

Search for Agency ID and Name using the criteria below.	
Agency ID	
Application ID	-
Agency Name	advanc
Agency List	Select Agency
Grant Applicant Type	☐ INTERMEDIARY ☐ LHCA ☐ MSO ☐ SHFA
Grant Type	☐ COMP ☐ HECM ☐ LDRC ☐ FLMF ☐ TRNG ☐ MMSA
Search Clear Cancel	

Figure 182.D. OM – Reports: Awards Report by Agency: Agency Search for Agency Name 'ADVANC'

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY AGENCY

For Fiscal Year 2009

Back

Agency	Agency ID	HOC	Agency Type	Appl ID	Grant Type	Requested	Recommended	Awarded	Difference
PHILADELPHIA COUNCIL FOR COMMUNITY ADVANCEMENT	80072	HOC 1 - Philadelphia	LHCA	0321-092	COMP	$ 75,000.00	$ 0.00	$ 37,480.00	- 37,520.00
				0322-008	HECM	$ 5,000.00	$ 0.00	$ 5,000.00	0.00
			TOTAL		2	$ 80,000.00	$ 0.00	$ 42,480.00	$- 37,520.00

Print Export Save Back

Figure 182.E. OM – Reports: Awards Report by Agency: Result of Agency Search for Agency Name 'ADVANC'

8.6.2.6 *Awards Report by Office*

This report lists agencies that are awarded a grant and listed in respective of their assigned HUD office.

1. From the top navigation menu, under **Reports** sub-menu, click **Awards Report by Office** hyperlink, the *Awards Report by Office for Fiscal Year 20XX appears.*

AWARDS REPORT BY OFFICE
For Fiscal Year 2009

Appl. ID	Agency Name	Requested	Recommended	Awarded
0011-001	CATHOLIC CHARITIES USA	$2,147,090.28	$2,147,090.28	$1,057,385.00
0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO	$2,499,995.00	$2,499,995.00	$1,499,193.00
0011-003	MON VALLEY INITIATIVE	$855,000.00	$855,000.00	$855,000.00
0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION	$2,700,000.00	$2,700,000.00	$1,436,078.00
0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.	$1,431,926.00	$1,431,926.00	$1,246,732.00
0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS	$1,113,528.00	$1,113,528.00	$931,154.00
0011-007	NEIGHBORHOOD REINVESTMENT CORPORATION	$2,700,000.00	$2,700,000.00	$1,120,501.00
0011-008	NATIONAL COUNCIL OF LA RAZA	$2,700,000.00	$2,700,000.00	$1,120,501.00
0011-009	HOUSING PARTNERSHIP NETWORK	$2,675,123.00	$2,675,123.00	$1,751,655.00
0011-010	NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC	$1,200,000.00	$1,200,000.00	$552,462.00
0011-011	THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC.	$2,346,655.00	$300,000.00	$300,000.00
0011-012	WEST TENNESSEE LEGAL SERVICES, INCORPORATED	$2,700,000.00	$2,700,000.00	$1,120,501.00
0011-013	NATIONAL URBAN LEAGUE	$2,700,000.00	$2,700,000.00	$1,246,732.00
0011-014	HOMEFREE - U S A	$1,995,000.00	$1,995,000.00	$1,120,501.00
0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE	$2,700,000.00	$2,700,000.00	$1,183,615.00
0011-016	ACORN HOUSING CORPORATION	$2,700,000.00	$2,700,000.00	$1,625,424.00
0011-017	NACA (NEIGHBORHOOD ASSISTANCE CORPORATION OF AMERICA)	$2,700,000.00	$2,700,000.00	$1,246,732.00
0011-018	NUEVA ESPERANZA	$1,927,498.00	$300,000.00	$300,000.00
0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE	$1,300,000.00	$300,000.00	$300,000.00
0011-020	MISSION OF PEACE	$1,600,000.00	$1,600,000.00	$868,039.00
0011-021	NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	$2,700,000.00	$2,700,000.00	$1,562,309.00
0011-022	CLEARPOINT FINANCIAL SOLUTIONS, INC.	$2,700,000.00	$2,700,000.00	$615,577.00
0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION	$1,215,966.00	$1,215,966.00	$994,270.00
0011-024	MONEY MANAGEMENT INTERNATIONAL INC.	$2,700,000.00	$2,700,000.00	$931,154.00
0011-025	NATIONAL COUNCIL ON THE AGING (NCOA)	$1,467,213.00	$1,467,213.00	$741,808.00
	Intermediary (COMP) Totals:	$53,474,994.28	$48,800,841.28	$25,727,323.00
0941-002	WASHINGTON STATE HOUSING FINANCE COMMISSION	$470,000.00	$470,000.00	$136,881.00
	Santa Ana (SHFA - COMP) Totals:	$773,695.00	$237,896.46	$200,245.00
0943-001	WASHINGTON STATE HOUSING FINANCE COMMISSION	$30,000.00	$29,999.80	$30,000.00
	Santa Ana (SHFA - LDRC) Totals:	$30,000.00	$29,999.80	$30,000.00
	Grand Totals:	$119,845,892.40	$62,626,873.28	$62,850,000.00

Print Export

Figure 183. OM – Reports: Awards Report by Office

8.6.2.7 *Awards Report by State*

This report groups all agencies that are awarded a grant in respective to their State they are located in.

1. From the top navigation menu, under **Reports** sub-menu, click **Awards Report by State** hyperlink, the *Awards Report by State for Fiscal Year 20XX* appears.

AWARDS REPORT BY STATE
For Fiscal Year 2009

City/State	Agency Name(Application ID)	Awarded
Auburn, AL	ALABAMA COUNCIL ON HUMAN RELATIONS, INC (0421-011)	$30,000.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0421-007)	$39,228.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0423-039)	$9,314.00
Birmingham, AL	JEFFERSON COUNTY HOUSING AUTHORITY (0421-008)	$26,992.00
Decatur, AL	COMMUNITY ACTION PARTNERSHIP OF NORTH ALABAMA, INC. (0421-004)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0421-002)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0422-001)	$47,671.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0423-001)	$7,745.00
Huntsville, AL	COMMUNITY ACTION PARTNERSHIP, HUNTSVILLE/MADISON & LIMESTONE COUNTIES, INC (0421-006)	$20,000.00
Huntsville, AL	FAMILY SERVICES CENTER, INC. (0421-001)	$51,750.00
Mobile, AL	MOBILE HOUSING BOARD (0421-003)	$53,500.00
Mobile, AL	MOBILE HOUSING BOARD (0422-008)	$10,000.00
Mobile, AL	MOBILE HOUSING BOARD (0423-037)	$7,000.00
Troy, AL	ORGANIZED COMMUNITY ACTION PROGRAM, INC (0421-009)	$30,488.00
Tuscaloosa, AL	COMMUNITY SERVICE PROGRAMS OF WEST ALABAMA, INC. (0421-005)	$40,976.00
	State Total:	$446,128.00
Casper, WY	INTERFAITH OF NATRONA COUNTY, INCORPORATED (0821-070)	$20,000.00
Casper, WY	WYOMING HOUSING NETWORK, INC. (0821-071)	$51,464.00
	State Total:	$71,464.00
	Grand Total:	$62,850,000.00

Print Export

Select a State Go

Figure 184.A. OM – Reports: Awards Report by State

2. To search for agency/agencies locate in a state, select the specific state from the **Select a State** dropdown at the bottom of the page, and click **Go** button. A list of agency/agencies awarded in the selected state is displayed.

AWARDS REPORT BY STATE (AL)
For Fiscal Year 2009

City/State	Agency Name(Application ID)	Awarded
Auburn, AL	ALABAMA COUNCIL ON HUMAN RELATIONS, INC (0421-011)	$30,000.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0421-007)	$39,228.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0423-039)	$9,314.00
Birmingham, AL	JEFFERSON COUNTY HOUSING AUTHORITY (0421-008)	$26,992.00
Decatur, AL	COMMUNITY ACTION PARTNERSHIP OF NORTH ALABAMA, INC. (0421-004)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0421-002)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0422-001)	$47,671.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0423-001)	$7,745.00
Huntsville, AL	COMMUNITY ACTION PARTNERSHIP, HUNTSVILLE/MADISON & LIMESTONE COUNTIES, INC (0421-006)	$20,000.00
Huntsville, AL	FAMILY SERVICES CENTER, INC. (0421-001)	$51,750.00
Mobile, AL	MOBILE HOUSING BOARD (0421-003)	$53,500.00
Mobile, AL	MOBILE HOUSING BOARD (0422-008)	$10,000.00
Mobile, AL	MOBILE HOUSING BOARD (0423-037)	$7,000.00
Troy, AL	ORGANIZED COMMUNITY ACTION PROGRAM, INC (0421-009)	$30,488.00
Tuscaloosa, AL	COMMUNITY SERVICE PROGRAMS OF WEST ALABAMA, INC. (0421-005)	$40,976.00
	State Total:	$446,128.00
	Grand Total:	$446,128.00

Print Export

AL - Alabama Go

Figure 184.B. OM – Reports: Awards Report by State – Result Page of State Search

8.6.2.8 *Funding Report Search*

This report lists agencies that are awarded a grant and listed in respective of their assigned HUD office.

1. From the top navigation menu, under **Reports** sub-menu, click the **Funding Report by Filter** hyperlink, the *Funding Report Search for Fiscal Year 20XX appears.*

Note: The search screen will allow you to narrow down your results based on the following criteria:

- Agency ID
- HOC Office
- Agency Name
- Agency Type
- Counseling Services
- City
- State
- Zip Code

2. Once you have entered your criteria click the **Search** button to retrieve your results, the **Clear** button to erase the information already type in, or **Cancel** to return to Awards Report by Agency.

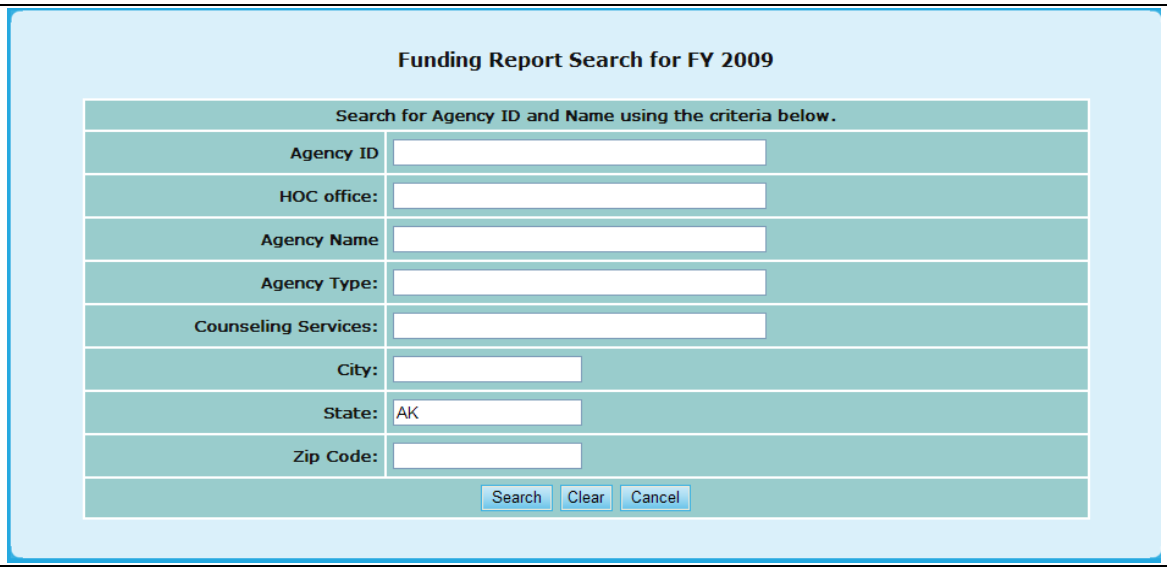


Figure 185. OM – Reports: Funding Report by Filter – Search

3. From this screen you will also be able to view this information in Excel form, by clicking the **Excel Format** hyperlink, or return back to the search function, but clicking **Search Again**.

FUNDING REPORT SEARCH FOR FISCAL YEAR 2009

Search Criteria: • State: AK

5 Record(s) Found

Excel Format

Agency ID	Agency Name	Agency type	Total Awarded	Total Funding			Grant Type	City/State
				Admin. Allocation	Indirect Cost	Allocation		
80206	ALASKA COMMUNITY DEVELOPMENT CORPORATION	Sub Grantee	$0.00	$0.00	$0.00	$22,276.00	INTERMEDIARY - COMP	PALMER - AK
80207	NEIGHBORWORKS ANCHORAGE FORMERLY ANCHORAGE NEIGHBORHOOD HOUSING SERVICES	Sub Grantee	$0.00	$0.00	$0.00	$11,409.09	INTERMEDIARY - COMP	Anchorage - AK
80208	CCCS OF ALASKA	LHCA	$0.00	$0.00	$0.00	$3,416.67	INTERMEDIARY - LDRC	Anchorage - AK
80208	CCCS OF ALASKA	LHCA	$0.00	$0.00	$0.00	$23,603.44	INTERMEDIARY - COMP	Anchorage - AK
81107	FAIRBANKS NEIGHBORHOOD HOUSING SERVICES, INC	Sub Grantee	$0.00	$0.00	$0.00	$11,409.09	INTERMEDIARY - COMP	Fairbanks - AK
		Total:	$0.00	$0.00	$0.00	$72,114.29		

SEARCH AGAIN

Figure 186. OM – Reports: Funding Report by Filter – Results

8.6.2.9 *Reviewers Final Report*

1. From the top navigation menu, under **Reports** sub-menu, click the **Reviewers Final Report** hyperlink, the Select a Grant Application for Fiscal Year 20XX appears.

2. This will prompt you to a list of Grant Applications arranged by Agency. To view an Agency report, click the hyperlink for that Agency under the **Agency Name** column.

Select a Grant Application for FY 2009

Instructions: Click on the Agency Name that you wish to generate the report.

Agency ID	Application ID	Agency Name (Application ID)
80750	0011-001	CATHOLIC CHARITIES USA
82359	0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO
80084	0011-003	MON VALLEY INITIATIVE
84081	0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION
81504	0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.
84539	0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS
80989	0011-009	HOUSING PARTNERSHIP NETWORK
81639	0011-013	NATIONAL URBAN LEAGUE
84538	0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0011-016	ACORN HOUSING CORPORATION
84546	0011-018	NUEVA ESPERANZA
82507	0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE
81276	0011-020	MISSION OF PEACE
82559	0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION
84538	0012-002	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0013-006	ACORN HOUSING CORPORATION
80753	0014-007	ACORN HOUSING CORPORATION
80961	0321-002	YWCA DELAWARE
80219	0321-003	UNIVERSITY LEGAL SERVICES
80570	0321-004	NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC
84173	0321-005	CHRISTIAN ACTIVITIES COUNCIL
84654	0321-006	OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.
84534	0321-007	MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS
82095	0321-012	BERKSHIRE COUNTY REGIONAL HOUSING AUTHORITY-H

Figure 187.A. OM – Reports: Reviewers Final Report

Note: Provided below is an example of a Final Reviewer Report.

Under each Factor, there are six places for comments based on the following criteria:

- Primary R. Strength
- Reviewers Strength
- Final Primary Reviewer Strength

- Primary R. Weakness
- Reviewers Weakness
- Final Primary Reviewer Weakness

Primary Reviewer Final Comment - Chairman Reports

Instructions: + –

Agency ID:	82456		
Agency Name:	HRS	**Application ID:**	0321-030
Grant Category:	LHCA	**Grant Type:**	COMP
Reviewer:	Maryanne Daniel (Prim. Rvwr)		
Reviewer(s):	Tom Hardy David Gallian		

Rating Factor	Score	Bonus Points	Max Points	Max Bonus Points	Other Scores	
1. Capacity of the Applicant and Relevant Organizational Staff	27	0	30	2	**TH** 0	**DG** 26
1a. RF1-2a: Average Combined Housing Counseling Experience of Project Director and Staff	6		6		0	6
1b. RF1-2b: Specialized Training Received for all Counselors and Staff	5		5		0	3
1c. RF1-3a: Grantee Requirements	2		3		0	1
1d. RF1-3b: HUD 9902-Filed Electronically in a timely manner	1		2		0	0
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?	2		2		0	3
1f. RF1-3d: Performance Reviews	5		5		0	0
1g. RF1-3e: Housing Counseling System (HCS)	2		2		0	0
1h. RF1-4a: Performance Evaluation	0		1		0	0
1i. RF1-4b: Goals/Results	4		4		0	0

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

2. Need/Extent of the Problem	4	0	5		**TH** 0	**DG** 4
2a. RF2-1: Needs Data	3		3		0	6
2b. RF2-2: Departmental Policy Priorities	1		2		0	3

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

3. Soundness of Approach/Scope of Housing Counseling Services	37	0	45		**TH** 0	**DG** 39
3a. RF3-1a: Average Number of Hours per Client/per Counseling Type	1		2		0	6
3b. RF3-1b: Types of Counseling	4		4		0	3
3c. RF3-1c: Group vs One-on-One	0		1		0	1
3d. RF3-1d: Marketing and Outreach	1		1		0	0
3e. RF3-2a: Cost Per Client	6		6		0	3
3f. RF3-2b: Capacity	1		1		0	0

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

4. Leveraging Resources	10	0	10		TH 0	DG 10

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

5. Achieving Results and Program Evaluation	10	0	10		TH 0	DG 10
5a. RF5-1a: Outputs/Services	3		3		0	6
5b. RF5-1b: Outcomes	3		3		0	3
5c. RF5-1c: Logic Model Projections	3		3		0	1
5d. RF5-1d: Evaluation Tools	1		1		0	0

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

Total	88	0	100	2	TH 0	DG 89

Print

Figure 187.B. OM – Reports: Reviewers Final Report Result

Note: In order to maximize or minimize these comments either select the + –. Provided below is an example of the comments boxes maximized in order to read the comments by those who reviewed this agency"s request.

Primary R. Strength: + –

2 bilingual counselors on staff; no performanc review conducted last year. Director has more than 8 yrs of experience. Most of the counselors have certifications.

Reviewers Strength: + –

this rating factor was well organized and easy to read. applicant addressed most of the questions.

Final Primary Reviewer Strength: + –

Primary R. Weakness: + –

Lost point for timeliness of 9902

Figure 187.C. OM – Reports: Reviewers Final Report Result – Strengths and Weaknesses

Note: If a primary reviewer has not reviewed a specific application, you will see the following message at the top of a report.

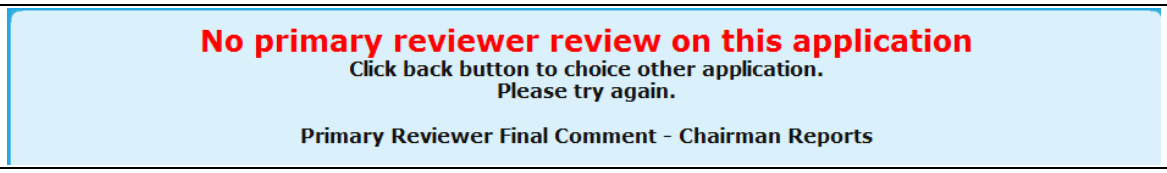


Figure 187.D. OM – Reports: Reviewers Final Report Result – No Review Alert

8.6.2.10 *Reviewers Report*

1. From the top navigation menu, under **Reports** sub-menu, click **Reviewers Report** hyperlink, following prompt appears. If **OK** button is clicked, the Strength and Weakness comments will be included in the report. If **Cancel** button is clicked, the Strength and Weakness comments will not be included in the report.

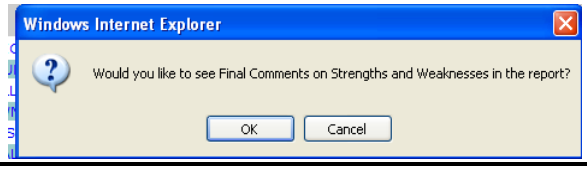
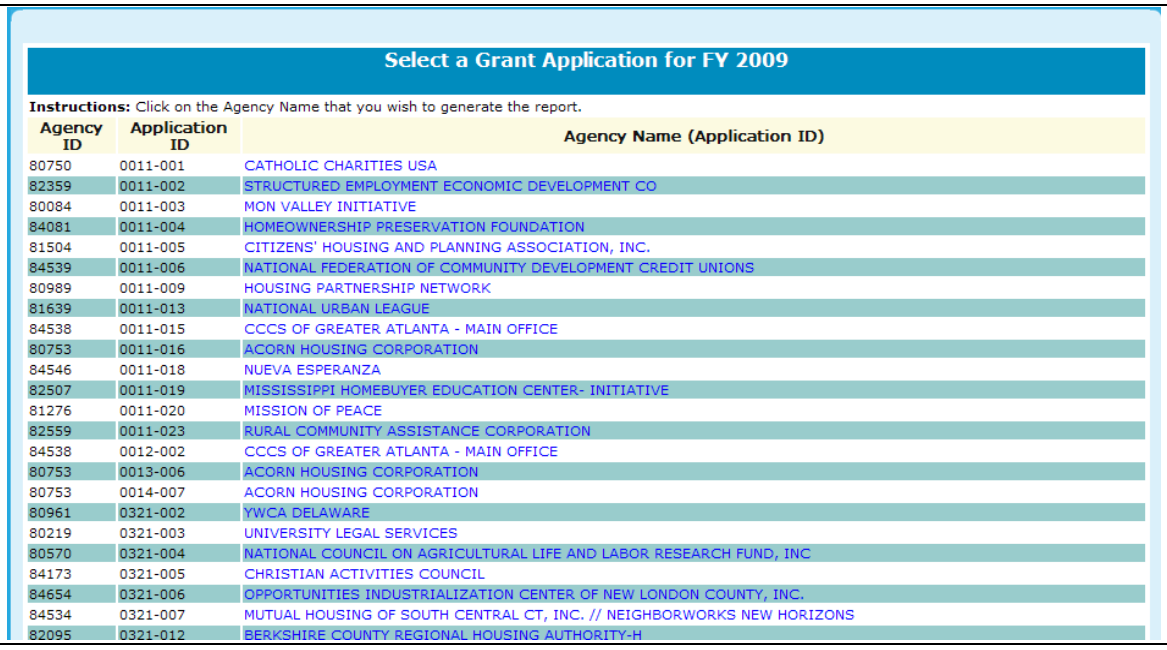


Figure 188. OM – Reports: Reviewers Report – Whether to Show Strengths and Weaknesses in the Report Prompt

2. Upon selecting Ok or Cancel, you will be prompted to the Select a Grant Application for FY 20XX screen. From here, like in Final Reviewers Report, you have the ability to choose a report based on an Agency.



Select a Grant Application for FY 2009

Instructions: Click on the Agency Name that you wish to generate the report.

Agency ID	Application ID	Agency Name (Application ID)
80750	0011-001	CATHOLIC CHARITIES USA
82359	0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO
80084	0011-003	MON VALLEY INITIATIVE
84081	0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION
81504	0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.
84539	0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS
80989	0011-009	HOUSING PARTNERSHIP NETWORK
81639	0011-013	NATIONAL URBAN LEAGUE
84538	0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0011-016	ACORN HOUSING CORPORATION
84546	0011-018	NUEVA ESPERANZA
82507	0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE
81276	0011-020	MISSION OF PEACE
82559	0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION
84538	0012-002	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0013-006	ACORN HOUSING CORPORATION
80753	0014-007	ACORN HOUSING CORPORATION
80961	0321-002	YWCA DELAWARE
80219	0321-003	UNIVERSITY LEGAL SERVICES
80570	0321-004	NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC
84173	0321-005	CHRISTIAN ACTIVITIES COUNCIL
84654	0321-006	OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.
84534	0321-007	MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS
82095	0321-012	BERKSHIRE COUNTY REGIONAL HOUSING AUTHORITY-H

Figure 189.A. OM – Reports: Reviewers Report – Select a Grant Application for FY 20XX

3. Once you have selected the agency to review you will be prompted to the Reviewer Scoring and Comment Summary Report. In order to view a specific Reviewers report, you will have to choose a name that has a hyperlink attached. This can be found in the Other Reviewers row.

Reviewer Scoring and Comment Summary Report

Agency ID:	80753		
Agency Name:	ACORN HOUSING CORPORATION	**Application ID:**	0011-016
Grant Category:	INTERMEDIARY	**Grant Type:**	COMP
Reviewer:	Ronald Bedoya		
Other Reviewer(s):	Brian Siebenlist (Prim. Rvwr) Terri Ames Jennifer Smith		

Rating Factor	Scored	Bonus Points	Max Points	Max Bonus Points
1. Capacity of the Applicant and Relevant Organizational Staff	28		30	
1a. RF1-2a: Average Combined Housing Counseling Experience of Project Director and Staff	5		6	
1b. RF1-2b: Specialized Training Received for all Counselors and Staff	5		5	
1c. RF1-3a: Grantee Requirements	3		3	
1d. RF1-3b: HUD 9902-Filed Electronically in a timely manner	2		2	
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?	2		2	
1f. RF1-3d: Performance Reviews	4		5	
1g. RF1-3e: Housing Counseling System (HCS)	2		2	
1h. RF1-4a: Performance Evaluation	1		1	
1i. RF1-4b: Goals/Results	4		4	
Strength: + −				
Weakness: + −				
2. Need/Extent of the Problem	5		5	
2a. RF2-1: Needs Data	3		3	
2b. RF2-2: Departmental Policy Priorities	2		2	
Strength: + −				
Weakness: + −				
3. Soundness of Approach/Scope of Housing Counseling Services	44		45	
3a. RF3-1a: Average Number of Hours per Client/per Counseling Type	2		2	
3b. RF3-1b: Types of Counseling	4		4	
3c. RF3-1c: Group vs One-on-One	1		1	
3d. RF3-1d: Marketing and Outreach	1		1	
3e. RF3-2a: Cost Per Client	6		6	
3f. RF3-2b: Capacity	1		1	
3g. RF3-2c: Training Expenditures	2		2	
3h. RF3-2d: Percentage of Grant Funding Passed Through	1		1	
3i. RF3-2e: Geographic Coverage, # of States	0		1	
3j. RF3-3a: Types of Counseling and Eduction Services	5		5	
3k. RF3-3b: Average Number of Hours per Client/per Counseling Type	2		2	
3l. RF3-3c: Sufficient Staff to Carry Out Proposed Activities & Number of Clients	0		1	
3m. RF3-3d: Training	1		1	
3n. RF3-3e: Plans to Effectively Serve and/or Communicate with Persons with Limited English and Disabilities	1		1	
3o. RF3-3f: Budget Explanation	1		1	
3p. RF3-4a: Cost per Client	4		4	
3q. RF3-4b: Projected Performance - Group Education and One-on-One Counseling	1		2	
3r. RF3-4c: Marketing and Outreach	2		2	
3s. RF3-5a: Partnerships and Efforts to Coordinate Proposed Activities	2		2	
3t. RF3-5b: Complementing Other HUD Programs	2		2	
3u. RF3-5c: Plans to Avoid Conflicts of Interest	2		2	
3v. RF3-6a: Percent of Grant Funding to be Passed Through	2		3	
3w. RF3-6b: Capacity	1		1	
Strength: + −				
Weakness: + −				
4. Leveraging Resources	10		10	
Strength: + −				
Weakness: + −				
5. Achieving Results and Program Evaluation	9		10	
5a. RF5-1a: Outputs/Services	2		3	
5b. RF5-1b: Outcomes	3		3	
5c. RF5-1c: Logic Model Projections	3		3	
5d. RF5-1d: Evaluation Tools	1		1	
Strength: + −				
Weakness: + −				
Total	96		100	0

Print

Figure 189.B. OM – Reports: Reviewers Report – Reviewer Scoring and Comment Summary Report

8.6.2.11 *Application Number Reference*

This report breaks down the Office ID, Office Name, and whether or not a table exists for this application.

1. From the top navigation menu, under **Reports** sub-menu, click the **Application Number Reference** hyperlink, the Grant Application Number Reference – for Fiscal Year 20XX appears.

Grant Application Number Reference - for FY 2009

Instructions: This page allows for viewing of which offices have or have not been created from the Funding Appropriation page.

Office ID	Office Name	Exists In Table
0011	Intermediary (COMP)	YES
0013	Intermediary (LDRC)	YES
0014	Intermediary (FLMF)	YES
0012	Intermediary (HECM)	YES
0015	Intermediary (TRNG)	YES
0321	Philadelphia (LHCA - COMP)	YES
0323	Philadelphia (LHCA - LDRC)	YES
0322	Philadelphia (LHCA - HECM)	YES
0331	Philadelphia (MSO - COMP)	YES
0333	Philadelphia (MSO - LDRC)	YES
0332	Philadelphia (MSO - HECM)	YES
0341	Philadelphia (SHFA - COMP)	YES
0343	Philadelphia (SHFA - LDRC)	YES
0421	Atlanta (LHCA - COMP)	YES
0423	Atlanta (LHCA - LDRC)	YES
0422	Atlanta (LHCA - HECM)	YES
0431	Atlanta (MSO - COMP)	YES
0433	Atlanta (MSO - LDRC)	YES
0432	Atlanta (MSO - HECM)	YES
0441	Atlanta (SHFA - COMP)	YES
0443	Atlanta (SHFA - LDRC)	YES
0821	Denver (LHCA - COMP)	YES
0823	Denver (LHCA - LDRC)	YES
0822	Denver (LHCA - HECM)	YES
0831	Denver (MSO - COMP)	YES
0833	Denver (MSO - LDRC)	YES
0832	Denver (MSO - HECM)	YES

Figure 190. OM – Reports: Application Number Reference

8.7 Export

This section creates required fixed reports at the conclusion of the grant processing period. This section produces reports using the Export functions to share with various offices and departments to execute the grant awards. You can perform a variety of tasks as needed, which include viewing and/or exporting following HCS data:

- Agency Award/No Award Letters– official announcement given to each agency, providing the results of their grant applications.
- Agency Name Check Review – report to allow review list of awardees before award Letters generation.
- Application Data– complete data in spreadsheet to allow unique analysis.
- Congressional Report Data– Fixed report sent to HUD congressional liaison office.
- Draw Down Report Processing– Function to record agencies" draw down activities.
- Funding Aggregate Report– Complete comprehensive aggregate spreadsheet.
- HUD-1044– Award document each agency must sign.
- IRS Delinquent Data– Fixed report sent to HUD Grant office for IRS

- List of Awardees– Text report listing agencies in the format to be published in the Federal Register.
- Procurement Accounting Data– Spreadsheet given to CFO.
- Public Affairs Report– Fixed report sent to Public Affairs office announcing awarded agencies.

8.7.1 Agency Award/No Award Letter

This is the official announcement to each application stating the results of the grant processing. These letters use the merge function. Care should be taken to ensure the letters are updated before executing the mail merge.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Agency Award/No Award Letters Data** hyperlink, the Agency Award/No Award Letters Data for 20XX options selection screen appears.

2. Select what type of data to search for, **Agency Award Letters Data, Agency No Award Letters Data**, or **Both**, and then Click **OK** button**.**

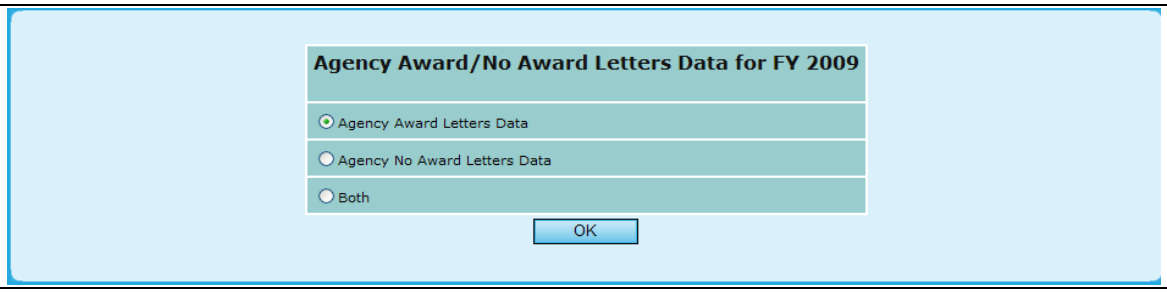


Figure 191.A. OM – Export: Agency Award/No Award Letters Data for FY 20XX

3. The Agency Award/No Award Letters Data Filter screen appears. Set the desired data filter and click the **OK** button.

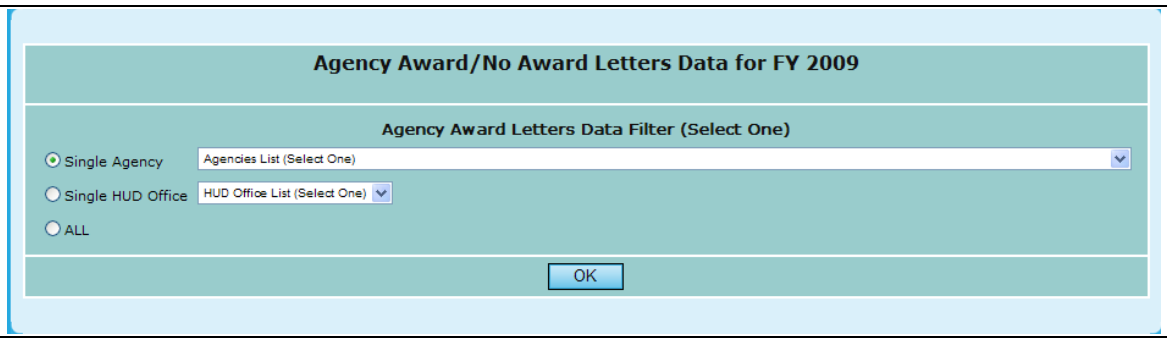


Figure 191.B. OM – Export: Agency Award/No Award Letters Data – Data Filter Screen

4. Once your parameters have been set, and you click **OK**, you will be presented with the Download for your search criteria.

5. Click **AWDDATA.DOC** data file hyperlink. The File Download window appears.

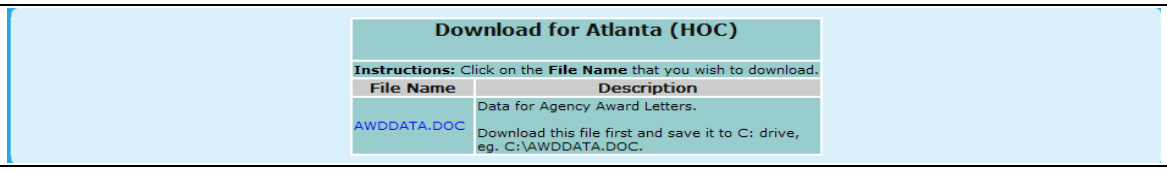


Figure 192.A. OM – Export: Agency Award/No Award Letters – Download Screen

6. To open the document, click the **Open** button. To save it, Click the **Save** button. To cancel file download, click the **Cancel** button. When the **Open** button is clicked, following data page is displayed in HCS main display area. The data is listed by agency name.

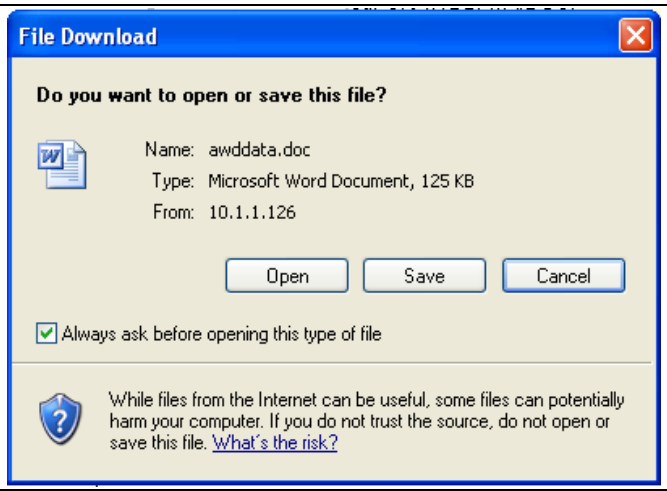
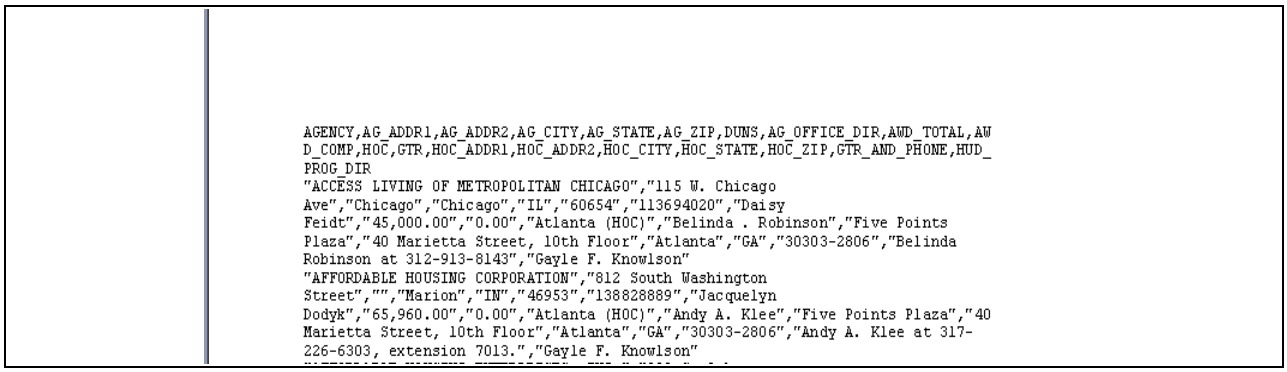


Figure 192.B. OM – Export: Agency Award/No Award Letters Data – File Download Window

7. Following the data downloading, your information will be provided in .doc form.



```
AGENCY,AG_ADDR1,AG_ADDR2,AG_CITY,AG_STATE,AG_ZIP,DUNS,AG_OFFICE_DIR,AWD_TOTAL,AW
D_COMP,HOC,GTR,HOC_ADDR1,HOC_ADDR2,HOC_CITY,HOC_STATE,HOC_ZIP,GTR_AND_PHONE,HUD_
PROG_DIR
"ACCESS LIVING OF METROPOLITAN CHICAGO","115 W. Chicago
Ave","Chicago","Chicago","IL","60654","113694020","Daisy
Feidt","45,000.00","0.00","Atlanta (HOC)","Belinda . Robinson","Five Points
Plaza","40 Marietta Street, 10th Floor","Atlanta","GA","30303-2806","Belinda
Robinson at 312-913-8143","Gayle F. Knowlson"
"AFFORDABLE HOUSING CORPORATION","812 South Washington
Street","","Marion","IN","46953","138828889","Jacquelyn
Dodyk","65,960.00","0.00","Atlanta (HOC)","Andy A. Klee","Five Points Plaza","40
Marietta Street, 10th Floor","Atlanta","GA","30303-2806","Andy A. Klee at 317-
226-6303, extension 7013.","Gayle F. Knowlson"
```

Figure 192.C. OM – Export: Agency Award/No Award Letters Data

8.7.2 Agency Name Check Review

Before making the official announcement of the results of the grant processing information needs to be reviewed. Agency Name Check Review report allows generate list of awardees as it will be used to create award letters via mail merge function. List will be reviewed and approved by HUD officials prior Award Letters generation.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Agency Name Check Review** hyperlink, this report appears in Excel format allowing you to view the following information:

a. Agency Name
b. Address
c. City
d. State
e. Zip Code
f. TIN Number
g. DUNS Number
h. HUD Office
i. Contact Name
j. Contact Phone Number

A1 AGENCIES NAME CHECK REVIEW REPORTING

	A	B	C	D	E	F	
1	AGENCIES NAME CHECK REVIEW REPORTING						
2	Single Family Housing Counseling Grant Awards FY 2009						
3	Agency	Address 1	Address 2	City	State	Zip	TIN
4	ABYSSINIAN DEVELOPMENT CORPORATION	4 W. 125 Street		New York	NY	10027	13-35
5	ACCESS LIVING OF METROPOLITAN CHICAGO	115 W. Chicago Ave	Chicago	Chicago	IL	60654	36-33
6	ACCOMACK-NORTHAMPTON PLANNING DISTRICT COMMISSSION	23372 Front Street	P.O. Box 417	Accomac	VA	23301	54-08
7	ACORN HOUSING CORPORATION	846 N Broad St, 2nd floor		Philadelphia	PA	19130-2234	72-10
8	ADAMS COUNTY HOUSING AUTHORITY	7190 Colorado Blvd 6th Fl		Commerce City	CO	80022-1812	84-07
9	ADMINISTRATION OF RESOURCES AND CHOICES	3003 S Country Club Suite 207		Tucson	AZ	85713	86-07
10	AFFORDABLE HOMES OF MILLVILLE ECUMENICAL	400 East Main St.	P.O. Box 241	Millville	NJ	08332	22-31
11	AFFORDABLE HOUSING ALLIANCE OF NEW JERSEY	59 Broad Street		Eatontown	NJ	07724	22-31
12	AFFORDABLE HOUSING CORPORATION	812 South Washington Street		Marion	IN	46953	35-19
13	AFFORDABLE HOUSING ENTERPRISES, INC.	333 S. 9th Street		Griffin	GA	30224	58-20
14	AFFORDABLE HOUSING, EDUCATION AND DEVELOPMENT, INC. (AHEAD)	161 Main St.		Littleton	NH	03561	22-31
15	ALABAMA COUNCIL ON HUMAN RELATIONS, INC	319 W Glenn Ave	PO Box 409	Auburn	AL	36831-0409	63-03
16	ALBANY COUNTY RURAL HOUSING ALLIANCE, INC.	24 Martin Road	PO Box 407	Voorheesville	NY	12186	14-16
17	ALLEGANY COUNTY COMMUNITY OPPORTUNITIES AND RURAL DEVELOPMENT (ACCORD) CORP.	84 Schuyler Street	P.O. Box 573	Belmont	NY	14813-1051	22-22
18	ALLIED CHURCHES TEACHING SELF-EMPOWERMENT CDC	1445 North 24th Street		Milwaukee	WI	52305-1803	39-18
	ANOKA COUNTY COMMUNITY ACTION						

agency_chk_rpt

Figure 193. OM – Export: Agency Name Check Review

8.7.3 Application Data

This report provides a spreadsheet of all relevant information for the grant processing period. It is useful for creating unique reports, validating information and sharing information.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Application Data** hyperlink, and the following spreadsheet appears.

Note: Figures 194.A. through 194.J. are continuation of Figure 272 horizontally.

	A	B	C	D	E
1	Agency ID	Agency	Fiscal Year	Address 1	Address 2
2	80003	RURAL HOUSING COUNSELING AGENCY	2006	200 Fair St	
3	80008	FAITHFUL HOUSING COUNSELING AGNECY	2006	21 New St.	

(data abbreviated)

394	82441	CENTRAL VERMONT HOUSING COUNSELING AGENCY	2006	105 US Route 302 - Berlin	

(data abbreviated)

Figure 194.A. OM – Export: Applications Data – Part 1

	F	G	H	I	J	K	L	M	N	O
1	City	State	Zip	TIN	DUNS #	Phone	Email	Application ID	Project #	Agency Type Name
2	Kingston	NY	12401-	22-2222222	122990980	845-333-0029-103	mallen@rhca.org	0398-123	HC060398123	LHCA
3	Binghamton	NY	13903-	16-1809090	089877879	607-790-0902	ssmith@aol.com	0398-128	HC060398128	LHCA

(data abbreviated)

394	Barre	VT	05641-	03-0123456	021343551	802-723-0934	msmith@cvhca.org	0398-063	HC060398063	LHCA

(data abbreviated)

Figure 194.B. OM – Export: Applications Data – Part 2

	P	Q	R	S	T	U	V	W	X	Y
1	Grant Type	Office Director	Office CEO/President	Delinquent	Faith Base	Colonias	Migrant Workers	HUD Office	Requested Amt.	Recommend Amt.
2	Comprehensive	Kevin O'Connor		N				Philadelphia (HOC)	56671	33014.6
3	Comprehensive	Laura Rhinehart		N				Philadelphia (HOC)	20000	20000

(data abbreviated)

394	Comprehensive	Mary Smith		N				Philadelphia (HOC)	50000	30411.68

(data abbreviated)

Figure 194.C. OM – Export: Applications Data – Part 3

Z	AA	AB	AC	AD	AE	AF	AG
Awarded Amt.	User ID of Award	User Name of Award	Award Date & Time	Affiliate of	Affiliate Name	Counseling Types	Primary Reviewer
33015	H00468	Donald Gillett	Aug 18 2006 8:08AM			RC PRL PPC PC MDM LM HOM HIR HEP HEC FHA DFC	H03232
20000	H00468	Donald Gillett	Aug 15 2006 2:35PM			RC PRL PPC PC MDM HIR HEP HEC DRC DFC	H03232

(data abbreviated)

394	30412	H00468	Donald Gillett	Aug 18 2006 7:45AM			PPC PC HOM HEC DRC DFC	H02102

(data abbreviated)

Figure 194.D. OM – Export: Applications Data – Part 4

	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ
1	Primary Rvwr Score	Reviewer 1	Rev 1 Score	Reviewer 2	Rev 2 Score	Reviewer 3	Rev 3 Score	Avg Score	Final Score	Client Projection that will be served
2	88	H02646	95	H06763	91			45.5	95	
3	96	H02646	94	H06763	96			48	95	

(data abbreviated)

394	87	H02134	90	H02122	87			43.5	91	858

(data abbreviated)

Figure 194.E. OM – Export: Applications Data – Part 5

	AR	AS	AT	AU
1	Client Projection (Committed) that will be served	Client Projection of Pre-Purchase Counseling that will purchase home	Client Projection (Committed) of Pre-Purchase Counseling that will purchase home	Client Projection of Pre-Purchase Counseling that are working and will become mortgage ready
2				
3				

(data abbreviated)

394		50		0

(data abbreviated)

Figure 194.F. OM – Export: Applications Data – Part 6

	AV	AW	AX	AY
1	Client Projection (Committed) of Pre-Purchase Counseling that are working and will become mortgage ready	Client Projection of Pre-Purchase Counseling that will not purchase a home	Client Projection (Committed) of Pre-Purchase Counseling that will not purchase a home	Client Projection of Default Counseling successfully avoiding foreclosure
2				
3				

(data abbreviated)

394		0		0

(data abbreviated)

Figure 194.G. OM – Export: Applications Data – Part 7

	AZ	BA	BB	BC
1	Client Projection (Committed) of Default Counseling successfully avoiding foreclosure	Client Projection of Rental Counseling	Client Projection (Committed) of Rental Counseling	Client Projection of Predatory Lending Counsel that have their mortgage modify, refinanced, or other to avoid foreclosure
2				
3				

(data abbreviated)

394		0		

(data abbreviated)

Figure 194.H. OM – Export: Applications Data – Part 8

	BD	BE	BF	BG	BH	BI	BJ	BK	BL	BM	BN	BO	BP	BQ	BR	BS	BT	BU	BV
1	Client Projection (Committed) of Predatory Lending Counsel that have their mortgage modify, refinanced, or other to avoid foreclosure	Zip 1	Zip 2	Zip 3	Zip 4	Zip 5	Zip 6	Zip 7	Zip 8	Zip 9	Zip 10	Zip 11	Zip 12	Zip 13	Zip 14	Zip 15	Zip 16	Zip 17	Zip 18
2		00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000
3		00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000

(data abbreviated)

394		05031	05032	05033	05036	05038	05039	05045	05051	05060	05065	05068	05072	05075	05077	05086	05442	05464	05602

(data abbreviated)

Figure 194.I. OM – Export: Applications Data – Part 9

	BW	BX	BY	BZ	CA	CB	CC	CD	CE	CF	CG	CH	CI	CJ	CK	CL	CM	CN	CO	CP	CQ	CR
1	Zip 19	Zip 20	Zip 21	Zip 22	Zip 23	Zip 24	Zip 25	Zip 26	Zip 27	Zip 28	Zip 29	Zip 30	Zip 31	Zip 32	Zip 33	Zip 34	Zip 35	Zip 36	Zip 37	Zip 38	Zip 39	Zip 40
2	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000
3	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000

(data abbreviated)

394	05602	05633	05641	05647	05648	05649	05651	05653	05655	05656	05660	05661	05663	05667	05669	05672	05676	05678	05747	05748	05767	05772

Figure 194.J. OM – Export: Applications Data – Part 10

8.7.4 Congressional Report Data

Report formatted by and given to HUD‟s Congressional liaison office to forward to Congress.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Congressional Report Data** hyperlink, and the following spreadsheet appears.

2. The following screen shows Congressional Report Data export spreadsheet. It displays agency information for those who received grant award(s), and their award(s) amount. If an agency received more than one award of different grant types, each award is displayed in one entry. The data is listed by State, and then by Recipient/Agency name.

	A	B	C	D	E	F	G	H	I	J	K	L
1	State	Recipient	Address	City	County	ZipCode	GrantType	GrantNumber	Amount	District	ContactName	ContactPhone
2	AK	HOUSING COUNSELING SERVICE OF ALASKA	208 E 4th Ave	Anchorage		99501	Comprehensive	0998-004	$55,162		Sharon Camarata	()
3	AL	ALABAMA HOUSING COUNSELING AGENCY	200 W Glenn Ave, PO Box 202	Auburn		36831	Comprehensive	0498-037	$23,400		Mishelle Kwang	()
4	AL	NORTHWEST ALABAMA HOUSING COUNSELING AGENCY	295 Thompson St	Florence		35630	Comprehensive	0498-120	$30,000		Ammy Deppe	()

(data abbreviated)

Figure 195. OM – Export: Congressional Report Data

8.7.5 Draw Down Report Process

Draw down processing is a tool to track and review agencies‟ spending of their grant award. When an agency submits their quarterly grant report, data should be entered into this section to record their results.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Draw Down Report Processing** hyperlink, the *Draw Down Reporting HUD Summary* screen appears, with the Agency Search function located in the second half of the screen.

2. To list agencies in a HUD Office, click the **HUD Office** name hyperlink under Office column.

Draw Down Reporting
HUD Summary
Draw Down Year : 2010

Office	Awarded Agencies	Total Grant	LOCCS Disbursements $(%)	Voucher Requests Q1 $(%)	Mid-Term $(%)	Q3 $(%)	Final $(%)	LOCCS Balance $(%)
Headquarters SF-HUD	25	$ 39,018,272.00	$ 0.00 (0.00%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 39,018,272.00 (100.00%)
Philadelphia (HOC)	179	$ 8,628,011.00	$ 0.00 (0.00%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 8,628,011.00 (100.00%)
Atlanta (HOC)	153	$ 7,014,736.00	$ 9,973.42 (0.14%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 7,004,762.58 (99.86%)
Denver (HOC)	101	$ 5,235,293.00	$ 0.00 (0.00%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 5,235,293.00 (100.00%)
Santa Ana (HOC)	41	$ 2,953,688.00	$ 0.00 (0.00%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 2,953,688.00 (100.00%)
All Offices	499	$ 62,850,000.00	$ 9,973.42 (0.02%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 62,840,026.58 (99.98%)

Print Export

Agency Search

Search Field: --Select-- | Compare Value: Is | Add Another Criteria

Search Reset

Figure 196. OM – Export: Draw Down Reporting – HUD Summary

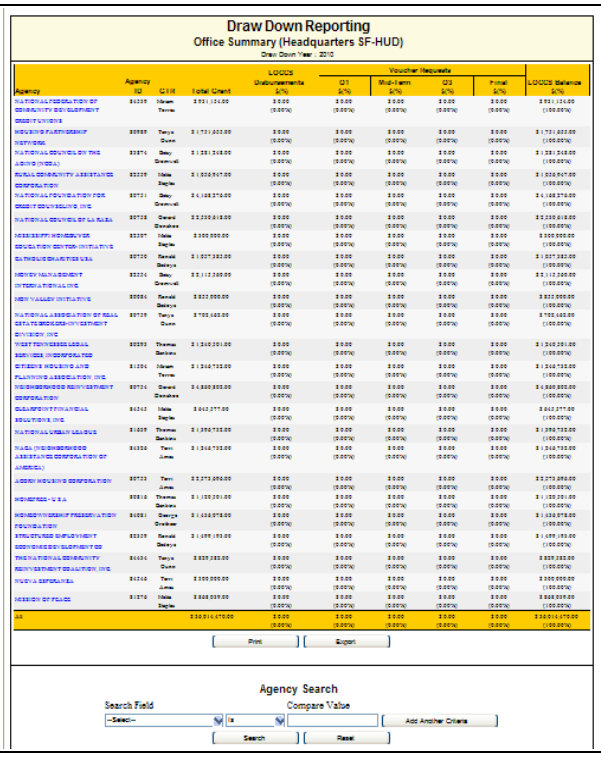


Figure 197. OM – Export: Draw Down Reporting – HUD Office HQ Summary

3. To export this data, Click the **Export** button**.** The *File Download* screen appears.

4. To open the document, Click the **Open** button. The Draw Down Reporting Excel file appears (see below). To save the file, Click the **Save** button**.** To cancel file download, Click the **Cancel** button.

Note: To perform a search, skip ahead to step 5.

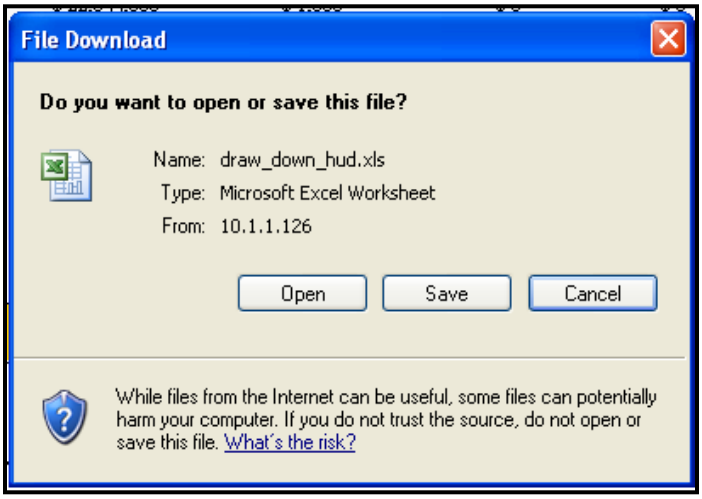
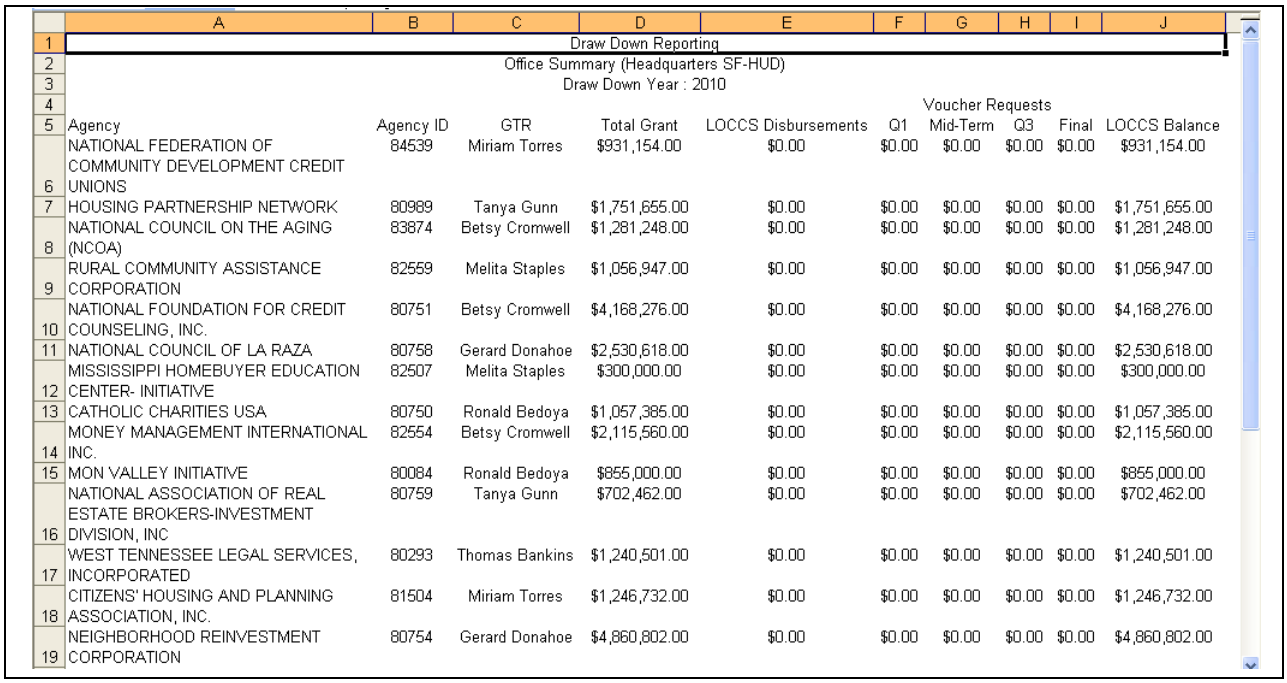


Figure 198.A. OM – Export: Draw Down Report Processing – File Download



Draw Down Reporting
Office Summary (Headquarters SF-HUD)
Draw Down Year : 2010

Agency	Agency ID	GTR	Total Grant	LOCCS Disbursements	Voucher Requests Q1	Mid-Term	Q3	Final	LOCCS Balance
NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS	84539	Miriam Torres	$931,154.00	$0.00	$0.00	$0.00	$0.00	$0.00	$931,154.00
HOUSING PARTNERSHIP NETWORK	80989	Tanya Gunn	$1,751,655.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,751,655.00
NATIONAL COUNCIL ON THE AGING (NCOA)	83874	Betsy Cromwell	$1,281,248.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,281,248.00
RURAL COMMUNITY ASSISTANCE CORPORATION	82559	Melita Staples	$1,056,947.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,056,947.00
NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	80751	Betsy Cromwell	$4,168,276.00	$0.00	$0.00	$0.00	$0.00	$0.00	$4,168,276.00
NATIONAL COUNCIL OF LA RAZA	80758	Gerard Donahoe	$2,530,618.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,530,618.00
MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE	82507	Melita Staples	$300,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$300,000.00
CATHOLIC CHARITIES USA	80750	Ronald Bedoya	$1,057,385.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,057,385.00
MONEY MANAGEMENT INTERNATIONAL INC.	82554	Betsy Cromwell	$2,115,560.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,115,560.00
MON VALLEY INITIATIVE	80084	Ronald Bedoya	$855,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$855,000.00
NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC	80759	Tanya Gunn	$702,462.00	$0.00	$0.00	$0.00	$0.00	$0.00	$702,462.00
WEST TENNESSEE LEGAL SERVICES, INCORPORATED	80293	Thomas Bankins	$1,240,501.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,240,501.00
CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.	81504	Miriam Torres	$1,246,732.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,246,732.00
NEIGHBORHOOD REINVESTMENT CORPORATION	80754	Gerard Donahoe	$4,860,802.00	$0.00	$0.00	$0.00	$0.00	$0.00	$4,860,802.00

Figure 198.B. OM – Export: Draw Down Reporting Export example

5. To search for agencies, complete your search criteria and Click the **Search** button**.** If no results are found, the follow screen appears.

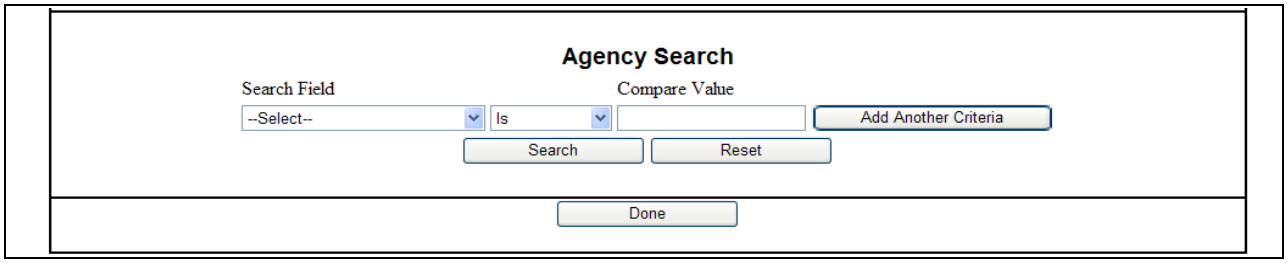


Figure 199.A. OM – Export: Draw Down Reporting Agency Search

6. If the system does find results matching your criteria for Agency Search, the following screen appears.

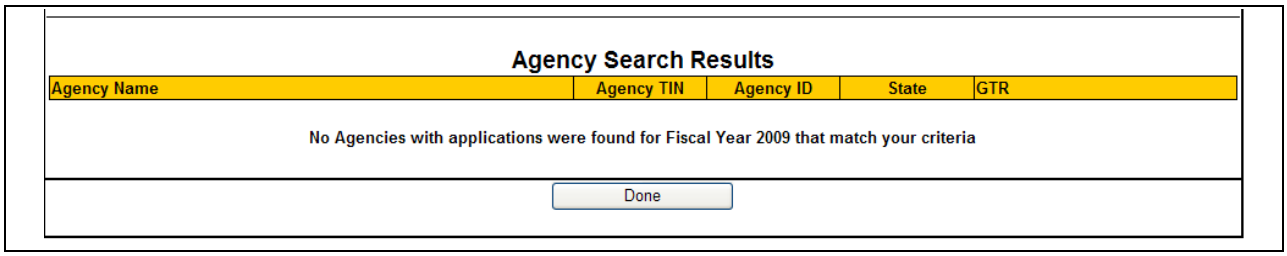
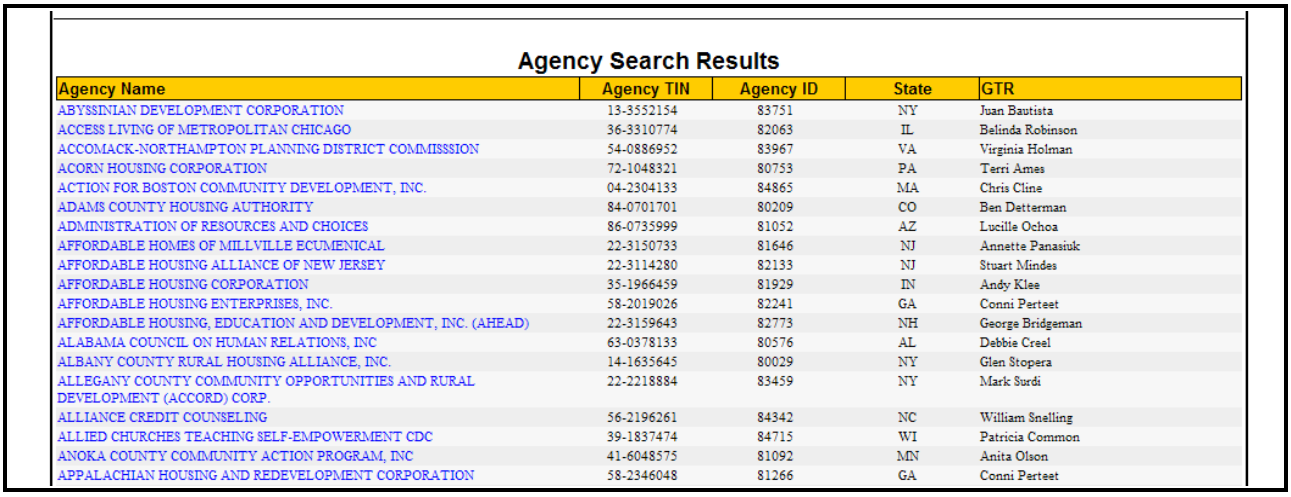


Figure 199.B. OM – Export: Draw Down Reporting Agency Search Results (No results)

7. To view an agency, click a hyperlink in the **Agency Name** column. The *Draw Down Reporting Agency Summary* screen appears.



Agency Search Results

Agency Name	Agency TIN	Agency ID	State	GTR
ABYSSINIAN DEVELOPMENT CORPORATION	13-3552154	83751	NY	Juan Bautista
ACCESS LIVING OF METROPOLITAN CHICAGO	36-3310774	82063	IL	Belinda Robinson
ACCOMACK-NORTHAMPTON PLANNING DISTRICT COMMISSSION	54-0886952	83967	VA	Virginia Holman
ACORN HOUSING CORPORATION	72-1048321	80753	PA	Terri Ames
ACTION FOR BOSTON COMMUNITY DEVELOPMENT, INC.	04-2304133	84865	MA	Chris Cline
ADAMS COUNTY HOUSING AUTHORITY	84-0701701	80209	CO	Ben Detterman
ADMINISTRATION OF RESOURCES AND CHOICES	86-0735999	81052	AZ	Lucille Ochoa
AFFORDABLE HOMES OF MILLVILLE ECUMENICAL	22-3150733	81646	NJ	Annette Panasiuk
AFFORDABLE HOUSING ALLIANCE OF NEW JERSEY	22-3114280	82133	NJ	Stuart Mindes
AFFORDABLE HOUSING CORPORATION	35-1966459	81929	IN	Andy Klee
AFFORDABLE HOUSING ENTERPRISES, INC.	58-2019026	82241	GA	Conni Perteet
AFFORDABLE HOUSING, EDUCATION AND DEVELOPMENT, INC. (AHEAD)	22-3159643	82773	NH	George Bridgeman
ALABAMA COUNCIL ON HUMAN RELATIONS, INC	63-0378133	80576	AL	Debbie Creel
ALBANY COUNTY RURAL HOUSING ALLIANCE, INC.	14-1635645	80029	NY	Glen Stopera
ALLEGANY COUNTY COMMUNITY OPPORTUNITIES AND RURAL DEVELOPMENT (ACCORD) CORP.	22-2218884	83459	NY	Mark Surdi
ALLIANCE CREDIT COUNSELING	56-2196261	84342	NC	William Snelling
ALLIED CHURCHES TEACHING SELF-EMPOWERMENT CDC	39-1837474	84715	WI	Patricia Common
ANOKA COUNTY COMMUNITY ACTION PROGRAM, INC	41-6048575	81092	MN	Anita Olson
APPALACHIAN HOUSING AND REDEVELOPMENT CORPORATION	58-2346048	81266	GA	Conni Perteet

Figure 200.A. OM – Export: Draw Down Report Processing – Agency Search Results (with results)

Note: Provided below is an example of a Draw Down Reporting Agency Summary.

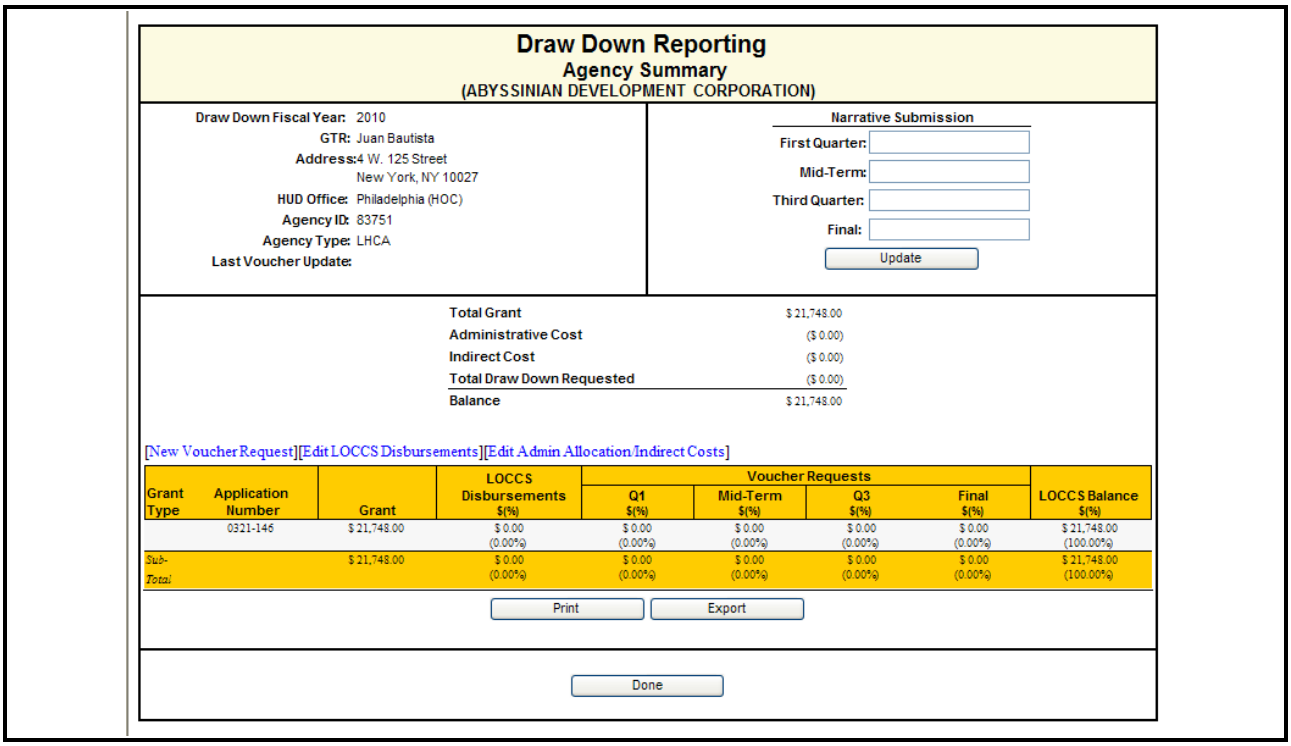


Figure 200.B. OM – Export: Draw Down Reporting – Agency Summary

8. To make a new voucher request, click **New Voucher Request**. The *New Voucher Request* screen appears.

9. Complete the form and Click the **Save** button to save the request. Click the **Cancel** button to cancel it. You will return to the *Draw Down Reporting* screen.

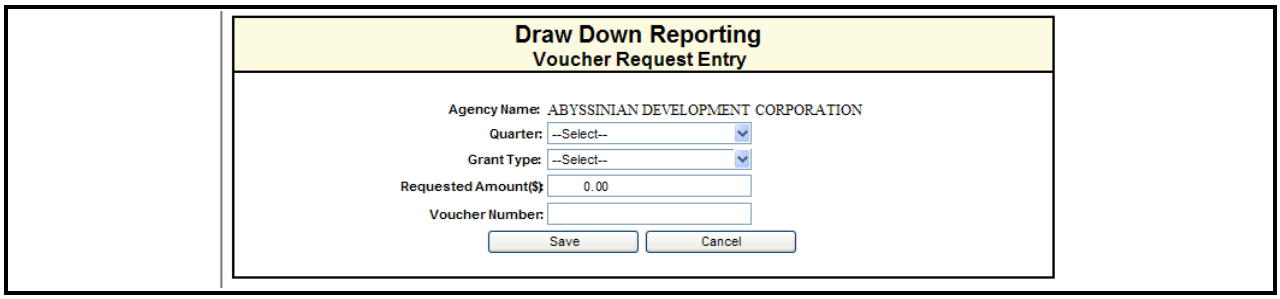


Figure 201.A. OM – Export: Draw Down Reporting – Voucher Request Entry

Draw Down Reporting
Agency Summary
(HOUSING COUNSELING SERVICE OF ALASKA)

Draw Down Fiscal Year: 2007
GTR: Sean Robinson
Address: 208 E 4th Ave
Anchorage, AK 99501
HUD Office: Santa Ana (HOC)
Agency ID: 80208
Agency Type: LHCA
Last Voucher Update: 02/20/2007

Narrative Submission
First Quarter:
Mid-Term:
Third Quarter:
Final:
Update

Total Grant	$ 55,162
Administrative Cost	($ 0)
Indirect Cost	($ 0)
Total Draw Down Requested	($ 15,000)
Balance	$ 40,162

[New Voucher Request][Edit LOCCS Disbursements][Edit Admin Allocation/Indirect Costs]

Grant Type	Application Number	Grant	LOCCS Disbursements $(%)	Voucher Requests Q1 $(%)	Mid-Term $(%)	Q3 $(%)	Final $(%)	LOCCS Balance $(%)
Comprehensive	0998-004	$ 55,162	$ 0 (0.00%)	$ 15,000 (27.19%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 55,162 (100.00%)
Sub-Total		$ 55,162	$ 0 (0.00%)	$ 15,000 (27.19%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 55,162 (100.00%)

Print Export

Comprehensive

Draw Down Request	Voucher Number	Quarter	Date	Action
$ 15,000	2007-001	Q1	02/20/2007	[Edit][Delete]
$ 15,000	*Sub-Total*			

Done

Figure 201.B. OM – Export: Draw Down Reporting – Agency Summary with Voucher Information

10. To edit a LOCCS Disbursement Update, click the **Edit LOCCS Disbursements** hyperlink. The *Draw Down Reporting LOCCS Disbursement* screen appears.

11. Edit the current LOCCS disbursement amount in the **Current LOCCS Disbursement Amount** field. Click the **Save** button to save, or **Cancel** button to cancel. You will return to the *Draw Down Reporting Agency Summary* screen.

Draw Down Reporting
LOCCS Disbursements Update

Agency Name: ABYSSINIAN DEVELOPMENT CORPORATION

Grant Type	Previous LOCCS Disbursement Amount	Current LOCCS Disbursement Amount
	$ 0.00	$

Save Cancel

Figure 202.A. OM – Export: Draw Down Reporting LOCCS Disbursements Update

12. To edit the Administrative Allocation/Indirect Costs, click **Edit Admin Allocation/Indirect Costs** hyperlink. The *Draw Down Reporting Grant Application Selection* screen appears.

[New Voucher Request][Edit LOCCS Disbursements][Edit Admin Allocation/Indirect Costs]

Grant Type	Application Number	Grant	LOCCS Disbursements $(%)	Voucher Requests Q1 $(%)	Mid-Term $(%)	Q3 $(%)	Final $(%)	LOCCS Balance $(%)
Comprehensive	0998-004	$ 55,162	$ 10,000 (18.13%)	$ 15,000 (27.19%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 45,162 (81.87%)
Sub-Total		$ 55,162	$ 10,000 (18.13%)	$ 15,000 (27.19%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 45,162 (81.87%)

Print Export

Figure 202.B. OM – Export: Draw Down Reporting – LOCCS Information in Agency Summary Page

13. Click the **Edit** hyperlink in the **Grant Type** entry you wish to input/edit the Administrative Allocation and/or Indirect Costs. The *Sub-Agency Grant Allocation* screen appears.

Draw Down Reporting
Grant Application Selection

Agency Name: ABYSSINIAN DEVELOPMENT CORPORATION

Grant Type	Grant Awarded	
	$ 21,748.00	Edit

Cancel

Figure 203.A. OM – Export: Draw Down Reporting – Grant Application Selection

14. Key in data into Administrative Allocation and Indirect Cost fields, and click the Submit button. The screen is refreshed with data have been saved message. Following is the screen of relevant section.

Sub-Agency Grant Allocation

Instructions: Check to ensure all sub-agencies are listed below. If an agency is not listed, go to Parent Agency Profile and add sub-agency to its list. Likewise remove any agencies that are not assigned to your organization. If Sub-Agency has incorrect information, the Agency ID is a hyperlink to go directly to agency's profile.

This page serves several functions. Primarily, it serves as a tool to sub-allocate the grant funds to the appropriate sub-agencies within your organization. Agencies that are sub-allocated will become approved and active in HUD's program for the funding fiscal year. Agencies not sub-allocated will be disapproved for the funding year. This page also allows input to the number of counselors each agency employs and the number of clients the agency plans to service under HUD's program. The counselor numbers can be adjusted throughout the year and can be accessed from the agency's profile page. The client number cannot be adjusted after the input suspense date is reached.

Grant allocation can be initially distributed several ways using automated tools provided. Allocate evenly distributes funds evenly among all agencies. Allocation by counselors and by clients distributes funds proportionally by these values among the agencies. Sub-allocation for agencies can always be edited for specific values. There are also places to allocated funds for Administrative and Indirect costs.

Allocation of funds must have a balance = zero ($0). The balance value is at the bottom of page. If the balance is not = $0, any funding changes made will not be saved in order for you to correctly make the appropriate allocations.

Parent Agency Name: **HOUSING COUNSELING SERVICE OF ALASKA**
HUD Office: **Santa Ana (HOC)**
Application ID: **0998-004**
Parent Agency ID: **80208**
Parent Agency Type: **LHCA**
Grant Type: **Comprehensive**

Grant Awarded: $55,162
Administrative Allocation: -$ 0
Indirect Cost: -$ 0
Available Funds: $55,162

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

Submit | Print | Export | Cancel

Sub-Agency	Agency ID	Agency Type	# of Counselors	# of Projected Clients	Sub-Allocation
SUB-ALLOCATION TOTALS:	0		0	0	$0
BALANCE:					$55,162

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

Submit | Print | Export | Cancel

Figure 203.B. OM – Export: Draw Down Reporting – Sub-Agency Grant Allocation Screen

15. Check to ensure all sub-agencies are listed below. If an agency is not listed, go to Parent Agency Profile and add sub-agency to its list. Likewise remove any agencies that are not assigned to your

organization. If Sub-Agency has incorrect information, the Agency ID is a hyperlink to go directly to agency's profile.

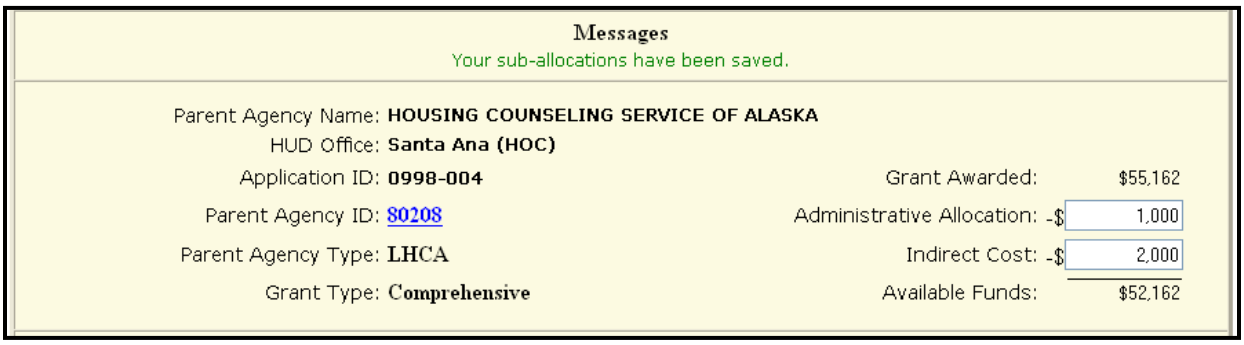


Figure 203.C. OM – Export: Draw Down Reporting – Sub-Agency Grant Allocation Screen – Administrative Allocation and Indirect Cost Input section

8.7.6 Funding Aggregate Report

A complete summary report displaying totals for each category, type and office listed. This is a great snap shot view of the results.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Funding Aggregate Report** hyperlink, the *File Download* screen appears.

2. To open the file, click the **Open** button; the spreadsheet opens in HCS main display area. To save the file, click the **Save** button. To cancel file download, click the **Cancel** button.

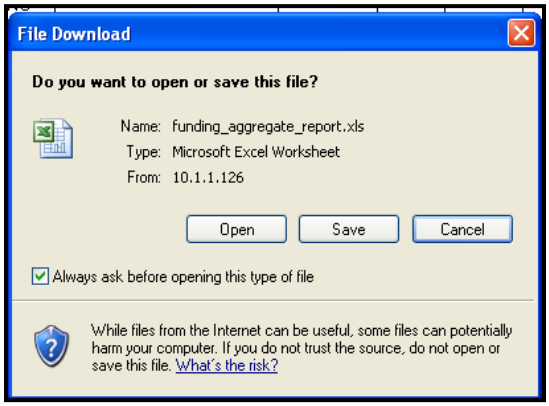


Figure 204.A. OM – Export: Funding Aggregate Report – File Download Window

Note: Following is the report displayed in HCS main display area.

A1 U.S. Department of Housing and Urban Development

U.S. Department of Housing and Urban Development
FY 2010 Housing Counseling Grants
FY 2009 Funds Awarded

Application Type	HUD-Approved Independent Agencies	Grant Request Agencies	Awarded Agencies	Requested Applications	Awarded Applications	NOFA Allocated	Requested	Recommended	Awarded
National/Regional Intermediary									
Intermediary (COMP)		25	25	25	25	$25,727,323.00	$53,474,994.28	$48,800,841.28	$25,727,323.00
Intermediary (HECM)		5	5	5	5	$6,500,000.00	$8,580,390.00	$8,580,390.00	$6,500,000.00
Intermediary (LDRC)		9	9	9	9	$992,677.00	$1,209,220.00	$1,000,000.00	$992,677.00
Intermediary (FLMF)		8	1	8	1	$798,272.00	$6,410,896.00	$1,000,000.00	$798,272.00
Intermediary (TRNG)		3	3	3	3	$5,000,000.00	$8,000,000.00	$0.00	$5,000,000.00
HQ Intermediary Total	23	25	25	50	43	$39,018,272.00	$77,675,500.28	$59,381,231.28	$39,018,272.00
LHCA									
Philadelphia (LHCA - COMP)		201	169	201	169	$17,111,728.00	$15,746,509.33	$0.00	$6,082,506.00
Philadelphia (LHCA - HECM)		18	17	18	17	$1,000,000.00	$331,077.00	$0.00	$281,077.00
Philadelphia (LHCA - LDRC)		50	40	50	40	$904,358.00	$923,396.80	$0.00	$289,322.00
Philadelphia LHCA Total	343	201	169	269	226	$19,016,086.00	$17,000,983.13	$0.00	$6,652,905.00
Atlanta (LHCA - COMP)		174	149	174	149	$0.00	$13,697,823.00	$0.00	$5,899,008.00
Atlanta (LHCA - HECM)		16	13	16	13	$0.00	$452,000.00	$0.00	$322,342.00
Atlanta (LHCA - LDRC)		47	40	47	40	$0.00	$971,721.00	$0.00	$332,743.00
Atlanta LHCA Total	326	174	149	237	202	$0.00	$15,121,544.00	$0.00	$6,554,093.00
Denver (LHCA - COMP)		105	95	105	95	$0.00	$8,751,328.00	$0.00	$3,736,178.00
Denver (LHCA - HECM)		12	12	12	12	$0.00	$230,508.00	$0.00	$197,700.00
Denver (LHCA - LDRC)		20	19	20	19	$0.00	$416,720.00	$0.00	$160,428.00
Denver LHCA Total	224	105	95	137	126	$0.00	$9,398,556.00	$0.00	$4,094,306.00
Santa Ana (LHCA - COMP)		40	37	40	37	$0.00	$4,168,568.61	$0.00	$1,394,036.00
Santa Ana (LHCA - HECM)		8	8	8	8	$0.00	$198,881.00	$0.00	$198,881.00
Santa Ana (LHCA - LDRC)		17	15	17	15	$0.00	$385,102.00	$0.00	$121,865.00

hcgr1810 / Sheet2 / Sheet3

Figure 204.B. OM – Export: Funding Aggregate Report

8.7.7 HUD-1044

This report is the grant award agreement each agency must sign.

This is a form using Microsoft Mail Merge function. Review the 1044 document and enter any common information that will be in all documents created to save time and effort. Unique information will be merge creating individual agency 1044 forms.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **HUD-1044** hyperlink, the *Data Filter* screen appears.

2. Select the proper data filter and click the **OK** button, the *Download* screen appears. If you prefer to create one agency report at a time, select the „Single Agency". To create in mass all reports within a HOC, select the „Single HOC" button.

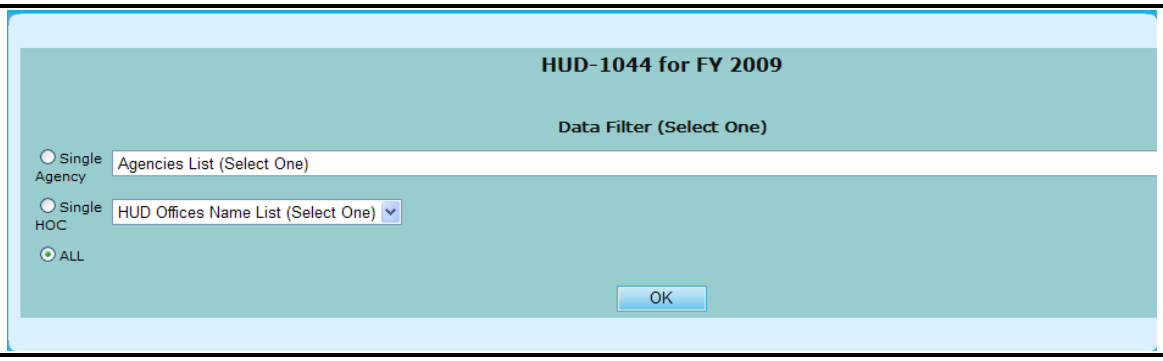
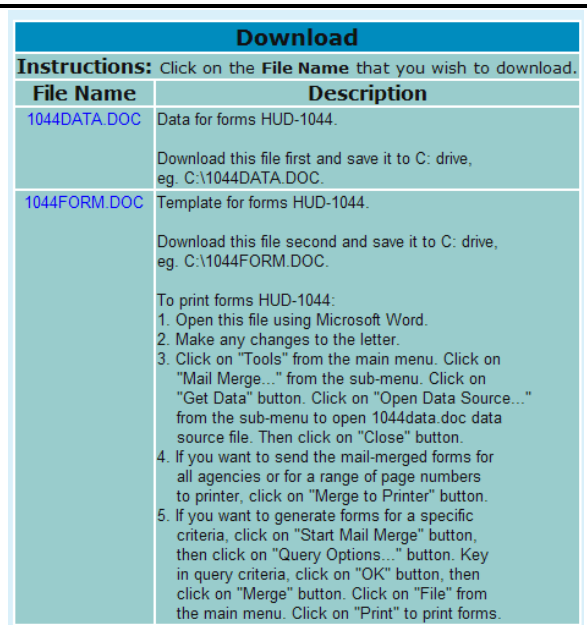


Figure 205. OM – Export: HUD-1044 – Data Filter

3. You can click the **1044DATA.DOC** hyperlink to download HUD-1044 data to a Microsoft Word file. Or, you can click the **1044FORM.DOC** hyperlink to download mail merge template of HUD-1044 form to a Microsoft Word file. If you click the **1044DATA.DOC** hyperlink, following *File Download* screen appears.



Download

Instructions: Click on the **File Name** that you wish to download.

File Name	Description
1044DATA.DOC	Data for forms HUD-1044. Download this file first and save it to C: drive, eg. C:\1044DATA.DOC.
1044FORM.DOC	Template for forms HUD-1044. Download this file second and save it to C: drive, eg. C:\1044FORM.DOC. To print forms HUD-1044: 1. Open this file using Microsoft Word. 2. Make any changes to the letter. 3. Click on "Tools" from the main menu. Click on "Mail Merge..." from the sub-menu. Click on "Get Data" button. Click on "Open Data Source..." from the sub-menu to open 1044data.doc data source file. Then click on "Close" button. 4. If you want to send the mail-merged forms for all agencies or for a range of page numbers to printer, click on "Merge to Printer" button. 5. If you want to generate forms for a specific criteria, click on "Start Mail Merge" button, then click on "Query Options..." button. Key in query criteria, click on "OK" button, then click on "Merge" button. Click on "File" from the main menu. Click on "Print" to print forms.

Figure 206.A. OM – Export: HUD-1044 – Download Screen

4. To open the file, click the **Open** button, the data file appears in a separate window (see the figure below, in which data is ordered by State code, city name, and then by agency name). To save the

file to your hard drive or other device, click the **Save** button. To cancel the file download, click the **Cancel** button.

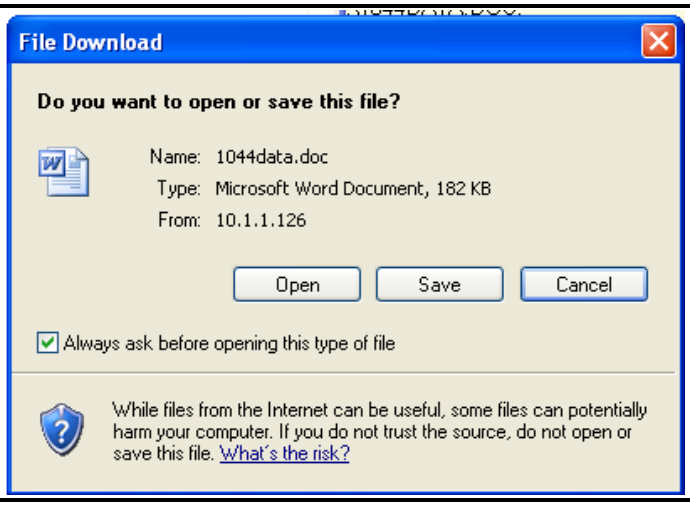
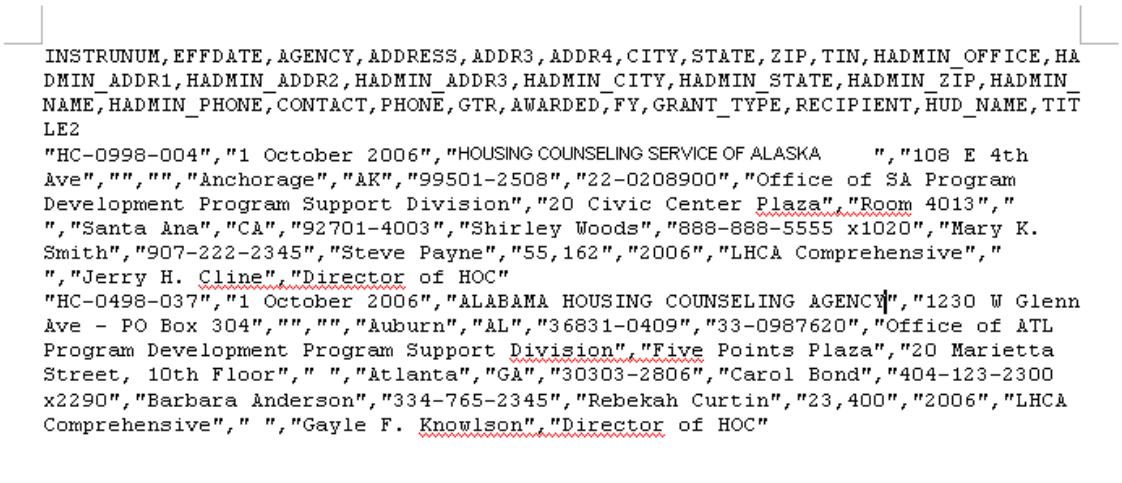


Figure 206.B. OM – Export: HUD-1044 Download – File Download Window

Note: Provided below is an example of the HUD-1044 document.



```
INSTRUNUM,EFFDATE,AGENCY,ADDRESS,ADDR3,ADDR4,CITY,STATE,ZIP,TIN,HADMIN_OFFICE,HA
DMIN_ADDR1,HADMIN_ADDR2,HADMIN_ADDR3,HADMIN_CITY,HADMIN_STATE,HADMIN_ZIP,HADMIN_
NAME,HADMIN_PHONE,CONTACT,PHONE,GTR,AWARDED,FY,GRANT_TYPE,RECIPIENT,HUD_NAME,TIT
LE2
"HC-0998-004","1 October 2006","HOUSING COUNSELING SERVICE OF ALASKA     ","108 E 4th
Ave","","","Anchorage","AK","99501-2508","22-0208900","Office of SA Program
Development Program Support Division","20 Civic Center Plaza","Room 4013","
","Santa Ana","CA","92701-4003","Shirley Woods","888-888-5555 x1020","Mary K.
Smith","907-222-2345","Steve Payne","55,162","2006","LHCA Comprehensive","
","Jerry H. Cline","Director of HOC"
"HC-0498-037","1 October 2006","ALABAMA HOUSING COUNSELING AGENCY","1230 W Glenn
Ave - PO Box 304","","","Auburn","AL","36831-0409","33-0987620","Office of ATL
Program Development Program Support Division","Five Points Plaza","20 Marietta
Street, 10th Floor"," ","Atlanta","GA","30303-2806","Carol Bond","404-123-2300
x2290","Barbara Anderson","334-765-2345","Rebekah Curtin","23,400","2006","LHCA
Comprehensive"," ","Gayle F. Knowlson","Director of HOC"
```

(data abbreviated)

Figure 206.C. OM – Export: HUD-1044 Data File

5. If you select to download the HUD-1044 form template, the HUD-1044 mail merge template screen appears.

Assistance Award/Amendment

U.S. Department of Housing and Urban Development
Office of Administration

1. Assistance Instrument ☐ Cooperative Agreement ☒ Grant	2. Type of Action ☒ Award ☐ Amendment
3. Instrument Number «INSTRUNUM» 4. Amendment Number	5. Effective Date of this Action «EFFDATE» 6. Control Number
7. Name and Address of Recipient «AGENCY» «ADDRESS» «ADDR3» «ADDR4» «CITY», «STATE» «ZIP»	8. HUD Administering Office «HADMIN_OFFICE» «HADMIN_ADDR1» «HADMIN_ADDR2» «HADMIN_ADDR3» «HADMIN_CITY», «HADMIN_STATE» «HADMIN_ZIP»
TIN NUMBER: «TIN»	8a. Name of Administrator «HADMIN_NAME» 8b. Telephone Number «HADMIN_PHONE»
10. Recipient Project Manager «CONTACT» «PHONE»	9. HUD Government Technical Representative «GTR»
11. Assistance Arrangement ☒ Cost Reimbursement ☐ Cost Sharing ☐ Fixed Price 12. Payment Method ☐ Treasury Check Reimbursement ☐ Advance Check ☒ Automated Clearinghouse	13. HUD Payment Office CFO Accounting Center/HUD PO Box 901013 Fort Worth, TX 76101
14. Assistance Amount	15. HUD Accounting and Appropriation Data
Previous HUD Amount $	15a. Appropriation Number 15b. Reservation number
HUD Amount this action $«AWARDED»	
Total HUD Amount $«AWARDED»	Amount Previously Obligated $
Recipient Amount $	Obligation by this action $«AWARDED»
Total Instrument Amount $«AWARDED»	Total Obligation $«AWARDED»

16. Description

FY «FY» - HOUSING COUNSELING GRANT VOUCHER UNDER LOCCS BUDGET LINE ITEM 9500.

GRANT TYPE: «GRANT_TYPE»

17. ☒ Recipient is required to sign and return three (3) copies of this document to the HUD Administering Office	18. ☐ Recipient is not required to sign this document.
19. Recipient (By Name) «RECIPIENT»	20. HUD (By Name) «HUD_NAME»
Signature & Title Date (mm/dd/yyyy)	Signature & Title «TITLE2» Date (mm/dd/yyyy)

form HUD-1044 (8/90)
ref. Handbook 2210.17

Figure 206.D. OM – Export: HUD-1044 Form – Mail Merge Template

8.7.8 IRS Delinquent Data

The report formatted by and given to the HUD Grant Office who forwards it to the IRS. Coordinate with the HUD Grant Office to ensure the format is correct and no changes are required.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **IRS Delinquent Data** hyperlink, the *Delinquent Federal Debt Agency List for FY 2006* options selection screen appears.

2. Select to search on either **Agencies that Indicate YES** or **Agencies that Indicate NO**, and then click the **OK** button. The *File Download* window appears.

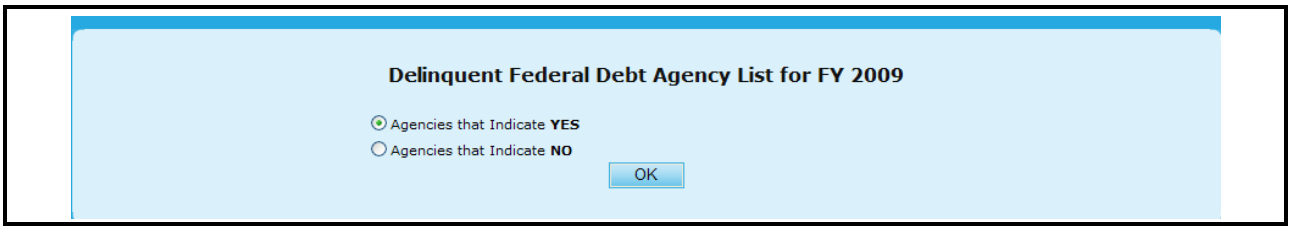


Figure 207. OM – Export: IRS Delinquent Data – Options Selection Screen

3. To open the file, click the **Open** button; the file is displayed in HCS main display area. To save file, click the **Save** button. To cancel file download, click the **Cancel** button**.**

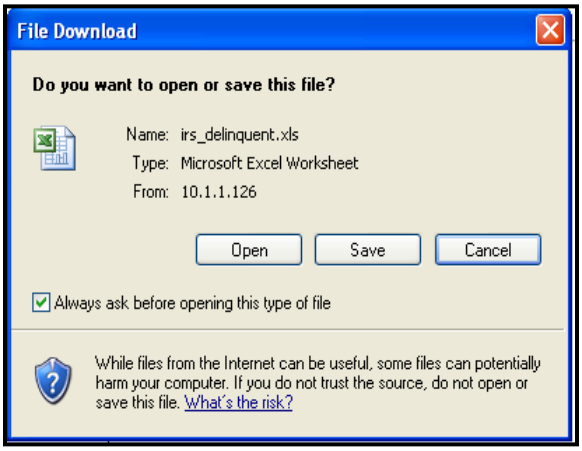


Figure 208.A. OM – Export: IRS Delinquent Data – File Download Window

4. The following screen shows the IRS Delinquent Data export spreadsheet for agency that has delinquent federal debt. It displays agency information for those who received grant award(s), and their total awarded amount. The data is listed by agency name.

	A	B	C	D	E	F	G	H	I	J	K	L
1	FEDERAL DEBT - AGENCIES REPORTING - YES											
2	Single Family Housing Counseling Grant Awards FY 2006											
3	Agency	Address 1	Address 2	City	State	Zip	TIN	DUNS #	HUD Office	Contact Name	Contact Phone	Award Amount
4	AREA COMMITTEE HOUSING COUNSELING AGENCY	200 Main Street		Athens	GA	30603	55-0978790	079898989	Atlanta (HOC)	John Hildreth	706-555-6666-20	$32,017

Figure 208.B. OM – Export: IRS Delinquent Data

5. If there is no data returned for the selection option, following message appears.

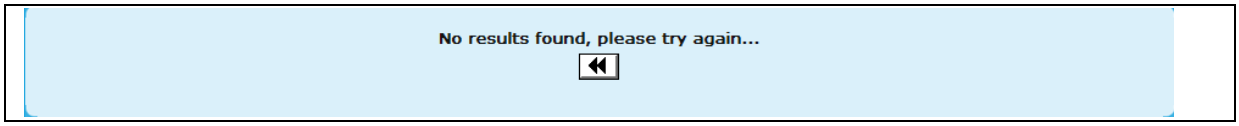


Figure 209. OM – Export: IRS Delinquent Data – No Results Message

8.7.9 List of Awardees

This is a report to be published in the Federal Register announcing awarded agencies.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **List of Awardees** hyperlink, the *Download* screen appears.

2. Click the **REGIDATA.DOC** hyperlink located in the **File Name** column, following *File Download* window appears.

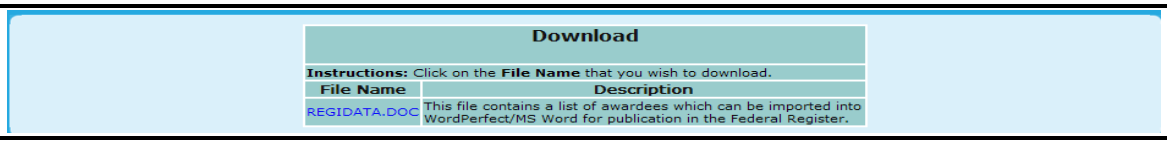


Figure 210. OM – Export: List of Awardees – Download

3. Click the **Open** button, the file content is displayed in HCS main display area. Click the **Save** button, a *Save As* window appears; follow the direction to save the file to hard drive or other storage device. Click the **Cancel** button to cancel file download. . This saved file will be forwarded to appropriate office to have it published in the Federal Register.

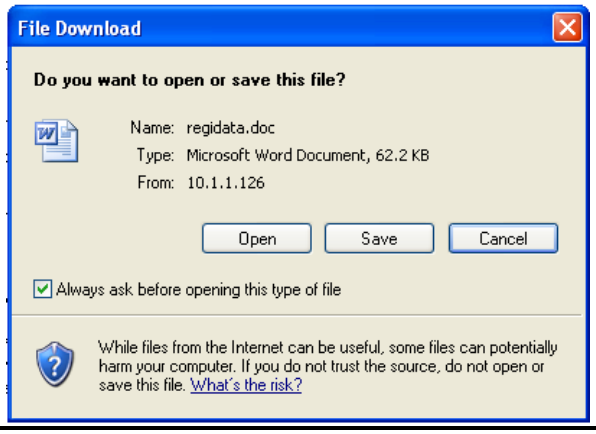


Figure 211.A. OM – Export: List of Awardees -File Download window

4. In the file, data is listed by grant type, grant category, HUD office name, and agency name order. As following figure shows, each data block contains agency name, address, grant type, and awarded grant amount.

```
INTERMEDIARY ORGANIZATIONS (17)

Headquarters SF-HUD

ADVANCED HOUSING COUNSELING CORPORATION
800 N Broad St, 2nd floor
Philadelphia, PA 19130-2234
Grant Type: Comprehensive
Amount Awarded:   $1,821,596

ADVANCING COUNCIL CORPORATION
800 12th Street, NW, Suite 200
Washington, DC 20036-
Grant Type: Comprehensive
Amount Awarded:   $1,145,894

CITIZEN HOUSING COUNSELING ORGANIZATION
10 Tremont Street, Suite 202
Boston, MA 02108-
Grant Type: Comprehensive
Amount Awarded:     $901,000

HOMEFREE HOUSING COUNSELING CORPORATION
300 Riggs Rd NE
Washington, DC 20011-2534
Grant Type: Comprehensive
Amount Awarded:   $1,218,655

INTERNATIONAL CHARITIES ORGANIZATION
1200 King Street
Alexandria, VA 22314
Grant Type: Comprehensive
Amount Awarded:     $782,088

MISSION HOUSING COUNSELING ORGANIZATION
805 East Fifth Avenue
Flint, MI 48503-
Grant Type: Comprehensive
Amount Awarded:     $563,805

MON STREAM HOUSING COUNSELING, INC.
301 E. 8th Avenue
Homestead, PA 15120-1517
Grant Type: Comprehensive
Amount Awarded:   $1,000,000
```

Figure 211.B. OM – Export: List of Awardees

8.7.10 Procurement Accounting Data

This report is formatted and sent to the CFO to reserve grant funding. It is necessary to coordinate with the finance office to gather updates and added information necessary to add into columns that HCS does not populate.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Procurement Accounting Spreadsheet** hyperlink, to view this file.

Note: The following figures show the content of Procurement Accounting Spreadsheet. Please note that Figures 212.A. through 212.D. are a continuation of Figure 212 horizontally.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	BATCH-ID	TRANS-CODE	TRANS-MOD	PROG-CODE	FISCYR	ALOT-NO	RO-NO	AO-NO	DOC-NO	PROJ-NO	AMOUNT	EFF-DATE	FED-NON	FILLER
2	3	3	2	3	1	1	2	2	6	15	13	8	1	
3					8	6	00	97	NEW	HC060000001	782,088			
4					8	6	00	97	NEW	HC060000002	1,145,894			
5					8	6	00	97	NEW	HC060000003	1,291,416			

Figure 212.A. OM – Export: Procurement Accounting Spreadsheet, Part I

	O	P	Q	R	S	T	U	V	W	X
1	SCHED-NO	LOCCS-IND	BATCH-I	METRO-ID	CONTRACT-TYPE	UNITS	APPLICANT-NAME	CONTR-AUTH	TERM	ELDER-UNITS
2										
3							INTERNATIONAL CHARITIES ORGANIZATION			
4							ADVANCING COUNCIL CORPORATION			
5							NEIGHBORHOOD REINVESTMENT CORPORATION			

Figure 212.B. OM – Export: Procurement Accounting Spreadsheet, Part 2

	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	SECOND-PRO	STATE	FILLE	CONTINUS-MARK	BATCH	OBJECT-CLASS	FISCAL-YR-END	EXECUT-DATE	INIT-CONTR-DATE	CONTR-EXPIRE-DATE
2		2								
3		VA								
4		DC								
5		DC								

Figure 212.C. OM – Export: Procurement Accounting Spreadsheet, Part 3

AI	AJ	AK	AL	AM	AN
INIT-EXECUT-DATE	CONTRACT-NO	PROJ-RESV	176-FLAG	FILL	CONTINUE-MARK2

Figure 212.D. OM – Export: Procurement Accounting Spreadsheet, Part 4

8.7.11 Public Affairs Report

This report is given to the Public Affairs office to be published showing awarded agencies. This office dictates on the format of the report.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Public Affairs Report** hyperlink, the *Public Affairs Report for FY 20XX* options selection screen appears.

2. Select to search on **National & Regional Housing Counseling Grantees**, **Local Housing Counseling Grantees**, **Multi-State Agencies**, **State Housing Finance Agencies**, or **All** and then click the **OK** button.

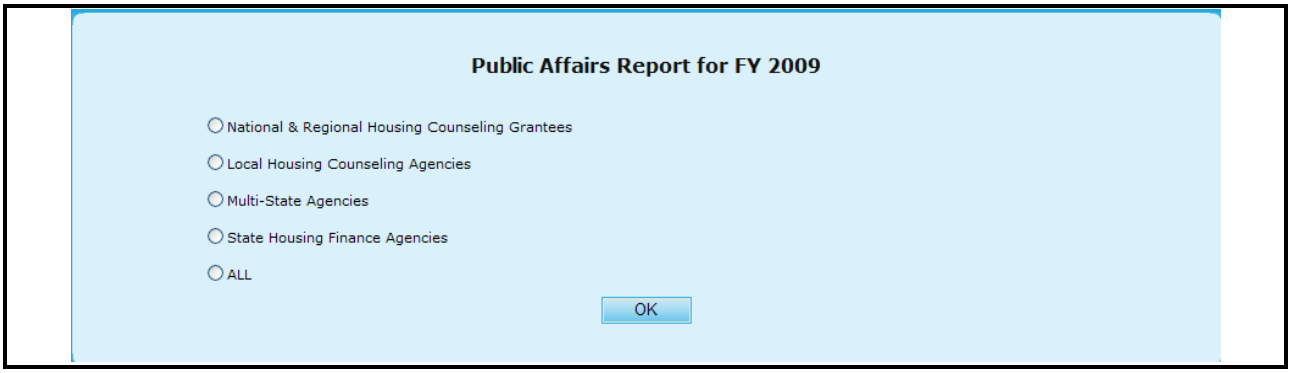


Figure 213. OM – Export: Public Affairs Report – Options Selection Screen

Note: The following screen shows the report of National & Regional Housing Counseling Grantees, which is listed by State and then by City order.

HOUSING COUNSELING GRANTEES
FOR FISCAL YEAR 2009

STATE	CITY	NATIONAL & REGIONAL HOUSING COUNSELING GRANTEES	AWARDED	GRANT TYPE
CALIFORNIA				
California	Oakland	NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC	$552,462.00	COMP
California	Oakland	NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC	$150,000.00	LDRC
California	West Sacramento	RURAL COMMUNITY ASSISTANCE CORPORATION	$994,270.00	COMP
California	West Sacramento	RURAL COMMUNITY ASSISTANCE CORPORATION	$62,677.00	LDRC
		STATE TOTAL	1759409	
DC				
District of Columbia	Washington	NATIONAL COUNCIL OF LA RAZA	$1,120,501.00	COMP
District of Columbia	Washington	NATIONAL COUNCIL OF LA RAZA	$150,000.00	LDRC
District of Columbia	Washington	NATIONAL COUNCIL OF LA RAZA	$1,260,117.00	TRNG
District of Columbia	Washington	NATIONAL COUNCIL ON THE AGING (NCOA)	$741,808.00	COMP
District of Columbia	Washington	NATIONAL COUNCIL ON THE AGING (NCOA)	$539,440.00	HECM
District of Columbia	Washington	NEIGHBORHOOD REINVESTMENT CORPORATION	$1,120,501.00	COMP
District of Columbia	Washington	NEIGHBORHOOD REINVESTMENT CORPORATION	$500,000.00	HECM
District of Columbia	Washington	NEIGHBORHOOD REINVESTMENT CORPORATION	$3,240,301.00	TRNG
District of Columbia	Washington	THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC.	$300,000.00	COMP
District of Columbia	Washington	THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC.	$30,000.00	LDRC
District of Columbia	Washington	THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC.	$499,582.00	TRNG
		STATE TOTAL	9502250	

(data abbreviated)

Figure 214. OM – Export: Public Affairs Report

8.8 HCS Archive

Upon selecting the HCS Archive hyperlink, you will be prompted to a new screen where you will be able to access archived reports. The specific reports are:

- Application Progress Status
- Application Score Status
- Awards Report by Agency
- Awards Report by Office
- Awards Report by State
- Funding Recommendation
- Strength/Weakness All Factors
- Strength/Weakness by Factor

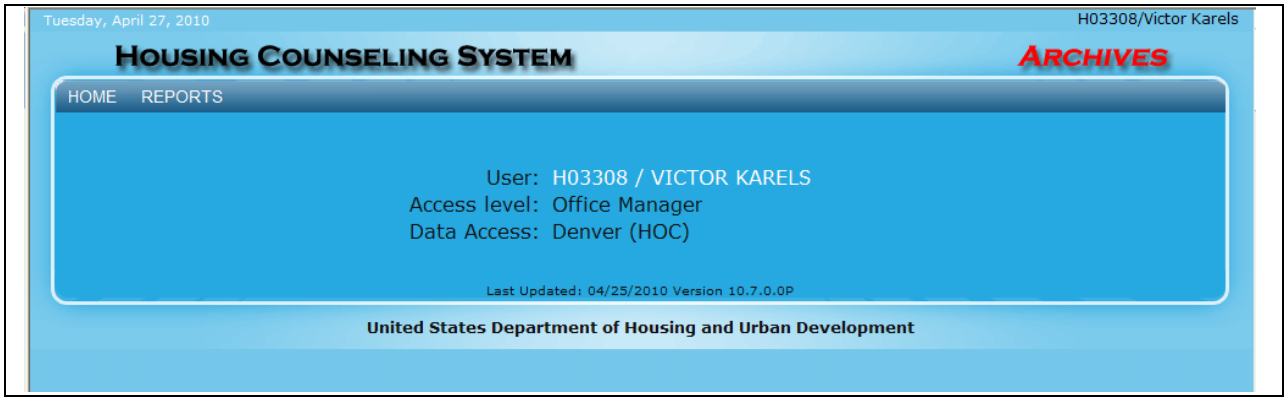


Figure 215. OM – HCS Archive: Home Screen

8.8.1 Reports

Provided below is a display of your Report options as found on the menu.

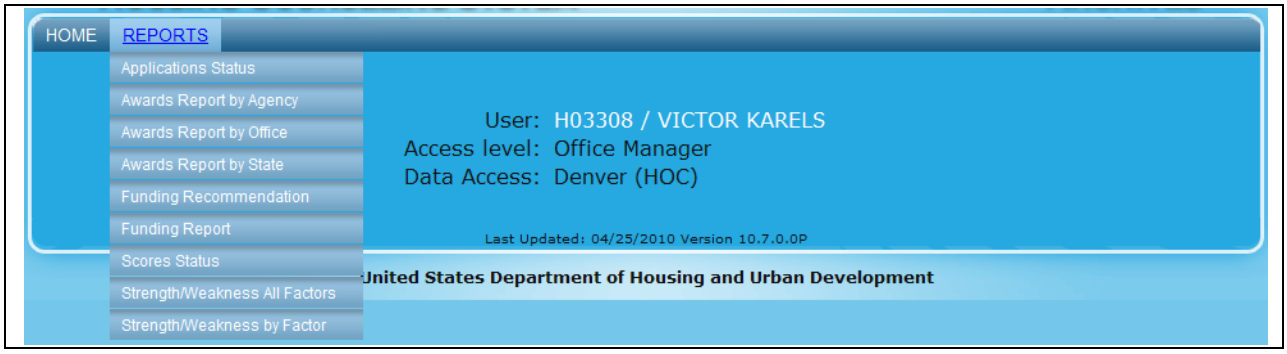
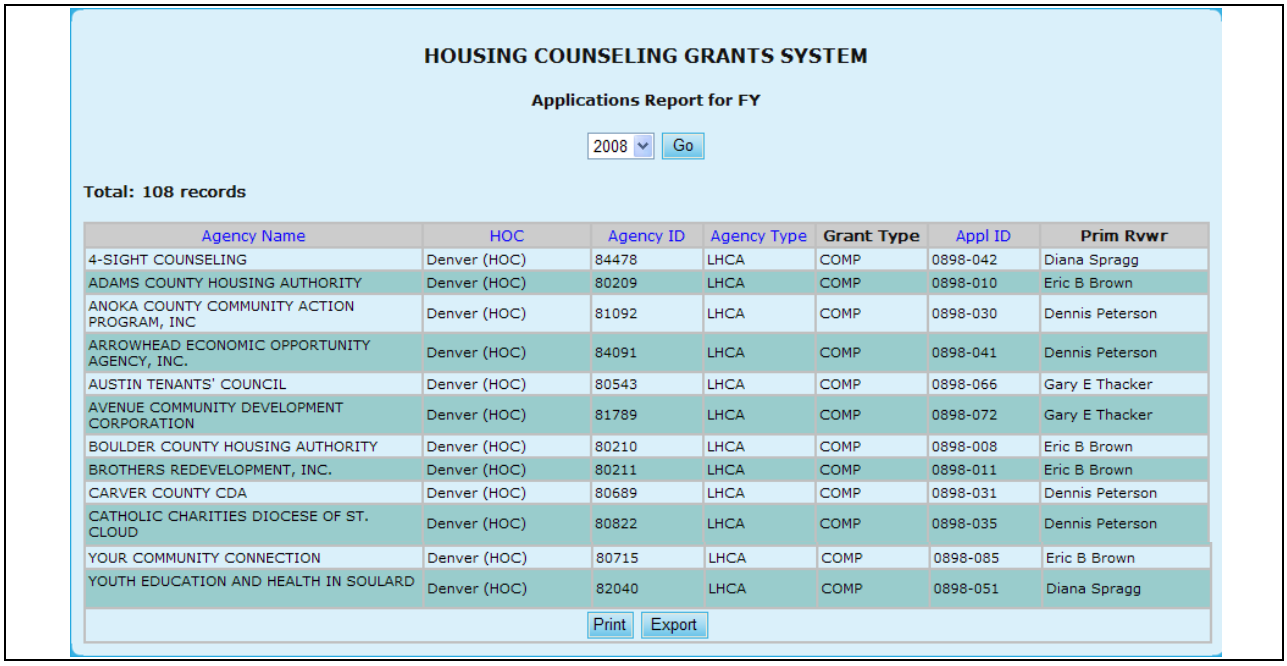


Figure 216. OM – HCS Archive: Report Options

8.8.1.1 *Application Progress Status*

Provided below is an example of an Application Progress Status Report

1. To change between years, select which year you would like your data to reflect, and click **Go**. To print this report, click the **Print** button at the bottom of the report, or to Export to Excel, click the **Export** button.



HOUSING COUNSELING GRANTS SYSTEM

Applications Report for FY

2008 Go

Total: 108 records

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr
4-SIGHT COUNSELING	Denver (HOC)	84478	LHCA	COMP	0898-042	Diana Spragg
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0898-010	Eric B Brown
ANOKA COUNTY COMMUNITY ACTION PROGRAM, INC	Denver (HOC)	81092	LHCA	COMP	0898-030	Dennis Peterson
ARROWHEAD ECONOMIC OPPORTUNITY AGENCY, INC.	Denver (HOC)	84091	LHCA	COMP	0898-041	Dennis Peterson
AUSTIN TENANTS' COUNCIL	Denver (HOC)	80543	LHCA	COMP	0898-066	Gary E Thacker
AVENUE COMMUNITY DEVELOPMENT CORPORATION	Denver (HOC)	81789	LHCA	COMP	0898-072	Gary E Thacker
BOULDER COUNTY HOUSING AUTHORITY	Denver (HOC)	80210	LHCA	COMP	0898-008	Eric B Brown
BROTHERS REDEVELOPMENT, INC.	Denver (HOC)	80211	LHCA	COMP	0898-011	Eric B Brown
CARVER COUNTY CDA	Denver (HOC)	80689	LHCA	COMP	0898-031	Dennis Peterson
CATHOLIC CHARITIES DIOCESE OF ST. CLOUD	Denver (HOC)	80822	LHCA	COMP	0898-035	Dennis Peterson
YOUR COMMUNITY CONNECTION	Denver (HOC)	80715	LHCA	COMP	0898-085	Eric B Brown
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0898-051	Diana Spragg

Print Export

Figure 217. OM – HCS Archive: Application Status

8.8.1.2 *Application Score Status*

Provided below is an example of an Application Score Status Report:

1. To change between years, select which year you would like your data to reflect, and click **Go**. You can also export this list to Excel, by clicking the **Export** button.

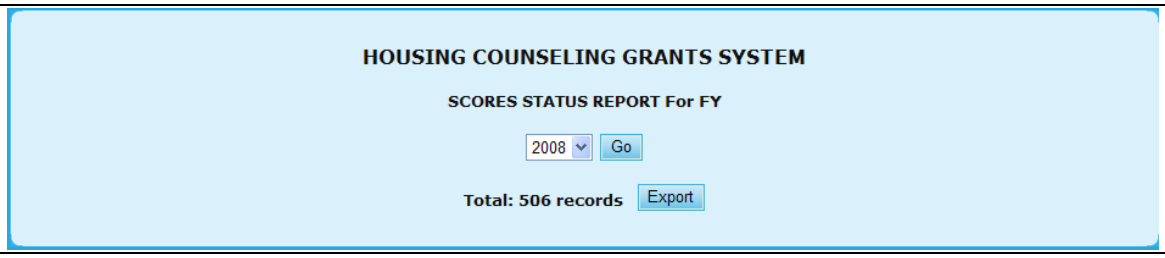
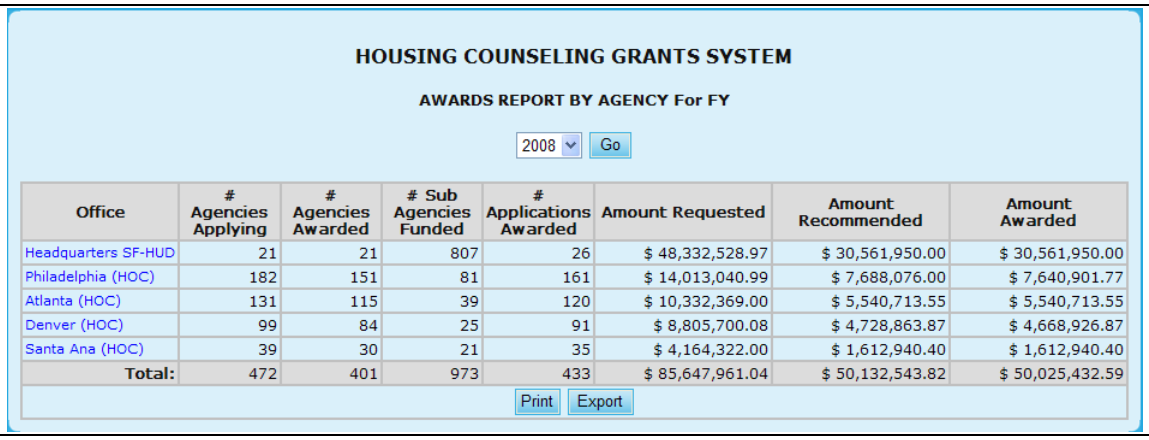


Figure 218. OM – HCS Archive: Scoring Status

8.8.1.3 *Awards Report by Agency*

Provided below is an example of an Awards Report by Agency:

1. To change between years, select which year you would like your data to reflect, and click **Go**.



HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY AGENCY For FY

2008 Go

Office	# Agencies Applying	# Agencies Awarded	# Sub Agencies Funded	# Applications Awarded	Amount Requested	Amount Recommended	Amount Awarded
Headquarters SF-HUD	21	21	807	26	$ 48,332,528.97	$ 30,561,950.00	$ 30,561,950.00
Philadelphia (HOC)	182	151	81	161	$ 14,013,040.99	$ 7,688,076.00	$ 7,640,901.77
Atlanta (HOC)	131	115	39	120	$ 10,332,369.00	$ 5,540,713.55	$ 5,540,713.55
Denver (HOC)	99	84	25	91	$ 8,805,700.08	$ 4,728,863.87	$ 4,668,926.87
Santa Ana (HOC)	39	30	21	35	$ 4,164,322.00	$ 1,612,940.40	$ 1,612,940.40
Total:	472	401	973	433	$ 85,647,961.04	$ 50,132,543.82	$ 50,025,432.59

Print Export

Figure 219. OM – HCS Archive: Awards Report by Agency

8.8.1.4 *Awards Report by Office*

Provided below is an example of an Awards Report by Office:

1. To change between years, select which year you would like your data to reflect, and click **Go**.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY OFFICE For FY

2008 Go

Total: 433 records

Appl. ID	Agency Name	Requested	Recommended	Awarded
0000-001	HOMEOWNERSHIP PRESERVATION FOUNDATION	$2,400,000.00	$1,308,434.51	$1,308,434.51
0000-002	CATHOLIC CHARITIES USA	$2,026,200.00	$1,056,325.88	$1,056,325.88
0000-003	WEST TENNESSEE LEGAL SERVICES, INCORPORATED	$2,500,000.00	$1,245,407.36	$1,245,407.36
0000-004	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.	$1,132,900.00	$1,132,900.00	$1,132,900.00
0000-005	MON VALLEY INITIATIVE	$1,270,000.00	$1,270,000.00	$1,270,000.00
0000-006	RURAL COMMUNITY ASSISTANCE CORPORATION	$947,028.00	$947,028.00	$947,028.00
0000-007	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDI	$969,300.00	$804,217.26	$804,217.26
0000-008	NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	$2,500,000.00	$1,623,570.30	$1,623,570.30
0000-009	NATIONAL COUNCIL ON THE AGING (NCOA)	$1,208,689.00	$804,217.26	$804,217.26
0000-010	MONEY MANAGEMENT INTERNATIONAL INC.	$1,706,104.97	$1,056,325.88	$1,056,325.88
0000-011	NATIONAL COUNCIL OF LA RAZA	$2,300,000.00	$1,371,461.67	$1,371,461.67
0000-012	NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVEST	$2,300,000.00	$678,162.94	$678,162.94
0000-013	NEIGHBORHOOD REINVESTMENT CORPORATION	$2,500,000.00	$1,056,325.88	$1,056,325.88
0000-014	ACORN HOUSING CORPORATION	$2,500,000.00	$1,623,570.30	$1,623,570.30
0000-015	HOUSING PARTNERSHIP NETWORK	$2,494,229.00	$1,749,624.61	$1,749,624.61
0000-016	NACA (NEIGHBORHOOD ASSISTANCE CORPORATION OF AMERI	$2,500,000.00	$1,119,353.04	$1,119,353.04
0000-017	HOMEFREE - U S A	$1,965,500.00	$993,298.73	$993,298.73
0000-018	NATIONAL URBAN LEAGUE	$1,600,000.00	$1,245,407.36	$1,245,407.36
0000-019	MISSION OF PEACE	$1,200,000.00	$867,244.41	$867,244.41
0999-001	IDAHO HOUSING AND FINANCE ASSOCIATION	$192,295.00	$127,823.53	$127,823.53
0999-002	WASHINGTON STATE HOUSING FINANCE COMMISSION	$450,000.00	$93,235.29	$93,235.29
	Santa Ana (SHFA - COMP) Totals:	$642,295.00	$221,058.82	$221,058.82
	Grand Totals:	$80,147,604.34	$50,072,606.82	$50,025,432.59

Print Export

Figure 220. OM – HCS Archive: Awards Report by Office

8.8.1.5 *Awards Report by State*

Provided below is an example of an Awards Report by State:

1. To change between years, select which year you would like your data to reflect, and click **Go**. You also have the option to narrow your search based on State. The main page represents all states, and under that drop-down function is the ability to narrow down based on state. Once you have corresponded State and Fiscal Year, click **Go** to retrieve your results.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY STATE

All in Fiscal Year 2008 Go

Total: 91 records

City/State	Agency Name (Application ID)	Awarded
Arkadelphia, AR	SOUTH ARKANSAS COMMUNITY DEVELOPMENT (0898-004)	$42,000.00
Fort Smith, AR	CRAWFORD SEBASTIAN COMMUNITY DEVELOPMENT COUNCIL (0898-002)	$28,662.00
Jonesboro, AR	JONESBORO URBAN RENEWAL AND HOUSING AUTHORITY HOUS (0898-003)	$50,326.30
Pine Bluff, AR	SOUTHERN GOOD FAITH FUND (0898-005)	$50,000.00
Russellville, AR	UNIVERSAL HOUSING DEVELOPMENT CORPORATION (0898-006)	$46,956.71
	State Total:	$217,945.01
Aurora, CO	CITY OF AURORA COMMUNITY DEVELOPMENT DIVISION (0898-007)	$63,804.66
Boulder, CO	BOULDER COUNTY HOUSING AUTHORITY (0898-008)	$60,435.07
Colorado Springs, CO	PARTNERS IN HOUSING, INC. (0898-009)	$34,000.00
Commerce City, CO	ADAMS COUNTY HOUSING AUTHORITY (0898-010)	$90,761.37
Denver, CO	BROTHERS REDEVELOPMENT, INC. (0898-011)	$26,739.18
Denver, CO	COLORADO HOUSING ASSISTANCE CORPORATION (0898-012)	$26,739.18
Denver, CO	DENVER HOUSING AUTHORITY (0898-013)	$20,000.00
Denver, CO	NORTHEAST DENVER HOUSING CENTER (0898-014)	$43,587.12
Denver, CO	SOUTHWEST IMPROVEMENT COUNCIL (0898-015)	$57,065.48
Durango, CO	HOUSING SOLUTIONS FOR THE SOUTHWEST (0898-016)	$59,811.00
Fort Collins, CO	NEIGHBOR TO NEIGHBOR (0898-017)	$56,330.00
	State Total:	$539,273.06
Glenwood City, WI	WEST CENTRAL WISCONSIN COMMUNITY ACTION AGENCY, IN (0898-088)	$43,587.12
Janesville, WI	COMMUNITY ACTION, INCORPORATED OF ROCK AND WALWORT (0898-089)	$25,000.00
Madison, WI	TENANT RESOURCE CENTER (0898-090)	$23,369.59
Milwaukee, WI	SCI-TECH DEVELOPMENT, INC. (SDI) DBA SDI (0892-007)	$10,000.00
Milwaukee, WI	SCI-TECH DEVELOPMENT, INC. (SDI) DBA SDI (0898-091)	$60,435.07
	State Total:	$162,391.78
Casper, WY	INTERFAITH OF NATRONA COUNTY, INCORPORATED (0898-093)	$23,369.59
	State Total:	$23,369.59
	Grand Total:	$4,668,926.87

Print Export

Figure 221. OM – HCS Archive: Awards Report by State

8.8.1.6 *Funding Recommendation*

Provided below is an example of a Funding Recommendation Report:

1. To change between years, select which year you would like your data to reflect, and click **Go**.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS RECOMMENDATION REPORT For FY 2008 Go

Total: 108 records

Agency Name(Application ID)	Final Score	Recommended	Requested
JUSTINE PETERSEN HOUSING AND REINVESTMENT COR (0892-001)	96.00	$15,000.00	$15,000.00
LEGAL AID OF WESTERN MISSOURI (0892-002)	97.00	$6,521.00	$6,521.00
HIGH PLAINS COMMUNITY DEVELOPMENT, CORP. (0892-004)	96.00	$25,190.00	$25,190.00
CITY OF FORT WORTH HOUSING DEPARTMENT (0892-005)	85.00	$30,000.00	$30,000.00
CCCS OF N CENTRAL TEXAS (0892-006)	75.00	$5,000.00	$30,000.00
SCI-TECH DEVELOPMENT, INC. (SDI) DBA SDI (0892-007)	85.00	$10,000.00	$10,000.00
EL PASO COMMUNITY ACTION PROGRAM, PROJECT BRAVO, I (0892-008)	84.00	$29,937.00	$29,937.00
COMMUNITY ACTION PARTNERSHIP OF SUBURBAN HENNEPIN (0892-009)	81.00	$30,000.00	$30,000.00
COMMUNITY ACTION SERVICES (0892-010)	90.00	$8,500.00	$8,500.00
Denver (LHCA - HECM) Total:		$160,148.00	$185,148.00
MONTANA BOARD OF HOUSING (0899-001)	86.00	$145,117.65	$180,000.00
SOUTH DAKOTA HOUSING DEVELOPMENT AUTHORITY (0899-002)	87.00	$153,764.71	$266,351.00
IOWA FINANCE AUTHORITY (0899-003)	89.00	$171,058.82	$177,993.00
NORTH DAKOTA HOUSING FINANCE AGENCY (0899-004)	90.00	$179,705.88	$193,030.00
NEW MEXICO MORTGAGE FINANCE AUTHORITY (0899-005)	88.00	$162,411.76	$277,350.00
Denver (SHFA - COMP) Total:		$812,058.82	$1,094,724.00

Print Export

Figure 222. OM – HCS Archive: Funding Recommendation Report

8.8.1.7 *Funding Report*

Provided below is an example of a Funding Report:

1. To change between years, select which year you would like your data to reflect, and click **Go**.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT For FY 2008 Go

Total: 3 catogories

Office Name	Requested	Recommended	Awarded
LHCA			
Denver (LHCA - COMP)	$7,525,828.08	$3,756,657.05	$3,756,657.05
Denver (LHCA - HECM)	$185,148.00	$160,148.00	$100,211.00
LHCA Totals:	$7,710,976.08	$3,916,805.05	$3,856,868.05
SHFA			
Denver (SHFA - COMP)	$1,094,724.00	$812,058.82	$812,058.82
SHFA Totals:	$1,094,724.00	$812,058.82	$812,058.82
Grand Totals:	$8,805,700.08	$4,728,863.87	$4,668,926.87

Print Export

Figure 223. OM – HCS Archive: Funding Report

8.8.1.8 *Strength/Weakness All Factors*

Provided below is an example of a Strengths/Weakness All Factors report:

1. By clicking this menu function, you will be prompted to an options menu, for Fiscal Year, and Agency you would like. To change year, select which year you would like and click **Go**.

2. Once you have done that Click the hyperlink for the Agency you would like to view.

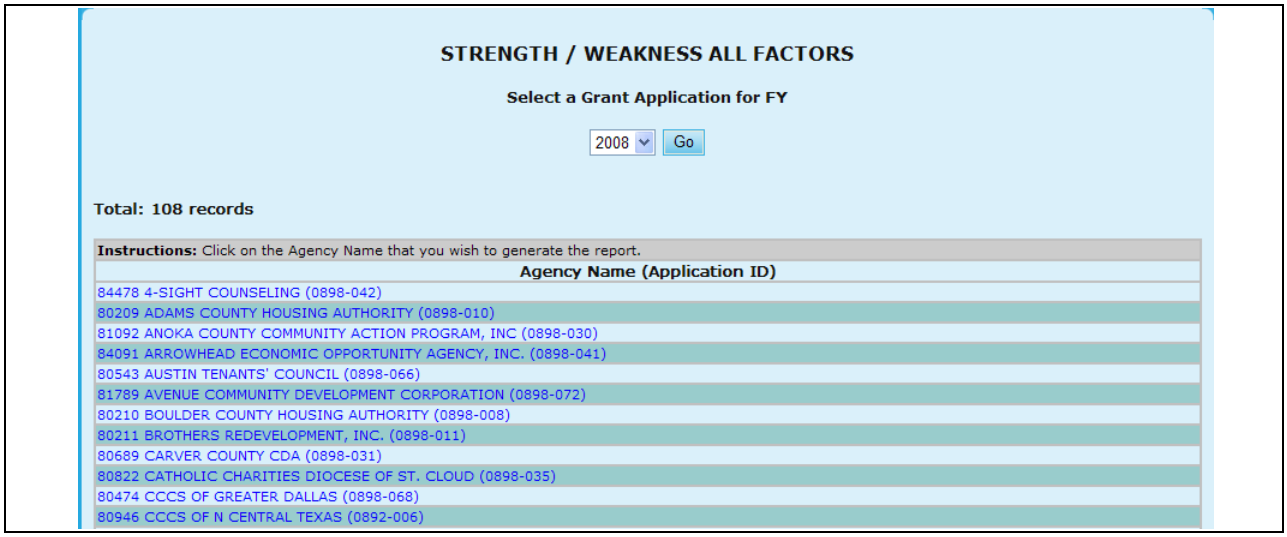


Figure 224.A. OM – HCS Archive: Strength/Weakness All Factors Report

3. After clicking the Agency hyperlink the report for Strength/Weakness All Factors will be retrieved.

STRENGTH/WEAKNESS ALL FACTORS DETAIL REPORT

For Fiscal Year 2008

Agency: 84478 4-SIGHT COUNSELING (0898-042)

Factors	1. Capacity of the Applicant and Relevant Organizational Staff
Primary Reviewer Score	27.00
Primary Reviewer Strength	Both counselors have attended recent training. Although this is a newly approved counseling agency - both counselors have been increasing their knowledge by not only attending NeighborWorks Classes but also viewing HUD's on-line training.
Primary Reviewer Weakness	No bilingual couselors. Narrative was not double spaced.
1st Secondary Reviewer Score	24.00
1st Secondary Reviewer Strength	
1st Secondary Reviewer Weakness	
2nd Secondary Reviewer Score	25.00
2nd Secondary Reviewer Strength	
2nd Secondary Reviewer Weakness	This is a newly approved agency and a lot of statistics are not available.
3rd Secondary Reviewer Score	No review
3rd Secondary Reviewer Strength	
3rd Secondary Reviewer Weakness	
Factors	2. Need/Extent of the Problem
Primary Reviewer Score	5.00
Primary Reviewer Strength	
Primary Reviewer Weakness	Did not submit HUD 27300. Limited demographic and needs info - also, limited sources for needs data. Note: Narrative not double spaced.
1st Secondary Reviewer Score	2.00
1st Secondary Reviewer Strength	
1st Secondary Reviewer Weakness	
2nd Secondary Reviewer Score	4.00
2nd Secondary Reviewer Strength	
2nd Secondary Reviewer Weakness	Needs Data is not as detailed as it should be. Did not provide other programs and not just HUD's programs for providing increased homeownership and rental opportunities. The Agency also did not provide names of other organizations who they work with in providing access to grassroots, faith based organizations.
3rd Secondary Reviewer Score	No review
3rd Secondary Reviewer Strength	
3rd Secondary Reviewer Weakness	
Factors	3. Soundness of Approach/Scope of Housing Counseling Services
Primary Reviewer Score	29.00
Primary Reviewer Strength	
Primary Reviewer Weakness	Applicant did not provide average hours of counseling (projected). Also, did not indicated what percentage of grant to be used for salaries/benefits (historical). Note: Narrative was not double spaced.
1st Secondary Reviewer Score	30.00
1st Secondary Reviewer Strength	
1st Secondary Reviewer Weakness	
2nd Secondary Reviewer Score	32.00
2nd Secondary Reviewer Strength	
2nd Secondary Reviewer Weakness	The 9902 was not completed correctly - the totals wer not right and did not match narrative.
3rd Secondary Reviewer Score	No review
3rd Secondary Reviewer Strength	
3rd Secondary Reviewer Weakness	
Factors	4. Leveraging Resources
Primary Reviewer Score	7.00
Primary Reviewer Strength	
Primary Reviewer Weakness	
1st Secondary Reviewer Score	7.00
1st Secondary Reviewer Strength	
1st Secondary Reviewer Weakness	
2nd Secondary Reviewer Score	7.00
2nd Secondary Reviewer Strength	
2nd Secondary Reviewer Weakness	

Figure 224.B. OM – HCS Archive: Strength/Weakness All Factors Detail Report

8.8.1.9 *Strength/Weakness by Factor*

Provided below is an example of a Strength/Weakness by Factor Report:

1. By clicking this menu function, you will be prompted to an options menu, for Fiscal Year, and Factor you would like search. To change year, select which year you would like and click **Go**.

2. Once you have done that Click the hyperlink for the Factor you would like to search for.

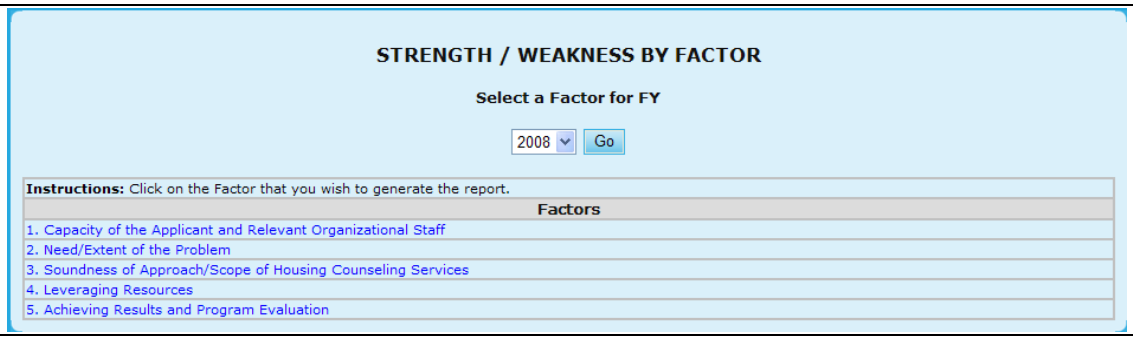


Figure 225.A. OM – HCS Archive: Strength/Weakness by Factors Options

3. This will prompt you to a search screen, which allows you to narrow your results based on:
   a. Agency ID
   b. Application ID
   c. Agency Name

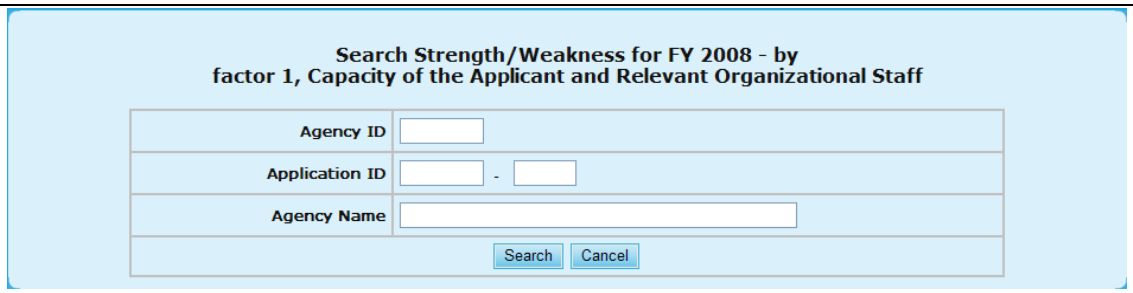


Figure 225. B. OM – HCS Archive: Strength/Weakness by Factors Search

4. In order to retrieve your results, click **Search**. To return back to the previous screen click **Cancel**. Once you click Search, your result will be retrieved for you.

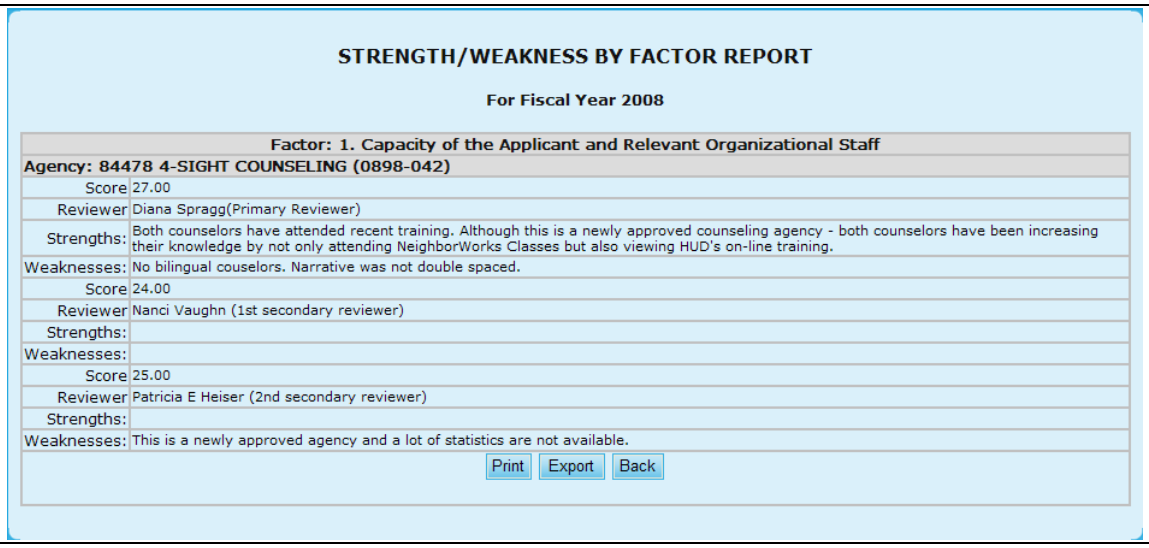


Figure 225.C. OM – HCS Archive: Strength/Weakness by Factors Report

9.0 PROGRAM MANAGER

9.0 PROGRAM MANAGER

The HUD Program Manager"s role is the one with full access rights to the HCS System. The Program Manager is responsible for setting system controls and criteria for all segments in HCS.

- Maintain and review all Grant Processing functions

  Grant Processing Preparation:
  - Setup Grant Category (in Maintenance sub-menu)
  - Setup Grant Type (in Maintenance sub-menu)
  - Setup Funding Appropriations (in Maintenance sub-menu)
  - Funding Allocations (in Grant Application Process sub-menu)
  - Office Reviewer (in Maintenance sub-menu)
  - Modify Scoring Criteria (in Maintenance sub-menu)
  - Setup Recommended Award Criteria (in Maintenance sub-menu)

  Grant Processing:
  - Setup Grant Applications (in Grant Application Process sub-menu)
  - Scoring (in Grant Application Process sub-menu)
  - Final Scoring for Primary Reviewers (in Grant Application Process sub-menu)
  - Calculate Recommended Awards (in Grant Application Process sub-menu)
  - Input Awards / Sub Allocations (in Grant Application Process sub-menu)

  Post Award Functions:
  - View various grant processing reports to monitor the grant process (in Reports sub-menu)
  - Export grant processing information to Microsoft Word, Excel, and text files for external usage as needed (in Export sub-menu)

- Maintain and review HUD-9902 data and reports
- Maintain and review Agency information
- Manage all HCS Users Information
- Perform all Management Functions.

The sections below provide detailed instructions on how each of these functions work.

Upon logging into the system as a *Program Manager,* you will see the following screen:

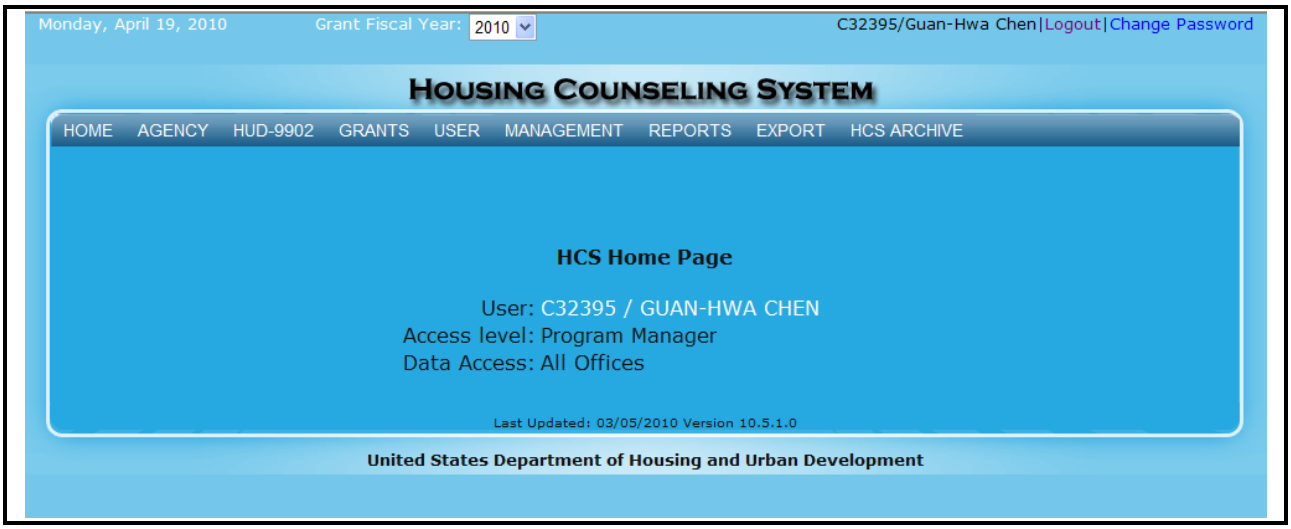


Figure 226. Program Manager: HCS Home Page

9.1 Agency

As a Program Manager, you can also review or submit information on all HUD agencies.

9.1.1 Agency Search

1. From the top navigation menu, click the **Agency** hyperlink**.** The *Agency Search* screen appears. You can also access this from the **Agency Search** sub-menu option.

2. Click the dropdown box to select the fiscal year you wish to search for, and click **Go** button.

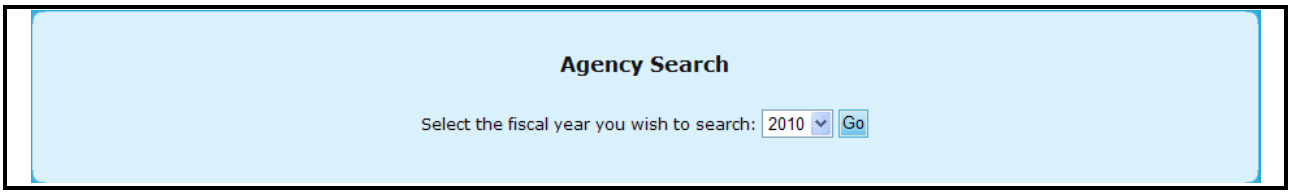


Figure 227.A. PM – Agency: Agency Search

3. The *Agency Search for FY 20XX* screen appears. From here you will be able to perform a Basic Search, or perform an Advanced Search. To go to the Advanced Search click the **Go to advanced agency search hyperlink**.

4. On the *Agency Search* page, the following listed search criteria have multiple selection enabled controls. Users can Click the field to display choices and select multiple items, or select one field to search. You can also enter values with comma to delimit list of values.
   a. Agency Information
   b. HUD Office & GTR
   c. Agency Location
   d. Agency Type & Services
   e. Agency Status & Validation
   f. Grant & 9902 Information

5. Fill out the form and click the **Search** button. The *Agency List* screen appears.

Agency Search for FY 2010

Search for Agencies using criteria below. To select multiple values hold Ctrl or shift key while clicking on various values. You can also type list of values divided by comma.

*Agency ID

Agency Name

Search

Go to advanced agency search

Figure 227.B. PM – Agency: Basic Agency Search for FY 20XX

Advanced Agency Search for FY 2010

Back to simple agency search

Search for Agencies using criteria below. To select multiple values hold Ctrl or shift key while clicking on various values. You can also type list of values divided by comma.

Search

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

Search by Agency Information

* Agency ID Agency Name

Sub-Agencies List of Parent Agency

Has Sub-Agencies * CMS Submission

Search by HUD Office and GTR

* HUD Office

GTR Assigned GTR Name

Search by Agency Location

City * State * Zip Code

Search by Agency Type and Services

* Agency Type * Counseling Services Provided

Search by Agency Status and Validation

* Status Validated

Last Update Date Between and

Validated Date Validated Date Between and

Active Status Expiration Expiration within: days after today's date

Active Status Expired or Will Expire Between and

Previous dates shows agencies that already expired; future dates shows agencies about to expire.

Search by Agency Grant and 9902 Information

Submitted 9902

* You must select 9902 report period when you selected "Yes" or "No" from submitted 9902

HUD 9902 Report Period

Individual 9902 Submission Required

Delinquent in Federal Debt

Applied for Grant

Grant Funded Last Year

* Grant Type

* You must select "Grant Funded Last Year" when you selected "Grant Type"

Search Clear the Search Criteria

Figure 227.C. PM – Agency: Agency Search for FY 20XX

Note: Provided below is an example of an Agency List Search result.

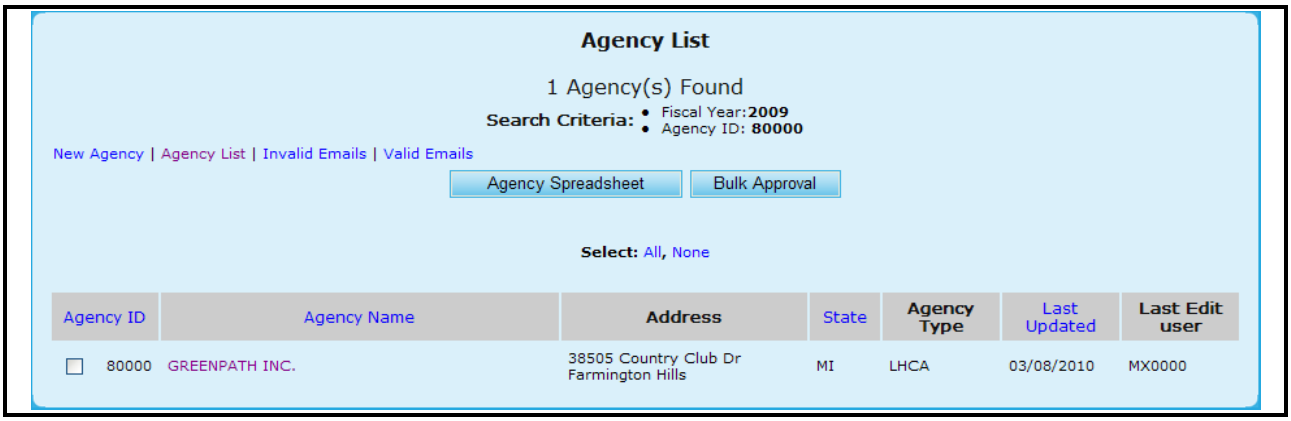


Figure 228.A. PM – Agency: Agency List

6. To retrieve a list of email addresses for the agencies listed, click the Valid Emails hyperlink. A list of valid email addresses is listed from which an exported file can be generated.

Figure 228.B. PM – Agency: Agency List Valid Emails

7. To view a list of agencies that do not have a valid email address, click the Invalid Emails hyperlink. A list of agencies that do not have a valid email address is listed. From this list, you can edit or enter a valid email address for the agency.
    a. To edit or enter a valid email address for the agency, Click the email text in the Invalid Email Address column.
    b. An input box with an Update and Cancel button appears.
    c. Enter a valid email address and click the Update button to save or Cancel to undo.
    d. Once Updated with a valid email address, the agency is removed from the current list and added to the Valid Emails list.

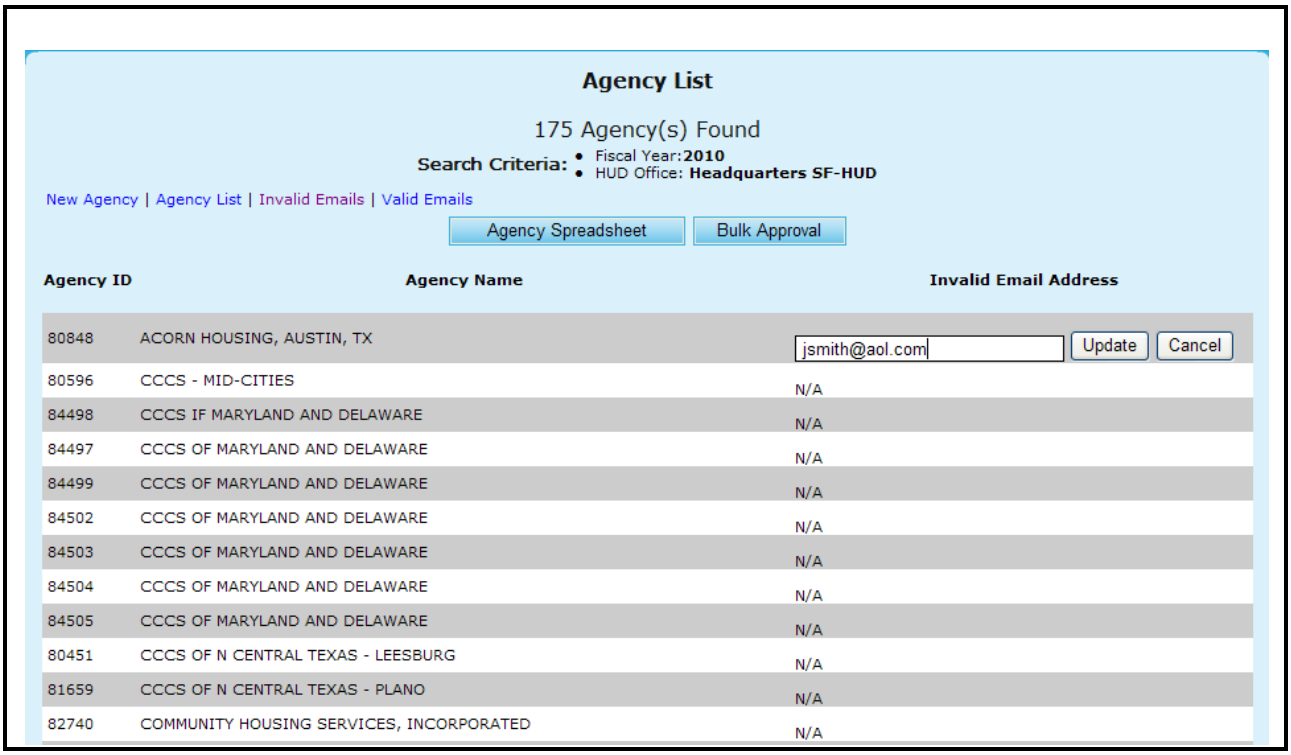


Figure 228.C. PM – Agency: Agency List Invalid Emails

8. If you want to export the agency list to an Excel spreadsheet, click the **Agency Spreadsheet** button. The *File Download* dialog box appears.

9. Select to either open or save the file and then return to Agency List screen.

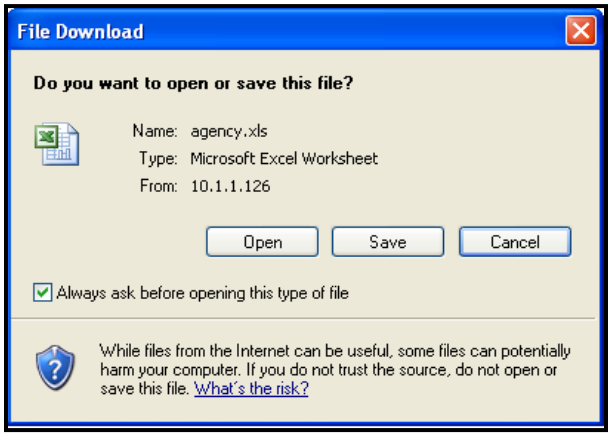


Figure 229. PM – Agency: Agency List File Download Dialog Box.

10. To view more information about or to update data of an agency listed in the *Agency List* page, click the agency"s name hyperlink in the **Agency Name** column. The *Agency Profile* screen for that agency appears.

11. From the Agency Summary screen, you have six tabs to choose from to view more detailed information regarding that specific agency. You can view information on:
    a. Agency Summary
    b. Agency Information

c. Personnel
d. Contact Information
e. HUD Affiliation
f. Counselor/Client

Note: You will be able to edit some information found in these tabs; however the edit function is not available in all fields.

12. From the **Agency Summary** you are able to add and delete HUD Comments.

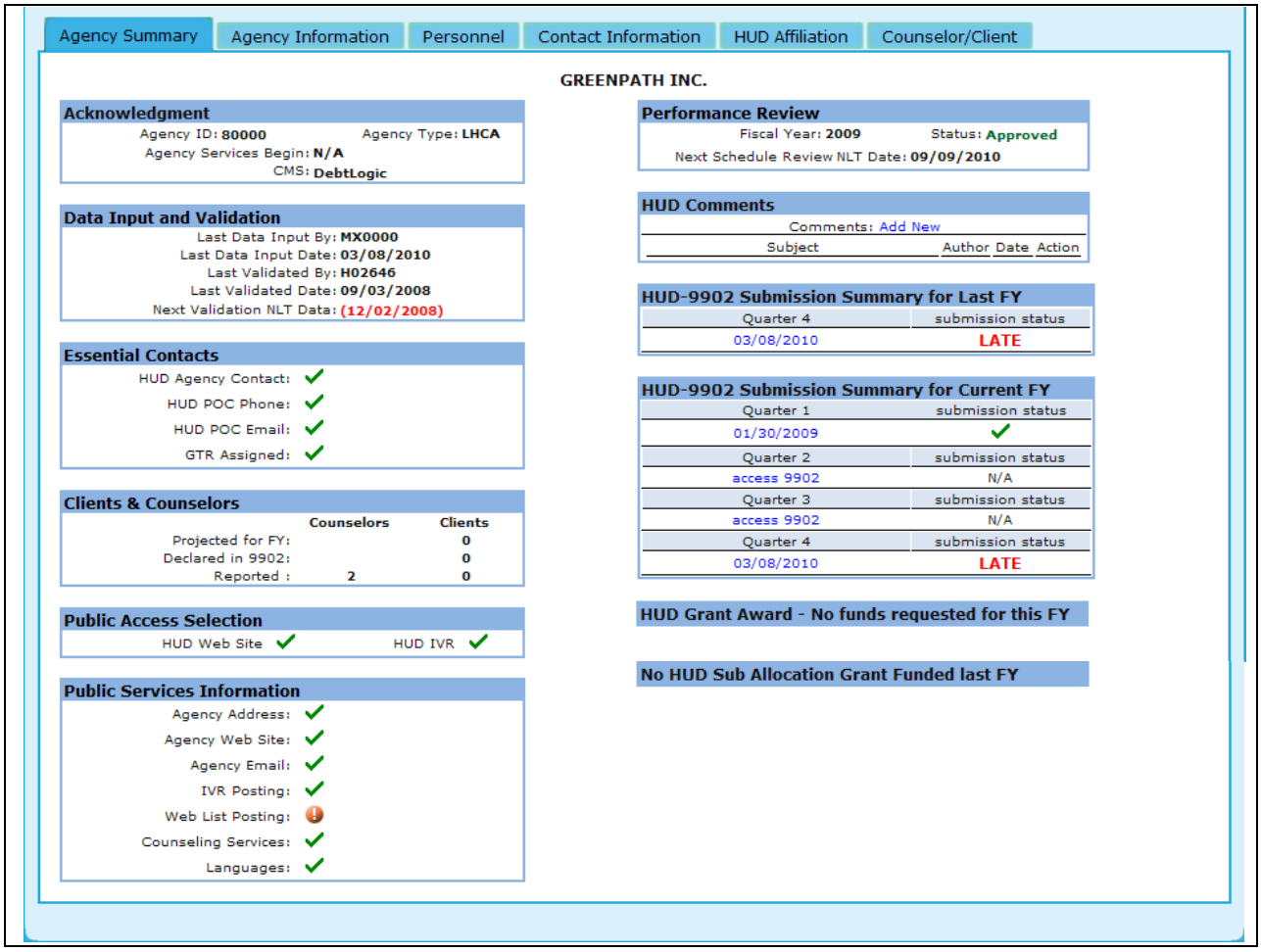


Figure 230.A. PM – Agency: Agency Summary

13. To add a HUD Comment, click the Add New hyperlink found next to comments in the HUD Comments box.

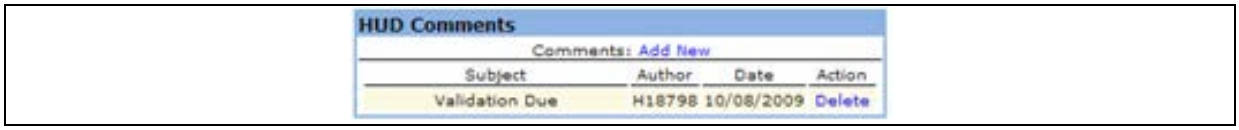


Figure 230.B.1. PM – Agency: Agency Summary – HUD Comments

14. Enter the Subject and your comment, and click **Save**, to save the comment, or **Cancel** to close the Comment box.

Figure 230.B.2. PM – Agency: Agency Summary – Add New HUD Comment

15. To delete a comment, click the **Delete** hyperlink located under the Action column.

16. Under the **Agency Information** you are unable to alter any of that information.

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

Agency ID: **80000**

☐ **Validated?**
Last Validated on **09/03/2008** (Next Validation Required by 12/02/2008)

Agency Name: **GREENPATH INC.**

Agency Designations
Faith Base:N Colonials: N Migrant Workers:N

Number of Counselors: **0** Number of Projected Clients: **0**
Housing Counseling Services Provided as of:

Delinquent in Federal Debt? **No**
Federal Tax ID Number (TIN):
38-6142925

DUNS Number:
172773500
For information about obtaining a DUNS number, please refer to
http://smallbusiness.dnb.com or call 866-705-5711

Education/Group Sessions
Session Title **Session Date** **Attendees**

Additional Languages Provided:
English
Spanish

OK | Cancel | Sub-Agency(s) | Associated Applications:

Figure 230.C. PM – Agency: Agency Information

17. Under the **Personnel** tab, you will be able to edit the information in fields where a drop-down option is available, as highlighted with a circle.

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

Agency ID: **80000**

☐ **Validated?**
Last Validated on **09/03/2008** (Next Validation Required by 12/02/2008)

Agency Name: **GREENPATH INC.**

Agency Manager:
Salutation --select-- User ID: **MX0000** Business Title HUD Contact
Setina Briggs

Agency Senior Executive:
Salutation: --select-- Business Title: HUD Contact
Setina Briggs
Agency Senior Executive Phone:
248-553-5400

Agency Contact for HUD Use
Salutation: --select-- Business Title: HUD Contact
Setina Briggs
Agency POC Phone:
248-553-5400
Agency POC Email:
sbriggs@greenpath.com

OK | Cancel | Sub-Agency(s) | Associated Applications:

Figure 230.D. PM – Agency: Personnel

18. Under the **Contact Information** you are unable to alter any of the information.

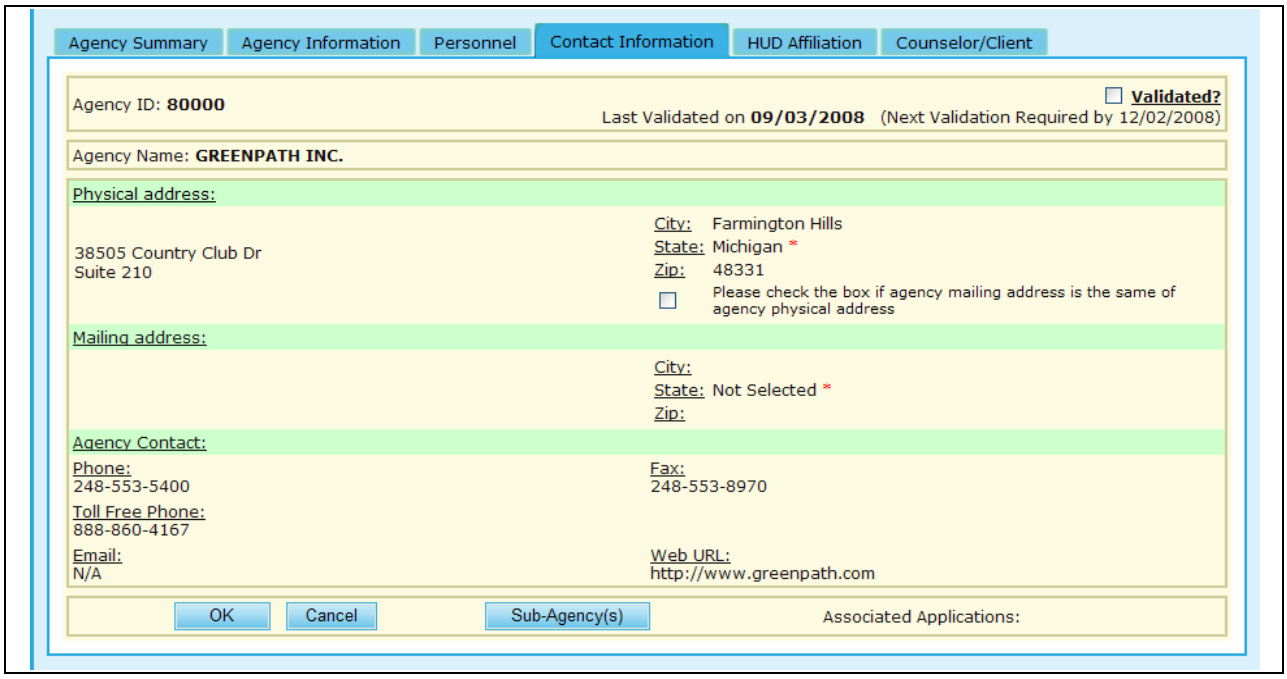


Figure 230.E. PM – Agency: Contact Information

19. Under the **HUD Affiliation** tab you will be able to edit all information found on that page. This includes:
    a. Agency Name
    b. Type of Agency
    c. Status (Further information can be found in Section 9.2.1.1.).
    d. HUD Office GTR
    e. GTR Phone Number
    f. HUD Office Assigned to
    g. Types of Counseling Services
    h. Zip Codes Affiliation(By pressing the Add Another Zip Code hyperlink, an input box will appear which will allow you to insert a new zip code)
    i. State Affiliations (By pressing the Add Another State hyperlink, a drop-down box will appear as demonstrated in the figure below, and circled in Red)
    j. Allow for Public Access

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

Agency ID: 80000

Validated?
Last Validated on 09/03/2008 (Next Validation Required by 12/02/2008)

Agency Name:
GREENPATH INC.

Status: Approved As Of: 09/09/2008 Up To: 09/09/2010 Change | View History

Type of Agency: LHCA
Parent Org:
Temporary Affiliate

HUD Office GTR: Stopera, Glen
GTR Phone: 518 - 464 - 4200 x 2824

HUD Office assigned to: Philadelphia (HOC)

Types of Counseling Services:

- [ ] DFC - Mortgage Delinquency and Default Resolution Counseling
- [x] FHA - Fair Housing Assistance
- [x] HEP - Homebuyer Education Programs
- [ ] HOM - Services for Homeless
- [x] MDM - Money Debt Management
- [x] PC - Prepurchase Counseling
- [x] PRL - Predatory Lending
- [ ] DRC - Mobility and Relocation Counseling
- [x] HEC - Home Equity Conversion Mortgage Counseling
- [x] HIR - Home Improvement and Rehabilitation Counseling
- [ ] LM - Loss Mitigation
- [ ] MOI - Marketing and Outreach Initiatives
- [x] PPC - Postpurchase Counseling
- [x] RC - Renters Assistance

Zip Code Affiliations:
Default Affiliation: 48331

12167	12406	12421	12430	12434
12438	12455	12459	12474	13731
13737	13740	13750	13751	13752
13753	13754	13755	13756	13757
13775	13782	13783	13786	13788
13789	13804	13805	13806	13820
13838	13839	13846	13847	13856
20816				

Add Another Zip Code

State Affiliations:
Default Affiliation: Michigan
Maryland
New York

Add Another State

Public display options
- [x] Allow for public access?
  - [x] Allow public access through Zip Code Affiliations?
  - [x] Allow public access through State Affiliations?

OK | Cancel | Sub-Agency(s)

Figure 230.F. PM – Agency: HUD Affiliation

20. Under the **Counselor/Client** tab, you will be prompted to a list of counselors that are under each specific agency. From this tab, you can also perform a **Counselor search**, **Add Counselor**, and perform a **Client search**.

21. Provided below is the screen that you will be prompted to for Counselor Search. This is further explained in Section 9.2.3.

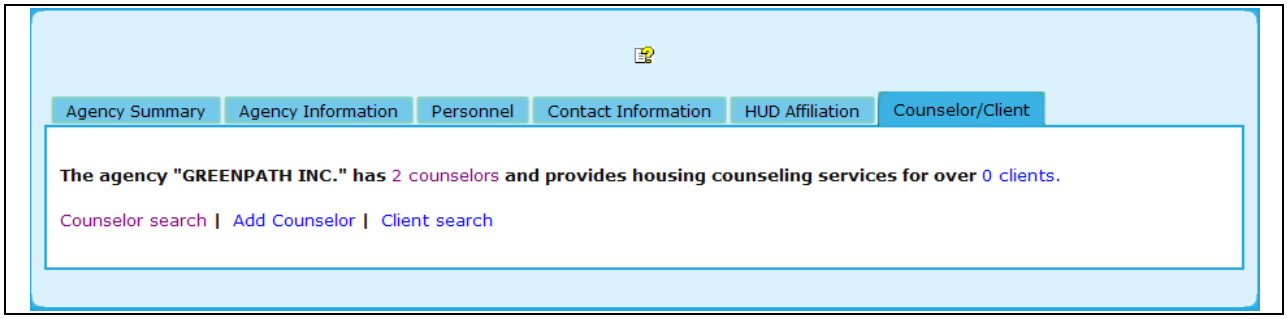


Figure 230.G.1. PM – Agency: Counselor/Client

22. To add a new counselor, click the **Add Counselor** hyperlink, and you will be prompted to a form which needs to be completed prior to officially adding that counselor. An example of this is provided below. Once you have completed the necessary fields, click **Add New** to save this counselor, or **Clear**, to erase previously input data.

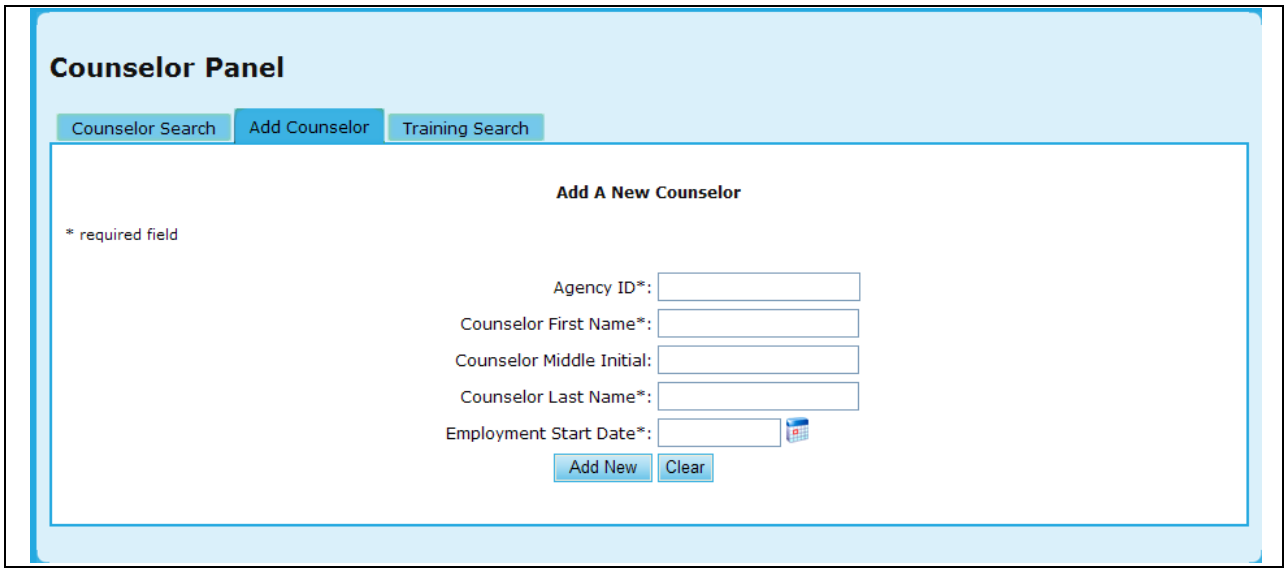


Figure 230.G.2. PM – Agency: Add Counselor

23. To perform a Counselor Training Search, click the **Training Search** hyperlink, and you will be prompted to a search which will allow you to narrow down your results. An example of this is provided below. Once you have completed your criteria, click **Search** to retrieve results, or **Clear** to erase previously input data.

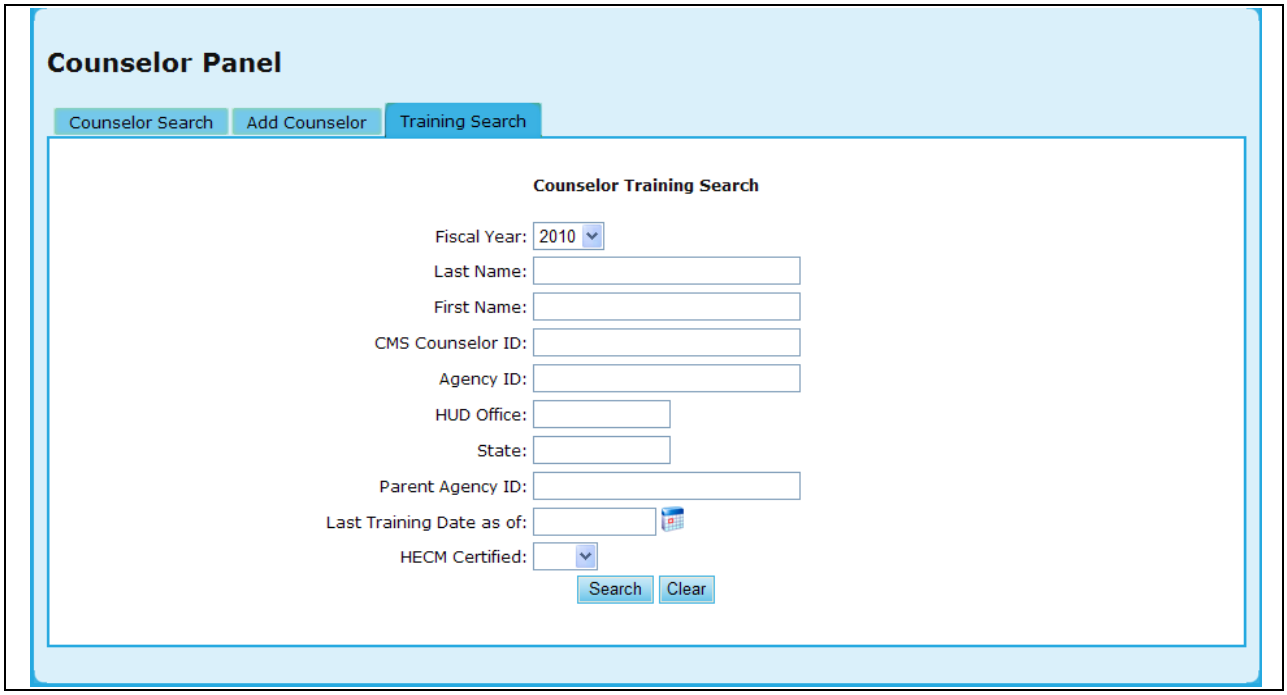


Figure 230.G.3. PM – Agency: Counselor Training Search

24. By clicking the hyperlink under the name, you will be prompted to the Counselor Profile.

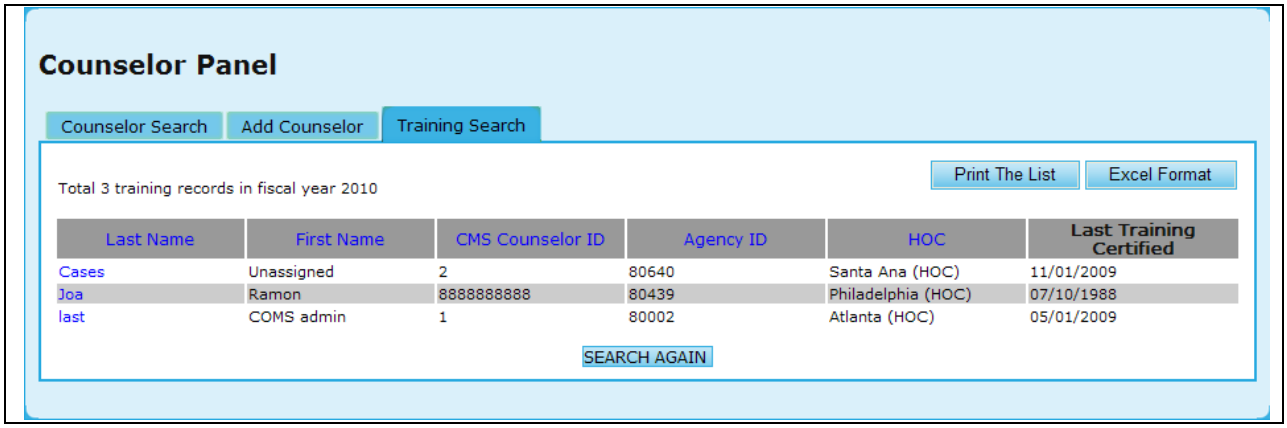


Figure 230.G.4. PM – Agency: Training Search Results

25. If you desire to update this profile, edit the information you desire and click **Update info** to save those changes, or **Clear** to remove that information.

Counselor Search | Add Counselor | Training Search | Counselor Profile

Counselor Profile

* required field

First Name*: Facilitator
Middle Init:
Last Name*: Workshop
CMS Counselor ID: 122
Agency ID: 80727
Agency Name: CONSUMER CREDIT COUNSELING SERVICE
Agency Type: LHCA
Last Training Date: 01/01/2010
Employment Start Date*: 01/26/2010
Employment End Date:
HECM Certified: No

Update info | Clear

Counselor Training Info

Training Title:	Training Date:	Training Organization:	Other Training Organization:	Training Sponsor:
New Counselor Training	01/01/2010	Other	CCCS of LSS in SD	N/A

Figure 230.G.5. PM – Agency: Agency Counselor/Client – Training Search – Counselor Profile

9.1.1.1 *Agency Status Update*

MANUAL STATUS CHANGING

Status changes are available only to HUD users. They are made either directly in the agency‟s profile or from the results of a search feature that lists agencies.

PROFILE

The agency‟s status is reflected in a HUD write protected section in the profile. The start and end dates are shown. When an agency is terminated, there will not be an end date since the Terminated status is indefinite until it is manually changed. In the status section are two action links; Change / View History. Select the Change action to initiate a change in the agency‟s status. The status entry is a dropdown menu allowing the HUD user to make the appropriate selection. The HUD user will also record the reason for the status change in the available comment box labeling an appropriate subject for quick reference. Status start dates cannot be a future date but the current date or a previous date. The HUD user and the date/time the status change is made will be recorded.

AGENCY LIST

To make multiple Approval changes when several agencies are about to be terminated, HCS allows mass approval to be made. From the desired list of agencies, at the top of the list are action items. Make a mark in the boxes at the left edge of the agency list for all the agencies you want to Re-approve. Individual agencies can be manually marked or selecting „ALL" will mark all boxes automatically. Select the „Bulk Approval‟ item and all the marked boxes will re-approve the applied agencies.

You should notice that not all agencies have a box along the left edge. Keep in mind only LHCA, Intermediaries and SHFA can be approved (participating for SHFA).

VIEW STATUS HISTORY

Each profile now shows the history of the status changes. The status history is for HUD use only to better understand the agencies circumstances in the program. The agency can only view their current status. If the dates or comments need to be corrected, simply Click the desired history status to edit the information. The status cannot be changed. The current status will be reflected in the agency spreadsheet; not the history statuses.

9.1.1.2 *Update Status from Agency List*

Agency Search results provide an option to update multiple agencies‟ statuses with a single start date. The duration of the approval period is determined according to the rules specified above.
To update the active status of multiple agencies follow the steps below:

1. From the Agency Search for FY 2XXX page, select the criteria you wish to find agencies with.
   a. The System displays a list of agencies that match your criteria.
   b. Note the check boxes that appear next to some of the agencies listed. Only LHCA‟s, SHFA‟s, Intermediaries, and Multi-State Organizations are permitted to have their statuses updated from the search results page.
   c. You can click the "All" hyperlink next to Select to check all checkable agencies in the list. You can also click the "None" hyperlink next to Select to uncheck all agencies in the list.

2. After checking the agencies you want to update, click the Bulk Approve button.

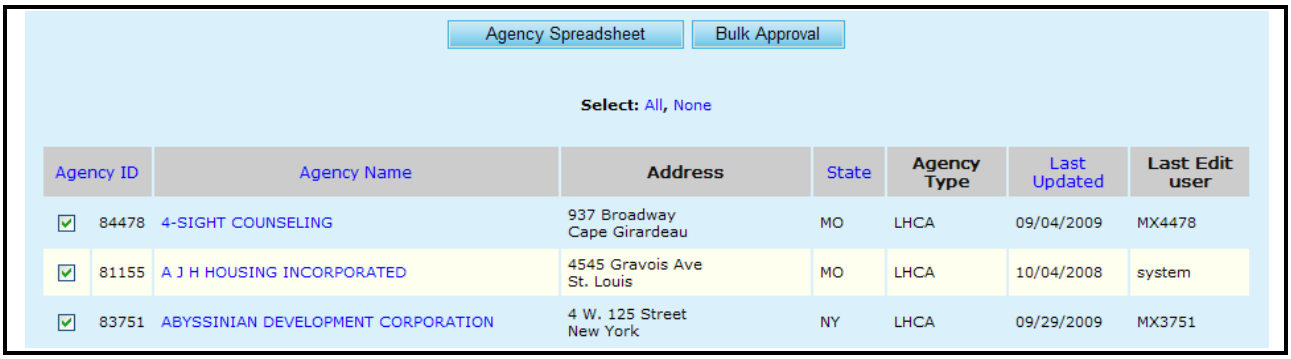


Figure 231.A. PM – Agency: Update Agency Status Bulk Approve

3. Enter the Approval effective date and click the Apply button to apply status change. If you wish not to change the statuses, click the Cancel button or the Close button.

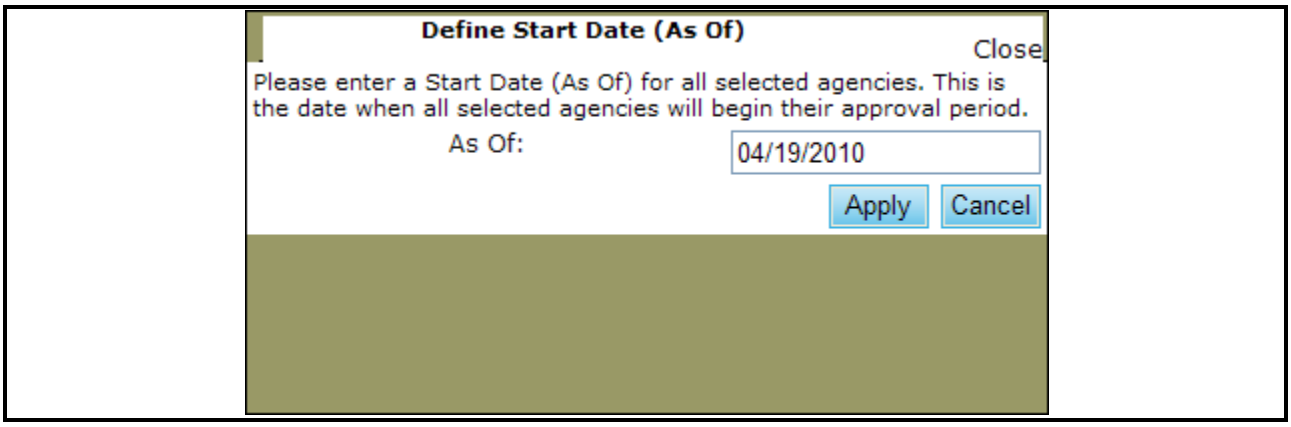


Figure 231.B. PM – Agency: Update Agency Status – Bulk Approve

9.1.1.3 *Update Status from Agency Information*

To update the status for a single agency, go to the agency profile for the agency you wish to update and following the steps below:

1. Under the HUD Affiliation tab, you will see Status, with the option to either **Change** or **View History**. Figure 232.A demonstrates the View History, and once in view mode, you have the option to select **Hide History**.

Status: **Participating** As Of: **10/01/2009** Up To: **09/30/2010** Change | Hide History

Reason	As Of	Up To	Author	Date	Status
Parent Agency:84539 status was changed.	10/01/2009	09/30/2010	H13932	11/02/2009	Participating
Status updated due to expiration of previous statu	10/01/2009	10/31/2009	SYSTEM	10/01/2009	Conditional
Parent Agency:84539 status was changed.	10/01/2009	10/31/2009	SYSTEM	10/01/2009	Conditional
	01/06/2009	09/30/2009	H13932	01/06/2009	Participating

Figure 232.A. PM – Agency: Update Agency Status – Agency Profile – View History

2. In the Status Change pop up box, you can change the following information:
   a. Status – the Status options listed reflect only those statuses an agency type can have. Please refer to Section 4.1.5 concerning active statuses. Changing statuses creates a new status history record.
   b. For – This option is only available for Conditional and Inactive statuses. It is used to auto-calculate the Up To date.
   c. Renew – This creates a new status history record instead of overwriting the current status record. Renew is only applicable if the status has not changed but the As Of and Up To dates have changed. If Status has changed, the Renew checkbox is ignored.
   d. Status As Of Date – The effective date of the status
   e. Status Up To Date – The last day on which the selected status is effective
   f. Reason – A brief description for the reasoning behind updating the status
   g. Comment – A longer description for the reasoning behind updating the status

3. Click the **Apply** button to save the status update.

4. After clicking the Apply button, the pop up box is closed and the updated status information is displayed on the Agency Profile. You do not need to click the **OK** button to save the status change as it has already been saved.

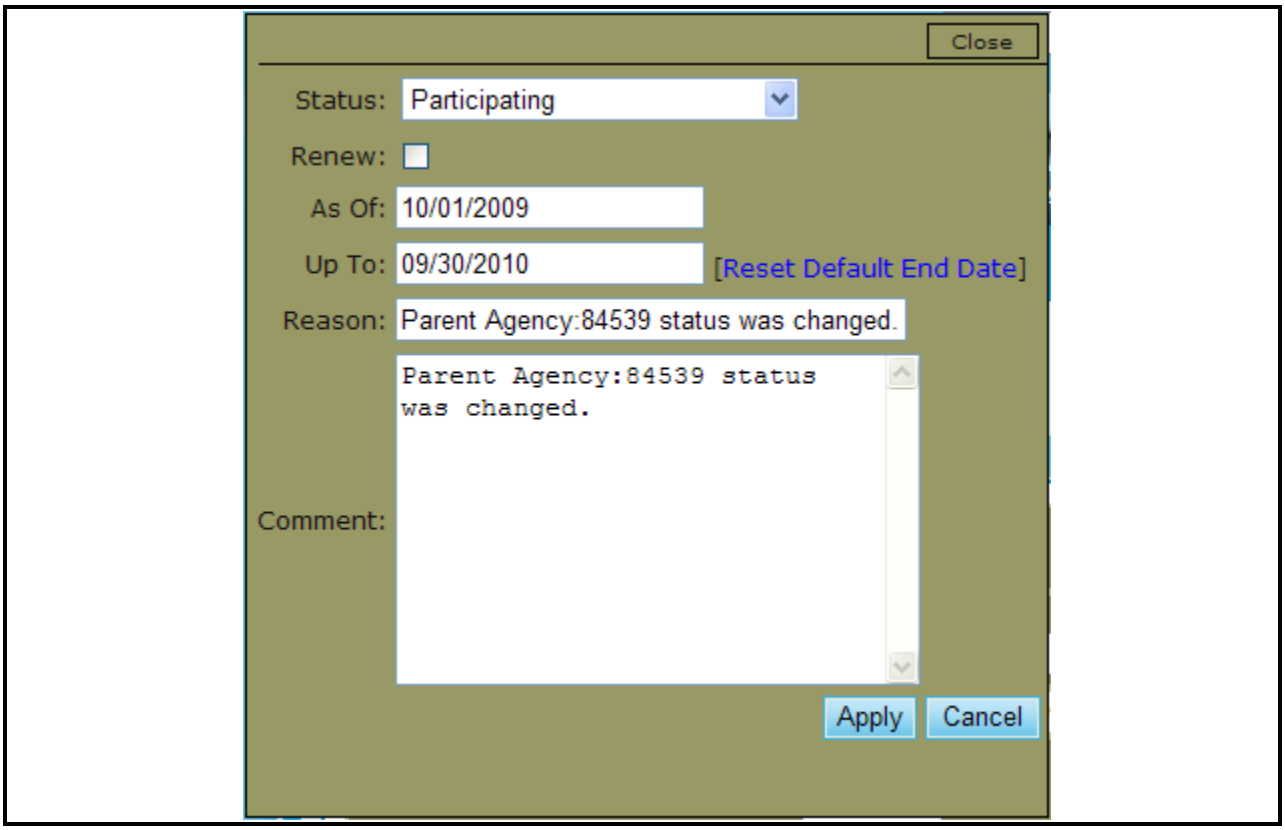


Figure 232.B. PM – Agency: Update Agency Status – Agency Profile – Change

9.1.2 Add New Agency

You can click **Add New Agency** button from *Agency Search* page or from *Agency List* page to add a new agency to the HCS system.

1. From the upper navigation menu, scroll over the **Agency** hyperlink**.** And select the **Add New Agency** button.

2. Complete all of the required fields that are marked with *. Fields that are not marked with * are not mandatory. Following are the *Agency Profile* required fields.
   a. Agency Name
   b. Type of Agency: Following are the options of type of agency shown in the dropdown list.
   c. HUD Office GTR: The GTR assigned to this agency, as well as their contact number and office location.
   d. Agency Manager: The Point of Contact for the newly formed Agency.
   e. Physical Address: What is required is the City, State, and Zip Code of the Agency Office location.
      i. State: Select a state from the dropdown list where the agency physically resides in. System automatically assigns a HUD Office to the agency based on the State selected.
   f. Fiscal Year: The fiscal year the new agency profile is being created for. The options are „This Year" and „Next Year".
   g. Federal Tax ID Number (TIN): This is agency"s federal employer identification number. The system defaults its value to "00-0000000". If user leaves the default value unchanged,

following warning message appears when the **OK** button is clicked by user to save data. Click the OK button from the warning message window to continue the process.

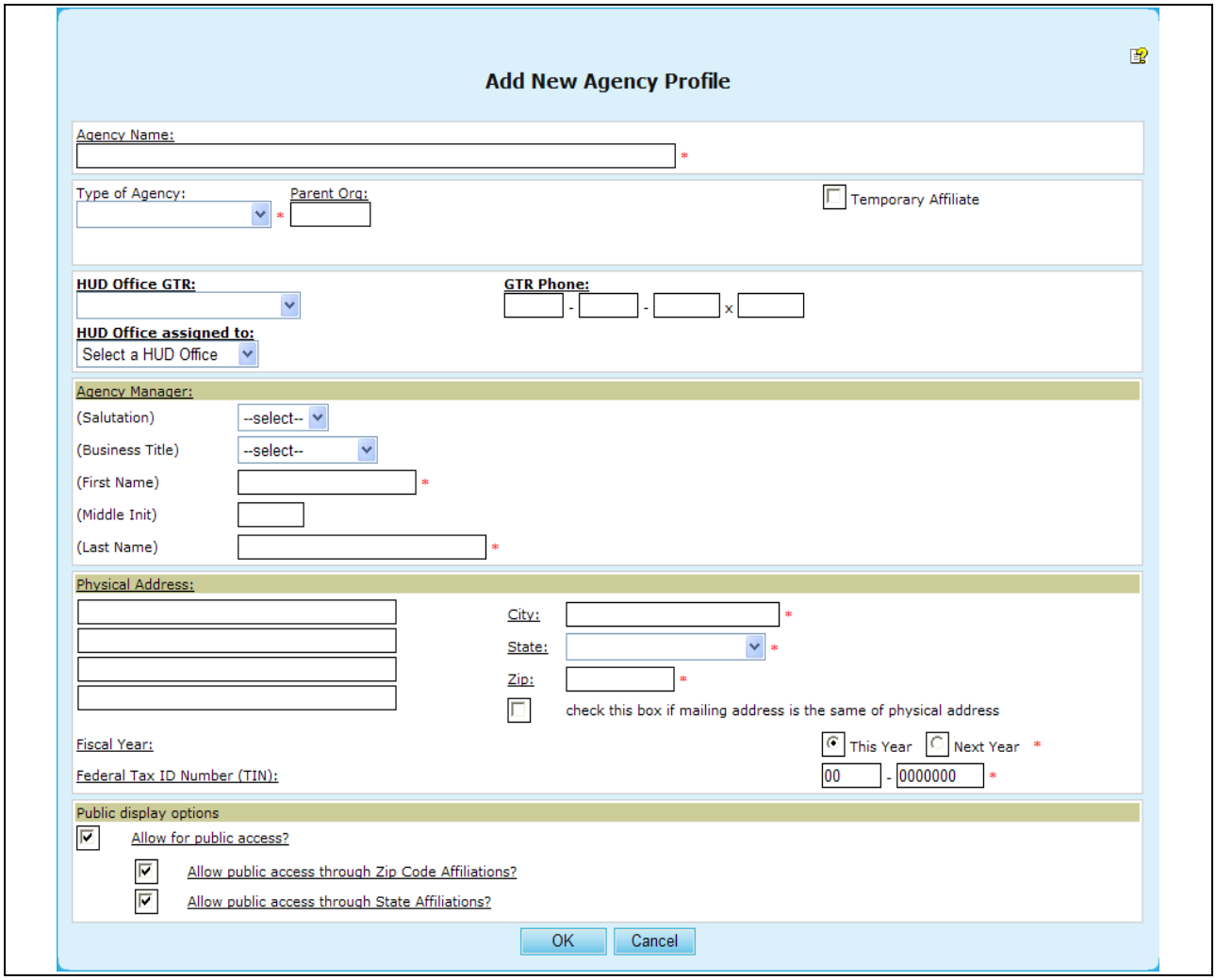


Figure 233.A. PM – Agency: Add New Agency Profile

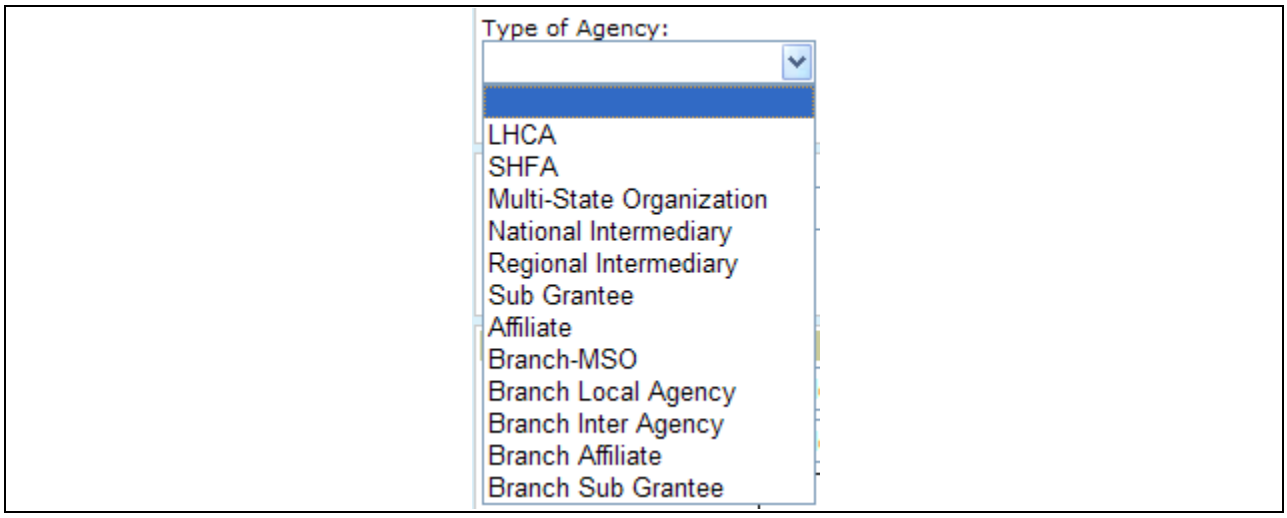


Figure 233.B. PM – Agency: Type of Agency Dropdown List

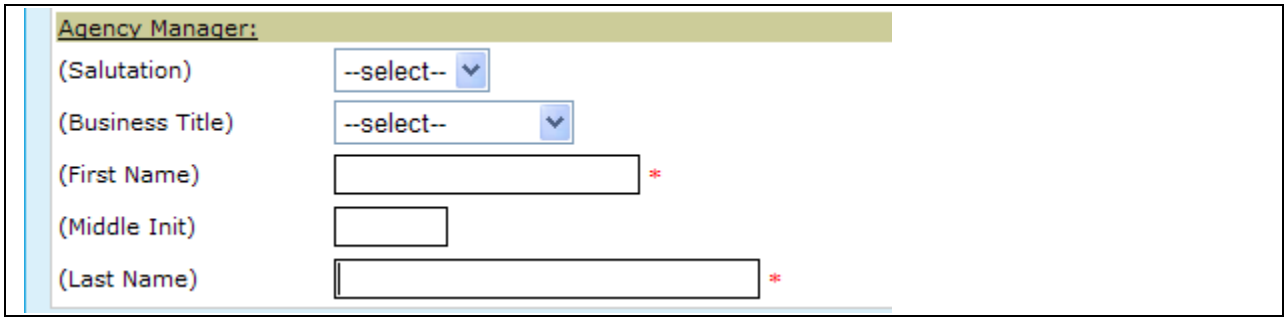


Figure 233.C. PM – Agency: Agency Manager

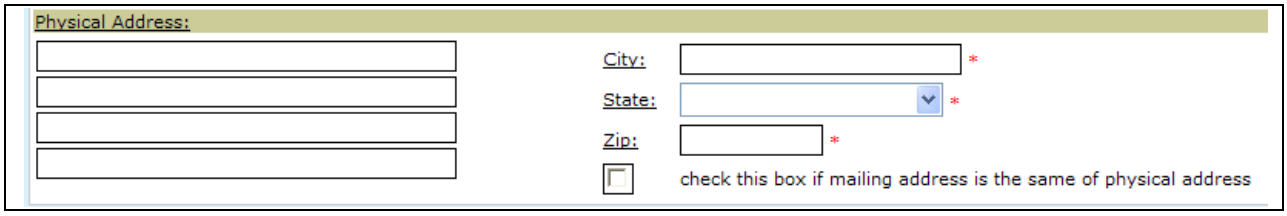


Figure 233.D. PM – Agency: Agency Physical Address

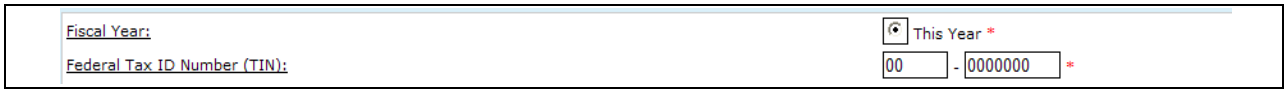


Figure 233.E. PM – Agency: Fiscal Year and Federal Tax ID Number

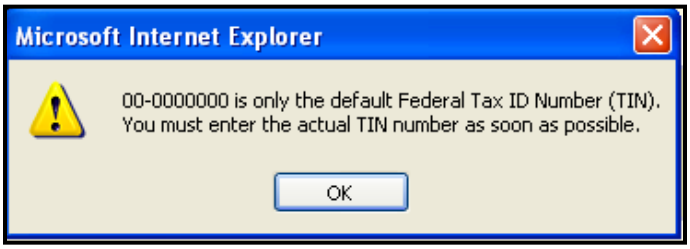


Figure 233.F. PM – Agency: Default TIN Number Warning Message

3. Complete the form. To save, click **OK** button. To exit without saving, click **Cancel** button. Screen returns to previous page.

9.1.3 Counselor Information

1. From the upper navigation menu, scroll over the **Agency** hyperlink**.** And select the **Counselor Information** button.

2. Once you have completed your criteria, click **Search** to retrieve results, or **Clear** to erase previously input data.

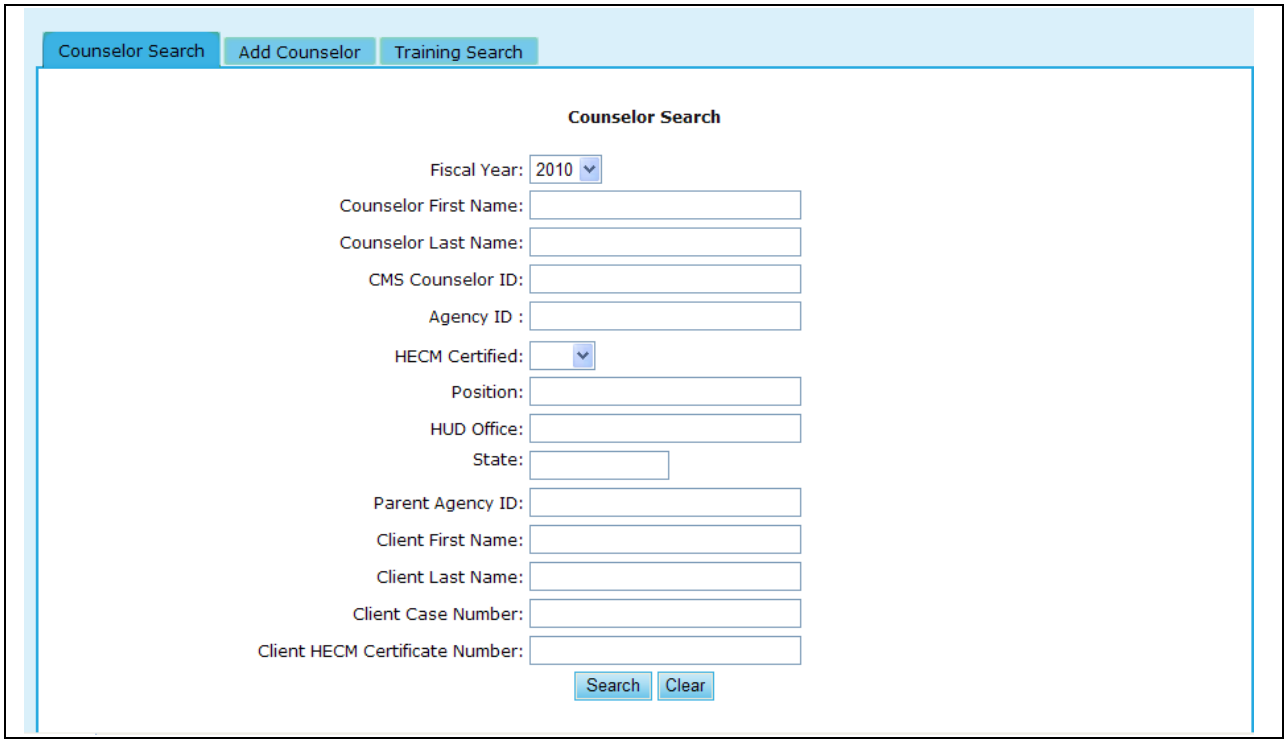


Figure 234.A. PM – Agency: Agency Counselor/Client Counselor Search

3. Provided below is an example of the search results retrieved while performing a counselor search.

4. To view further information on a counselor, click the hyperlink found in the Last Name column. By clicking the hyperlink under the name, you will be prompted to the Counselor Profile.

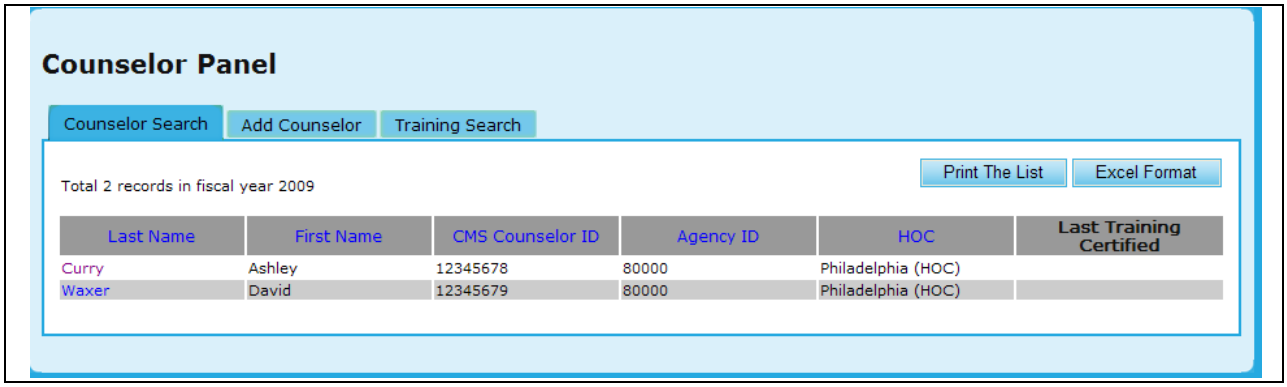


Figure 234.B. PM – Agency: Counselor Search

5. If you desire to update this profile, edit the information you desire and click **Update Profile** to save those changes, or **Clear** to remove that information.

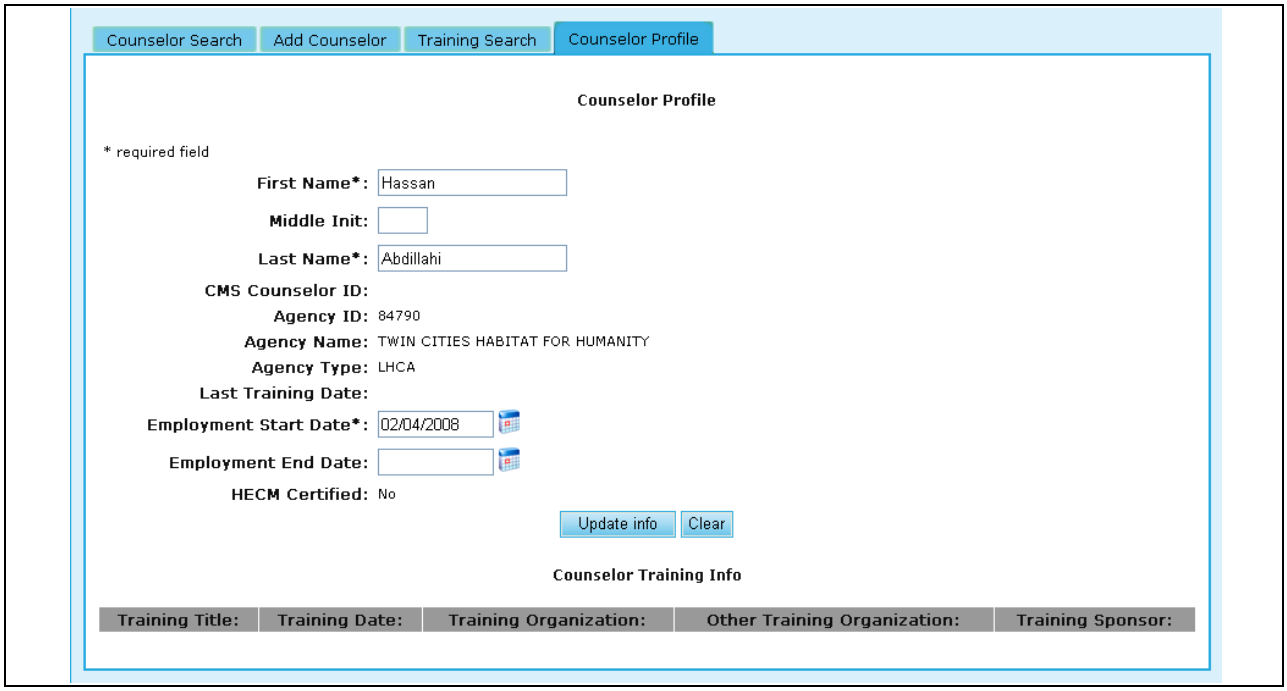


Figure 234.C. PM – Agency: Agency Counselor/Client Counselor Profile

9.1.4 Client Information

Client Search under the **Agency** tab provides the same options as demonstrated under the **Agency Search** function (Section 9.2.2).

1. From the upper navigation menu, scroll over the **Agency** hyperlink**.** And select the **Client Search** button.

2. Select the criteria in which you would like to search for, and click **Search** to retrieve those results, or **Clear**, to erase what was previously typed.

Client Search

Client Search

** To select multiple values at once hold the Ctrl or Shift key while clicking on various items

Fiscal Year: 2010

Client info

Case Number:

Client ID:

Client First Name:

Client Last Name:

**State: Alaska, Alabama, Arkansas

Counselor Info

CMS Counselor ID :

Counselor First Name:

Counselor Last Name:

Case Completed:

Agency Info

Agency ID:

Parent ID:

HOC Info

**HUD Funded: Other HUD Program, Place Based Rental Assistance, Purchase REO Property, Rental Voucher

**HOC: Atlanta (HOC), Denver (HOC), Headquarters SF-HUD

9902 Info

Ethnicity:

Race:

**Income Group: a. < 50% of Area Median Income (AMI), b. 50 - 79% of AMI, c. 80 - 100% of AMI

**Workshop/Seminar: a. Pre-Purchase Homebuyer Education, b. Financial Literacy, c. Resolve or Prevent Mortgage Delinquency

Service category:

Service Outcome:

HECM Info

HECM Certified:

Client HECM Certificate Number:

Search Clear

Figure 235.A. PM – Agency: Client Search Options

3. To view further detail, click the hyperlink found under the Case Number column. This will prompt you to the following screen.

Client List

Total 463 records in fiscal year 2010

Print The List | Excel Format

Next 200 records

Case Number	Last Name	First Name	City	State	Agency ID	HOC	Service	CMS Counselor ID
1141179	ABRAHAM	SARAH	TULSA	OK	80724	Denver (HOC)		274
1141886	ALFRED	SARAH	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	191
1142306	ALLEN	LUTISHA	OKLAHOMA CITY	OK	80724	Denver (HOC)		7
1142287	ALYEA	CHRISTINA	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	15
1141840	ANDERSON	CONNIE	HASKELL	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	209
1142447	ANDERSON	CAROL	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	191
1142240	ANDERSON	KENYATTA	TULSA	OK	80724	Denver (HOC)	d. Locate, Secure, or Maint Residence in Rental Housing - 9) Decided to remain in current housing situation	191
1141258	AZLIN	JIMMY	WEWOKA	OK	80724	Denver (HOC)		7
1888466	Adams	Tracy	Sicklerville	NJ	80941	Philadelphia (HOC)		102
1860964	Aleogena	Irene	Williamstown	NJ	80941	Philadelphia (HOC)		102
22114	Algee	Mary	Dayton	OH	84573	Philadelphia (HOC)		122
1780781	Antonucci	Michael	West Chester	PA	80941	Philadelphia (HOC)		13

Figure 235.B. PM – Agency: Client Search Results

Note: Provided below is an example of the Client Profile.

Client Search | Client Profile

Client Profile

First Name: SARAH
Middle Name: A
Last Name: ABRAHAM
Address1: 1616 W 47TH ST
Address2:
City: TULSA
State: OK
Zip: 74107
Phone: 918-447-7776
Case Number: 1141179
Service:

Figure 235.C. PM – Agency: Client Search Client Detail

9.2 HUD-9902

As a *Program Manager*, you can submit and review HUD-9902 forms. To do so, you must first search for the HUD-9902 form that you want to review or submit. This feature has two sections; one to track the progress of agencies submissions, and the other to analyze the data.

9.2.1 9902 Data Reporting Status Inquiry

This feature is primarily a tool to track agencies that are required to submit their 9902 reports.

To view/update the HUD-9902 form, you must perform a 9902 Data Reporting Status Inquiry.

1. From the upper navigation menu, click **HUD-9902 Processing** hyperlink**.** The *9902 Data Reporting Status Inquiry* page appears.

2. In the drop-down box, select the fiscal year and reporting period that you wish to search. Then click **Continue**. The *9902 Data Reporting Status Inquiry for FY 20XX* screen appears.

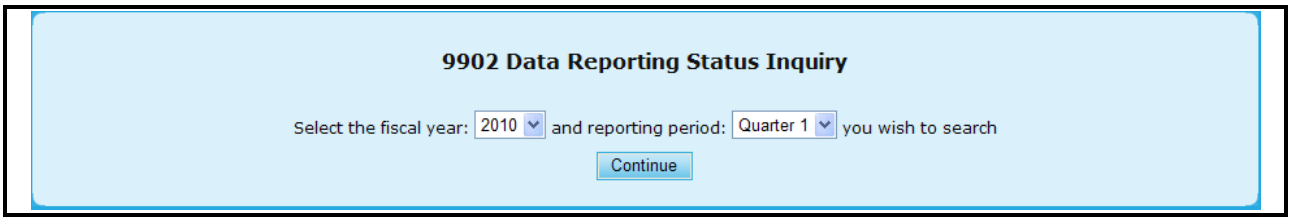


Figure 236. PM – HUD-9902: 9902 Data Reporting Status Inquiry Fiscal Year Selection

3. To enter a single agency‟s 9902 report, enter Agency ID in the upper section in 9902 Data Reporting Status Inquiry page. Click the **Submit Inquiry** button, and 9902 form is displayed.

4. Complete all of the fields you want to search on or just leave the fields blank to retrieve all the reported HUD-9902 forms. Click **Submit Inquiry**. The inquired 9902 result screen appears.
   a. Agency ID – Allows you to extract information based on a particular Agency‟s ID number.
   b. GTR Name – Allows a search to be performed based off of a particular Government Technical Officer.
   c. Agency Type – Allows a search to be made on an individual or multiple agency types.
   d. Grant Awardees – This enables you to narrow down your results based on whether an agency was awarded a grant.
   e. Have Reported Individual 9902 – This enables you to narrow down your results based on whether a particular Agency and individually reported their 9902.
   f. Reported on Time – Along the lines of the 9902, this helps in determining if it was reported on time.
   g. Reported Data are Validated – Allows a search to be made on whether or not reported data has been validated.
   h. CMS – Allows you to perform a search based on various Client Management Systems.

5. To get online help instructions for Form-9902, click the FAQ button found on the Search page.

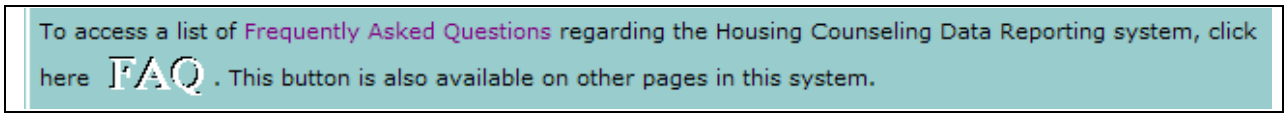


Figure 237.A. PM – HUD-9902: 9902 Processing – FAQ

HOUSING COUNSELING 9902 REPORTING

9902 Data Reporting Status Inquiry for Quarter 4 of FY 2009

Instructions: + −

Inquiry Scope	Assigned Area
Agency ID	
Parent Agency ID (for sub-agencies listing)	
HUD Office	
GTR Name	
Agency Type	This field allows multiple value entry. Click on the field to display choices and select item or enter a comma delimited list of values.
Grant Awardees	
Have Reported Individual 9902	Yes
Reported On Time	
Reported Data Are Validated	
CMS	This field allows multiple value entry. Click on the field to display choices and select item or enter a comma delimited list of values.
	SUBMIT INQUIRY
	To access a list of Frequently Asked Questions regarding the Housing Counseling Data Reporting system, click here FAQ. This button is also available on other pages in this system.

Figure 237.B. PM – HUD-9902: 9902 Data Reporting Status Inquiry Criteria Screen

6. Upon the retrieval of your search criteria, you can view the details of a 9902 form for any Agency represented. This is done by clicking the **9902** hyperlink located under the **Details** header.

1809 agency(s) have Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- Have Reported 9902: Yes

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Details
82337	1ST CHOICE CREDIT UNION	Sub Grantee	315 Auburn Avenue Atlanta, GA 30303	404-832-5800 404-607-8252	HCS	9902
83799	28TH LEGISLATIVE DISTRICT COMMUNITY DEVELOPMENT CORPORATION	Sub Grantee	815 N. Hickory Street Chattanooga, TN 37404	423-698-8190 423-698-8191	HCS	9902
84478	4-SIGHT COUNSELING	LHCA	937 Broadway Broadway Plaza, Suite 305 Cape Girardeau, MO 63701	573-334-7995 573-335-8610	HCS	9902
83504	A.G.A.P.E. CDC	Sub Grantee	5205 Capital Boulevard Suite 5293 Raleigh, NC 27616	919-876-1239 888-876-1238	HCS	9902
83502	ABCD INC.	Sub Grantee	1225 Gross Avenue N.E. Canton, OH 44705-1605	330-455-6385 330-456-3913	HCS	9902
83751	ABYSSINIAN DEVELOPMENT CORPORATION	LHCA	4 W. 125 Street New York, NY 10027	646-442-6545 646-442-6598	HCS	9902
80015	ACCESS INCORPORATED	LHCA	3630 Aviation Way PO Box 4666 Medford, OR 97501	541-779-6691 541-779-8886	HCS	9902
84019	YWCA VIRGINIA PENINSULA	Sub Grantee	2702 Orcutt Avenue Newport News, VA 23607	757-245-6026 757-247-6485	HCS	9902
80824	YWCA-CCCS EL PASO DEL NORTE REGION	LHCA	1600 N. Brown St El Paso, TX 79902-4725	915-577-2530 915-533-8132	HCS	9902

Print | Export | Invalid Email List | Email Address List

Figure 238. PM – HUD-9902: 9902 Data Reporting Status Inquiry Criteria Screen

Note: Provided below is an example of a 9902 form report.

Housing Counseling Agency Activity Report	**U.S. Department of Housing and Urban Development** Office of Housing Federal Housing Commissioner	OMB Approval No. 2502-0261 (Exp. 3/28/2009)

1. Counseling Agency Name		**2. Reporting Period and Budget**	
Agency Name		Reporting Period:	Quarter 1
NORTHEAST DENVER HOUSING CENTER		Fiscal Year:	2010
Agency ID:	80213	From:	10/01/2009
Agency Type:	LHCA	To:	12/31/2009
Address: 1735 Gaylord St Denver, CO 80206-1208		Initial Submission Date:	01/27/2010
		Date Updated:	01/27/2010
Parent Agency Name(if applicable)		Total Annual Housing Counseling Program Budget, All Sources: $ 214086.00	
Agency ID:		HUD Funded Activity Ratio: 14.13% (0.1413)	
Agency Type:			

Validated: Yes Deadline for late submissions has been extended until 02/28/2010

Last Validated: 02/05/2010 **Validated by:** Gary Thacker

HUD-9902	HUD-9902 (Derived)	Logic Model	
		All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds
3. Ethnicity of Clients (select only one)			
a. Hispanic		35	4.95
b. Not Hispanic		102	14.41
c. Chose not to respond		0	0
	Section 3 Total:	**137**	**19.36**
4. Race of Clients			
Single Race			
a. American Indian/Alaskan Native		0	0
b. Asian		0	0
c. Black or African American		45	6.36
d. Native Hawaiian or Other Pacific Islander		0	0
e. White		52	7.35
Multi-Race			
f. American Indian or Alaska Native *and* White		2	.28
g. Asian *and* White		0	0
h. Black or African American *and* White		2	.28
i. American Indian or Alaska Native *and* Black or African American		0	0
j. Other multiple race		1	.14
k. Chose not to respond		35	4.95
	Section 4 Total:	**137**	**19.36**
5. Income Levels			
a. < 50% of Area Median Income (AMI)		34	4.8
b. 50 - 79% of AMI		40	5.65
c. 80 - 100% of AMI		52	7.35
d. > 100% AMI		11	1.55
e. Chose not to respond		0	0
	Section 5 Total:	**137**	**19.35**
6. Clients Receiving Education/Group Sessions			
a. Completed pre-purchase homebuyer education workshop		8	1.13
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair		0	0
c. Completed resolving or preventing mortgage delinquency workshop		0	0
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners		0	0
e. Completed fair housing workshop		0	0
f. Completed predatory lending workshop		0	0
g. Completed rental workshop		0	0
h. Other workshop		0	0
	Group Session / Section 6 Total:	**8**	**1.13**

7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	5	.71
2) Client will be mortgage ready within 90 days	0	0
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	0	0
4) Receiving long term pre-purchase counseling	7	.99
5) Entered lease purchase program	0	0
6) Decided Not to purchase housing; no further effort to prepare needed	2	.28
7) Withdrew from counseling	0	0
8) Other	0	0
Section 7a Sub-total:	**14**	**1.98**
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	4	.57
2) Mortgage refinanced	0	0
3) Mortgage modified	5	.71
4) Received second mortgage	0	0
5) Initiated forbearance agreement/repayment plan	0	0
6) Executed a deed-in-lieu	0	0
7) Sold property/chose alternative housing solution	1	.14
8) Pre-forclosure sale	1	.14
9) Mortgage foreclosed	6	.85
10) Counseled and referred to another social service or emergency assistance agency	0	0
11) Obtained partial claim loan from FHA lender	0	0
12) Bankruptcy	1	.14
13) Entered debt management plan	0	0
14) Counseled and referred for legal assistance	0	0
15) Currently receiving foreclosure prevention/budget counseling	53	7.49
16) Withdrew from counseling	0	0
17) Other	6	.85
Section 7b Sub-total:	**77**	**10.89**
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	31	4.38
2) Counseled on HECM; decided not to obtain mortgage	5	.71
3) Obtained a non-FHA reverse mortgage	0	0
4) Received home equity or home improvement loan or other home repair assistance	0	0
5) Received consumer loan (unsecured)	0	0
6) Mortgage refinanced	0	0
7) Counseled and referred to other social service agency	0	0
8) Sold house/chose alternative housing solution	0	0
9) Completed financial management/budget counseling	0	0
10) Completed home maintenance counseling	0	0
11) Counseled and utilities brought current	0	0
12) Counseled and referred for legal assistance	0	0
13) Currently receiving counseling	0	0
14) Withdrew from counseling	0	0
15) Other	2	.28
Section 7c Sub-total:	**38**	**5.37**

d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	0	0
2) Obtained temporary rental relief	0	0
3) Counseled and referred to agency with rental assistance program	0	0
4) Advised on recertification for HUD/other subsidy program	0	0
5) Counseled and referred to other social service agency	0	0
6) Counseled and referred to legal aid agency for fair housing assistance	0	0
7) Counseled and referred to legal aid agency for assistance with eviction	0	0
8) Found alternative rental housing	0	0
9) Decided to remain in current housing situation	0	0
10) Resolved issue in current tenancy	0	0
11) Entered debt management/repayment plan	0	0
12) Counseled and utilities brought current	0	0
13) Resolved security deposit dispute	0	0
14) Currently receiving counseling	0	0
15) Withdrew from counseling	0	0
16) Other	0	0
Section 7d Sub-total:	**0**	**0**
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	0	0
2) Occupied transitional housing	0	0
3) Occupied permanent housing with rental assistance	0	0
4) Occupied permanent housing without rental assistance	0	0
5) Counseled Referred to other social service agency	0	0
6) Remained homeless	0	0
7) Currently receiving counseling	0	0
8) Withdrew from counseling	0	0
9) Other	0	0
Section 7e Sub-total:	**0**	**0**
Individual Counseling / Section 7 a-e Total:	**129**	**18.24**
Total Counseling / Section 6 and 7 Total:	**137**	**19.37**

8. HUD Housing Counseling Grant(s)-Summary Data

HUD Housing Counseling Grant or Sub-grant Number/Source	Grant Type	HUD Housing Counseling Grant Amount
0821-019	COMP	$25,244.00
0823-018	LDRC	$5,000.00
	Section 8 Totals:	$30,244.00

9. Authorization:

Input Official		**Agency Official**	
First Name:	Tracy	First Name:	Tracy
Last Name:	Smith	Last Name:	Smith
Title:		Title:	Agency Manager
Phone:		Phone:	

Send | Help | Reload | Back | PDF Version

Figure 239.A. PM – HUD-9902: 9902 form.

7. Complete all fields. Steps 8-14 explain important aspects of the HUD-9902 form.

8. In the **Counseling Agency Name & Address** area, keep the following information in mind:
   a. Although the address shown may be modified on-line through the Agency Information page of HCS, Housing Counseling Agencies should notify their respective HUD Homeownership Center (HOC) of any address changes.
   b. Reference to HUD HOC offices can be found at: http://www.hud.gov/offices/hsg/sfh/hoc/hsghocs.cfm
   c. Affiliates/branches are required to enter their Intermediary ID in the appropriate box on the Agency Information page of HCS.

9. In the **Reporting Period and Budget** section, remember that this is an accumulating quarterly report. All activities that took place from the first day of the fiscal year to the last day of the reporting period should be included in the report. Quarter 4 Reporting Period is the same as an annual report because it covers the entire fiscal year. Grant reporting period report are required for those agencies who have a grant agreement with HUD and should specify the starting date and ending date of the Grant reporting period.

10. Complete the Ethnicity of Clients, Race of Clients, Income Levels, and Number of Clients Receiving Educational/Outreach Services sections.

Note: The report contains two data columns for all sections of the HUD-9902 form:

- **All Counseling and Education Activities** – Enter data covering all housing counseling activities, including those performed under one or more HUD housing counseling grants.
- **Counseling and Education Activities attributed to HUD Housing Counseling Grant Funds** – Starting in FY 2007 the HUD Grant Activities are automatically calculated based on the HUD Funded Activity Ratio in Section 2. This ratio is determined by the total HUD grant awards in Section 8 divided by the Total Annual Housing Counseling Program Budget in Section 2. These data elements are recalculated when you enter a value into the All Counseling Activities column or when the Total Annual Housing Counseling Program Budget is changed.

11. For the **Number of Clients Counseled, by Purpose of Visit and Results** section, keep the following information in mind:
    a. Enter the number of clients to whom you provided counseling during the report period. This might include clients who entered your workload the previous report period but you carried over into and counseled during the current report period.
    b. You are not reporting the number of individual persons you counseled. Examples: A husband and wife or a brother and sister or three friends who are mortgagors under the same note count as one client. Three renting families who experience the same problem with the same landlord and come to your agency together for assistance count as one client.
    c. **Seeking Shelter or Services for the Homeless** – A client reported on this line must meet the definition for "homeless" or "homeless individual" set forth in Section 103, General Definition of Homeless Individual, of the Stewart B. McKinney Homeless Assistance Act (Public Law 100-77). Instructions / Guidance and FAQ – The following hyperlink will take you to the appropriate HUD website for form HUD-9902 instructions and FAQs. At the top of the site under INDEX, select "reports (PDF page)" and you will be directed to the proper location. Scroll down for further information at this location. http://www.hud.gov/offices/hsg/sfh/hcc/hc_faq.cfm

12. For **HUD Housing Counseling Grant Summary Data,** Section 8 of the form HUD-9902. This section is automatically calculated and shows the awards that were granted by HUD.

13. For **HUD Housing Counseling Grant Summary Data,** Section 8 of the form HUD-9902. This section is automatically calculated and shows the awards that were granted by HUD.

14. For the **Authorization** section, the first and last name of the user logged into HCS who completes this form is automatically entered for the Input Official when the Send button is clicked. The Agency Official is the Director first name and last name from the Agency Information page of HCS.

15. Starting in January of 2008, agencies can submit their client level data through a CMS system. The HUD 9902 Form provides an automated tool that generates the HUD 9902 Form and Logic Model from the client level data submitted. To view the client level data derived HUD 9902 Form and Logic Model Click the HUD 9902 (Derived) and Logic Model tabs respectively

The HUD 9902 (Derived) provides a features which overrides the permanent HUD 9902 Form. To use the client level data derived HUD 9902 Form as your permanent HUD 9902 Form click the Commit Data button. This causes the System to overwrite the regular HUD 9902 Form.

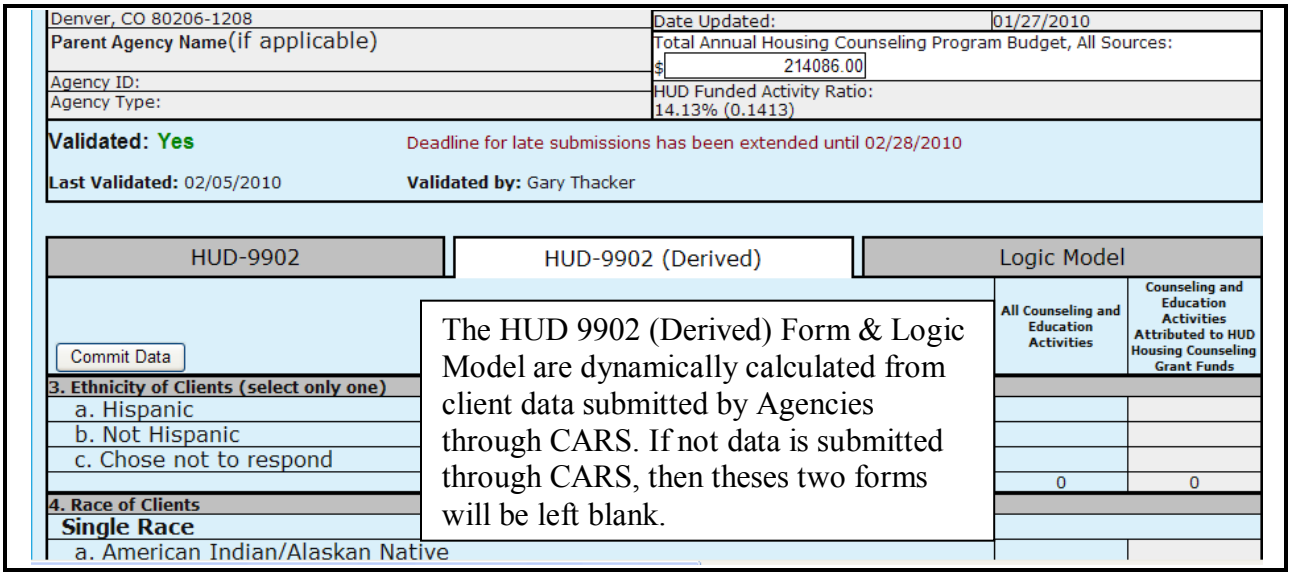
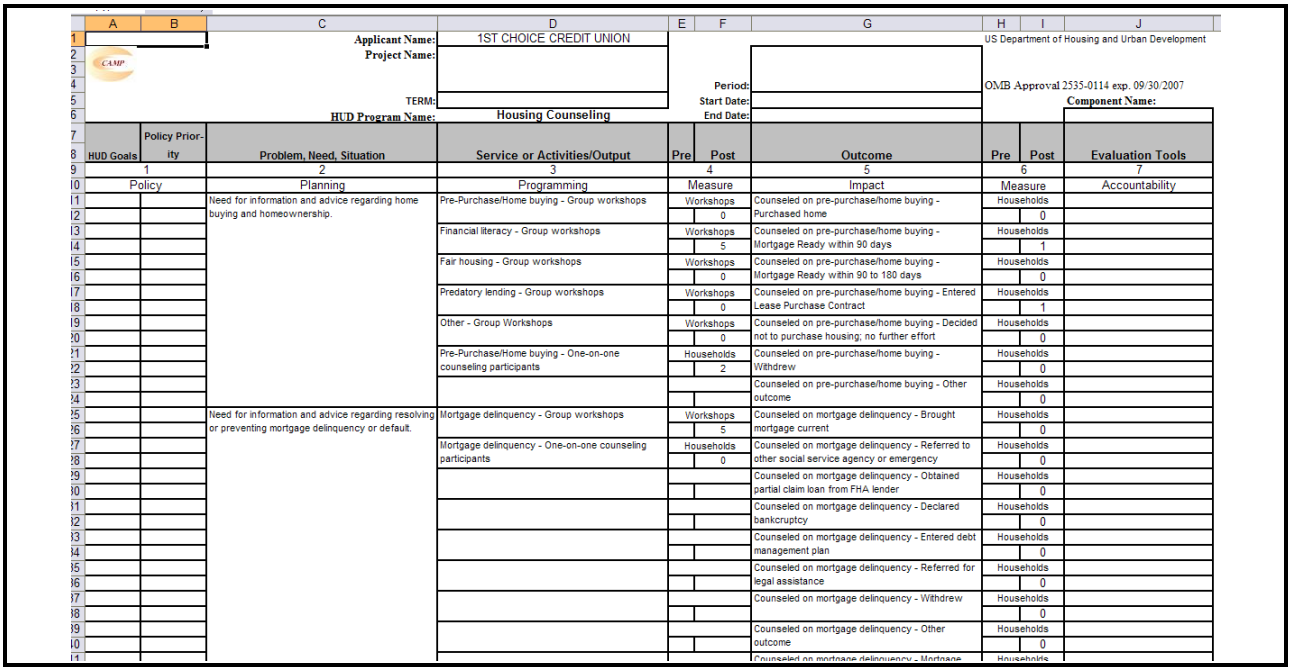


Figure 239.B. PM – HUD-9902: 9902 (Derived)

16. To view the Logic Model, Click the Logic Model tab and a new window is displayed that show the Logic Model filled out with the client level data submitted through the CMS systems.



Applicant Name: 1ST CHOICE CREDIT UNION
Project Name:
TERM:
HUD Program Name: Housing Counseling
Period:
Start Date:
End Date:
US Department of Housing and Urban Development
OMB Approval 2535-0114 exp. 09/30/2007
Component Name:

HUD Goals	Policy Priority	Problem, Need, Situation	Service or Activities/Output	Pre	Post	Outcome	Pre	Post	Evaluation Tools
1		2	3	4		5	6		7
Policy		Planning	Programming	Measure		Impact	Measure		Accountability
		Need for information and advice regarding home buying and homeownership.	Pre-Purchase/Home buying - Group workshops	Workshops	0	Counseled on pre-purchase/home buying - Purchased home	Households	0	
			Financial literacy - Group workshops	Workshops	5	Counseled on pre-purchase/home buying - Mortgage Ready within 90 days	Households	1	
			Fair housing - Group workshops	Workshops	0	Counseled on pre-purchase/home buying - Mortgage Ready within 90 to 180 days	Households	0	
			Predatory lending - Group workshops	Workshops	0	Counseled on pre-purchase/home buying - Entered Lease Purchase Contract	Households	1	
			Other - Group Workshops	Workshops	0	Counseled on pre-purchase/home buying - Decided not to purchase housing; no further effort	Households	0	
			Pre-Purchase/Home buying - One-on-one counseling participants	Households	2	Counseled on pre-purchase/home buying - Withdrew	Households	0	
						Counseled on pre-purchase/home buying - Other outcome	Households	0	
		Need for information and advice regarding resolving or preventing mortgage delinquency or default.	Mortgage delinquency - Group workshops	Workshops	5	Counseled on mortgage delinquency - Brought mortgage current	Households	0	
			Mortgage delinquency - One-on-one counseling participants	Households	0	Counseled on mortgage delinquency - Referred to other social service agency or emergency	Households	0	
						Counseled on mortgage delinquency - Obtained partial claim loan from FHA lender	Households	0	
						Counseled on mortgage delinquency - Declared bankcruptcy	Households	0	
						Counseled on mortgage delinquency - Entered debt management plan	Households	0	
						Counseled on mortgage delinquency - Referred for legal assistance	Households	0	
						Counseled on mortgage delinquency - Withdrew	Households	0	
						Counseled on mortgage delinquency - Other outcome	Households	0	

Figure 239.C PM – HUD-9902: Logic Model

17. When you finish completing this form, click **Send**. A message appears at the top of your screen.

A 9902 report has been created in database.

If the calculated totals don't agree with your calculations, verify your entries/totals and re-send the form if necessary.

Figure 240. PM – HUD-9902: Database Updated Message

Note: For help, click **HELP**. To send, click **SEND**. To reload the form, and start over, click **RELOAD**. To return to the home page, click **BACK**. For more information about these navigation buttons, please see **Chapter 3, Getting Started**.

You have now successfully completed a HUD-9902 form.

There are other dynamics associated with the Data Reporting Status Inquiry, which are found at the bottom of your returned search.

18. To print this list, click **Print**. A print dialog box appears allowing you to print the search results.

19. To export this list to Microsoft Excel, click **Export**. A File Download dialog box appears allowing you to save or open the search results using Microsoft Excel.

1809 agency(s) have Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- Have Reported 9902: Yes

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Details
82337	1ST CHOICE CREDIT UNION	Sub Grantee	315 Auburn Avenue Atlanta, GA 30303	404-832-5800 404-607-8252	HCS	9902
83799	28TH LEGISLATIVE DISTRICT COMMUNITY DEVELOPMENT CORPORATION	Sub Grantee	815 N. Hickory Street Chattanooga, TN 37404	423-698-8190 423-698-8191	HCS	9902
84478	4-SIGHT COUNSELING	LHCA	937 Broadway Broadway Plaza, Suite 305 Cape Girardeau, MO 63701	573-334-7995 573-335-8610	HCS	9902
83504	A.G.A.P.E. CDC	Sub Grantee	5205 Capital Boulevard Suite 5293 Raleigh, NC 27616	919-876-1239 888-876-1238	HCS	9902
83502	ABCD INC.	Sub Grantee	1225 Gross Avenue N.E. Canton, OH 44705-1605	330-455-6385 330-456-3913	HCS	9902
83751	ABYSSINIAN DEVELOPMENT CORPORATION	LHCA	4 W. 125 Street New York, NY 10027	646-442-6545 646-442-6598	HCS	9902
80015	ACCESS INCORPORATED	LHCA	3630 Aviation Way PO Box 4666 Medford, OR 97501	541-779-6691 541-779-8886	HCS	9902

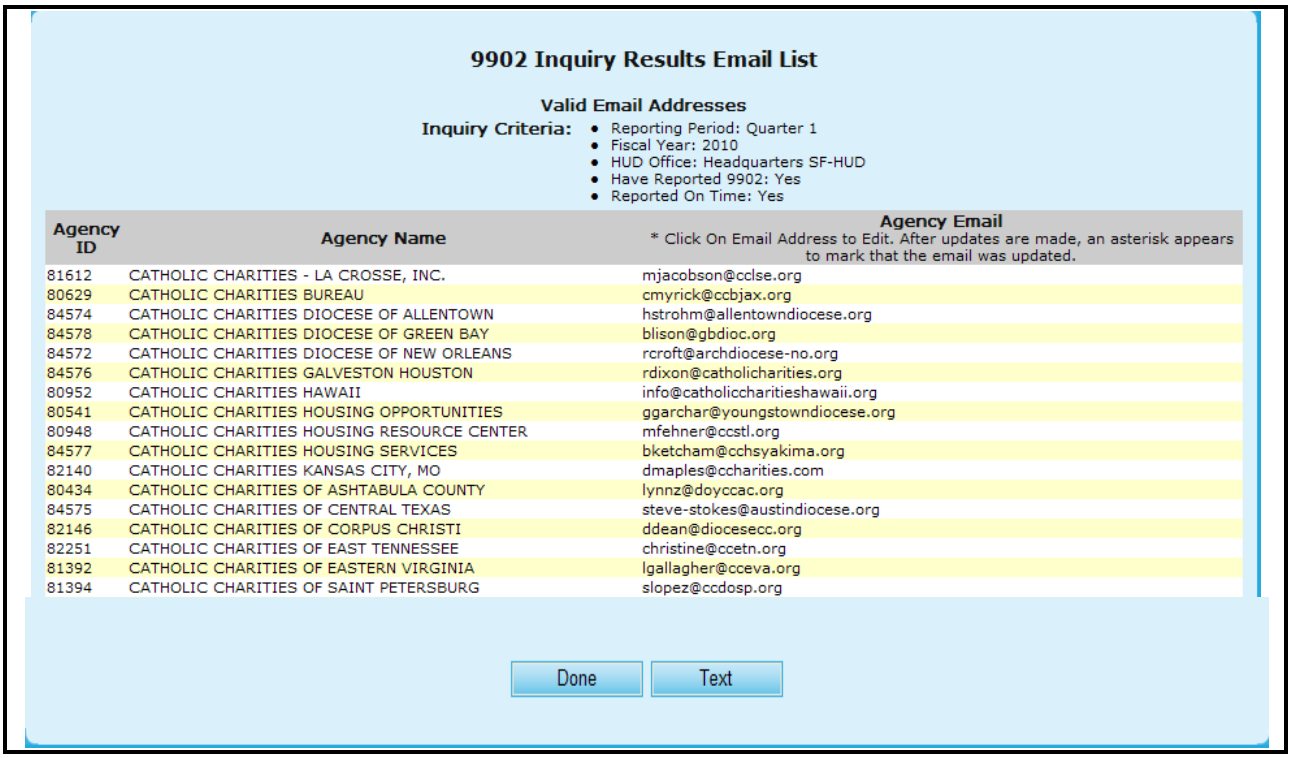
Print | Export | Invalid Email List | Email Address List

Figure 241. PM – HUD-9902: 9902 Data Reporting Status Inquiry Results

20. To view the e-mail list for this agency, click **Email Address List**. The *9902 Inquiry Results Email List* screen appears.

21. To save the email list as a text file, click **Text**. A File Download dialog box appears; click **Save** or **Open**.

22. When you are done reviewing the **Email List**, click **Done**. You return to the *9902 Inquiry Search Results List* screen



9902 Inquiry Results Email List

Valid Email Addresses

Inquiry Criteria:
- Reporting Period: Quarter 1
- Fiscal Year: 2010
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: Yes
- Reported On Time: Yes

Agency ID	Agency Name	Agency Email * Click On Email Address to Edit. After updates are made, an asterisk appears to mark that the email was updated.
81612	CATHOLIC CHARITIES - LA CROSSE, INC.	mjacobson@cclse.org
80629	CATHOLIC CHARITIES BUREAU	cmyrick@ccbjax.org
84574	CATHOLIC CHARITIES DIOCESE OF ALLENTOWN	hstrohm@allentowndiocese.org
84578	CATHOLIC CHARITIES DIOCESE OF GREEN BAY	blison@gbdioc.org
84572	CATHOLIC CHARITIES DIOCESE OF NEW ORLEANS	rcroft@archdiocese-no.org
84576	CATHOLIC CHARITIES GALVESTON HOUSTON	rdixon@catholicharities.org
80952	CATHOLIC CHARITIES HAWAII	info@catholiccharitieshawaii.org
80541	CATHOLIC CHARITIES HOUSING OPPORTUNITIES	ggarchar@youngstowndiocese.org
80948	CATHOLIC CHARITIES HOUSING RESOURCE CENTER	mfehner@ccstl.org
84577	CATHOLIC CHARITIES HOUSING SERVICES	bketcham@cchsyakima.org
82140	CATHOLIC CHARITIES KANSAS CITY, MO	dmaples@ccharities.com
80434	CATHOLIC CHARITIES OF ASHTABULA COUNTY	lynnz@doyccac.org
84575	CATHOLIC CHARITIES OF CENTRAL TEXAS	steve-stokes@austindiocese.org
82146	CATHOLIC CHARITIES OF CORPUS CHRISTI	ddean@diocesecc.org
82251	CATHOLIC CHARITIES OF EAST TENNESSEE	christine@ccetn.org
81392	CATHOLIC CHARITIES OF EASTERN VIRGINIA	lgallagher@cceva.org
81394	CATHOLIC CHARITIES OF SAINT PETERSBURG	slopez@ccdosp.org

Done Text

Figure 242. PM – HUD-9902: Inquiry Results Email List

23. To view the missing and invalid e-mail address(es) for this agency, click **Invalid Email List**. The *9902 Inquiry Results Email List* screen appears.

9902 Inquiry Results Email List

Missing/Invalid Email Addresses

Inquiry Criteria:
- Reporting Period: Quarter 1
- Fiscal Year: 2010
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: Yes
- Reported On Time: Yes

Agency ID	Agency Name	Agency Email * Click On Email Address to Edit. After updates are made, an asterisk appears to mark that the email was updated.
82259	HOUSING EDUCATION RESOURCE CENTER	N/A
84287	SOUTHSIDE COMM DEVEL & HOUSING	N/A
84437	METROPOLITAN MILWAUKEE FAIR HOUSING COUNCIL	N/A
80604	CENTRO DE APOYO FAMILIAR (CAF)	N/A
80605	COMMUNITY HOUSING WORKS	N/A
84330	HARVEST AMERICA	N/A
80627	IN CHARGE DEBT SOLUTIONS	N/A
84684	PATH STONE	N/A
80628	SOUTHWEST KEY PROGRAMS, INC.	n/a
81001	NEIGHBORWORKS HOME RESOURCES	N/A
82812	CALIFORNIA RURAL LEGAL ASSISTANCE	N/A
82810	CALIFORNIA RURAL LEGAL ASSISTANCE-MARYSVILLE OFFICE	N/A
81240	ASSOCIATION HOUSE	N/A
84558	BROOKLYN HOUSING AND FAMILY SERVICES	N/A
84211	CENTER FOR WORKING FAMILIES	N/A
81238	HUMBOLDT PARK SOCIAL SERVICES	N/A
81261	NEAR WESTSIDE COMMUNITY DEVELOPMENT CORPROATION	N/A
81239	SOUTHEAST CHICAGO DEVELOPMENT COMMISSION	N/A
83795	ST NICHOLAS NEIGHBORHOOD PRESERVATION CORPORATION	N/A
84219	UNIVERSITY SETTLEMENT	N/A
82987	WEST JACKSON CDC	N/A

Done

Figure 243.A. PM – HUD-9902: 9902 Inquiry Results Invalid Email List

a. To update the invalid email address, Click the invalid email address text under Agency Email.
b. An input box appears with two buttons, **Update** and **Cancel**.
c. Enter a valid email address and click the **Update** button to save.

9902 Inquiry Results Email List

Missing/Invalid Email Addresses

Inquiry Criteria:
- Reporting Period: Quarter 1
- Fiscal Year: 2010
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: Yes
- Reported On Time: Yes

Agency ID	Agency Name	Agency Email * Click On Email Address to Edit. After updates are made, an asterisk appears to mark that the email was updated.
82259	HOUSING EDUCATION RESOURCE CENTER	testing@aol.com Update Cancel
84287	SOUTHSIDE COMM DEVEL & HOUSING	N/A
84437	METROPOLITAN MILWAUKEE FAIR HOUSING COUNCIL	N/A

Done

Figure 243.B. PM – HUD-9902: 9902 Inquiry Results Invalid Email List – Edit

24. When you are finished reviewing this list, click **Done** to be returned back to the 9902 Inquiry Results list screen.

9902 Inquiry Results Email List

Missing/Invalid Email Addresses

Inquiry Criteria:
- Reporting Period: Quarter 1
- Fiscal Year: 2010
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: Yes
- Reported On Time: Yes

Agency ID	Agency Name	Agency Email * Click On Email Address to Edit. After updates are made, an asterisk appears to mark that the email was updated.
82259	HOUSING EDUCATION RESOURCE CENTER	testing@aol.com *
84287	SOUTHSIDE COMM DEVEL & HOUSING	N/A
84437	METROPOLITAN MILWAUKEE FAIR HOUSING COUNCIL	N/A

Done

Figure 243.C PM – HUD-9902: 9902 Inquiry Results Invalid Email List – Saved

25. To view more information about an agency listed on the agency search list, select an agency by clicking the hyperlink under the **Agency Name** column. The *Agency Profile* screen appears, as depicted in Section 9.2.1.

26. To view the HUD-9902 form for an agency, click the 9902 hyperlink. The HUD-9902 form appears.

27. If you key in a parent agency ID to the **Agency ID** field in *9902 Data Report Status Inquiry* criteria page, you will get a consolidated non-editable 9902 data report. Following is an example of consolidated 9902 report.

1 agency(s) belonging to CATHOLIC CHARITIES USA have Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- Parent Agency ID: 80750
- Have Reported 9902: Yes

CATHOLIC CHARITIES USA (80750): 1 Affiliate(s) have Reported Consolidated 9902

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Click for Details
82257	CATHOLIC FAMILY AND COMMUNITY SERVICES, A CATHOLIC CHARITIES AGENCY FOR THE DIOCESE OF PATERSON	Sub Grantee	24 DeGrasse Street Paterson, NJ 07505	973-279-7100-20 973-523-1150	HCS	9902

Print | Export | Invalid Email List | Email Address List

Figure 244.A. PM – HUD-9902: 9902 Processing – Report of Affiliates Belonging to A Parent Agency Have Reported 9902 Data

28. Upon selecting Consolidated 9902 you will be prompted to the report, presented as followed.

Totals for Sub-Agencies of

CATHOLIC CHARITIES USA

Agency ID: 80750
Agency Type: National Intermediary
HUD Office GTR: Ronald Bedoya
Number of Sub-Agencies Reported: 1
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	130	70.17
b. Not Hispanic	141	76.11
c. Chose not to respond	0	0.00
Section 3 Total:	271	146.28
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0	0.00
b. Asian	0	0.00
c. Black or African American	87	46.96
d. Native Hawaiian or Other Pacific Islander	0	0.00
e. White	184	99.32
Multi-Race		
f. American Indian or Alaska Native and White	0	0.00
g. Asian and White	0	0.00
h. Black or African American and White	0	0.00
i. American Indian or Alaska Native and Black or African American	0	0.00
j. Other multiple race	0	0.00
k. Chose not to respond	0	0.00
Section 4 Total:	271	146.28
5. Income Levels		
a. < 50% of Area Median Income (AMI)	19	10.26
b. 50 - 79% of AMI	76	41.02
c. 80 - 100% of AMI	103	55.60
d. > 100% AMI	73	39.41
e. Chose not to respond	0	0.00
Section 5 Total:	271	146.29
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	0	0.00
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	0	0.00
c. Completed resolving or preventing mortgage delinquency workshop	0	0.00
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0.00
e. Completed fair housing workshop	0	0.00
f. Completed predatory lending workshop	0	0.00
g. Completed rental workshop	0	0.00
h. Other workshop	0	0.00
Group Session / Section 6 Total:	0	0.00
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	0	0.00
2) Client will be mortgage ready within 90 days	0	0.00
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	0	0.00
4) Receiving long term pre-purchase counseling	0	0.00
5) Entered lease purchase progra	0	0.00
6) Decided Not to purchase housing; no further effort to prepare needed	0	0.00
7) Withdrew from counseling	0	0.00
8) Other	0	0.00
Section 7a Sub-total:	0	0.00
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	0	0.00
2) Mortgage refinanced	0	0.00

3) Mortgage modified	0	0.00
4) Received second mortgage	0	0.00
5) Initiated forbearance agreement/repayment plan	4	2.16
6) Executed a deed-in-lieu	0	0.00
7) Sold property/chose alternative housing solution	1	0.54
8) Pre-forclosure sale	0	0.00
9) Mortgage foreclosed	0	0.00
10) Counseled and referred to another social service or emergency assistance agency	0	0.00
11) Obtained partial claim loan from FHA lender	0	0.00
12) Bankruptcy	0	0.00
13) Entered debt management plan	0	0.00
14) Counseled and referred for legal assistance	0	0.00
15) Currently receiving foreclosure prevention/budget counseling	0	0.00
16) Withdrew from counseling	0	0.00
17) Other	0	0.00
Section 7b Sub-total:	5	2.70
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	0	0.00
2) Counseled on HECM; decided not to obtain mortgage	0	0.00
3) Obtained a non-FHA reverse mortgage	0	0.00
4) Received home equity or home improvement loan or other home repair assistance	0	0.00
5) Received consumer loan (unsecured)	0	0.00
6) Mortgage refinanced	0	0.00
7) Counseled and referred to other social service agency	0	0.00
8) Sold house/chose alternative housing solution	0	0.00
9) Completed financial management/budget counseling	0	0.00
10) Completed home maintenance counseling	0	0.00
11) Counseled and utilities brought current	8	4.32
12) Counseled and referred for legal assistance	0	0.00
13) Currently receiving counseling	0	0.00
14) Withdrew from counseling	0	0.00
15) Other	0	0.00
Section 7c Sub-total:	8	4.32
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	0	0.00
2) Obtained temporary rental relief	80	43.18
3) Counseled and referred to agency with rental assistance program	0	0.00
4) Advised on recertification for HUD/other subsidy program	0	0.00
5) Counseled and referred to other social service agency	0	0.00
6) Counseled and referred to legal aid agency for fair housing assistance	0	0.00
7) Counseled and referred to legal aid agency for assistance with eviction	0	0.00
8) Found alternative rental housing	0	0.00
9) Decided to remain in current housing situation	0	0.00
10) Resolved issue in current tenancy	0	0.00
11) Entered debt management/repayment plan	0	0.00
12) Counseled and utilities brought current	111	59.92
13) Resolved security deposit dispute	0	0.00
14) Currently receiving counseling	0	0.00
15) Withdrew from counseling	0	0.00
16) Other	0	0.00
Section 7d Sub-total:	191	103.10
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	67	36.17
2) Occupied transitional housing	0	0.00
3) Occupied permanent housing with rental assistance	0	0.00
4) Occupied permanent housing without rental assistance	0	0.00
5) Counseled Referred to other social service agency	0	0.00
6) Remained homeless	0	0.00
7) Currently receiving counseling	0	0.00
8) Withdrew from counseling	0	0.00
9) Other	0	0.00
Section 7e Sub-total:	67	36.17
Individual Counseling / Section 7 a-e Total:	271	146.29
Total Counseling / Section 6 and 7 Total:	271	146.29

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$1,056,325.88

Figure 244.B. PM – HUD-9902: 9902 Processing – Consolidated 9902 Report

29. If you select „Headquarters SF-HUD" from **HUD Office** dropdown, select „No" from **Have Reported Individual 9902** dropdown, and click **Submit Inquiry** button. The following report appears. In this report, name of parent agency, count and information of affiliates that have not reported 9902 data, links to agency profile(s) and individual 9902 report(s) are available and are grouped by parent agency name. You may click the individual 9902 report link to input 9902 data, or click agency name link to view or edit agency profile data.

926 agency(s) belonging to the Headquarters SF-HUD have Not Reported for Quarter 4 of Fiscal Year 2009

Inquiry Criteria:
- Reporting Period: Quarter 4
- Fiscal Year: 2009
- HUD Office: Headquarters SF-HUD
- Have Reported 9902: No

2 Agency(s) Having No Current Association

83453	HOPE HOUSING COUNSELING AGENCY	Affiliate	315 E. 7th Street Lawrence, KS 66049	785-856-4444 785-749-0095	HCS	9902
80920	NEIGHBORHOOD HOUSING SERVICES OF NORTH TEXAS (FORMERLY NHS OF FORT WORTH)	Sub Grantee	2315 N Main St Ste 401 Fort Worth, TX 76106	817-624-9454 817-624-0860	HCS	9902

ACORN HOUSING CORPORATION (80753): 39 Affiliate(s) have Not Reported

Agency ID	Agency Name	Agency Type	Agency Address	Contact	Data Source	Details
83075	ACORN HOUSING , ORLANDO, FL	Sub Grantee	120 E. Colonial Dr. Orlando, FL 32801	407-254-5974 407-254-0841	HCS	9902
84343	ACORN HOUSING BATON ROUGE, LA	Branch Inter Agency	5177 Greenwell Spring Road Baton Rounge, LA 70806	225-925-0937	HCS	9902

Figure 245. PM – HUD-9902: 9902 Processing – Report of Agencies Associated with Intermediaries in HQ Have Not Reported 9902 Data

9.2.2 Analysis Report Inquiry

As a Program Manager, you can perform an Analysis Reports Inquiry. The Analysis Reports Inquiry is used to organize and/or retrieve 9902 information. It can be exported into Excel spreadsheet in order to manipulate the data for other purpose.

1. From the top navigation menu, click **Analysis Reports Inquiry** hyperlink**.** The *9902 Data Analysis Reports Inquiry* page appears.

2. Complete all appropriate search fields in second half of the inquiry page and click the **Submit Inquiry** button.

Note: To view the differences in Analysis Type options, skip to Step 5.

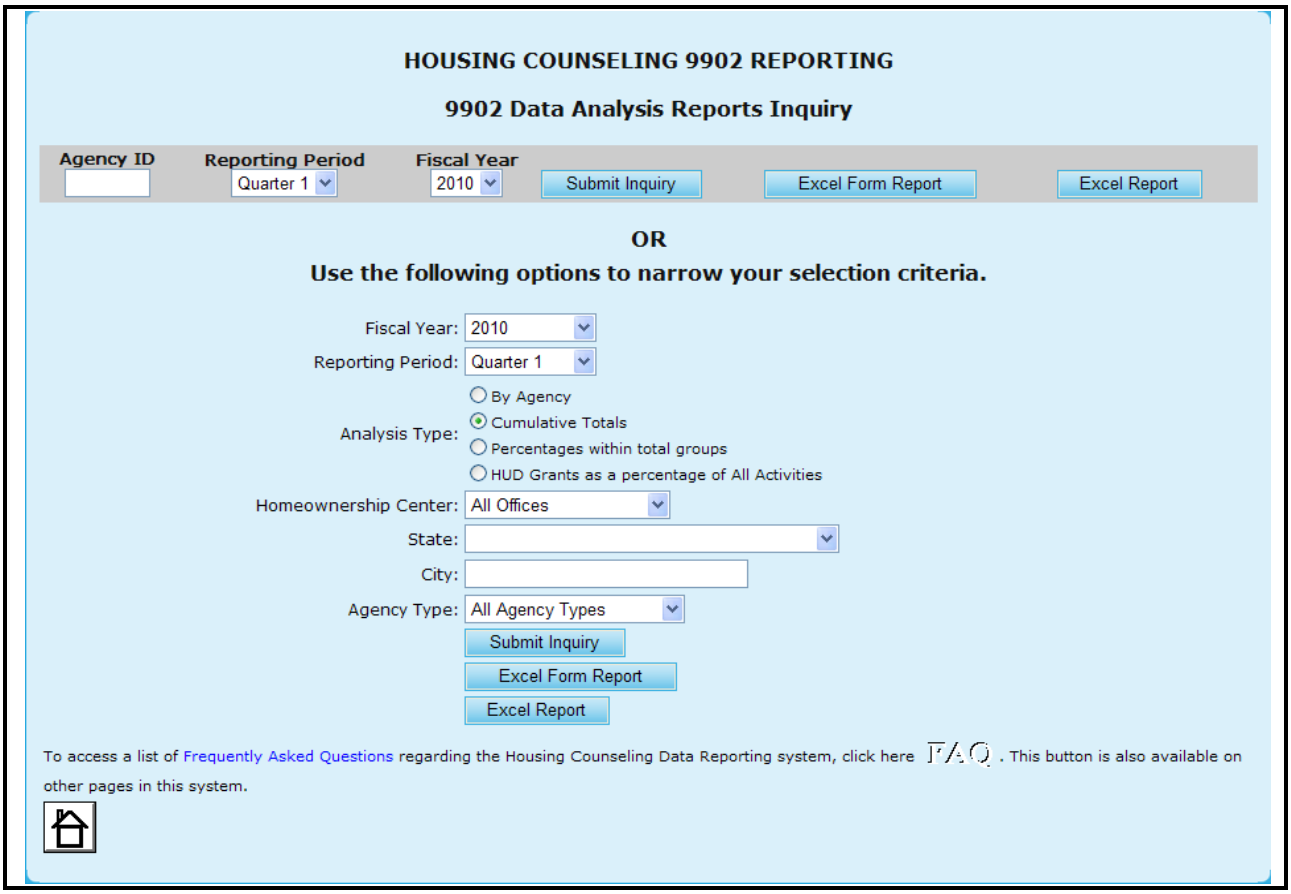


Figure 246.A. PM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry

3. Key in agency ID into **Agency ID** field and click the **Submit Inquiry** button, a read-only 9902 report appears. If a non-parent agency ID is keyed in, an individual 9902 report is displayed. Otherwise, a consolidated 9902 report will be displayed.

4. Key in agency ID into **Agency ID** field and click the **Excel Report** button, the *File Download* window appears. Follow the prompt to **Open** or to **Save** 9902 data in Excel spreadsheet.

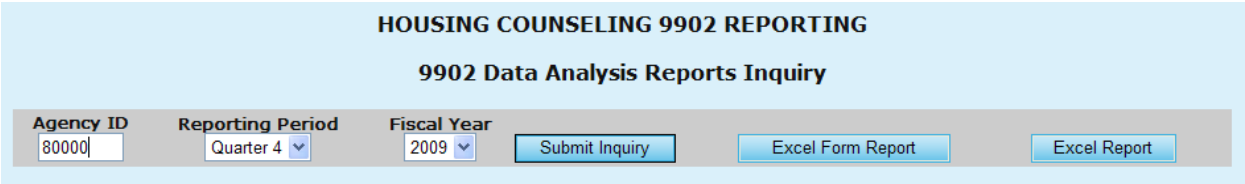


Figure 246.B. PM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – by Agency ID

Note: Provided below is an example of a Data Analysis Report when pressing Submit Inquiry.

DELAWARE OPPORTUNITIES, INCORPORATED

Agency ID: 80000
Agency Type: LHCA
HUD Office GTR: Glen Stopera
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	4	0.00
b. Not Hispanic	129	0.00
c. Chose not to respond	0	0.00
Section 3 Total:	133	0.00
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0	0.00
b. Asian	1	0.00
c. Black or African American	11	0.00
d. Native Hawaiian or Other Pacific Islander	1	0.00
e. White	118	0.00
Multi-Race		
f. American Indian or Alaska Native and White	0	0.00
g. Asian and White	0	0.00
h. Black or African American and White	1	0.00
i. American Indian or Alaska Native and Black or African American	0	0.00
j. Other multiple race	0	0.00
k. Chose not to respond	1	0.00
Section 4 Total:	133	0.00
5. Income Levels		
a. < 50% of Area Median Income (AMI)	14	0.00
b. 50 - 79% of AMI	85	0.00
c. 80 - 100% of AMI	34	0.00
d. > 100% AMI	0	0.00
e. Chose not to respond	0	0.00
Section 5 Total:	133	0.00
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	3	0.00
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	2	0.00
c. Completed resolving or preventing mortgage delinquency workshop	0	0.00
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0.00
e. Completed fair housing workshop	0	0.00
f. Completed predatory lending workshop	0	0.00
g. Completed rental workshop	0	0.00
h. Other workshop	0	0.00
Group Session / Section 6 Total:	5	0.00
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	3	0.00
2) Client will be mortgage ready within 90 days	5	0.00
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	0	0.00
4) Receiving long term pre-purchase counseling	1	0.00
5) Entered lease purchase progra	0	0.00
6) Decided Not to purchase housing; no further effort to prepare needed	1	0.00
7) Withdrew from counseling	1	0.00
8) Other	0	0.00
Section 7a Sub-total:	11	0.00

b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	0	0.00
2) Mortgage refinanced	0	0.00
3) Mortgage modified	0	0.00
4) Received second mortgage	0	0.00
5) Initiated forbearance agreement/repayment plan	0	0.00
6) Executed a deed-in-lieu	0	0.00
7) Sold property/chose alternative housing solution	0	0.00
8) Pre-forclosure sale	0	0.00
9) Mortgage foreclosed	0	0.00
10) Counseled and referred to another social service or emergency assistance agency	0	0.00
11) Obtained partial claim loan from FHA lender	0	0.00
12) Bankruptcy	0	0.00
13) Entered debt management plan	0	0.00
14) Counseled and referred for legal assistance	0	0.00
15) Currently receiving foreclosure prevention/budget counseling	0	0.00
16) Withdrew from counseling	0	0.00
17) Other	0	0.00
Section 7b Sub-total:	0	0.00
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	115	0.00
2) Counseled on HECM; decided not to obtain mortgage	2	0.00
3) Obtained a non-FHA reverse mortgage	0	0.00
4) Received home equity or home improvement loan or other home repair assistance	0	0.00
5) Received consumer loan (unsecured)	0	0.00
6) Mortgage refinanced	0	0.00
7) Counseled and referred to other social service agency	0	0.00
8) Sold house/chose alternative housing solution	0	0.00
9) Completed financial management/budget counseling	0	0.00
10) Completed home maintenance counseling	0	0.00
11) Counseled and utilities brought current	0	0.00
12) Counseled and referred for legal assistance	0	0.00
13) Currently receiving counseling	0	0.00
14) Withdrew from counseling	0	0.00
15) Other	0	0.00
Section 7c Sub-total:	117	0.00
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	0	0.00
2) Obtained temporary rental relief	0	0.00
3) Counseled and referred to agency with rental assistance program	0	0.00
4) Advised on recertification for HUD/other subsidy program	0	0.00
5) Counseled and referred to other social service agency	0	0.00
6) Counseled and referred to legal aid agency for fair housing assistance	0	0.00
7) Counseled and referred to legal aid agency for assistance with eviction	0	0.00
8) Found alternative rental housing	0	0.00
9) Decided to remain in current housing situation	0	0.00
10) Resolved issue in current tenancy	0	0.00
11) Entered debt management/repayment plan	0	0.00
12) Counseled and utilities brought current	0	0.00
13) Resolved security deposit dispute	0	0.00
14) Currently receiving counseling	0	0.00
15) Withdrew from counseling	0	0.00
16) Other	0	0.00
Section 7d Sub-total:	0	0.00
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	0	0.00
2) Occupied transitional housing	0	0.00
3) Occupied permanent housing with rental assistance	0	0.00
4) Occupied permanent housing without rental assistance	0	0.00
5) Counseled Referred to other social service agency	0	0.00
6) Remained homeless	0	0.00
7) Currently receiving counseling	0	0.00
8) Withdrew from counseling	0	0.00
9) Other	0	0.00
Section 7e Sub-total:	0	0.00
Individual Counseling / Section 7 a-e Total:	128	0.00
Total Counseling / Section 6 and 7 Total:	133	0.00

8. HUD Housing Counseling Grant(s) Data		
HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$0.00

Figure 247.A. PM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – Individual 9902 Report

Note: Provided below is an example of a Data Analysis Report when pressing the Excel Form Report button.

A1 DELAWARE OPPORTUNITIES, INCORPORATED

	A	B	C	D	E
1	**DELAWARE OPPORTUNITIES, INCORPORATED**				
2	**Agency ID:** 80000				
3	**Report Period:** HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009				
4	**Fiscal Year:** 2009				
5		All Counseling and	Counseling and Education Activities Attributed to HUD Housing Counseling		
6		Education Activities	Grant		
7	3. Ethnicity of Clients (select only one)				
8	a. Hispanic	4	0		
9	b. Not Hispanic	129	0		
10	c. Chose not to respond	0	0		
11	Section 3 Total:	133	0		
12	4. Race of Clients				
13	**Single Race**				
14	a. American Indian/Alaskan Native	0	0		
15	b. Asian	1	0		
16	c. Black or African American	11	0		
17	d. Native Hawaiian or Other Pacific Islander	1	0		
18	e. White	118	0		
19	**Multi-Race**				
20	f. American Indian or Alaska Native and White	0	0		
21	g. Asian and White	0	0		
22	h. Black or African American and White	1	0		
23	i. American Indian or Alaska Native and Black or African American	0	0		
24	j. Other multiple race	0	0		
25	k. Chose not to respond	1	0		
26	Section 4 Total:	133	0		

Figure 247.B. PM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry –9902 Excel Form Report Spreadsheet

Note: Provided below is an example of a Data Analysis Report when pressing the Excel Report button.

A1 DELAWARE OPPORTUNITIES, INCORPORATED

	A	B	C	D	E
1	**DELAWARE OPPORTUNITIES, INCORPORATED**				
2	**Agency ID:** 80000				
3	**Report Period:** HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009				
4	**Fiscal Year:** 2009				
5					
6	Agency ID	Ethnicity_Clients_Counseling_Hispanic_all	Ethnicity_Clients_Counseling_Hispanic_hud	Ethnicity_Clients_Counseling_Non_Hispanic_all	Ethnicity_Clients_Counseling_hud
7	80000	4	0	129	
8					

(data abbreviated)

Figure 247.C. PM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry –9902 Excel Report Spreadsheet

5. If the default **Cumulative Totals** criteria is chosen for Analysis Type, the *Cumulative Totals* report will be prompted, as depicted below. By pressing either the **Excel Form Report** or **Excel Report** buttons, you will be prompted to similar reports as illustrated in Step 4.

Cumulative Totals

HOC: All Offices
Agency Type: All Agency Types
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	498,079	59,425.51
b. Not Hispanic	2,061,154	278,568.97
c. Chose not to respond	430,677	33,571.67
Section 3 Total:	2,989,910	371,566.15
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	24,729	4,616.63
b. Asian	68,199	6,206.53
c. Black or African American	846,978	117,424.24
d. Native Hawaiian or Other Pacific Islander	14,912	1,794.28
e. White	1,310,642	181,519.80
Multi-Race		
f. American Indian or Alaska Native and White	6,236	931.13
g. Asian and White	4,106	501.93
h. Black or African American and White	19,785	2,591.11
i. American Indian or Alaska Native and Black or African American	2,968	422.22
j. Other multiple race	192,178	18,566.43
k. Chose not to respond	505,379	37,422.81
Section 4 Total:	2,996,112	371,997.11
5. Income Levels		
a. < 50% of Area Median Income (AMI)	1,070,242	158,837.61
b. 50 - 79% of AMI	619,615	88,735.09
c. 80 - 100% of AMI	283,499	35,948.79
d. > 100% AMI	335,236	32,513.20
e. Chose not to respond	678,008	54,911.26
Section 5 Total:	2,986,600	370,945.95
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	186,377	37,950.50
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	124,537	20,107.26
c. Completed resolving or preventing mortgage delinquency workshop	54,274	9,106.57
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	14,801	2,902.63
e. Completed fair housing workshop	12,361	1,730.57
f. Completed predatory lending workshop	14,989	2,218.11
g. Completed rental workshop	20,207	5,694.89
h. Other workshop	337,180	24,526.38
Group Session / Section 6 Total:	764,726	104,236.91
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	34,168	7,312.68
2) Client will be mortgage ready within 90 days	67,330	13,031.85
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	35,399	7,659.90
4) Receiving long term pre-purchase counseling	48,509	9,993.02
5) Entered lease purchase progra	607	104.34
6) Decided Not to purchase housing; no further effort to prepare needed	6,740	1,372.07
7) Withdrew from counseling	24,389	3,498.80
8) Other	16,873	3,204.65
Section 7a Sub-total:	234,015	46,177.31

b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	41,170	4,338.38
2) Mortgage refinanced	13,599	917.72
3) Mortgage modified	218,799	18,059.16
4) Received second mortgage	14,017	545.40
5) Initiated forbearance agreement/repayment plan	80,715	7,528.13
6) Executed a deed-in-lieu	3,892	235.31
7) Sold property/chose alternative housing solution	9,829	681.13
8) Pre-forclosure sale	27,011	1,356.88
9) Mortgage foreclosed	18,408	1,722.50
10) Counseled and referred to another social service or emergency assistance agency	83,169	5,764.14
11) Obtained partial claim loan from FHA lender	2,649	286.87
12) Bankruptcy	43,129	3,638.79
13) Entered debt management plan	18,265	1,909.95
14) Counseled and referred for legal assistance	21,295	2,700.70
15) Currently receiving foreclosure prevention/budget counseling	528,677	47,816.46
16) Withdrew from counseling	74,659	5,710.59
17) Other	202,909	17,545.51
Section 7b Sub-total:	1,402,192	120,757.62
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	116,647	15,653.38
2) Counseled on HECM; decided not to obtain mortgage	23,162	2,577.15
3) Obtained a non-FHA reverse mortgage	502	71.34
4) Received home equity or home improvement loan or other home repair assistance	6,880	1,538.77
5) Received consumer loan (unsecured)	402	80.63
6) Mortgage refinanced	1,703	214.64
7) Counseled and referred to other social service agency	7,471	1,236.24
8) Sold house/chose alternative housing solution	1,650	101.63
9) Completed financial management/budget counseling	24,393	3,420.69
10) Completed home maintenance counseling	4,513	589.00
11) Counseled and utilities brought current	10,417	1,367.82
12) Counseled and referred for legal assistance	7,201	1,110.38
13) Currently receiving counseling	32,791	6,856.23
14) Withdrew from counseling	6,596	1,078.75
15) Other	19,897	1,935.51
Section 7c Sub-total:	264,225	37,832.16
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	35,366	5,817.78
2) Obtained temporary rental relief	19,078	4,834.89
3) Counseled and referred to agency with rental assistance program	11,070	2,527.34
4) Advised on recertification for HUD/other subsidy program	16,738	4,394.14
5) Counseled and referred to other social service agency	13,180	2,467.68
6) Counseled and referred to legal aid agency for fair housing assistance	3,280	522.73
7) Counseled and referred to legal aid agency for assistance with eviction	17,041	1,940.27
8) Found alternative rental housing	9,173	1,728.94
9) Decided to remain in current housing situation	29,942	5,133.64
10) Resolved issue in current tenancy	23,810	3,418.16
11) Entered debt management/repayment plan	7,898	1,562.10
12) Counseled and utilities brought current	26,052	3,662.19
13) Resolved security deposit dispute	5,827	585.61
14) Currently receiving counseling	43,308	6,246.32
15) Withdrew from counseling	6,310	1,118.38
16) Other	35,865	5,982.83
Section 7d Sub-total:	303,938	51,943.00
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	25,979	6,420.77
2) Occupied transitional housing	4,098	546.15
3) Occupied permanent housing with rental assistance	8,014	1,788.51
4) Occupied permanent housing without rental assistance	2,932	496.03
5) Counseled Referred to other social service agency	4,836	755.84
6) Remained homeless	3,148	547.89
7) Currently receiving counseling	7,089	1,734.12
8) Withdrew from counseling	1,316	406.81
9) Other	2,166	316.56
Section 7e Sub-total:	59,578	13,012.68
Individual Counseling / Section 7 a-e Total:	2,263,948	269,722.77
Total Counseling / Section 6 and 7 Total:	3,028,674	373,959.68

8. HUD Housing Counseling Grant(s) Data		
HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$41,502,773.55

Figure 248. PM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – Cumulative Totals Report

6. If the default **By Agency** criteria is chosen for Analysis Type, the *By Agency* report will be prompted, as depicted below. By pressing either the **Excel Form Report** or **Excel Report** buttons, you will be prompted to similar reports as illustrated in Step 4.

Reporting Period: HUD-9902 Data from Oct 1, 2009 to Dec 31, 2009
Fiscal Year: 2010

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	15,563	1,978.90
b. Not Hispanic	61,932	12,318.99
c. Chose not to respond	19,267	558.22
Section 3 Total:	96,762	14,856.11
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	427	113.36
b. Asian	1,320	156.63
c. Black or African American	29,370	6,911.16
d. Native Hawaiian or Other Pacific Islander	169	28.13
e. White	44,754	6,630.25
Multi-Race		
f. American Indian or Alaska Native and White	135	17.71
g. Asian and White	83	10.96
h. Black or African American and White	638	140.25
i. American Indian or Alaska Native and Black or African American	51	6.31
j. Other multiple race	4,033	390.16
k. Chose not to respond	15,994	487.42
Section 4 Total:	96,974	14,892.34
5. Income Levels		
a. < 50% of Area Median Income (AMI)	37,313	7,400.64
b. 50 - 79% of AMI	22,147	3,721.23
c. 80 - 100% of AMI	9,956	1,772.53
d. > 100% AMI	9,392	1,064.57
e. Chose not to respond	18,044	852.74
Section 5 Total:	96,852	14,811.71

6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	7,638	1,529.39
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	11,019	1,143.23
c. Completed resolving or preventing mortgage delinquency workshop	1,518	202.76
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	501	204.05
e. Completed fair housing workshop	156	67.72
f. Completed predatory lending workshop	229	31.45
g. Completed rental workshop	546	250.17
h. Other workshop	5,568	395.40
Group Session / Section 6 Total:	27,175	3,824.17
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	1,418	266.96
2) Client will be mortgage ready within 90 days	1,854	395.64
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	1,523	345.40
4) Receiving long term pre-purchase counseling	2,845	685.05
5) Entered lease purchase progra	22	15.76
6) Decided Not to purchase housing; no further effort to prepare needed	273	61.38
7) Withdrew from counseling	535	85.69
8) Other	536	104.44
Section 7a Sub-total:	9,006	1,960.32
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	1,908	119.95
2) Mortgage refinanced	875	30.72
3) Mortgage modified	5,729	458.46
4) Received second mortgage	2,259	6.92
5) Initiated forbearance agreement/repayment plan	2,731	382.73
6) Executed a deed-in-lieu	368	15.17
7) Sold property/chose alternative housing solution	433	21.31
8) Pre-forclosure sale	257	22.81
9) Mortgage foreclosed	1,033	39.49
10) Counseled and referred to another social service or emergency assistance agency	748	108.54
11) Obtained partial claim loan from FHA lender	160	7.17

12) Bankruptcy	2,875	127.45
13) Entered debt management plan	447	12.77
14) Counseled and referred for legal assistance	691	131.89
15) Currently receiving foreclosure prevention/budget counseling	12,118	2,042.43
16) Withdrew from counseling	2,032	165.95
17) Other	2,092	151.74
Section 7b Sub-total:	36,756	3,845.50
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	5,318	592.52
2) Counseled on HECM; decided not to obtain mortgage	518	49.35
3) Obtained a non-FHA reverse mortgage	37	3.27
4) Received home equity or home improvement loan or other home repair assistance	267	49.29
5) Received consumer loan (unsecured)	16	0.00
6) Mortgage refinanced	270	1.08
7) Counseled and referred to other social service agency	80	21.82
8) Sold house/chose alternative housing solution	6	1.87
9) Completed financial management/budget counseling	718	433.60
10) Completed home maintenance counseling	142	63.97
11) Counseled and utilities brought current	397	107.79
12) Counseled and referred for legal assistance	807	108.87
13) Currently receiving counseling	2,751	706.75
14) Withdrew from counseling	513	71.78
15) Other	2,387	63.76
Section 7c Sub-total:	14,227	2,275.72
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	691	328.39
2) Obtained temporary rental relief	732	165.48
3) Counseled and referred to agency with rental assistance program	260	69.22
4) Advised on recertification for HUD/other subsidy program	952	421.82
5) Counseled and referred to other social service agency	620	164.96
6) Counseled and referred to legal aid agency for fair housing assistance	26	1.40
7) Counseled and referred to legal aid agency for assistance with eviction	61	7.92
8) Found alternative rental housing	297	113.11
9) Decided to remain in current housing situation	563	136.13
10) Resolved issue in current tenancy	946	124.91
11) Entered debt management/repayment plan	113	59.35
12) Counseled and utilities brought current	570	71.71
13) Resolved security deposit dispute	8	23.42
14) Currently receiving counseling	1,697	594.99
15) Withdrew from counseling	154	51.31
16) Other	1,565	208.79
Section 7d Sub-total:	9,255	2,542.91
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	77	13.58
2) Occupied transitional housing	106	40.74
3) Occupied permanent housing with rental assistance	140	103.70
4) Occupied permanent housing without rental assistance	54	20.94
5) Counseled Referred to other social service agency	248	164.96
6) Remained homeless	167	71.09
7) Currently receiving counseling	112	16.51
8) Withdrew from counseling	104	36.74
9) Other	158	26.09
Section 7e Sub-total:	1,166	494.35
Individual Counseling / Section 7 a-e Total:	70,410	11,118.80
Total Counseling / Section 6 and 7 Total:	97,585	14,942.97

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$9,475,101.32

Figure 249. PM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – By Agency Report

7. If the default **Percentages Within Total Group** criteria is chosen for Analysis Type, the *Percentages Within Total Group* report will be prompted, as depicted below. By pressing either the Excel Form Report or Excel Report buttons, you will be prompted to similar reports as illustrated in Step 4.

Percentages Within Total Groups

HOC: All Offices
Agency Type: All Agency Types
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	16.7%	16.0%
b. Not Hispanic	68.9%	75.0%
c. Chose not to respond	14.4%	9.0%
Section 3 Total:	100.0%	100.0%
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	0.8%	1.2%
b. Asian	2.3%	1.7%
c. Black or African American	28.3%	31.6%
d. Native Hawaiian or Other Pacific Islander	0.5%	0.5%
e. White	43.7%	48.8%
Multi-Race		
f. American Indian or Alaska Native and White	0.2%	0.3%
g. Asian and White	0.1%	0.1%
h. Black or African American and White	0.7%	0.7%
i. American Indian or Alaska Native and Black or African American	0.1%	0.1%
j. Other multiple race	6.4%	5.0%
k. Chose not to respond	16.9%	10.1%
Section 4 Total:	100.0%	100.0%
5. Income Levels		
a. < 50% of Area Median Income (AMI)	35.8%	42.8%
b. 50 - 79% of AMI	20.7%	23.9%
c. 80 - 100% of AMI	9.5%	9.7%
d. > 100% AMI	11.2%	8.8%
e. Chose not to respond	22.7%	14.8%
Section 5 Total:	100.0%	100.0%
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	24.4%	36.4%
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	16.3%	19.3%
c. Completed resolving or preventing mortgage delinquency workshop	7.1%	8.7%
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	1.9%	2.8%
e. Completed fair housing workshop	1.6%	1.7%
f. Completed predatory lending workshop	2.0%	2.1%
g. Completed rental workshop	2.6%	5.5%
h. Other workshop	44.1%	23.5%
Group Session / Section 6 Total:	100.0%	100.0%
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	14.6%	15.8%
2) Client will be mortgage ready within 90 days	28.8%	28.2%
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	15.1%	16.6%
4) Receiving long term pre-purchase counseling	20.7%	21.6%
5) Entered lease purchase progra	0.3%	0.2%
6) Decided Not to purchase housing; no further effort to prepare needed	2.9%	3.0%
7) Withdrew from counseling	10.4%	7.6%
8) Other	7.2%	6.9%
Section 7a Sub-total:	100.0%	100.0%
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	2.9%	3.6%
2) Mortgage refinanced	1.0%	0.8%
3) Mortgage modified	15.6%	15.0%
4) Received second mortgage	1.0%	0.5%
5) Initiated forbearance agreement/repayment plan	5.8%	6.2%
6) Executed a deed-in-lieu	0.3%	0.2%
7) Sold property/chose alternative housing solution	0.7%	0.6%

8) Other	7.2%	6.9%
Section 7a Sub-total:	100.0%	100.0%
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	2.9%	3.6%
2) Mortgage refinanced	1.0%	0.8%
3) Mortgage modified	15.6%	15.0%
4) Received second mortgage	1.0%	0.5%
5) Initiated forbearance agreement/repayment plan	5.8%	6.2%
6) Executed a deed-in-lieu	0.3%	0.2%
7) Sold property/chose alternative housing solution	0.7%	0.6%
8) Pre-forclosure sale	1.9%	1.1%
9) Mortgage foreclosed	1.3%	1.4%
10) Counseled and referred to another social service or emergency assistance agency	5.9%	4.8%
11) Obtained partial claim loan from FHA lender	0.2%	0.2%
12) Bankruptcy	3.1%	3.0%
13) Entered debt management plan	1.3%	1.6%
14) Counseled and referred for legal assistance	1.5%	2.2%
15) Currently receiving foreclosure prevention/budget counseling	37.7%	39.6%
16) Withdrew from counseling	5.3%	4.7%
17) Other	14.5%	14.5%
Section 7b Sub-total:	100.0%	100.0%
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	44.1%	41.4%
2) Counseled on HECM; decided not to obtain mortgage	8.8%	6.8%
3) Obtained a non-FHA reverse mortgage	0.2%	0.2%
4) Received home equity or home improvement loan or other home repair assistance	2.6%	4.1%
5) Received consumer loan (unsecured)	0.2%	0.2%
6) Mortgage refinanced	0.6%	0.6%
7) Counseled and referred to other social service agency	2.8%	3.3%
8) Sold house/chose alternative housing solution	0.6%	0.3%
9) Completed financial management/budget counseling	9.2%	9.0%
10) Completed home maintenance counseling	1.7%	1.6%
11) Counseled and utilities brought current	3.9%	3.6%
12) Counseled and referred for legal assistance	2.7%	2.9%
13) Currently receiving counseling	12.4%	18.1%
14) Withdrew from counseling	2.5%	2.9%
15) Other	7.5%	5.1%
Section 7c Sub-total:	100.0%	100.0%
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	11.6%	11.2%
2) Obtained temporary rental relief	6.3%	9.3%
3) Counseled and referred to agency with rental assistance program	3.6%	4.9%
4) Advised on recertification for HUD/other subsidy program	5.5%	8.5%
5) Counseled and referred to other social service agency	4.3%	4.8%
6) Counseled and referred to legal aid agency for fair housing assistance	1.1%	1.0%
7) Counseled and referred to legal aid agency for assistance with eviction	5.6%	3.7%
8) Found alternative rental housing	3.0%	3.3%
9) Decided to remain in current housing situation	9.9%	9.9%
10) Resolved issue in current tenancy	7.8%	6.6%
11) Entered debt management/repayment plan	2.6%	3.0%
12) Counseled and utilities brought current	8.6%	7.1%
13) Resolved security deposit dispute	1.9%	1.1%
14) Currently receiving counseling	14.2%	12.0%
15) Withdrew from counseling	2.1%	2.2%
16) Other	11.8%	11.5%
Section 7d Sub-total:	100.0%	100.0%
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	43.6%	49.3%
2) Occupied transitional housing	6.9%	4.2%
3) Occupied permanent housing with rental assistance	13.5%	13.7%
4) Occupied permanent housing without rental assistance	4.9%	3.8%
5) Counseled Referred to other social service agency	8.1%	5.8%
6) Remained homeless	5.3%	4.2%
7) Currently receiving counseling	11.9%	13.3%
8) Withdrew from counseling	2.2%	3.1%
9) Other	3.6%	2.4%
Section 7e Sub-total:	100.0%	100.0%
Individual Counseling / Section 7 a-e Total:	100.0%	100.0%
Total Counseling / Section 6 and 7 Total:	100.0%	100.0%

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$41,502,773.55

Figure 250. PM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – Percentages Within Total Groups Report

8. If the default **HUD Grants as a Percentage of All Activities** criteria is chosen for Analysis Type, the *HUD Grants as a Percentage of All Activities* report will be prompted, as depicted below. By pressing either the Excel Form Report or Excel Report buttons, you will be prompted to similar reports as illustrated in Step 4.

HUD Grants as a Percentage of All Activities

HOC: All Offices
Agency Type: All Agency Types
Reporting Period: HUD-9902 Data from Oct 1, 2008 to Sep 30, 2009
Fiscal Year: 2009

PDF Report

	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant
3. Ethnicity of Clients (select only one)		
a. Hispanic	100.0%	11.9%
b. Not Hispanic	100.0%	13.5%
c. Chose not to respond	100.0%	7.8%
Section 3 Total:	100.0%	12.4%
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native	100.0%	18.7%
b. Asian	100.0%	9.1%
c. Black or African American	100.0%	13.9%
d. Native Hawaiian or Other Pacific Islander	100.0%	12.0%
e. White	100.0%	13.8%
Multi-Race		
f. American Indian or Alaska Native and White	100.0%	14.9%
g. Asian and White	100.0%	12.2%
h. Black or African American and White	100.0%	13.1%
i. American Indian or Alaska Native and Black or African American	100.0%	14.2%
j. Other multiple race	100.0%	9.7%
k. Chose not to respond	100.0%	7.4%
Section 4 Total:	100.0%	12.4%
5. Income Levels		
a. < 50% of Area Median Income (AMI)	100.0%	14.8%
b. 50 - 79% of AMI	100.0%	14.3%
c. 80 - 100% of AMI	100.0%	12.7%
d. > 100% AMI	100.0%	9.7%
e. Chose not to respond	100.0%	8.1%
Section 5 Total:	100.0%	12.4%
6. Clients Receiving Education/Group Sessions		
a. Completed pre-purchase homebuyer education workshop	100.0%	20.4%
b. Completed financial literacy workshop, including home financing, budgeting and/or credit repair	100.0%	16.1%
c. Completed resolving or preventing mortgage delinquency workshop	100.0%	16.8%
d. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	100.0%	19.6%
e. Completed fair housing workshop	100.0%	14.0%
f. Completed predatory lending workshop	100.0%	14.8%
g. Completed rental workshop	100.0%	28.2%
h. Other workshop	100.0%	7.3%
Group Session / Section 6 Total:	100.0%	13.6%
7. Numbers of Clients Counseled, by Purpose of Visit and Results		
a. Seeking Pre-Purchase Homebuyer Counseling		
1) Purchased housing	100.0%	21.4%
2) Client will be mortgage ready within 90 days	100.0%	19.4%
3) Client will be Mortgage Ready after 90 Days; entered debt management plan or some other type of long-term financial plan to prepare for homeownership	100.0%	21.6%
4) Receiving long term pre-purchase counseling	100.0%	20.6%
5) Entered lease purchase progra	100.0%	17.2%
6) Decided Not to purchase housing; no further effort to prepare needed	100.0%	20.4%
7) Withdrew from counseling	100.0%	14.3%
8) Other	100.0%	19.0%
Section 7a Sub-total:	100.0%	19.7%
b. Seeking Help with Resolving or Preventing Mortgage Delinquency		
1) Brought mortgage current	100.0%	10.5%
2) Mortgage refinanced	100.0%	6.7%
3) Mortgage modified	100.0%	8.3%
4) Received second mortgage	100.0%	3.9%
5) Initiated forbearance agreement/repayment plan	100.0%	9.3%
6) Executed a deed-in-lieu	100.0%	6.0%
7) Sold property/chose alternative housing solution	100.0%	6.9%

8) Pre-forclosure sale	100.0%	5.0%
9) Mortgage foreclosed	100.0%	9.4%
10) Counseled and referred to another social service or emergency assistance agency	100.0%	6.9%
11) Obtained partial claim loan from FHA lender	100.0%	10.8%
12) Bankruptcy	100.0%	8.4%
13) Entered debt management plan	100.0%	10.5%
14) Counseled and referred for legal assistance	100.0%	12.7%
15) Currently receiving foreclosure prevention/budget counseling	100.0%	9.0%
16) Withdrew from counseling	100.0%	7.6%
17) Other	100.0%	8.6%
Section 7b Sub-total:	100.0%	8.6%
c. Seeking Help with Home Maintenance and Financial Management for Homeowners		
1) Obtained a Home Equity Conversion Mortgage (HECM)	100.0%	13.4%
2) Counseled on HECM; decided not to obtain mortgage	100.0%	11.1%
3) Obtained a non-FHA reverse mortgage	100.0%	14.2%
4) Received home equity or home improvement loan or other home repair assistance	100.0%	22.4%
5) Received consumer loan (unsecured)	100.0%	20.1%
6) Mortgage refinanced	100.0%	12.6%
7) Counseled and referred to other social service agency	100.0%	16.5%
8) Sold house/chose alternative housing solution	100.0%	6.2%
9) Completed financial management/budget counseling	100.0%	14.0%
10) Completed home maintenance counseling	100.0%	13.1%
11) Counseled and utilities brought current	100.0%	13.1%
12) Counseled and referred for legal assistance	100.0%	15.4%
13) Currently receiving counseling	100.0%	20.9%
14) Withdrew from counseling	100.0%	16.4%
15) Other	100.0%	9.7%
Section 7c Sub-total:	100.0%	14.3%
d. Seeking Help in Locating, Securing, or Maintaining Residence in Rental Housing		
1) Received housing search assistance	100.0%	16.5%
2) Obtained temporary rental relief	100.0%	25.3%
3) Counseled and referred to agency with rental assistance program	100.0%	22.8%
4) Advised on recertification for HUD/other subsidy program	100.0%	26.3%
5) Counseled and referred to other social service agency	100.0%	18.7%
6) Counseled and referred to legal aid agency for fair housing assistance	100.0%	15.9%
7) Counseled and referred to legal aid agency for assistance with eviction	100.0%	11.4%
8) Found alternative rental housing	100.0%	18.8%
9) Decided to remain in current housing situation	100.0%	17.1%
10) Resolved issue in current tenancy	100.0%	14.4%
11) Entered debt management/repayment plan	100.0%	19.8%
12) Counseled and utilities brought current	100.0%	14.1%
13) Resolved security deposit dispute	100.0%	10.0%
14) Currently receiving counseling	100.0%	14.4%
15) Withdrew from counseling	100.0%	17.7%
16) Other	100.0%	16.7%
Section 7d Sub-total:	100.0%	17.1%
e. Seeking Shelter or Services for the Homeless		
1) Occupied emergency shelter	100.0%	24.7%
2) Occupied transitional housing	100.0%	13.3%
3) Occupied permanent housing with rental assistance	100.0%	22.3%
4) Occupied permanent housing without rental assistance	100.0%	16.9%
5) Counseled Referred to other social service agency	100.0%	15.6%
6) Remained homeless	100.0%	17.4%
7) Currently receiving counseling	100.0%	24.5%
8) Withdrew from counseling	100.0%	30.9%
9) Other	100.0%	14.6%
Section 7e Sub-total:	100.0%	21.8%
Individual Counseling / Section 7 a-e Total:	100.0%	16.3%
Total Counseling / Section 6 and 7 Total:	100.0%	15.9%

8. HUD Housing Counseling Grant(s) Data

HUD Housing Counseling Grant or Sub-grant Application Number	Grant Type	HUD Housing Counseling Grant Amount
All HUD Grants		$41,502,773.55

Figure 251. PM – HUD-9902: 9902 Processing – 9902 Data Analysis Reports Inquiry – HUD Grants as a Percentage of All Activities Report

9.3 Grants

The U.S. Department of Housing and Urban Development (HUD) administers a comprehensive housing counseling program and provides grants through competitive awards to approved local housing counseling agencies, national and regional intermediaries, and state housing finance agencies.

A Program Manager has unique and specific duties in preparing each fiscal year‟s grant processing. Program Manager‟s duties begin in participating in the NOFA‟s drafting. The Program Manager must

know the fiscal year‟s funding requirements and ensure HCS is capable of processing grant applications in accordance with the NOFA requirements. The Program Manager must assess if changes can be made in HCS setup features or if modifications to the system should be made.

A Program Manager uses the following features in that order to perform HCS **Grant Processing** functions.

- Setup Grant Category (Demonstrated in Management sub-menu)
- Setup Grant Type (Demonstrated in Management sub-menu)
- Setup Funding Appropriations (in Management sub-menu)
- Funding Allocations (in Grant Application Process sub-menu)
- Office Reviewer (Demonstrated in Management sub-menu)
- Modify Scoring Criteria (Demonstrated in Management sub-menu)
- Setup Recommended Award Criteria (Demonstrated in Management sub-menu)
- Setup Grant Applications (in Grant Application Process sub-menu)
- Scoring (in Grant Application Process sub-menu)
- Final Scoring for Primary Reviewers (in Grant Application Process sub-menu)
- Calculate Recommended Awards (in Grant Application Process sub-menu)
- Input Awards / Sub Allocations (in Grant Application Process sub-menu)
- View various grant processing reports to monitor the grant process (in Reports sub-menu)
- Export grant processing information to Microsoft Word, Excel, and text files for external usage as needed (in Export sub-menu)

Note: Further information on these steps will be discussed in their designated section, as mentioned in parenthesis.

While logging in as a *Program Manager*, Click the **Grant Processing** hyperlink from the upper navigation menu, following Grant Processing screen is displayed. In the main display area are Funding Grant Processing – Getting Started instructions and online Grant Processing User Manual hyperlinks. In the Grant Processing menu on the top are Grant Processing Help hyperlink, Grant Fiscal Year dropdown selection, and Grant Processing navigation menu items.

2009 Funding Grant Processing - Getting Started

Instructions: Follow the steps below to setup the HCG system for this fiscal year. Use the menu to the left to navigate through the HCG system.

Step 1:	Funding Allocations	The Program Manager at HQ enters in the Grant Funding according to grant type and HUD Offices. Notification of completion will be emailed out.
Step 2:	Setup Grant Applications	1. Managers will ensure: • Agencies applying for grant are listed in their agency list. • Agencies update their profile information. • GTRs are assigned to each agency. • Assign Primary Reviewer to each application. 2. Primary Reviewers build aplications for each of their agencies that are applying for grant funding.
Step 3:	Scoring	1. Reviewers enter their evaluations for each application. 2. Primary Reviewer enters own score. An average score will be provided by system. 3. Primary Reviewer will enter final score.
Step 4:	Calculate Recommended Awards	The system will determine award amount based on individual score compared with other applications' scores.
Step 5:	Input Awards	Primary Reviewers determine whether or not to accept system's recommended award by entering in the award amount suggested by the system or by entering their own adjusted amount.

Grant Processing User Manual

Instructions for Housing Counseling Applications and Grant Awards IAW SuperNOFA. (HTM)
Overview (HTM)
Grant Application Process (HTM)
Reports (HTM)
Maintenance (HTM)
Export (HTM)

Figure 252. PM – Grants: Grant Processing Screen

The above initial home page for grant processing provides a general procedure for HOCs to use in processing grants. Until this page is modified to allow direct edits, the Program Manager must submit changes of instructions to contractor for changes.

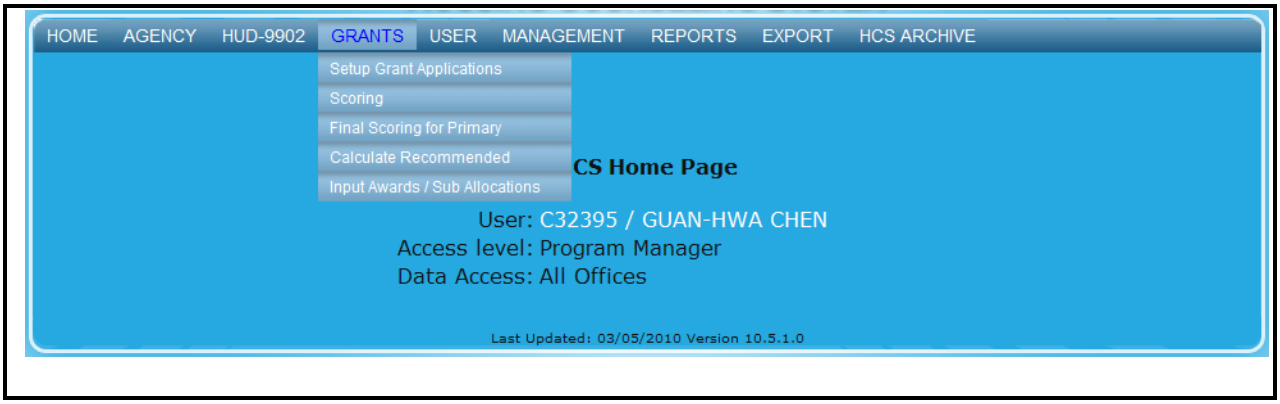


Figure 253. PM – Grants: Grant Processing Menu

9.3.1 Grant Application Process

- **Grant Fiscal Year**
  - From the top navigation menu, select from the dropdown list the fiscal year of grant application process you want to work on. The fiscal year selected represents the fiscal year the grant funding was appropriated by Congress and the year the grant award processing occurs; not the year the funds are used.

- **Setup and Maintenance**
  - Modify Scoring Criteria:
    - Modify last fiscal year‟s scoring criteria to setup the new (current) fiscal year‟s scoring criteria, if current year‟s is different from last year‟s.
    - Input maximum bonus points.
  - Setup Recommended Award Criteria: Setup criteria to be used for recommended awards calculation for the new (current) fiscal year.
  - Setup Grant Category: List the various agency types identified in the NOFA as categories.
  - Setup Grant Type: List the various grant types identified in the NOFA.
  - Setup Funding Appropriations: Assigned Grant allocations to the various appropriations:
    - Setup grant categories, grant types, HUD offices for funding appropriations and funding allocations usage, and funding allocation methods.
    - Input NOFA total funding amount, total appropriation for grants, and appropriations to grant categories and grant types for the new fiscal year.
  - Office Reviewer: This page allows for viewing of which HUD offices have or have not been created from the Funding Appropriations and Funding Allocations pages.
- **Grant Application Process**
  - Funding Allocations: Program Manager at HUD Headquarters enters in the grant funding according to grant types and grant categories.
  - Setup Grant Applications: This is a 3-step process.
    - All HUD offices must insure that the HUD persons they intend to use to evaluate applications must be listed in the user section in HCS.
    - The next step is to ensure that all agencies applying for grants are listed and have an active status through the fiscal year.
    - Primary reviewers build applications for each of their agencies that are applying for grant funding. Ensure that client projection numbers are entered. Assigned Reviewers to the application. Enter the agency‟s requested grant amount.
- **Scoring:**
  - Reviewers enter their evaluation for each application they are assigned.
  - Primary reviewer enters their own score. An average score will be provided by the system.
  - The „Individual Reviewers‟ score are primarily for the Primary Reviewer to determine the Final Score.

- Final Scoring for Primary Reviewers: Primary reviewer enters final score. All applications have to have a final score to complete the grant processing. The Recommended Award amounts are calculated using the final scores. There is a separate report that should be use to track final score input against all applications.

Note: All applications must have a Final Score entered into HCS in order for the Recommended Amount to be calculated.

- Calculate Recommended Awards: HCS system calculates the recommended award amounts that are based on individual score compared with other applications‟ scores.

Note: All applications must take their final score recorded in HCS before calculating final Recommended Awards.

- Input Awards / Sub Allocations

  - Primary reviewers, GTR, and/or Managers determine whether or not to accept system‟s recommended award by entering in the system calculated recommended award amount or by entering their own adjusted amount.
  - Parent organization‟s grant award is sub-allocated to their sub-agencies after Agencies receive formal grant Award.

- **Reports (As Detailed in Section 9.7)**
  - Application Status: Reports on the Grant Application Award status and shows all information filled out on the application, and the final scores by the Primary Reviewers.
  - Scores Status: This report summarizes the Scoring function rates and ranks grant applications.
  - Strength/Weakness by Factor: The Strength/Weakness by Factor function details the strength and weakness for each application.
  - Strength/Weakness All Factors: The Strength/Weakness All Factors function details all comments for each application.
  - Funding Recommendations: details by agency name and grant application ID, with their final score, recommended award amount, and requested grant amount.
  - Funding Report: details by HOC office name, grant type, the allocated amount, the amount awarded and the amount to be returned.
  - Awards Report by Agency: Reports on the Application Award amount. This is a good drill-down report allowing views from an office level down to the individual agency.
  - Awards Report by Office: The Awards Report by Office function details the awards granted by office.
  - Awards Report by State: The Awards Report by State function details the awards granted by state.

- **Export (As Detailed in Section 9.8)**
  - List of Awardees: This option contains a list of awardees which can be imported into MS Word for publication in the Federal Register. This feature is only available to users assigned to the HQ HUD Office.
  - Procurement Accounting Spreadsheet: Data of agencies that received grant award(s), grant awarded amount, state where agency locates, region number, fiscal year, and other coded data in a exportable Excel spreadsheetHUD-1044: The HUD-1044 option generates form HUD-1044 (Assistance Award/Amendment) for each agency.
  - Award Letters: This option is used to generate and process HUD Grant Notifications for each state.
  - Applications Data: Detailed information of agency profile and grant applications data contained in exportable Excel spreadsheet
  - IRS Delinquent Data: This option includes a listing of agencies delinquent in their payments to the IRS.
  - Congressional Report Data: This option includes a report to Congress about the awards and the amounts awarded.
  - Funding Aggregate Report: Aggregate report of counts of agencies and grant applications, and totals of NOFA funding, requested amount, recommended grant amount, and awarded amount that are listed by application type and HOC office in exportable Excel spreadsheet.
  - Public Affairs Report: Housing counseling grantees and awarded amount report listed in two exportable Excel spreadsheets for State and Local agencies and National and Regional agencies respectively
  - Agency Award/No Award Letters Data: This report generates a make-merge file for the award letters.

- Draw Down Report Processing: This report tracks the disbursements to agencies as they are handed out throughout the Fiscal Year.

The following instructions address each menu from top to bottom providing example screen shots.

9.3.2 Setup Grant Applications

As a Program Manager, you can update and create grant applications for all the HUD offices and agencies. To update or create grant applications follow the steps below.

1. From the top navigation menu, click the Setup Grant Applications hyperlink. The *Office Applications – for FY 20XX* screen appears, displaying a matrix showing the number of applications of all HOC offices for the selected fiscal year and previous fiscal year.

2. Click the appropriate Grant Type hyperlink based off of the HUD Office you desire, and you will be prompted to a list of those Grant Applications.

Setup Grant Applications - for FY 2009

Head Quarters office view

Grant Application by Office	Grant Type	# of Apps	# of Agencies
Headquarters SF-HUD GTR Reviewer Rule:	INTERMEDIARY -COMP	25	25
	INTERMEDIARY -HECM	5	
	INTERMEDIARY -TRNG	3	
Philadelphia (HOC) GTR Reviewer Rule: GTR - No Restriction	LHCA -COMP	201	211
	LHCA -HECM	18	
	MSO -COMP	2	
	MSO -HECM	0	
	SHFA -COMP	8	
Atlanta (HOC) GTR Reviewer Rule:	LHCA -COMP	174	178
	LHCA -HECM	16	
	MSO -COMP	0	
	MSO -HECM	0	
	SHFA -COMP	4	
Denver (HOC) GTR Reviewer Rule:	LHCA -COMP	105	111
	LHCA -HECM	12	
	MSO -COMP	1	
	MSO -HECM	0	
	SHFA -COMP	5	
Santa Ana (HOC) GTR Reviewer Rule: GTR - No Restriction	LHCA -COMP	40	44
	LHCA -HECM	8	
	MSO -COMP	2	
	MSO -HECM	1	
	SHFA -COMP	2	
ALL			
Total Applications	790		
Total Agencies	569		

Figure 254. PM – Grants: Office Applications for FY 20XX

3. To view and/or update an existing application, select an agency under **Agency Name** column. Their application will be displayed for view or edit. The *Setup Grant Application for FY 20XX* screen appears.

Grant Applications for FY 2009
Headquarters SF-HUD INTERMEDIARY-COMP

Instructions: + –

*Grant Application Setup process is closed!

Agency Name	Agency ID	Address	Appl Office Ref.	Appl ID	Agency Type	Grant Type	Awarded FY 2006	Awarded FY 2007	Awarded FY 2008	Delete
CATHOLIC CHARITIES USA	80750	Sixty-Six Canal Center Plaza Alexandria, VA 22314-2720	0011	001	National Intermediary	COMP				
STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO	82359	915 Broadway New York, NY 10010	0011	002	National Intermediary	COMP				
MON VALLEY INITIATIVE	80084	303-305 E. 8th Avenue Homestead, PA 15120-1517	0011	003	National Intermediary	COMP				
HOMEOWNERSHIP PRESERVATION FOUNDATION	84081	3033 Excelsior Blvd. Minneapolis, MN 55416	0011	004	National Intermediary	COMP				
CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.	81504	18 Tremont Street, Boston, MA 02108	0011	005	National Intermediary	COMP				
NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS	84539	116 John Street, 33rd Floor New York, NY 10038-3300	0011	006	National Intermediary	COMP				
NEIGHBORHOOD REINVESTMENT CORPORATION	80754	1325 G St NW Washington, DC 20005-3104	0011	007	National Intermediary	COMP				
NATIONAL COUNCIL OF LA RAZA	80758	Raul Yzaguirre Building Washington, DC 20036	0011	008	National Intermediary	COMP				
HOUSING PARTNERSHIP NETWORK	80989	160 State Street, 5th Fl Boston, MA 02109-2502	0011	009	National Intermediary	COMP				
NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC	80759	3560 Grand Avenue Oakland, CA 94610	0011	010	National Intermediary	COMP				
THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC.	84434	727 15th Street, N.W., Suite 900 Washington, DC 20005-6027	0011	011	National Intermediary	COMP				
WEST TENNESSEE LEGAL SERVICES, INCORPORATED	80293	210 West Main Street Jackson, TN 38301	0011	012	National Intermediary	COMP				
NATIONAL URBAN LEAGUE	81639	120 Wall Street New York, NY 10005	0011	013	National Intermediary	COMP				

Figure 255. PM – Grants: Grant Applications for FY 20XX – Headquarter SF-HD Intermediary-COMP

4. It is important to have as a minimum: the number of total clients projection under Factor 3, Primary Reviewer name, and the corrected grant amount requested in the application. Once you have updated the desired information, click **OK** to save changes, or **Cancel** to return back to Application list.

Setup Grant Application for FY 2009

Instructions: + –

Agency Name: NATIONAL COUNCIL OF LA RAZA

Agency ID: 80758 **Agency Type:** National Intermediary

Fed Tax ID Num: 86-0212873 **DUNS Num:** 074809369

Address:
Raul Yzaguirre Building
1126 16th Street, NW, Suite 600
Washington, DC 20036

HUD Office: Headquarters SF-HUD

Application ID: 0013 - 001

Grant Type: LOAN DOCUMENT REVIEW COUNSELING

Client Outcome Projections	Projected Next FY	Adjusted Projections	Committed Projections
Projected ## of Clients that will be served			

Eligibility Requirements
Delinquent in Federal Debt? ☐ **Yes**

HUD Office GTR: Donahoe, Gerard P **GTR Reviewer Rules:**

Primary Reviewer: Siebenlist, Brian N

Secondary Reviewer 1: Donahoe, Gerard P

Secondary Reviewer 2: Weiser, Colleen A (Inactive)

Secondary Reviewer 3: Ibanez, Joel R

Clients Serviced Last FY: 0

Requested: $ 150,000.00 * Min.=$30,000.00 Max.=$150,000.00

Recommended: $ 150,000.00

Prev. FY Funding: $ 0.00

2-YR Review: No

Prev. Yr. Draws: No

OK Cancel

Figure 256. PM – Grants: Setup Grant Application for FY 20XX

5. To create a new grant application that is not listed in the *Grant Applications* page, click the **New Application** button**.** The *Agency* selection screen appears.

6. Click the drop-down arrow and select an agency for the new application.

Figure 257. PM – Grants: Select Agency dropdown

Note: You must select an application before you click **OK**. To cancel this new application, click **Cancel**.

7. Click **OK**. The *Setup Grant Application for FY 20XX* screen appears.

8. Complete the form. Inputting at a minimum Grant Request and Primary Reviewer.

9. The number of last year‟s grant awards in the **Last Year's Grant Awards** field is automatically inputted by the system if applicable.

10. Enter the number of grant requests in the **Grant Request** field.

11. If the agency is delinquent in Federal debt, click the box next to **Yes** in the **Delinquent in Federal Debt** field.

12. Select a primary and secondary reviewer(s) using the appropriate reviewer drop-down boxes. If a Reviewer is not listed, activate their name and ID in the HCS User Information Section.

13. Select **Yes** or **No** in the **2-YR Review** and **Prev. Yr. Draws** field.

14. To save this new grant application, click **OK**. To cancel this application, click **Cancel**.

Setup Grant Application for FY 2010

Instructions: + –

Agency Name: GARDEN STATE CONSUMER CREDIT COUNSELING, INC / NOVADEBT

Agency ID: 84870 Agency Type: Multi-State Organization

Fed Tax ID Num: 22-3120920 DUNS Num: 000000000

Address:
225 Willowbrook Road
Freehold, NJ 07728

Grant Type:

Application Requests	Last Year's Grant Awards	Grant Requests * Min.=$50,000.00 Max.=$500,000.00
HECM	$ 0.00	$ 0.00

Eligibility Requirements

Delinquent in Federal Debt? Yes

HUD Office GTR: Mindes, Stuart GTR Reviewer Rules: No Rules Defined

Primary Reviewer: (select one)

Secondary Reviewer 1: Grotheer, George H

Secondary Reviewer 2: Robinson, Belinda

Secondary Reviewer 3: Barnes, Shirley

2-YR Review: No

Prev. Yr. Draws: No

OK Cancel

Figure 258. PM – Grants: Setup Grant Application for FY 20XX

You have now completed a new grant application.

9.3.3 Scoring

1. From the upper navigation menu, click the **Scoring** hyperlink. The *Application Scoring List Search for Fiscal Year 20XX* screen appears.

2. From here you will be able to edit your search criteria based on:
   a. Agency ID
   b. Agency Name
   c. Reviewer
   d. Application ID

3. Once you have narrowed down your search click the **Search** button to retrieve those results, or **Clear** to erase what was put into each field.

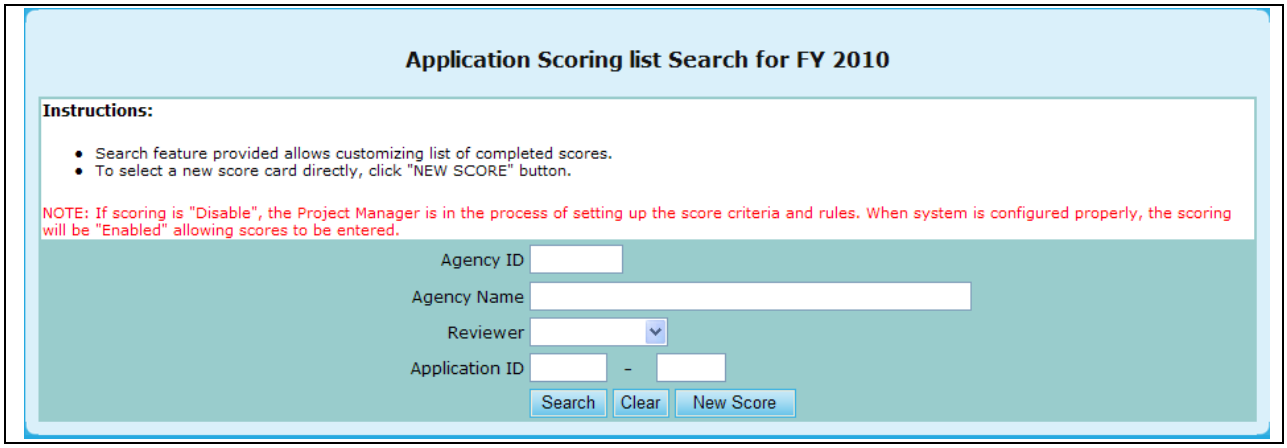


Figure 259. PM – Scoring: Application Scoring List Search for FY 20XX

4. You will be prompted to your search results, which you can sort based off of the following criteria:
    a. Agency Name
    b. Agency ID
    c. Agency Type
    d. Application ID
    e. Reviewer

5. To open a specific scorecard, click the hyperlink under Agency Name that you would like to view.

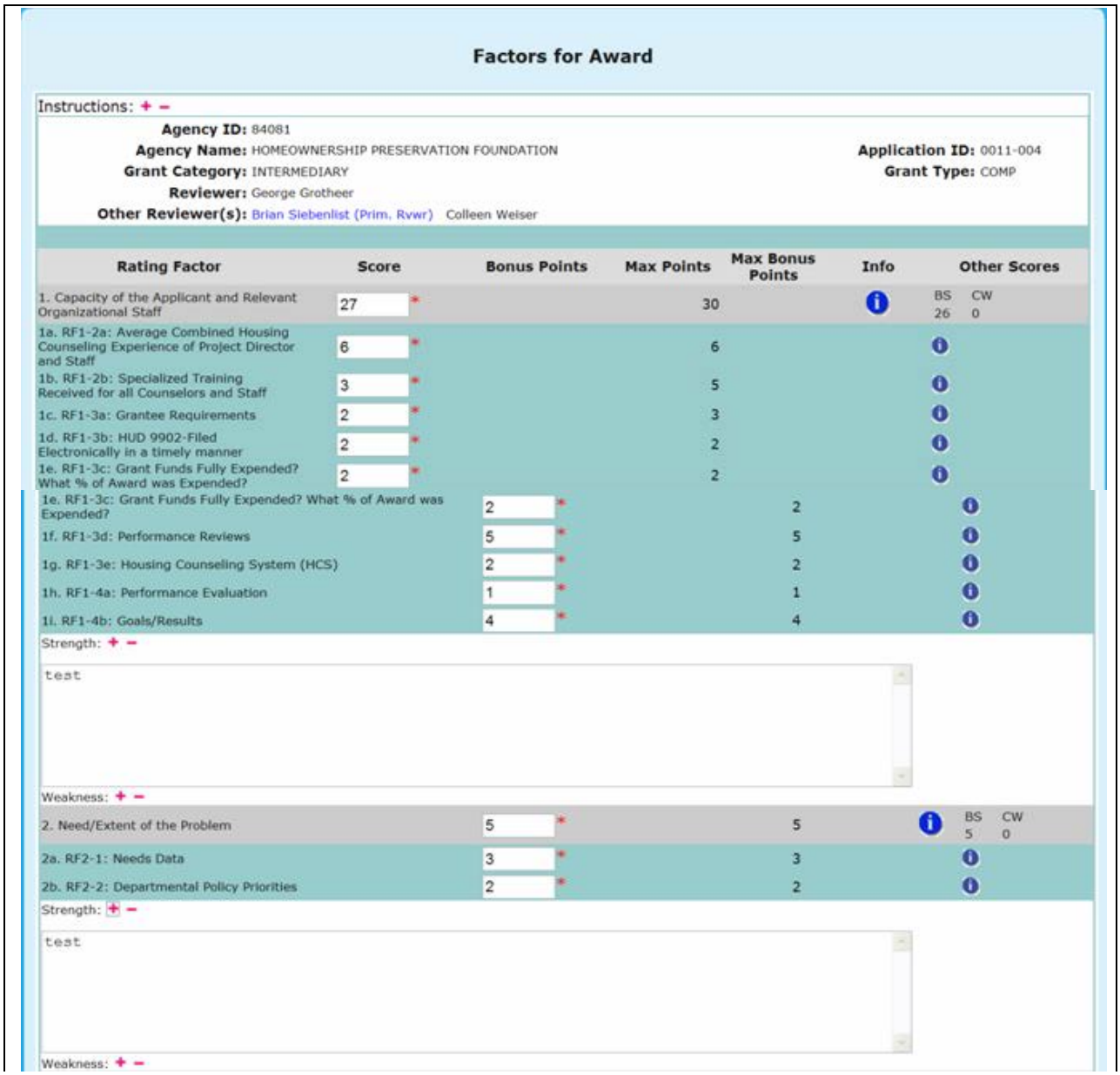
Note: to Delete or add New Score skip to step 9.

Figure 260. PM – Scoring: Application(s) Scored for Fiscal Year 2010

6. Once you have chosen your desired Agency, you will be prompted to the Factors For Award scorecard.
    a. Check agency information for accuracy to ensure you are evaluating the correct score card.
    b. Other Reviewers assigned to this application are posted for reference.
    c. All sub-factor scores when listed must be scored. Major Factor scores cannot be over written when sub-factors are listed. Major Factor scores will automatically sum the scores of its sub-factors. If no sub-factors are listed, the score for the Major Factor can be entered directly.

d. If applicable, instructions to each sub-factor are provided by selecting the Blue Information icon.
e. **Bonus Points** are shown if applicable. Combine the Factor scores plus Bonus Points to determine Total Score.

7. When all scores have been entered, click the **OK** button on the bottom to save the score card, or **Cancel** to erase changes.



1f. RF1-3d: Performance Reviews	5	*	5			
1g. RF1-3e: Housing Counseling System (HCS)	2	*	2			
1h. RF1-4a: Performance Evaluation	1	*	1			
1i. RF1-4b: Goals/Results	4	*	4			
Strength: + − Weakness: + −						
2. Need/Extent of the Problem	5	*	5		BS 5	CW 0
2a. RF2-1: Needs Data	3	*	3			
2b. RF2-2: Departmental Policy Priorities	2	*	2			
Strength: + − Weakness: + −						
3. Soundness of Approach/Scope of Housing Counseling Services	40	*	45		BS 0	CW 0
3a. RF3-1a: Average Number of Hours per Client/per Counseling Type	0	*	2			
3b. RF3-1b: Types of Counseling	4	*	4			
3c. RF3-1c: Group vs One-on-One	1	*	1			
3d. RF3-1d: Marketing and Outreach	1	*	1			
3e. RF3-2a: Cost Per Client	6	*	6			
3f. RF3-2b: Capacity	1	*	1			
3g. RF3-2c: Training Expenditures	0	*	2			
3h. RF3-2d: Percentage of Grant Funding Passed Through	1	*	1			
3v. RF3-6a: Percent of Grant Funding to be Passed Through	2	*	3			
3w. RF3-6b: Capacity	1	*	1			
Strength: + − Weakness: + −						
4. Leveraging Resources	10	*	10		BS 10	CW 0
Strength: + − Weakness: + −						
5. Achieving Results and Program Evaluation	10	*	10		BS 0	CW 0
5a. RF5-1a: Outputs/Services	3	*	3			
5b. RF5-1b: Outcomes	3	*	3			
5c. RF5-1c: Logic Model Projections	3	*	3			
5d. RF5-1d: Evaluation Tools	1	*	1			
Strength: + − Weakness: + −						
Total	92		100	0	BS 41	CW 0

OK Cancel

Figure 261.A. PM– Scoring: Application(s) Scored for Fiscal Year 2010

8. If you click **OK**, and there are errors associated with your scoring you will prompted to various messages.
    a. If the number you input is larger than the Max Points, a error message will pop-up
    b. If the number you input is not a whole number, a error message will pop-up
    c. If the number you input is not a positive number, a error message will pop-up

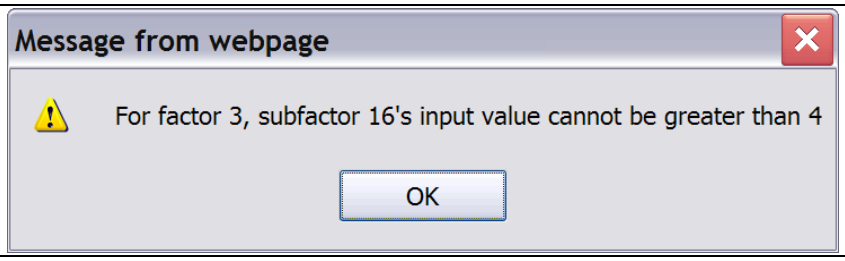


Figure 261.B. PM – Scoring: Message from webpage (Step 8.a)

Figure 261.C. PM – Scoring: Message from webpage (Step 8.b)

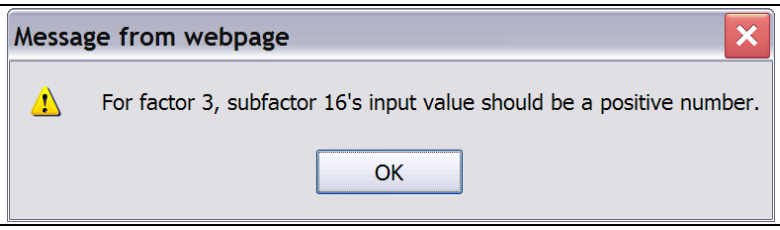


Figure 261.D. PM – Scoring: Message from webpage (Step 8.c)

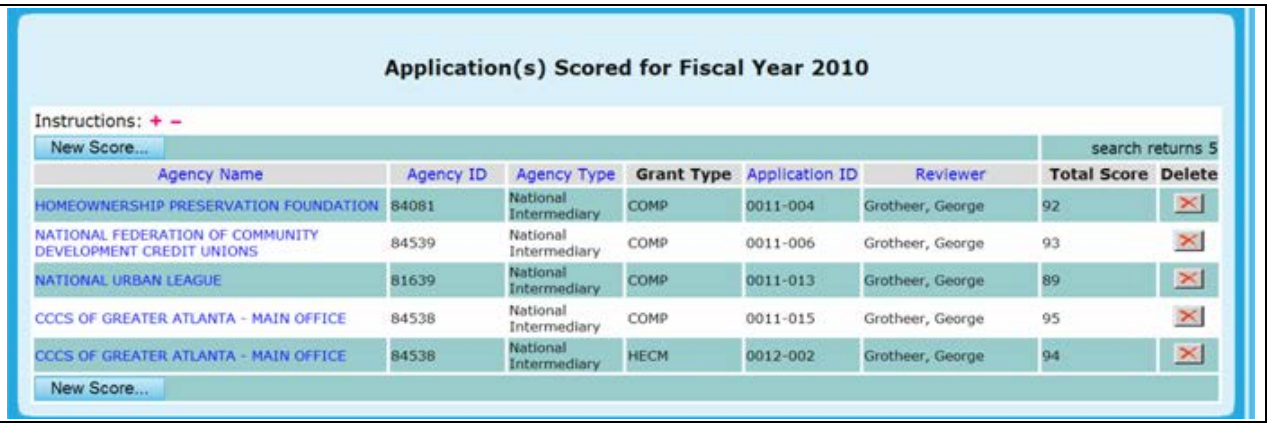


Figure 262. PM – Scoring: Application(s) Scored for Fiscal Year 2010

9. To delete a score, click the *X* button found under the delete column on the *Application(s) Scored for Fiscal Year 2010*.

10. A message will be prompted prior to finalizing your action. Click **OK** to delete the score, or **Cancel** to return back to the *Application(s) Scored for Fiscal Year 2010* page.

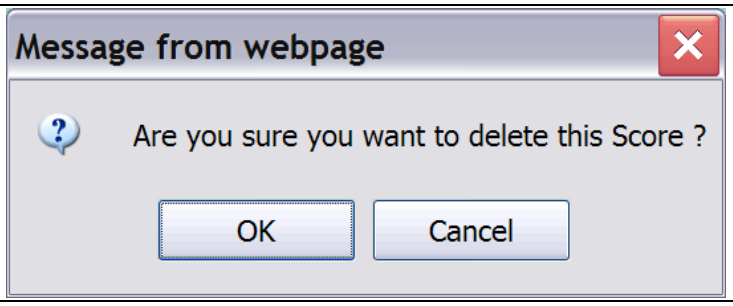


Figure 263. PM – Scoring: Message from webpage Delete a Score

11. To add a New Score, click the **New Score** button located above and below the Agency Name column.

12. This will prompt you to a list of scorecards that are awaiting your review, similar to Figure 262.

13. The scorecard, and process, will be the same as previously described in Steps 6 and 7.

You have now finished using the HCS **Scoring** feature.

9.3.4 Final Scoring for Primary Reviewer

You can complete the final scoring for primary reviewers by searching for an agency, reviewer name, or application ID.

1. From the top navigation menu, click the **Final Scoring for Primary Reviewers** hyperlink. The Final Scoring for Primary Reviewers Search for FY 20XX screen appears.

2. Search for the final scoring for primary reviewers by completing the desired search criteria field.
   a. Enter the agency ID you are searching for in the **Agency ID** field.
   b. Enter the agency‟s name in the **Agency Name** field.
   c. Click the drop-down box next to the **Primary Reviewer** field and select the primary reviewer for this scoring.
   d. Enter the application‟s ID in the **Application ID** field.

3. Click **Search**. The *Final Scoring List for Fiscal Year 20XX* search results screen appears displaying the search results the HCS system finds based on your search criteria.

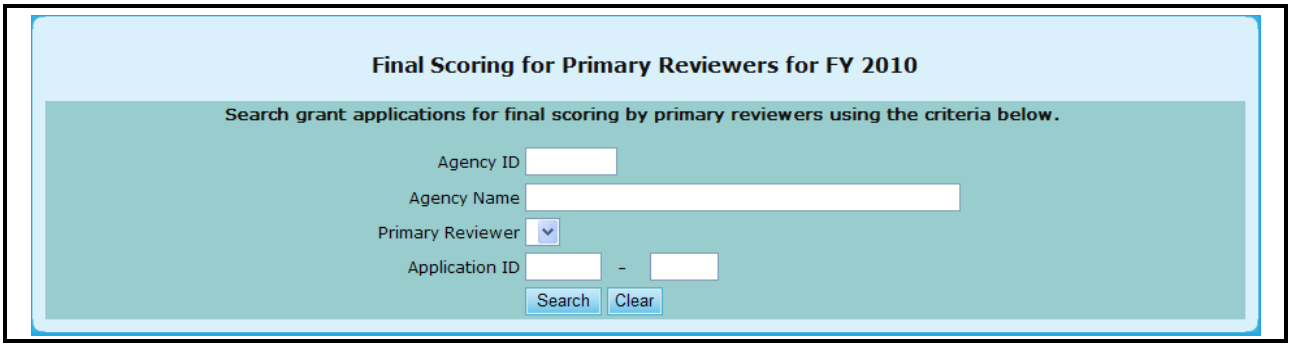


Figure 264. PM – Grants: Final Scoring for Primary Reviewers Search for FY 20XX

4. To view or edit the final scoring for a specific agency, Click the agency‟s name in the **Agency's Name** column. The *Final Scoring for Primary Reviewer* screen appears.

Final Scoring List for Fiscal Year 2008

Search Criteria: • Primary Reviewer: Stopera, Glen

Appl. ID	Agency Name	Reviewer	Factor No. 1	2	3	4	5	Total
0392-002	ALBANY COUNTY RURAL HOUSING ALLIANCE, INC.	Olmstead, John	29.00	10.00	28.00	9.00	10.00	86.00
		Welton, Sheryl	25.00	7.00	31.00	9.00	2.00	74.00
		Stopera, Glen (Prime Rvwr)	29.00	10.00	32.00	9.00	12.00	92.00
		Average Score:	27.67	9.00	30.33	9.00	8.00	84.00
		Final Score:	29.00	10.00	33.00	9.00	9.00	90.00
0398-062	ALBANY COUNTY RURAL HOUSING ALLIANCE, INC.	Olmstead, John	29.00	10.00	28.00	9.00	10.00	86.00
		Welton, Sheryl	25.00	7.00	31.00	9.00	2.00	74.00
		Stopera, Glen (Prime Rvwr)	29.00	10.00	32.00	9.00	12.00	92.00
		Average Score:	27.67	9.00	30.33	9.00	8.00	84.00
		Final Score:	29.00	10.00	33.00	9.00	9.00	90.00

Figure 265. PM – Grants: Final Scoring List for Fiscal Year 20XX

5. Once you have been prompted to a specific Scoring Application:
   a. Review the form; edit the final score by typing in the **Final Score** fields.
   b. The Primary Reviewer can see end Reviewer‟s scores and all the average scores for reference in determining the Final Score.

6. Click **OK** to save your changes or **Cancel** to exit the screen.

Final Scoring for Primary Reviewer

Instructions: Fill out the form below, review your information for accuracy, and click the **OK** button. The Average Score is based on scores submitted.

Agency Name: ALBANY COUNTY RURAL HOUSING ALLIANCE, INC.

Application ID: 0392-002 **Grant Category:** LHCA **Grant Type:** HECM

Primary Reviewer: Glen Stopera

Rating Factor	Max Points	Max Bonus Points	Glen Stopera	Sheryl Welton	John Olmstead	Average Score	Final Score
1. Capacity of the Applicant and Relevant Organizational Staff	30.00	2.00	29.00	25.00	29.00	27.67	29.00
2. Need/Extent of the Problem	10.00	0.00	10.00	7.00	10.00	9.00	10.00
3. Soundness of Approach/Scope of Housing Counseling Services	38.00	0.00	32.00	31.00	28.00	30.33	33.00
4. Leveraging Resources	10.00	0.00	9.00	9.00	9.00	9.00	9.00
5. Achieving Results and Program Evaluation	12.00	0.00	12.00	2.00	10.00	8.00	9.00
Total	100.00	2.00	92.00	74.00	86.00	84.00	90.00

OK Cancel

Figure 266. PM – Grants: Final Scoring for Primary Reviewer

You have now used the HCS Search for Final Scoring for **Primary Reviewers** feature.

9.3.5 Calculate Recommended Award

As a Program Manager you can calculate any or all of the recommended awards. If the funding allocation method was by grant type and HUD Office, click the hyperlink under „Grant Type" column in the *Recommended Awards Calculation for Fiscal Year 20XX* screen to activate the function to automatically calculate recommended awards for all applications that have a Final Score assigned to that Grant Type under the selected HUD Office. If the funding allocation method was by grant type only, Click the Grant Type hyperlink to activate the function to automatically calculate recommended awards for all applications that have a Final Score assigned to that Grant type. The recommended calculation will run so long as at least one application has their final Score reported. Keep in mind when running the Recommended Awards calculation having fewer applications with final score than the total will give a false recommended award. The Recommended Award calculates all the funds available against applicable applications, so the fewer will have a greater share of the funds. Therefore, the Recommended Application calculations should be executed only when the # Final score equals # applied.

To calculate recommended awards, follow these steps:

1. From the upper navigation menu, click the **Calculate Recommended Awards** hyperlink. The *Recommended Awards for Fiscal Year 20XX.*

2. To view Award Recommendations for a specific Grant Type, click the hyperlink associated with the Grant Type you would like.

Recommended Awards Calculation for Fiscal Year 2009

Instructions: + –

Grant Type	Allocated	Recommended Award	Requested Funds	# Applied	# Final Scored	# Calculated	% Completed
SHFA							
	$149,689.00	$149,689.00	$149,689.20	5	5	5	100.00%
COMP	$2,650,000.00	$2,650,000.00	$4,987,368.02	19	19	19	100.00%
MSO							
	$99,653.00	$99,653.00	$99,653.00	2	2	2	100.00%
HECM	$346,300.00	$346,300.00	$346,300.00	1	1	1	100.00%
COMP	$1,570,000.00	$0.00	$2,865,082.00	5	5	0	0.00%
INTERMEDIARY							
	$1,790,949.00	$2,000,000.00	$7,620,116.00	17	17	17	100.00%
HECM	$6,500,000.00	$8,580,390.00	$8,580,390.00	5	5	5	100.00%
TRNG	$5,000,000.00	$0.00	$8,000,000.00	3	0	0	0.00%
COMP	$25,727,323.00	$48,800,841.28	$53,474,994.28	25	25	25	100.00%
LHCA							
	$904,358.00	$0.00	$2,696,939.80	134	134	0	0.00%
HECM	$1,000,000.00	$0.00	$1,212,466.00	54	54	0	0.00%
COMP	$17,111,728.00	$0.00	$42,364,228.94	520	520	0	0.00%
HUD Total:	$62,850,000.00	$62,626,873.28	$132,397,227.24	790	787	74	9.37%

Figure 267. PM – Grants: Recommended Awards Calculation for Fiscal Year 20XX – Grant Type

3. Click the **Calculate** hyperlink to generate the Recommended Awards.
   a. Monitor the **# Calculated** for it to equal the **# Applied** to determine when all applications have been calculated. All applications applied must be calculated to get an accurate **Recommended Award** for each application.
   b. The **Recommended Award** amount should equal **Allocated amount** when all applications are calculated.

4. To erase changes that you had made to the original recommendation, click the **Cancel** button.

5. Once satisfied with your alterations click **Done & Close** to save the recommended awards to the database. Calculated applications will be reflected under the # **Calculated** column.

6. To Export the data into an **Excel** file, click the Export button, and you will be prompted to the File Download pop-up.

Instructions: + –

HCS GENERATED AWARD RECOMMENDATIONS - Ratio Method
FOR:
GRANT CATEGORY: **MSO**
GRANT TYPE: **COMP**
GRANT ALLOCATION: **$ 1,570,000.00** BALANCE: **$ 0.00**

VARIABLES VALUE
MAXIMUM APPLICATION: **31**

MINIMUM SCORE: **75.00** MAXIMUM SCORE: **100.00**
MINIMUM AWARD: **$ 50,000.00** MAXIMUM AWARD: **$ 675,000.00**

LIMIT SET TO REQUESTED AMOUNT: **YES**

RECOMMEND AWARD CALCULATIONS

Agency ID	Application #	Iteration Awarded	Eligible Applications Allowed to Be Awarded	Final Score	1st Iteration Pt > 75.00	1st Iteration Minimum Award Amount	1st Iteration Compare Requests	2nd Iteration % of All Eligible Agencies
84870	0331-003	2	Yes	93.00	18.00	$ 50,000.00	$ 50,000.00	0.272727272727
84871	0331-002	3	Yes	91.00	16.00	$ 50,000.00	$ 50,000.00	0.242424242424
84855	0931-002	3	Yes	89.00	14.00	$ 50,000.00	$ 50,000.00	0.212121212121
84783	0831-001	3	Yes	84.00	9.00	$ 50,000.00	$ 50,000.00	0.136363636364
84701	0931-001	3	Yes	84.00	9.00	$ 50,000.00	$ 50,000.00	0.136363636364
				SUB-TOTALS:		$ 250,000.00	$ 250,000.00	1.000000000000
				BALANCES:			$ 1,320,000.00	
				TOTALS:	66.00		$ 1,570,000.00	66.00

RESULTS SUMMARY

Agencies Calculated for Awards	5	TOTAL AWARDED	$ 1,570,000.00
Agencies with Recommended Awards	5		
Agencies Scoring less than Minimum	0		
Agencies that Applied for Funding	5	AVERAGE AWARD (Based on applications receiving awards)	$ 314,000.00
Agencies not yet Scored	0		
Iterations to complete Calculation	3	AVERAGE SCORE	88.20

Calculate | Done & Close | Cancel | Export

Figure 268.A. PM – Grants: HCS Generated Award Recommendations–Proportion Method screen, Part 1

2nd Iteration % of All Eligible Agencies	2nd Iteration % Calculation of All Agencies	2nd Iteration Compare Requests	3rd Iteration #1 Group 96.00-100.00 pts	3rd Iteration #1 Group % Calculation	3rd Iteration #1 Group Compare Requests
0.242857142857	$ 121,773.03	$ 112,000.00	0.000000000000	$ 112,000.00	$ 112,000.00
0.214285714286	$ 113,329.14	$ 113,329.14	0.000000000000	$ 113,329.14	$ 113,329.14
0.200000000000	$ 109,107.20	$ 100,000.00	0.000000000000	$ 100,000.00	$ 100,000.00
0.142857142857	$ 92,219.43	$ 92,219.43	0.000000000000	$ 92,219.43	$ 92,219.43
0.114285714286	$ 83,775.54	$ 83,775.54	0.000000000000	$ 83,775.54	$ 83,775.54
0.085714285714	$ 75,331.66	$ 75,331.66	0.000000000000	$ 75,331.66	$ 75,331.66
0.000000000000	$ 0.00	$ 0.00	0.000000000000	$ 0.00	$ 0.00
0.000000000000	$ 0.00	$ 0.00	0.000000000000	$ 0.00	$ 0.00
1.000000000000	$ 595,536.00	$ 576,655.77	0.000000000000	$ 576,655.77	$ 576,655.77
		$ 18,880.23			$ 18,880.23
70.00		$ 595,536.00	0.00		$ 595,536.00

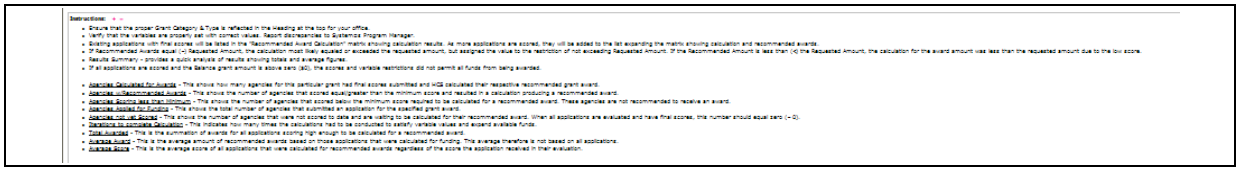
Figure 268.B. PM – Grants: HCS Generated Award Recommendations–Proportion Method screen, Part 2

4th Iteration #2 Group 91.00-95.00 pts	4th Iteration #2 Group % Calculation	4th Iteration #2 Group Compare Requests	5th Iteration #3 Group 86.00-90.00 pts	5th Iteration #3 Group % Calculation	5th Iteration #3 Group Compare Requests
0.000000000000	$ 112,000.00	$ 112,000.00	0.000000000000	$ 112,000.00	$ 112,000.00
0.000000000000	$ 113,329.14	$ 113,329.14	1.000000000000	$ 132,209.37	$ 132,209.37
0.000000000000	$ 100,000.00	$ 100,000.00	0.000000000000	$ 100,000.00	$ 100,000.00
0.000000000000	$ 92,219.43	$ 92,219.43	0.000000000000	$ 92,219.43	$ 92,219.43
0.000000000000	$ 83,775.54	$ 83,775.54	0.000000000000	$ 83,775.54	$ 83,775.54
0.000000000000	$ 75,331.66	$ 75,331.66	0.000000000000	$ 75,331.66	$ 75,331.66
0.000000000000	$ 0.00	$ 0.00	0.000000000000	$ 0.00	$ 0.00
0.000000000000	$ 0.00	$ 0.00	0.000000000000	$ 0.00	$ 0.00
0.000000000000	$ 576,655.77	$ 576,655.77	1.000000000000	$ 595,536.00	$ 595,536.00
		$ 18,880.23			$ 0.00
0.00		$ 595,536.00	15.00		$ 595,536.00

Figure 268.C. PM – Grants: HCS Generated Award Recommendations–Proportion Method, Part 3

Requested Amount	Recommend FINAL AWARDS	Award Difference
$ 300,000.00	$ 300,000.00	$ 0.00
$ 675,000.00	$ 406,666.67	-$ 268,333.33
$ 540,097.00	$ 362,083.33	-$ 178,013.67
$ 675,000.00	$ 250,625.00	-$ 424,375.00
$ 674,985.00	$ 250,625.00	-$ 424,360.00
	$ 1,570,000.00	
	$ 0.00	

Figure 268.D. PM – Grants: HCS Generated Award Recommendations–Proportion Method, Part 4



Instructions:

- Ensure that the proper Grant Category & Type is reflected in the Heading at the top for your office.
- Verify that the variables are properly set with correct values. Report discrepancies to Systems Program Manager.
- Existing applications with final scores will be listed in the "Recommended Award Calculation" matrix showing calculation results. As more applications are scored, they will be added to the list expanding the matrix showing calculation and recommended awards.
- If Recommended Awards equal (=) Requested Amount, the calculation most likely equaled or exceeded the requested amount, but assigned the value to the restriction of not exceeding Requested Amount. If the Recommended Amount is less than (<) the Requested Amount, the calculation for the award amount was less than the requested amount due to the low score.
- Results Summary – provides a quick analysis of results showing totals and average figures.
- If all applications are scored and the Balance grant amount is above zero ($0), the scores and variable restrictions did not permit all funds from being awarded.

- Agencies Calculated for Awards - This shows how many agencies for this particular grant had final scores submitted and HCS calculated their respective recommended grant award.
- Agencies w/Recommended Awards - This shows the number of agencies that scored equal/greater than the minimum score and resulted in a calculation producing a recommended award.
- Agencies Scoring less than Minimum – This shows the number of agencies that scored below the minimum score required to be calculated for a recommended award. These agencies are not recommended to receive an award.
- Agencies Applied for Funding - This shows the total number of agencies that submitted an application for the specified grant award.
- Agencies not yet Scored - This shows the number of agencies that were not scored to date and are waiting to be calculated for their recommended award. When all applications are evaluated and have final scores, this number should equal zero (= 0).
- Iterations to complete Calculation – This indicates how many times the calculations had to be conducted to satisfy variable values and expend available funds.
- Total Awarded - This is the summation of awards for all applications scoring high enough to be calculated for a recommended award.
- Average Award - This is the average amount of recommended awards based on those applications that were calculated for funding. This average therefore is not based on all applications.
- Average Score - This is the average score of all applications that were calculated for recommended awards regardless of the score the application received in their evaluation.

Figure 268.E. PM – Grants: Calculate Recommended Awards – Instructions screen – Part 5.

The Recommended Award Calculation page is a very detailed display of how the calculations are executed. This page gives the user a detail summary of the various variables that affect the calculation to ensure it is setup correctly. The lengthy columns show each iteration needed to calculate in order to properly assign award amounts to exhaust all the available funds. The blue highlights targeted applications that applied to the iteration. Only these are involved with the segment‟s calculation. The yellow highlights closes out an application after it completes its calculation and an award amount is given.

Note: When you are reviewing the form:

A. Ensure that the proper Grant Category & Type is reflected in the Heading at the top for your office.
B. Verify that the variables are properly set with correct values. Report discrepancies to System‟s Program Manager.
C. Existing applications with final scores will be listed in the "Recommended Award Calculation" matrix showing calculation results. As more applications are scored, they will be added to the list expanding the matrix showing calculation and recommended awards.
D. If Recommended Awards equal (=) Requested Amount, the calculation most likely equaled or exceeded the requested amount, but assigned the value to the restriction of not exceeding Requested Amount. If the Recommended Amount is less than (<) the Requested Amount, the calculation for the award amount was less than the requested amount due to the low score.
E. Results Summary – provides a quick analysis of results showing totals and average figures.
F. If all applications are scored and the Balance grant amount is above zero ($0), the scores and variable restrictions did not permit all funds from being awarded.

Note: Field Definition KEY:

- Agencies Calculated for Awards – This shows how many agencies for this particular grant had final scores submitted and HCS calculated their respective recommended grant award.
- Agencies w/Recommended Awards – This shows the number of agencies that scored equal/greater than the minimum score and resulted in a calculation producing a recommended award.
- Agencies Scoring less than Minimum – This shows the number of agencies that scored below the minimum score required to be calculated for a recommended award. These agencies are not recommended to receive an award.
- Agencies Applied for Funding – This shows the total number of agencies that submitted an application for the specified grant award.
- Agencies not yet Scored – This shows the number of agencies that were not scored to date and are waiting to be calculated for their recommended award. When all applications are evaluated and have final scores, this number should equal zero (= 0).
- Iterations to complete Calculation – This indicates how many times the calculations had to be conducted to satisfy variable values and expend available funds.
- Total Awarded – This is the summation of awards for all applications scoring high enough to be calculated for a recommended award.

- Average Award – This is the average amount of recommended awards based on those applications that were calculated for funding. This average therefore is not based on all applications.
- Average Score – This is the average score of all applications that were calculated for recommended awards regardless of the score the application received in their evaluation.

9.3.6 Input Award/Sub Allocations

As a Program Manager you can input awards and sub-allocate funding to sub-agencies. Follow these steps to input/review the awards and sub-allocations:

1. From the top navigation menu, click the **Input Awards/Sub Allocations** hyperlink. The *Input Awards for FY 20XX – Grant Type Funding Allocation* screen appears when funding allocation method is by Grant Type only. The Input Awards for FY 20XX – Grant Type and HUD Office Funding Allocation screen appears when funding allocation method is by Grant Type and HUD Office, displaying the available HUD Offices, and the allocated funds, amount awarded, and the grant type for each office.

2. Click a **Grant Application** hyperlink for the applications you"d like to input/review awards. The *Select a Grant Application to Award for FY 20XX* screen appears.

All Offices Office View

Input Awards for FY 2009

Instructions: List of grant applications for awards input will be displayed by clicking on corresponding **Grant Applicant Category**.

Grant Type		Allocated	Awarded
COMP	INTERMEDIARY	$25,727,323.00	$25,727,323.00
	LHCA	$17,111,728.00	$17,111,728.00
	MSO	$1,570,000.00	$1,570,000.00
	SHFA	$2,650,000.00	$2,650,000.00
HECM		Allocated	Awarded
	INTERMEDIARY	$6,500,000.00	$6,500,000.00
	LHCA	$1,000,000.00	$1,000,000.00
	MSO	$346,300.00	$346,300.00
TRNG		Allocated	Awarded
	INTERMEDIARY	$5,000,000.00	$5,000,000.00
	Grand Total:	$59,905,351.00	$59,905,351.00

Figure 269. PM – Grants: Input Awards for FY 20XX – Grant Type Funding Allocation

3. To sort this list: Click the **Agency Name** button to list the agencies in Agency Name order. Click the **Application ID** button to list the agencies in Application ID order. Click the **Tax ID Number** (TIN) button to list the agencies in TIN number and Agency Name order.

Select a Grant Application to Award for FY 2009

Instructions: + –

Agency Name	Agency ID	Agency Type	Grant Type	HUD office	City/State	Application ID	Sub-Allocated	Awarded
SPRINGBOARD NON PROFIT CONSUMER CREDIT MANAGEMENT INC - MAIN OFFICE	84701	Multi-State Organization	HECM	Santa Ana (MSO - HECM)	Riverside, CA	0932-001	Y	$346,300.00
							Total Awarded:	$346,300.00
							Total Allocated:	$346,300.00
							Award Difference:	$0.00

Figure 270. PM – Grants: Select a Grant Application to Award for FY 20XX

4. To select a grant application from a specific agency, click the hyperlink for the agency‟s name in the **Agency Name** column. The *Input Awards for FY 20XX* screen appears.

5. Complete the form; enter the amount awarded. The amount awarded should not exceed the agency‟s requested amount and the Amount Remaining, which is shown in green on the page.

6. To sub-allocate funds to any associated sub-agencies, click **Sub-Agency Allocation** button. The *Sub-Agency Grant Allocations* screen appears. The Sub-Allocation button is active only when the grantee is Awarded. The Sub-Allocation button is presented only to those Awarded agencies that have sub-agencies.

Input Awards for FY 2009

Instructions: Fill out the form below, review your information for accuracy, and click the **OK** button to save results.
Click the 'Sub-Agency Allocation' button to access screen to distribute funds to sub-agencies.
* indicates required information.

Agency Name:	SPRINGBOARD NON PROFIT CONSUMER CREDIT MANAGEMENT INC - MAIN OFFICE (0932-001)		
Address:	4351 Latham Street Riverside, CA 92501		
Requested:	$346,300.00	**Grant Category:**	MSO
Recommended:	$346,300.00	**Grant Type:**	HECM
Awarded:	$ 346,300.00 *	Enter the Amount Awarded in whole dollars (format: 99999999.99). The Amount Awarded should not exceed the Agency's Requested Amount. If the recommended Award Amount is greater than Amount Remaining (below) contact the system administrator for guidance.	
		HUD Office Responsible for Awarding Grant:	Santa Ana (MSO - HECM)
		Amount Allocated:	$346,300.00
		The Amount Awarded to Date excluding this Agency:	$0.00
		The Amount cannot exceed the Amount Remaining:	$346,300.00

OK | Cancel | Agency/Sub-Agency Allocation

Figure 271.A. PM – Grants: Input Awards for FY 20XX (by Agency)

Note: Provided below is the screen you will be directed to as it relates to Step 6.

Sub-Agency Grant Allocation

Instructions: + –

Parent Agency Name: **SPRINGBOARD NON PROFIT CONSUMER CREDIT MANAGEMENT INC - MAIN OFFICE**
HUD Office: **Santa Ana (HOC)**
Application ID: **0932-001**
Parent Agency ID: 84701
Parent Agency Type: **Multi-State Organization**
Grant Type: **REVERSE MORTGAGE COUNSELING**

Grant Awarded: $ 346,300.00
Administrative Allocation: -$ 0.00
Indirect Cost: -$ 0.00
Available Funds: $ 346,300.00

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

Submit | Print | Export | Cancel | Close this window

Sub-Agency	Agency ID	Agency Type	# of Counselors	# of Projected Clients	Sub-Allocation
SPRINGBOARD - BAKERSFIELD	83846	Branch-MSO	0	0	$
SPRINGBOARD - BALBOA	84687	Branch-MSO	0	0	$ 4,000.00
SPRINGBOARD - FRESNO	83843	Branch-MSO	0	0	$
SPRINGBOARD - HENDERSON	84691	Branch-MSO	0	0	$ 4,000.00
SPRINGBOARD - LAS VEGAS	84689	Branch-MSO	0	0	$
SPRINGBOARD - MESA	84690	Branch-MSO	0	0	$ 8,000.00
SPRINGBOARD - MISSION VIEJO	84686	Branch-MSO	0	0	$ 4,000.00
SPRINGBOARD - RIVERSIDE MAIN BRANCH	80555	Branch-MSO	0	0	$ 294,300.00
SPRINGBOARD - ROSEMEAD	82829	Branch-MSO	0	0	$ 4,000.00
SPRINGBOARD - SHINE CENTER RIVERSIDE	84685	Branch-MSO	0	0	$
SPRINGBOARD- HEMET	81005	Branch-MSO	0	0	$ 4,000.00
SPRINGBOARD- LONG BEACH	82017	Branch-MSO	0	0	$ 4,000.00
SPRINGBOARD- PALM SPRINGS	80653	Branch-MSO	0	0	$ 8,000.00
SPRINGBOARD- SAN BERNARDINO	80657	Branch-MSO	0	0	$ 4,000.00
SPRINGBOARD- TEMECULA	80655	Branch-MSO	0	0	$ 4,000.00
SPRINGBOARD-CHULA VISTA	82015	Branch-MSO	0	0	$ 4,000.00
SPRINGBOARD-EL CAJON	82021	Branch-MSO	0	0	$
SUB-ALLOCATION TOTALS:	17		0	0	$346,300.00
BALANCE:					$0.00

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

Submit | Print | Export | Cancel | Close this window

Figure 271.B. PM – Grants: Sub-Agency Grant Allocation

Note: This page serves several functions. Primarily, it serves as a tool to sub-allocate the grant funds to the appropriate sub-agencies within the organization. Agencies that are sub-allocated will become approved and active in HUD's program for the funding fiscal year. Agencies not sub-allocated will be disapproved for the funding year. This page also allows input to the number of counselors each agency employs and the number of clients the agency plans to service under HUD's program. The counselor

numbers can be adjusted throughout the year and can be accessed from the agency's profile page. The client number cannot be adjusted after the input suspense date is reached.

Grant allocation can be initially distributed several ways using automated tools provided. Allocate evenly distributes funds evenly among all agencies. Allocation by counselors and by clients distributes funds proportionally by these values among the agencies. Sub-allocation for agencies can always be edited for specific values. There are also places to allocated funds for Administrative and Indirect costs.

7. Key in data into Administrative Allocation and Indirect Cost fields, the Available Funds for sub-allocation will be automatically recalculated by the system and be displayed. Key in data to **# of Counselors** and **# of Projected Clients** fields.
    a. If you already have the sub-allocation amounts for the agencies in the list, you may key in the numbers directly. Or, you may use one of the three Allocate buttons to calculate the funding automatically by the system. To allocate the funds evenly, click **Allocate Evenly** button. To allocate by number of counselors, click **Allocate By # of Counselors** button. To allocate by number of clients, click **Allocate By # of Clients** button**.**
    b. If one of the automated tools were applied, the actual Sub-Allocation amount can be edited manually to ensure the parent organization allocates their grant awarded funds according to their plan. The automated calculations are available only as a suggested tool and the parent agency is not obligated to use it.

8. Review the form for accuracy and make necessary data adjustments. Make any adjustments to ensure the balance is $0 (zero). To save the input data and/or allocations, click the **Submit** button. If the amount in Balance line shows $0, the screen will refresh with the messages indicating the data has been saved (see Figure 271.C.).

Figure 271.C. PM – Grants: Sub-Agency Grant Allocation – Data Saved Messages

9. If the Balance is not $0, a warning message as shown in Figure 271.D. will be displayed.
    a. If the **Cancel** button is clicked, it will allow user to distribute the balance and adjust the allocation amount(s). When the balance is $0, click the **Submit** button again. The screen will refresh with the messages indicating the data has been saved (see Figure 271.C.).
    b. If the **OK** button is clicked, the screen will refresh with the instructional messages as shown in Figure 271.E.

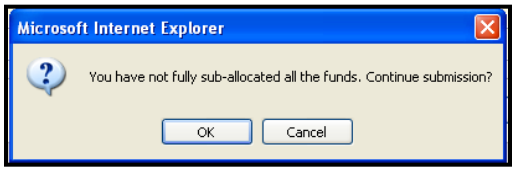


Figure 271.D. PM – Grants: Sub-Agency Grant Allocation – Funds not Fully Sub-Allocated Warning Message

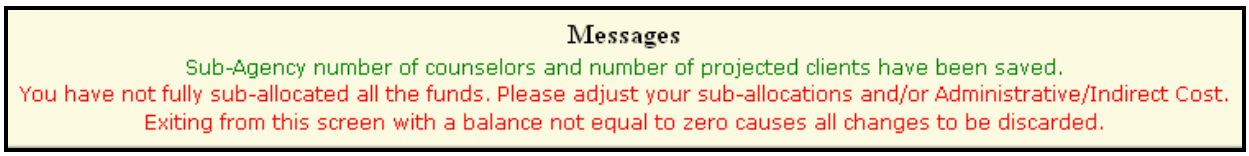


Figure 271.E. PM – Grants: Sub-Agency Grant Allocation – Funds not Fully Sub-Allocated Instructional Messages

10. To print data shown on the page, click **Print** button and follow the instructions in the *Print* dialog box. To export data to Microsoft Excel spreadsheet, click **Export** button and follow the instructions in the *File Download* dialog box. Click **Cancel** button will take you to the *Input Awards for FY 20XX* screen.

Please note that –

a. Agency type changes between Affiliate and Sub-Grantee when Sub-Allocation value is inputted. If a sub-agency is of type Affiliate, after it is sub-allocated with funding amount, its type will be changed to Sub-Grantee automatically by the system. On the other hand, if a sub-allocation amount is removed from a Sub-Grantee, its type will be changed to Affiliate automatically by the system.

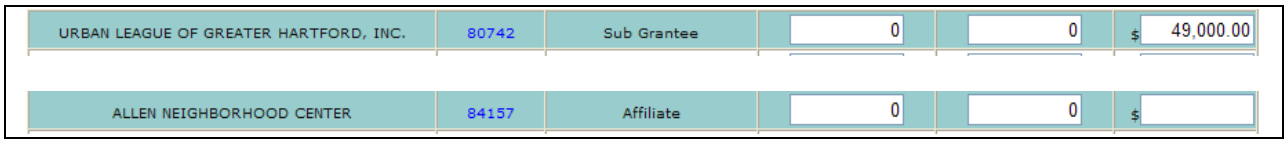


Figure 272. PM – Grants: Sub-Agency Grant Allocation – Agency Type Changed from Sub Grantee to Affiliate

b. **Sub-Allocation** amounts are saved to the database with the same fiscal year the Parent Agency was awarded with grant.
c. Click the **Parent Agency ID** hyperlink, parent agency profile of the awarded year will be displayed.
d. Data in Agency Type, **# of Counselors,** and **# of Projected Clients** columns are saved to one year after the sub-agencies are sub-allocated for.
e. Click the sub-agency‟s Agency ID hyperlink, sub-agency profile of one year after the sub-agency is sub-allocated with funding for will be displayed.

Check to ensure all sub-agencies are listed below. If an agency is not listed, go to Parent Agency Profile for the year the grant will be funded and spent, not the awarded year, and add sub-agency to its list. Likewise remove any agencies that are not assigned to your organization. If Sub-Agency has incorrect information, the Agency ID is a hyperlink to go directly to agency's profile.

9.4 User

This feature manages all HSC users.

1. From the top navigation menu, click the **User** hyperlink. The *Manager List* page appears.

2. To add a user, click **Add New User** button. The *Add a New User* screen appears.

Manager List

Program Manager					
Access Office	First Name	Last Name	User ID	Level	HUD Location
All Offices	Brian	Siebenlist	H13287	Program Manager	Headquarters SF-HUD
All Offices	George	Grotheer	H18798	Program Manager	Headquarters SF-HUD
All Offices	Ruth	Roman	H14975	Program Manager	Headquarters SF-HUD
All Offices	Wendy	Smith	C31745	Program Manager	Headquarters SF-HUD
All Offices	Andrey	Ignatov	C31744	Program Manager	Headquarters SF-HUD
All Offices	Zachary	Jones	C53672	Program Manager	Headquarters SF-HUD
All Offices	Guan-Hwa	Chen	C32395	Program Manager	Headquarters SF-HUD
All Offices	Jonny	Tester	CT1000	Program Manager	Headquarters SF-HUD

HUD Office Managers					
Access Office	First Name	Last Name	User ID	Level	HUD Location
Philadelphia (HOC)	Michael	Dziok	H02610	Office Manager	Philadelphia (HOC)
Philadelphia (HOC)	Robert	Wright	H06059	Office Manager	Philadelphia (HOC)
Philadelphia (HOC)	Jennifer	Sica	H17762	Office Manager	Philadelphia (HOC)
Philadelphia (HOC)	Donald	Gillett	H00468	Office Manager	Philadelphia (HOC)
Philadelphia (HOC)	Michael	McGowan	H23640	Office Manager	Philadelphia (HOC)
Philadelphia (HOC)	Brenda	Bellisario	H08700	Office Manager	Philadelphia (HOC)
Philadelphia (HOC)	Robert	Falkenstein	H06844	Office Manager	Philadelphia (HOC)
Philadelphia (HOC)	John	Niebieszczanski	H06145	Office Manager	Philadelphia (HOC)
Atlanta (HOC)	Ada	Caro	H06076	Office Manager	Atlanta (HOC)
Atlanta (HOC)	Faye	Reid	H01126	Office Manager	Atlanta (HOC)
Atlanta (HOC)	Javon	Blye	H45026	Office Manager	Atlanta (HOC)
All Offices	Tanya	Gunn	H22309	Office Manager	Headquarters SF-HUD
All Offices	Terri	Ames	H22310	Office Manager	Headquarters SF-HUD
All Offices	David	Huynh	H04079	Office Manager	Headquarters SF-HUD
All Offices	Michael	Reyes	H06155	Office Manager	Headquarters SF-HUD
All Offices	Ronald	Bedoya	H08070	Office Manager	Headquarters SF-HUD
All Offices	Miriam	Torres	H13932	Office Manager	Headquarters SF-HUD
All Offices	Mara	D'Angelo	H22042	Office Manager	Headquarters SF-HUD
All Offices	John	Beneventi	C12121	Office Manager	Headquarters SF-HUD
All Offices	Thomas	Bankins	H02653	Office Manager	Headquarters SF-HUD
All Offices	Gerard	Donahoe	H08646	Office Manager	Headquarters SF-HUD
All Offices	Betsy	Cromwell	H16037	Office Manager	Headquarters SF-HUD
All Offices	Melita	Staples	H18553	Office Manager	Headquarters SF-HUD
All Offices	Margaret	Smith	H45329	Office Manager	Headquarters SF-HUD
All Offices	Todd	Richardson	H13657	Office Manager	Headquarters SF-HUD

Add New User

Figure 273. PM – User: Manager List

3. Complete all of the required fields that are marked with *. Fields that are not marked with * are not mandatory.
   a. Enter a user ID to the **User ID** field.
   b. Enter a first, middle initial and last name, to the **First Name**, **Mid Init**, and **Last Name** fields.
   c. Accept the default password that is displayed in the **Password** field or enter a password that is different from the default password.

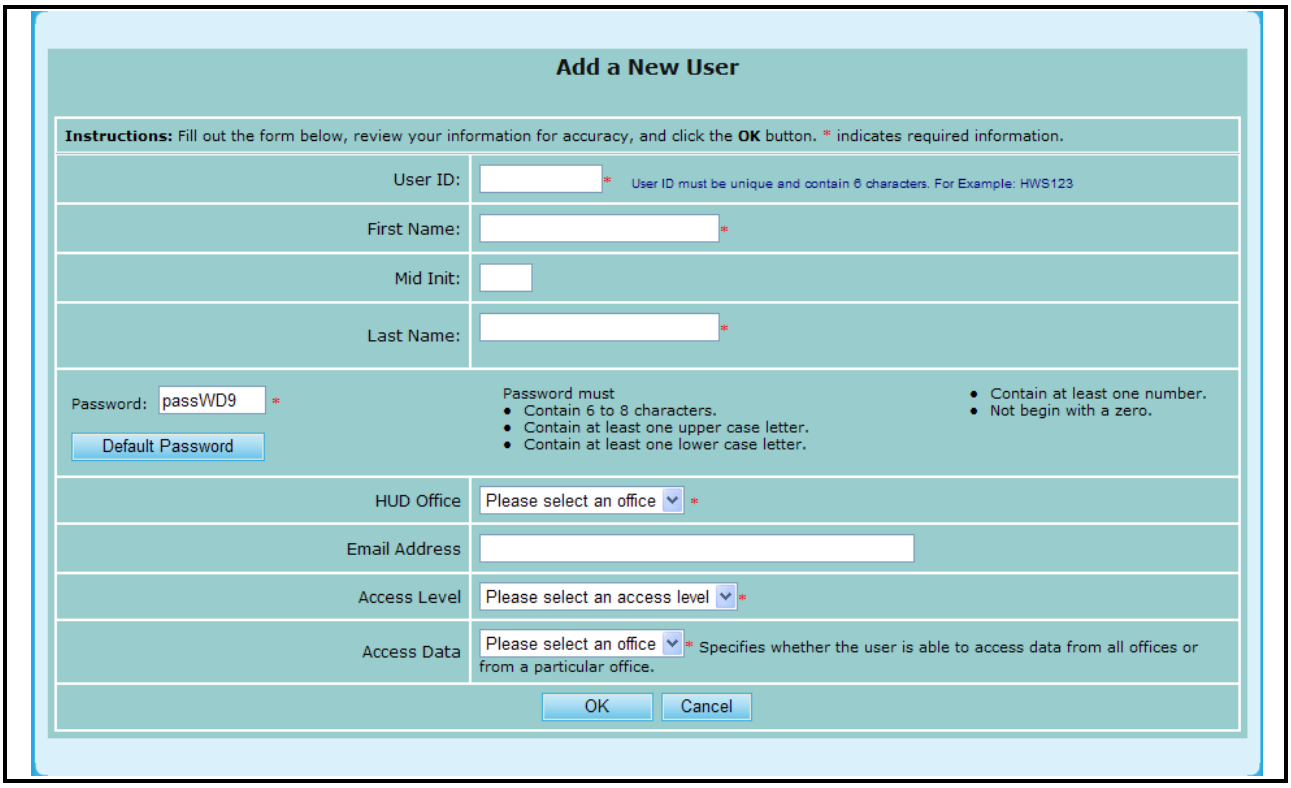


Figure 274.A. PM – User: Add a New User

d. Select a HUD office from following **HUD Office** dropdown list for the office that the new user is assigned to. Enter the email address to the **Email Address** field.

e. Select an access level from following **Access Level** dropdown list. Users cannot assign an access level that is above their own, i.e., Office Manager cannot assign Program Manager access level to other users. Access Levels are limited at this time. The access levels reflect the current user rights and the functional rights assigned are listed below:

- REVIEWER – a temporary user that normally does not need to access and work in HCS. Assigned to evaluate grant applications. Reviewer will only have access to their assigned grant score card associated to their application. The Reviewer access rights terminate at the end of the fiscal year.
- GTR/USER: a HUD user assigned to manage and assist assigned agencies. User has read/write access only agencies assigned.
- OFFICE MANAGER – a HUD user with managerial responsibilities to oversee all Housing Counseling agencies within their HOC. They have read/write access to all agencies assigned within their HOC area.
- PROGRAM MANAGER – a HUD user with project/program management responsibilities for the entire HUD Housing Counseling program. They have complete read/write access to all data and files. They have special management functions in HCS to setup and manage HCS.

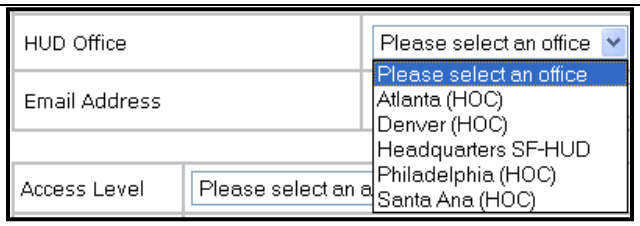


Figure 274.B. PM – User: HUD Office Dropdown List

f. Select from the following **Access Data** dropdown list the data of that particular office or all offices user has access to. Access data defines the list of files the user can write to. If you have a manager that needs to access files across HOC boundaries, assigned All Offices. Care should be taken to limit access rights to appropriate users to prevent too many users from over writing agency files that can cause confusion.

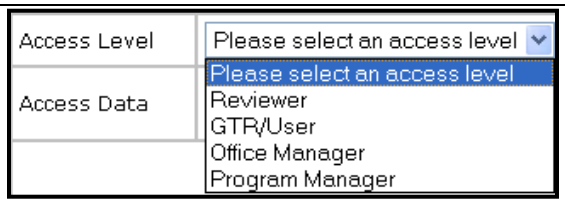


Figure 274.C. PM – User: Access Level Dropdown List

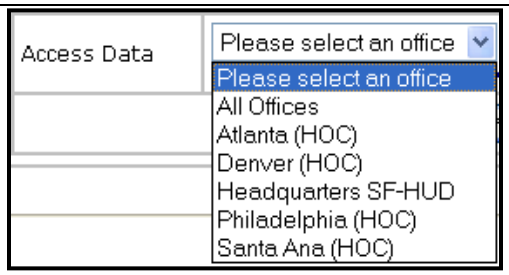


Figure 274.D. PM – User: Access Data Dropdown List

4. When you are finished, click **OK** to save or **Cancel** to cancel; the *Manager List* screen appears.

5. To view an existing user, click the **User ID** hyperlink in the **User ID** column. The *User Profile* screen appears.

6. Edit the fields or view them. When you are finished, click **OK** to save any changes or **Cancel** to close this screen without saving any changes. You are returned to the *Manager List* screen.

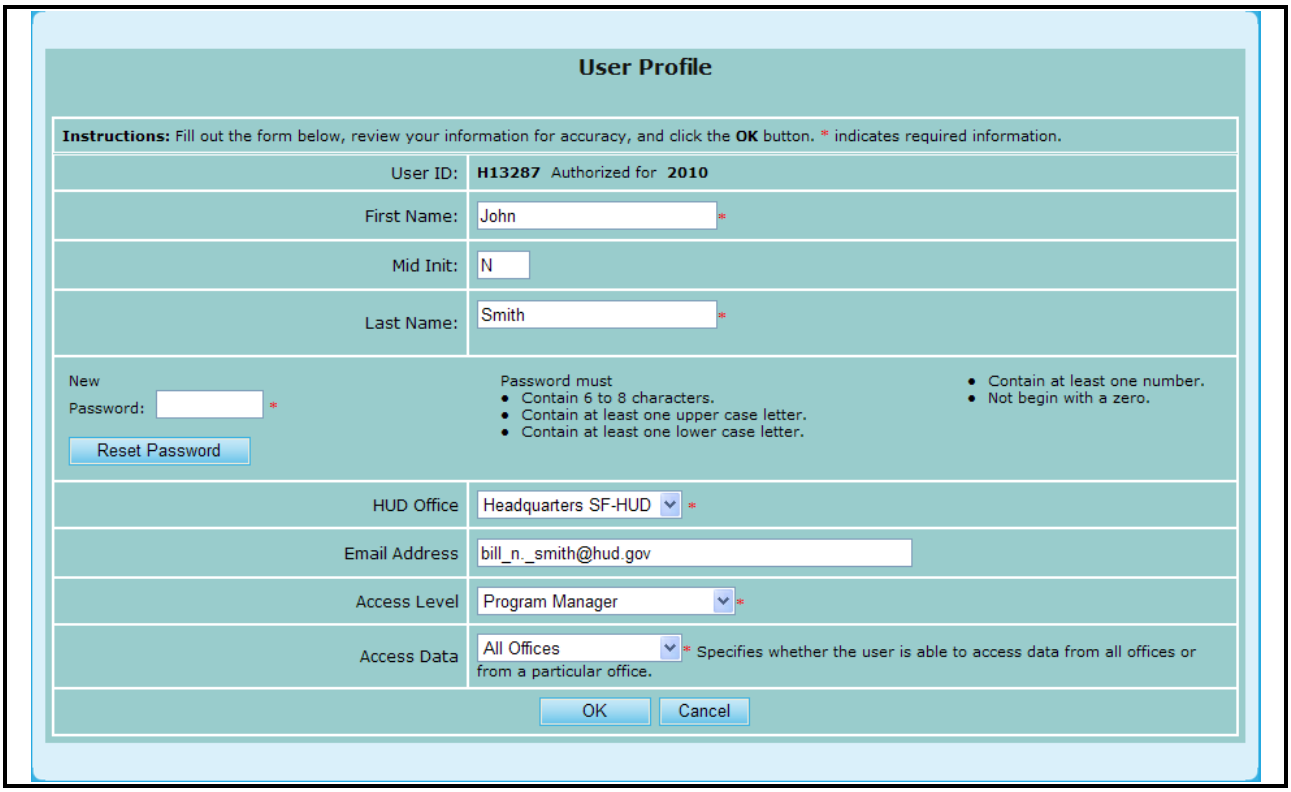


Figure 275. PM – User: User Profile

7. To view a list of all users for all offices, Click the **HUD Office** dropdown field found in the **Search** function, and select **All**. The *User List – All Offices* screen appears.

8. To sort the list by First Name, click the **First Name** hyperlink. To sort the list by Last Name, click the **Last Name** hyperlink. To sort the list by User ID, click the **User ID** hyperlink. To sort the list by HUD Office, click the **HUD Office** hyperlink. To sort the list by Agency Name and then by Access Level, click the **Access Level/Agency** hyperlink.

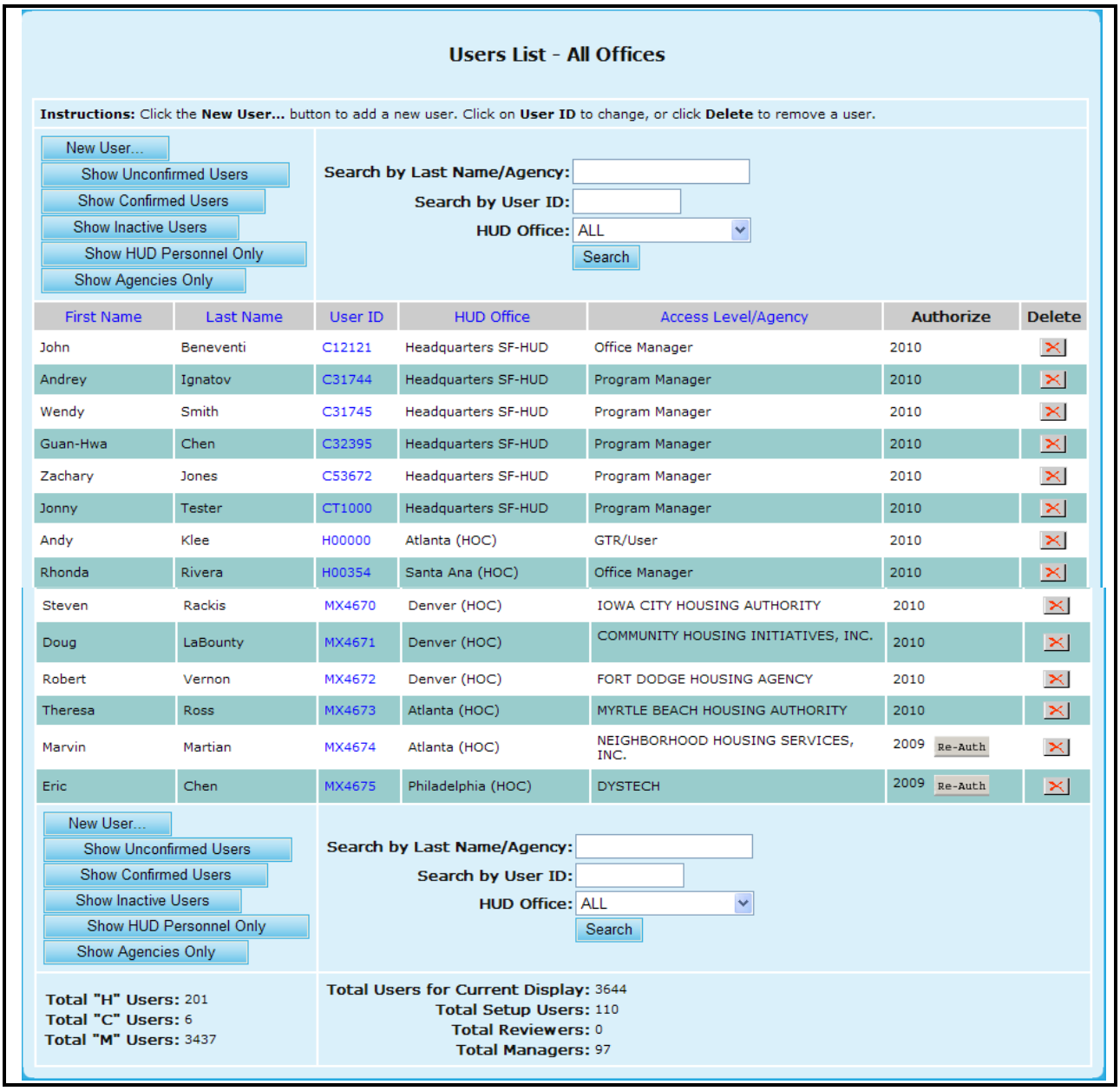


Figure 276.A. PM – User: Users List – All Offices

9. To search a user by Last Name or search for an agency by agency name, key in the information and click the **Search** button. The result is displayed.

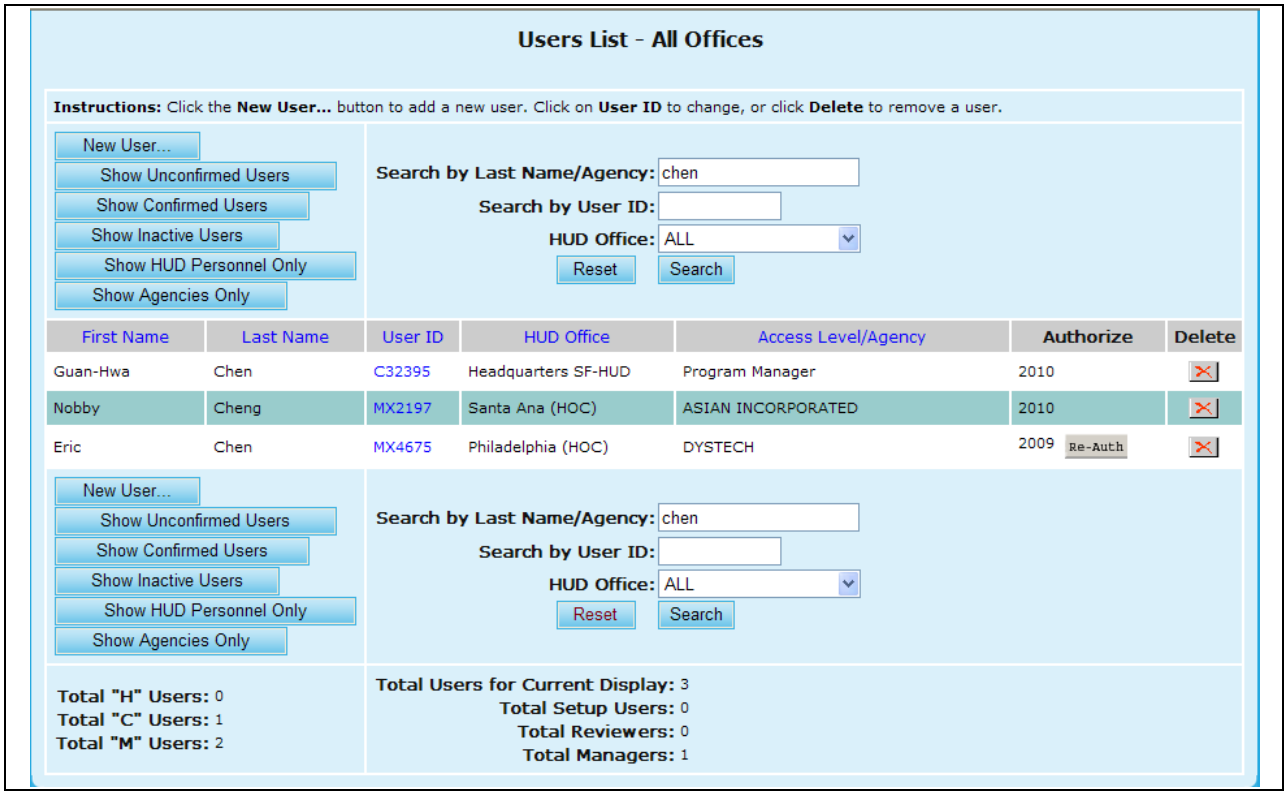


Figure 276.B. PM – User: Search by Last Name Result

10. To search for a user by User ID, key in the ID into **Search by User ID** and click the Search field.

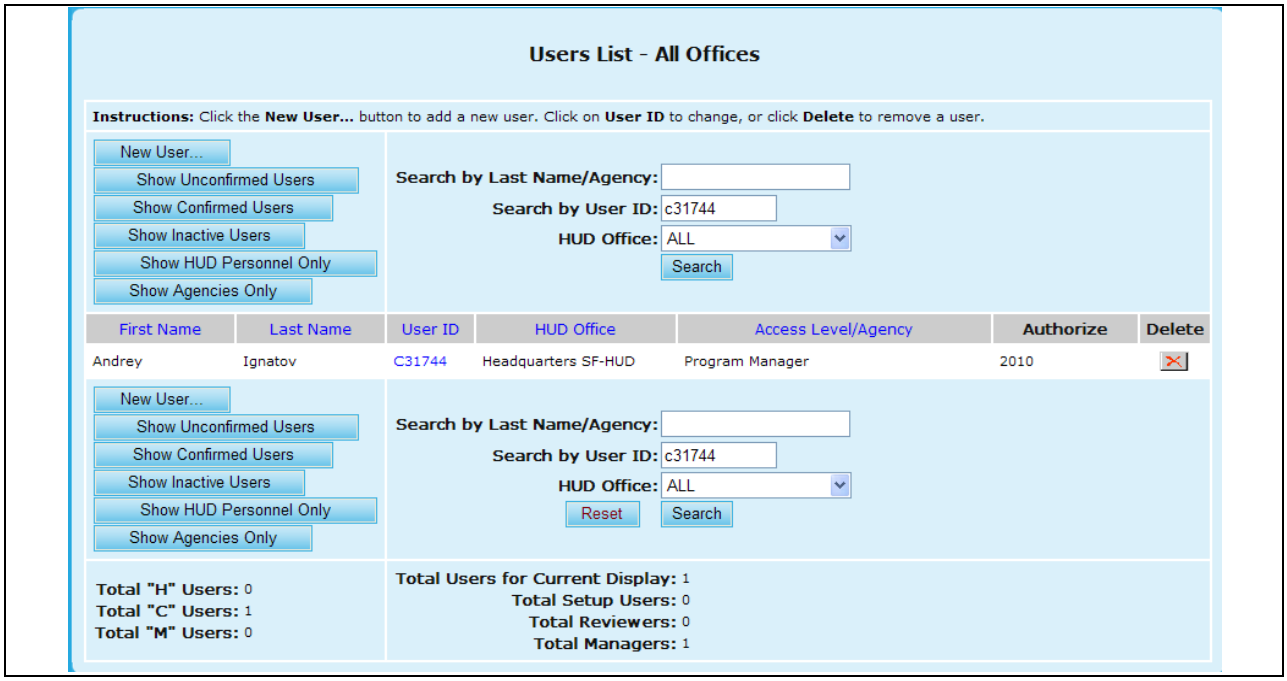


Figure 276.C. PM – User: Search by User ID Result

11. To list all users in a particular HUD Office, select the office from HUD Office dropdown list (shown in following screen), and click the **Search** button. A list of all the users in the selected HUD Office will be displayed.

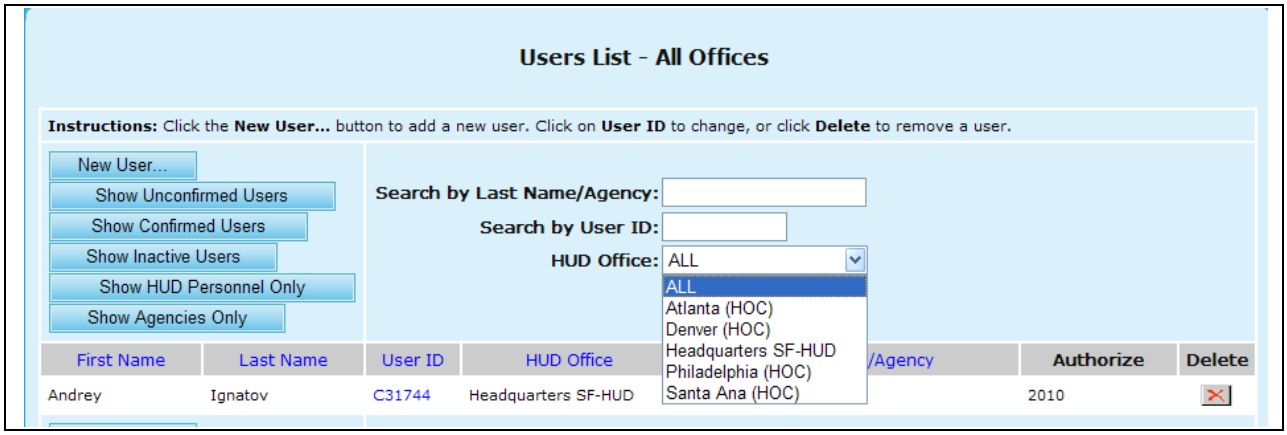


Figure 276.D. PM – User: Search by HUD Office

12. To deactivate a user‟s account, click the *X* button under the Delete column. A warning message appears.
    a. If you are sure that you want to delete (deactivate) this user, click **OK**. To cancel, click **Cancel**.

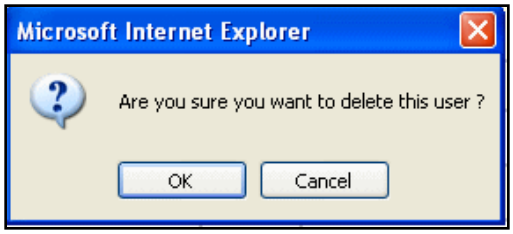


Figure 276.E. PM – User: Confirmation of Delete (Deactivate) Option

13. To list all the unconfirmed users for the specific HUD Office you are in or for all offices, click the **Show Unconfirmed Users** button. A list of unconfirmed users is displayed.

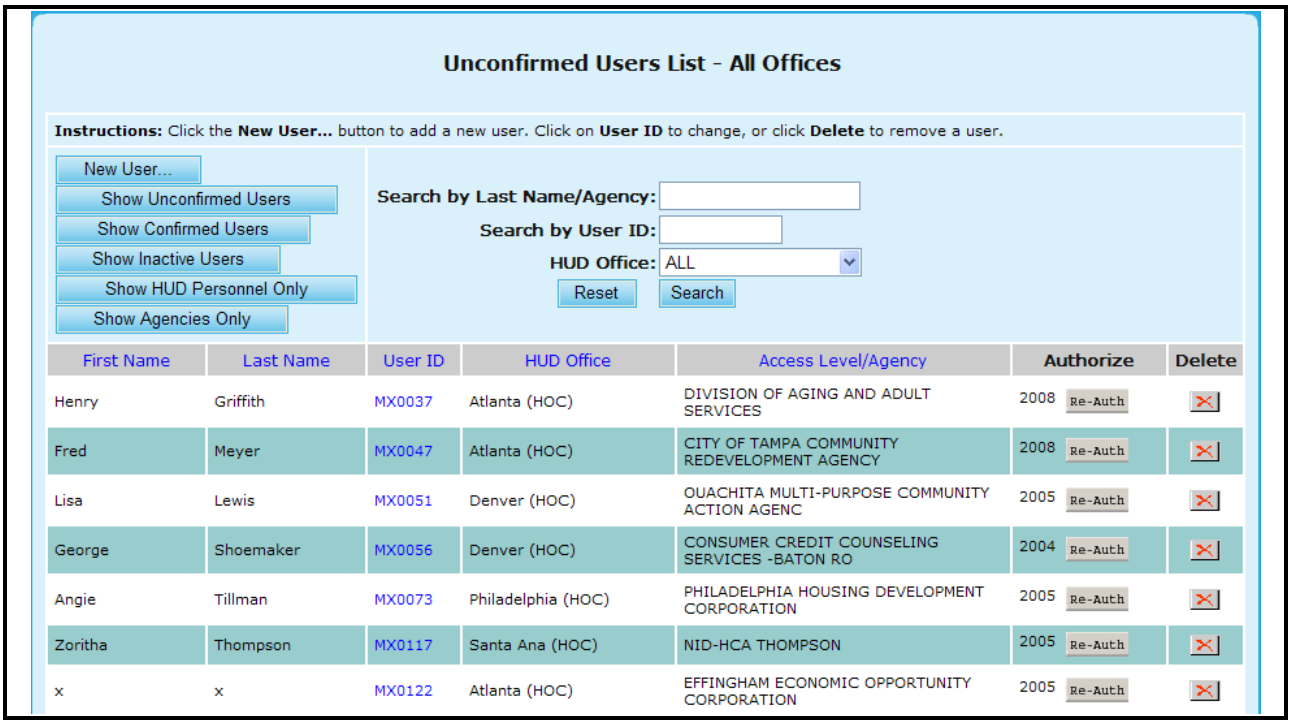
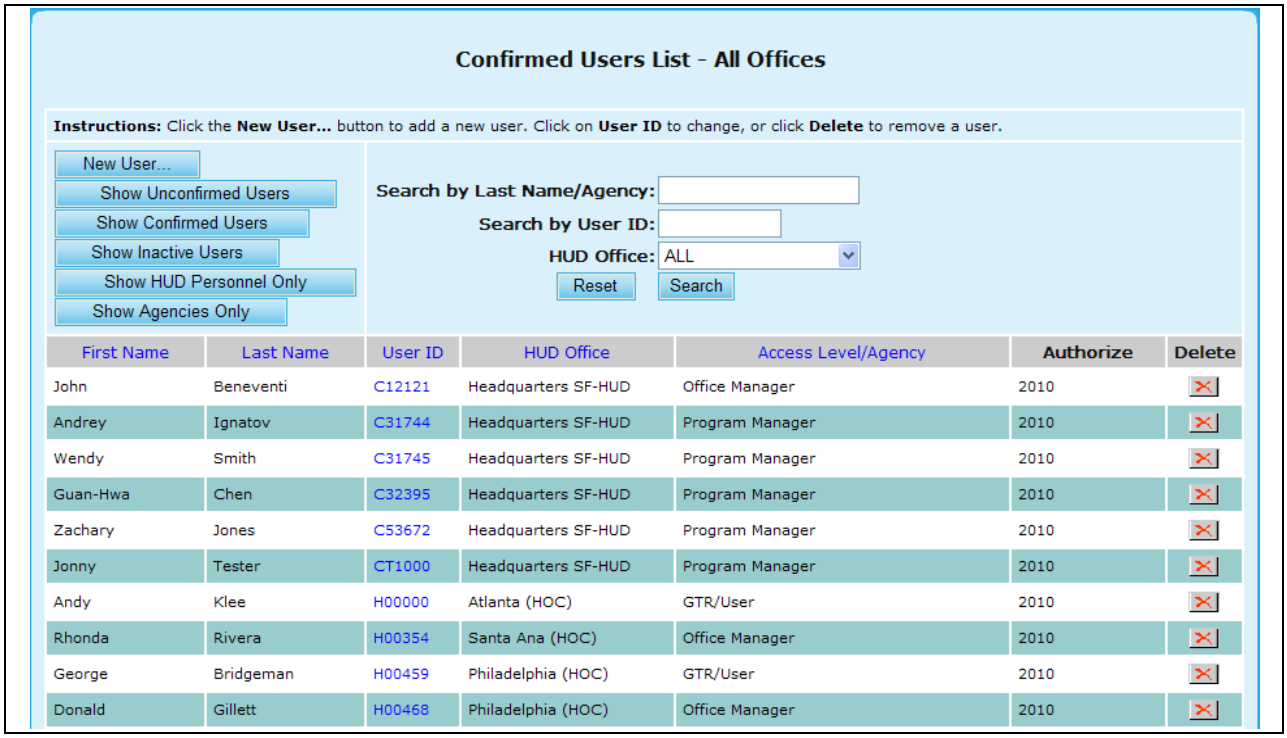


Figure 276.F. PM – User: Unconfirmed Users List – All Offices

14. To authorize an unconfirmed user that has a **Re-Auth** button shown in the Authorize column, click the **Re-Auth** button to the right of the desired entry, the user will be authorized for the current fiscal year.

15. To list all the confirmed users for the specific HUD Office you are in or for all offices, click the **Show Confirmed Users** button. A list of confirmed users is displayed.



First Name	Last Name	User ID	HUD Office	Access Level/Agency	Authorize	Delete
John	Beneventi	C12121	Headquarters SF-HUD	Office Manager	2010	
Andrey	Ignatov	C31744	Headquarters SF-HUD	Program Manager	2010	
Wendy	Smith	C31745	Headquarters SF-HUD	Program Manager	2010	
Guan-Hwa	Chen	C32395	Headquarters SF-HUD	Program Manager	2010	
Zachary	Jones	C53672	Headquarters SF-HUD	Program Manager	2010	
Jonny	Tester	CT1000	Headquarters SF-HUD	Program Manager	2010	
Andy	Klee	H00000	Atlanta (HOC)	GTR/User	2010	
Rhonda	Rivera	H00354	Santa Ana (HOC)	Office Manager	2010	
George	Bridgeman	H00459	Philadelphia (HOC)	GTR/User	2010	
Donald	Gillett	H00468	Philadelphia (HOC)	Office Manager	2010	

Figure 276.G. PM – User: Confirmed Users List – All Offices

16. To list all the inactive users for the specific HUD Office you are in or for all offices, click the **Show Inactive Users** button. A list of inactive users is displayed.

17. To activate an inactive user that has a **Re-Activate** button shown in the Authorize column, click the **Re-Activate** button to the right of the desired entry, the user will be activated and authorized for the current fiscal year.

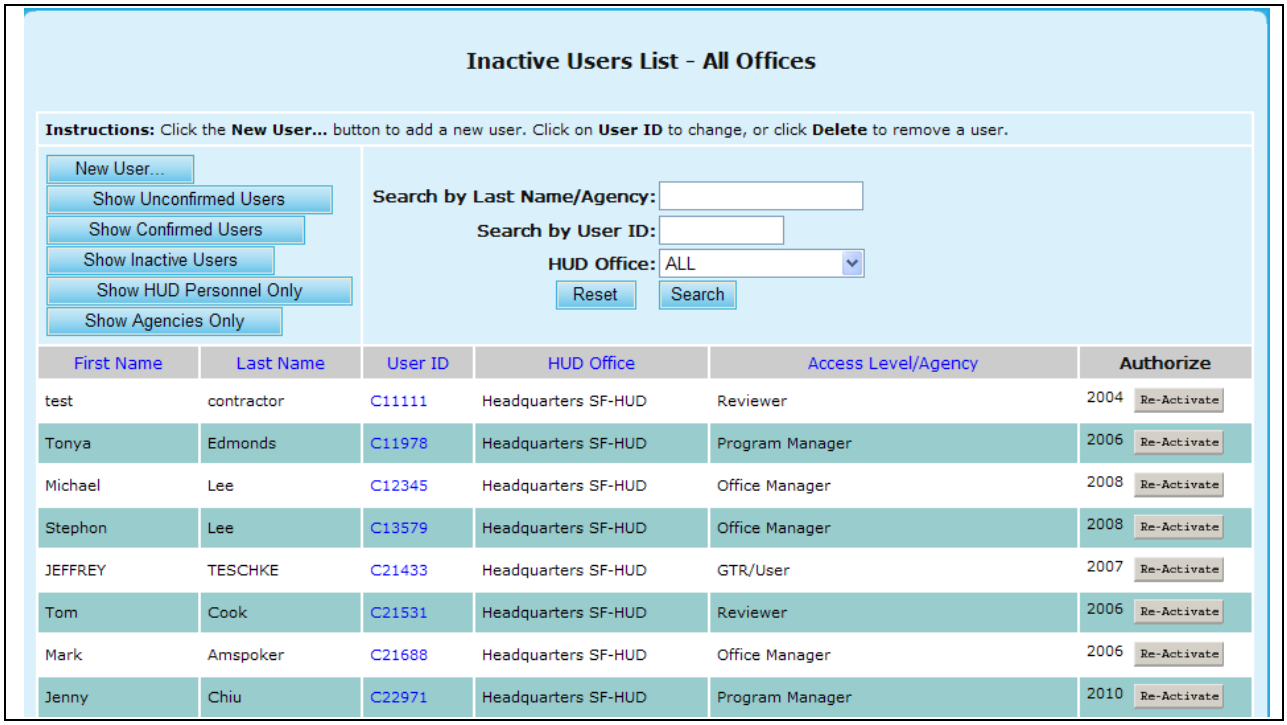


Figure 276.H. PM – User: Inactive Users List – All Offices

18. To list HUD personnel only for the specific HUD Office you are in or for all offices, click the **Show HUD Personnel Only** button. A list of HUD personnel only users is displayed.

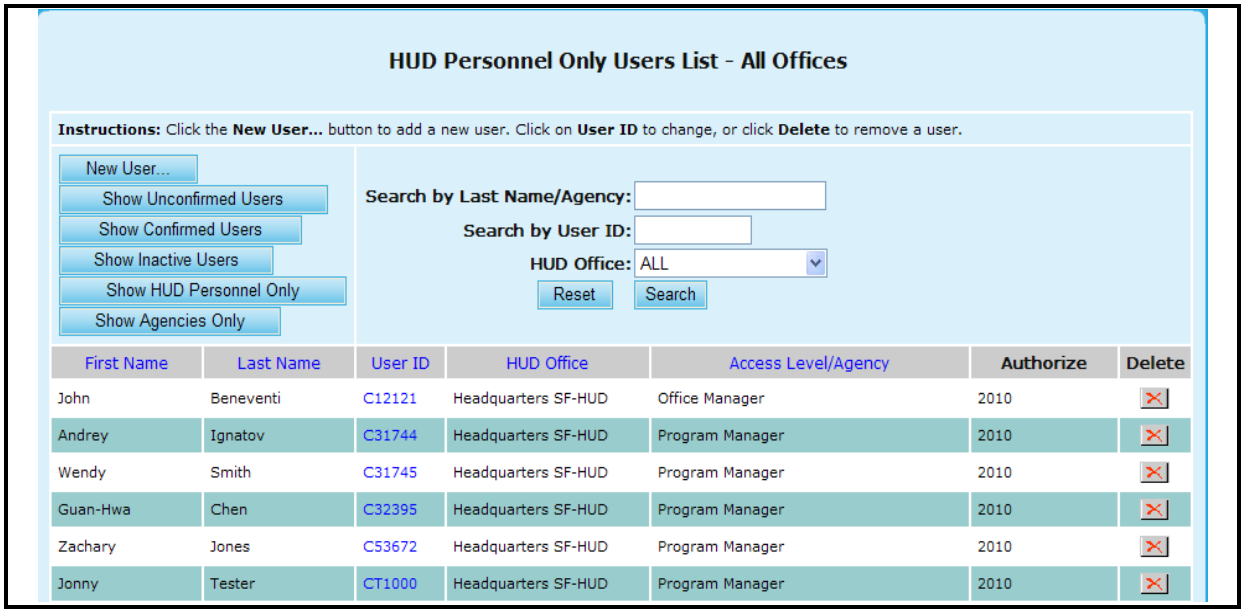


Figure 276.I. PM – User: HUD Personnel Only Users List – All Offices

19. To list agencies users only for the specific HUD Office you are in or for all offices, click the **Show Agencies Only** button. A list of HUD personnel only users is displayed.

20. To list all users for the specific HUD Office you are in or for all offices, click the **Reset** button.

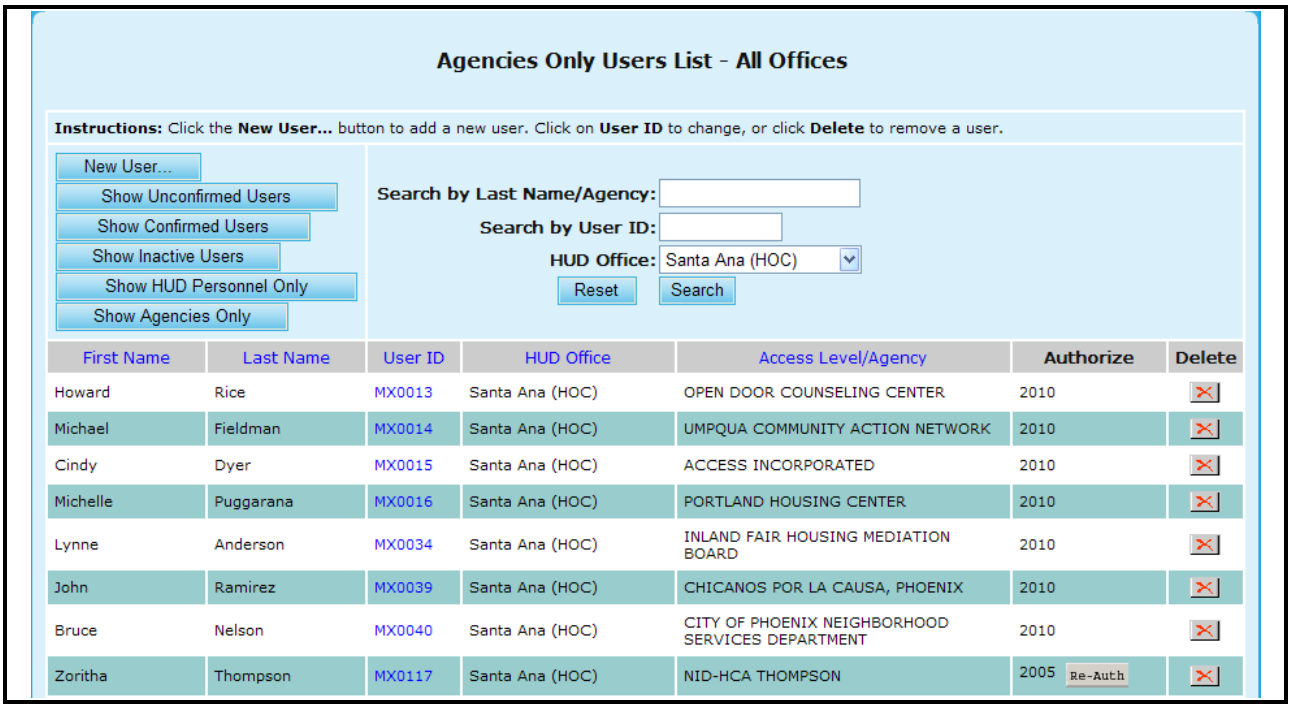


Figure 276.J. PM – User: Agencies Only Users List – Santa Ana (HOC)

9.5 Management

As a Program Manager user, you can perform following system management functions.

- Change system parameters
- View ARM submission verifications
- Grant Maintenance
- Agency Type Setup
- HCS Menu Control
- CMS Management
- AD HOC Query
- Change office defaults

When you log on to the HCS system as an Program Manager, click the **Management Functions** hyperlink in the top navigation menu, the *Management Functions* menu screen appears in the center display area and in the top navigation menu.

Figure 277. PM – Management: Main Screen

9.5.1 System Control Panel

From Management menu, click **System Control Panel** hyperlink. The *System Control Panel* page appears. This information is only editable by a Program Manager.

1. Under System Settings you are able to edit the following information:
    a. Password Expiration: This is the number of days user password is in effect.
    b. Default Password: This is the password a newly created user is set to and the password used when resetting existing users" password.

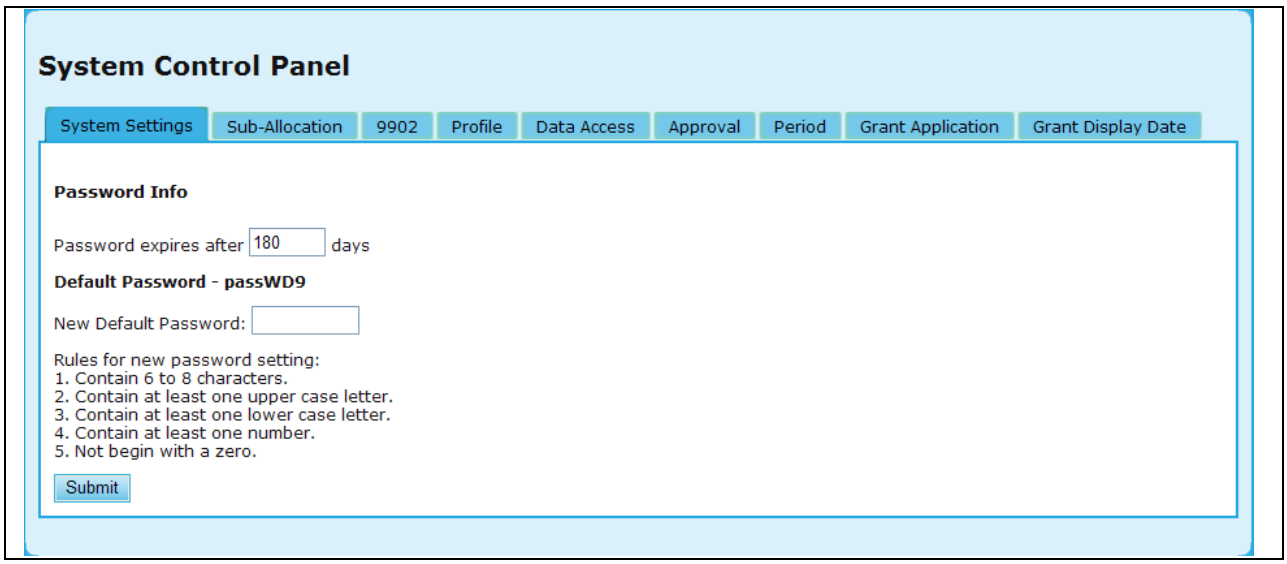


Figure 278.A. PM – Management: System Control Panel – System Settings

2. Under Sub-Allocation you are able to edit the following information:
    a. Sub-Agency Allocation Close Out Date: The date on or before which agencies can sub-allocate funding to their sub-agencies.

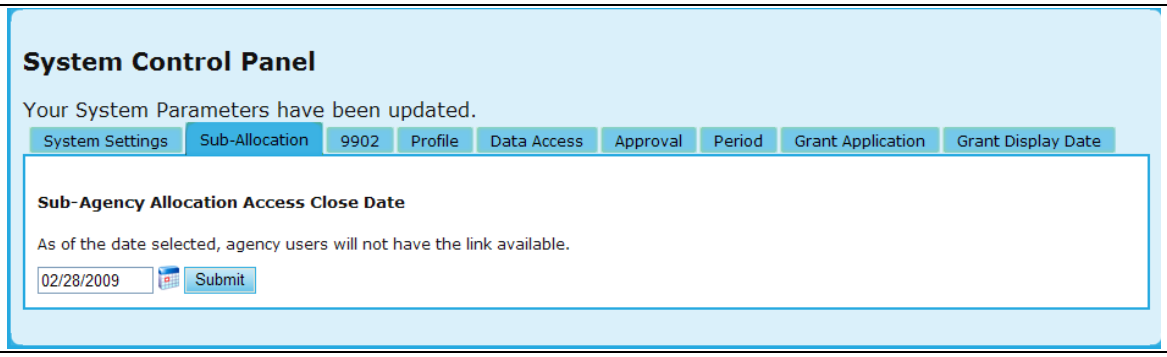


Figure 278.B. PM – Management: System Control Panel – Sub-Allocation Access Close Date

3. Under 9902 you are able to edit the following information:
    a. Due Date: The initial 9902 suspense date. The date when reports must be submitted to be reported on time.
    b. Late Date: The extended 9902 suspense date. If the date is later than the initial suspense date, reports submitted are considered late.
    c. Reports cannot be submitted after the late date.

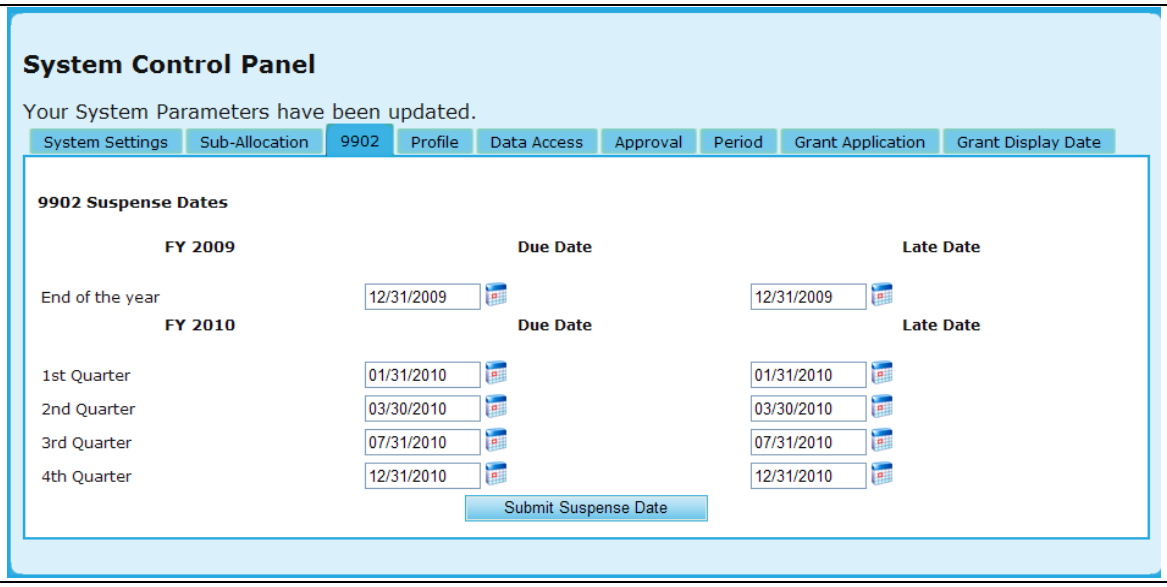


Figure 278.C. PM – Management: System Control Panel – 9902 Suspension Date

4. Under Profile you are able to edit the following information:
    a. Agency Profile Update Duration: This parameter sets the frequency that agencies must update their profile data.

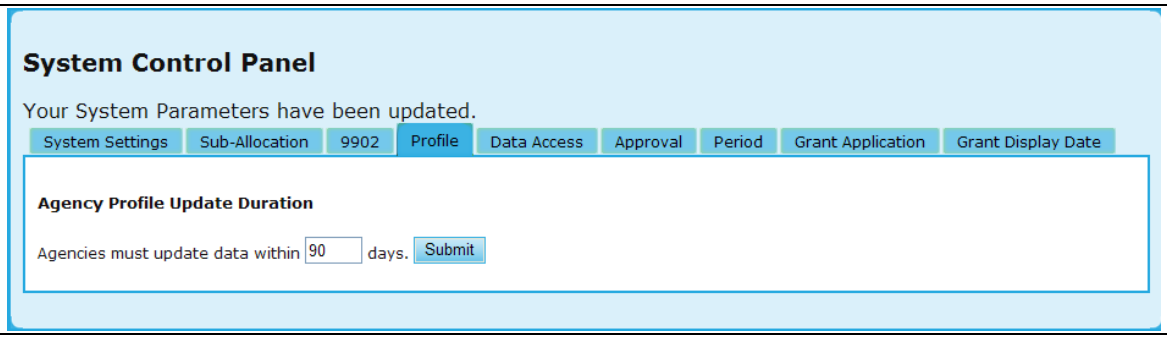


Figure 278.D. PM – Management: System Control Panel – Agency Profile Update Duration

5. Under Data Access you are able to edit the following information:
    a. Grant Processing FY Write Access: This parameter sets the roles of users who have write access to previous fiscal years‟ grant processing data. Currently it is set to „Office Manager and Above‟.

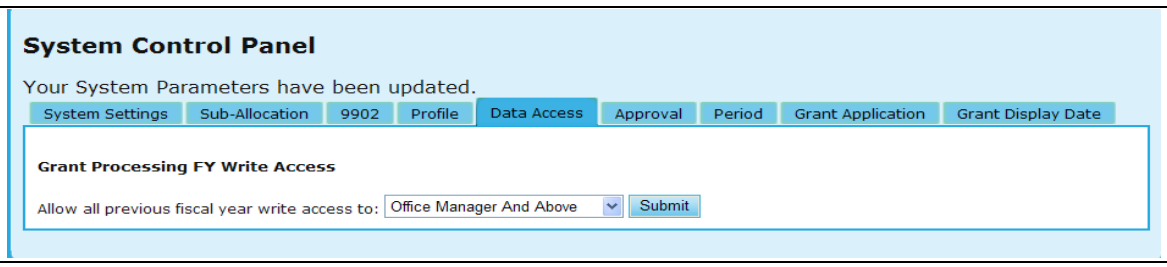


Figure 278.E. PM – Management: System Control Panel – Grant Processing FY Write Access

6. Under Approval you are able to edit the following information:
    a. Approval Status Assignments: This parameter determines what system abilities agency users have based on the status their agency is in.
        i. Login – determines whether the agency user can login to the system.
        ii. 9902 – determines whether they can access, read, or update their HUD 9902 Reports.
        iii. Profile – determines whether they can access, read, or update their Agency Profile.
        iv. Grant – determines whether they can access, read, or update their Sub-Allocations.
        v. Export: determines whether their agency contact and counseling data can be exported to other HUD programs and systems.

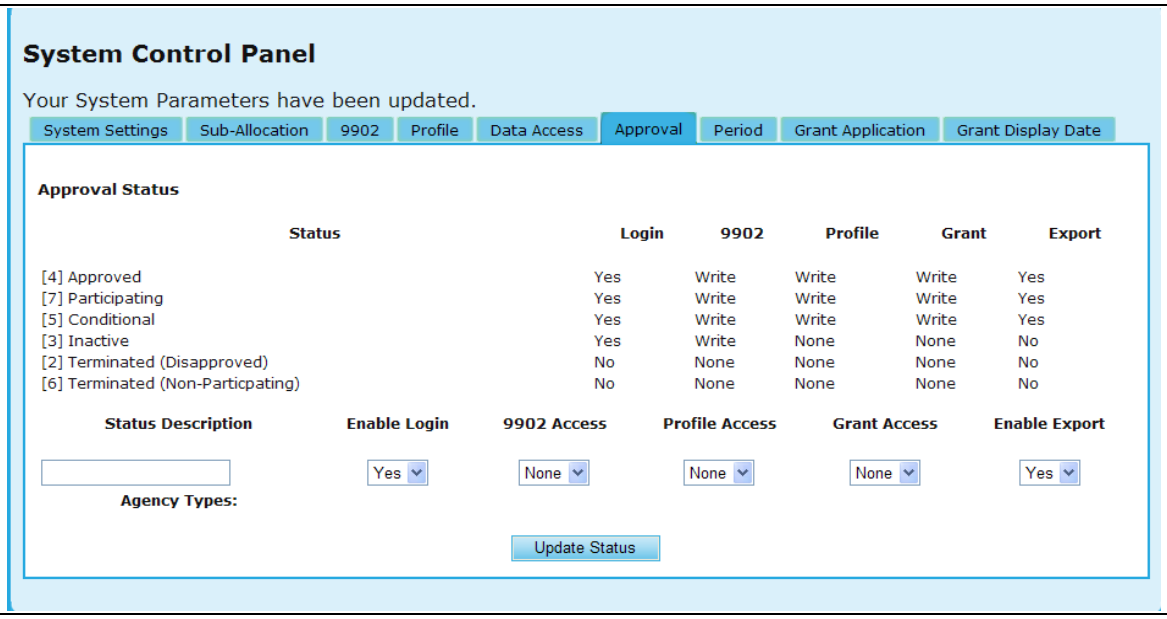


Figure 278.F. PM – Management: System Control Panel – Approval Status

7. Under Period you are able to edit the following information:
    a. Approval Period Default: This parameter sets default approval period duration based on their agency type. Please refer to Section 9.2.1.1. concerning the different statuses.

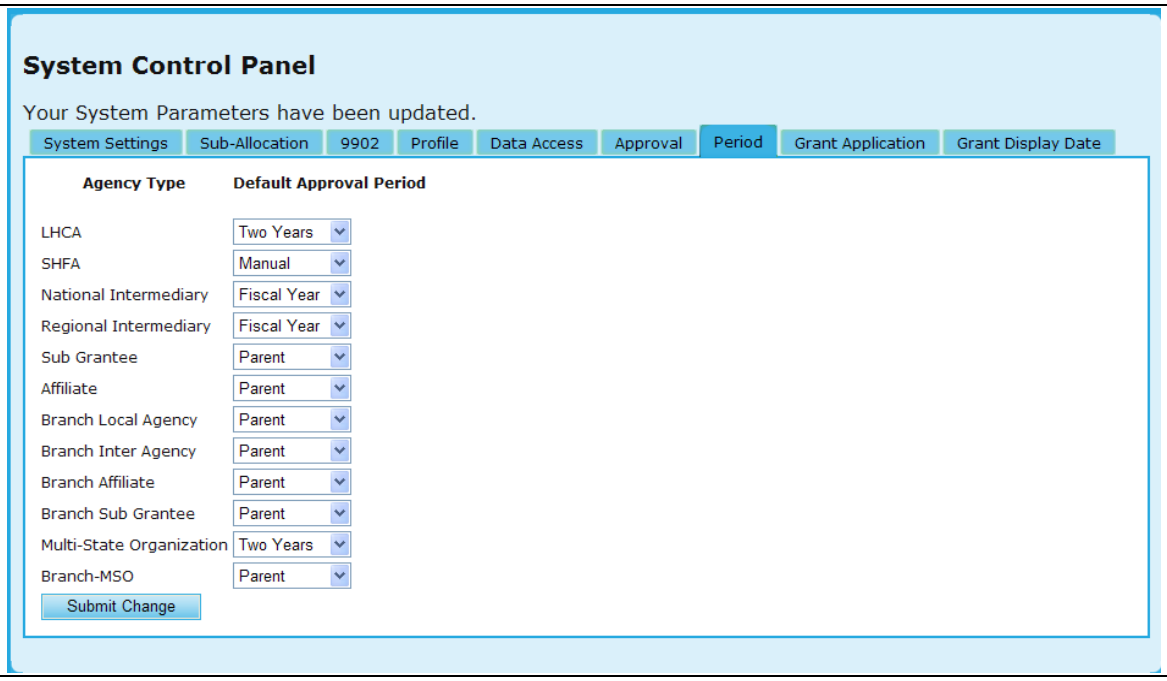


Figure 278.G. PM – Management: System Control Panel – Default Approval Period

8. Under Grant Application you are able to edit the following information:
    a. Grant Application Control allows you to decide whether or not you want to Enable or Disable the Grant Score Card or Grant Application Access.

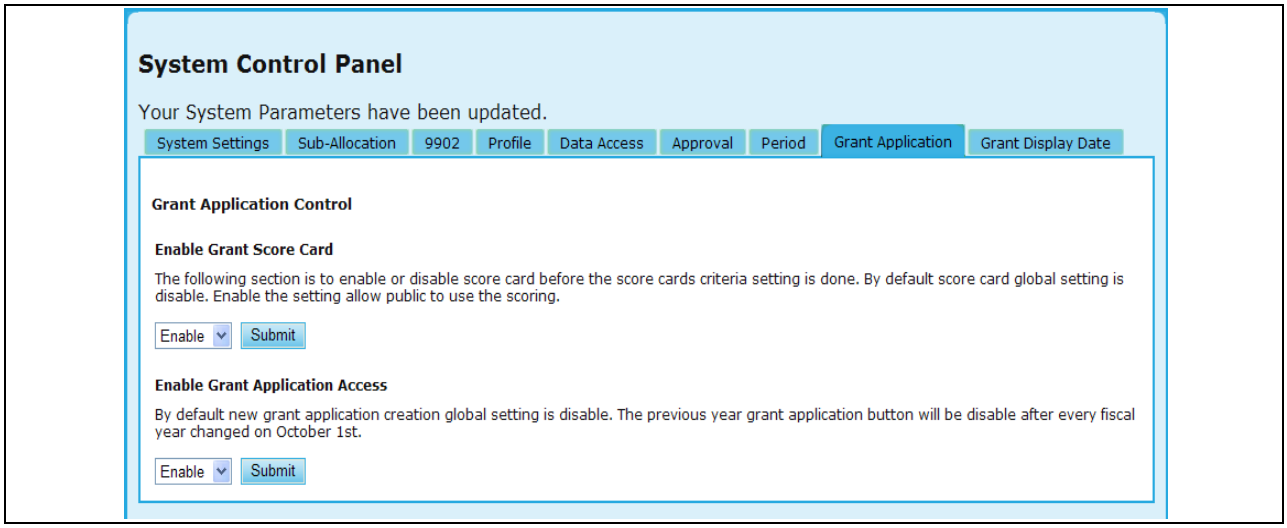


Figure 278.H. PM – Management: System Control Panel – Default Approval Period

9. Under Grant Display Date you are able to edit the following information:
    a. Grant Display Date allows you to set a specific date when individuals are able to access grant information.

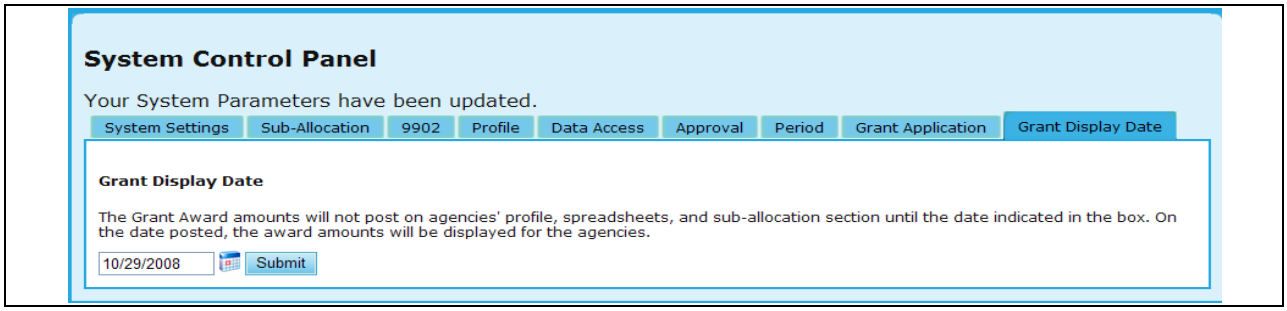


Figure 278.I. PM – Management: System Control Panel – Grant Display Date

9.5.2 Agency Report Module

From the Management Functions menu screen, click the **Agency Report Module** hyperlink. The *ARM Management Menu* appears.

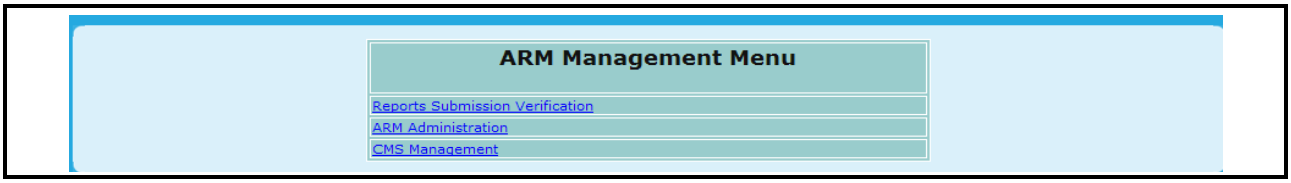


Figure 279. PM – Management: ARM Management Menu

9.5.2.1 *ARM Submission Verification*

1. From the ARM Management Menu, select the Reports Submission Verification hyperlink.

ARM April 28, 2010

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)

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Figure 280. PM – Management: ARM Submission Verification

2. Upon narrowing down your search criteria, you have three types of submission reports to choose from:
    a. All Submission: This will provide you a full list of submissions; the ones that failed and the ones that were successful
    b. Failed List: This will provide a list of only the submissions that failed.
    c. Success List: This will provide you a list of only the submissions that were successful.

ARM April 28, 2010

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) 01/01/2009 * End Date (mm/dd/yyyy) 05/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: All Submissions Total: 66

Date	Status	HCS Agency Id	Agency Name	CMS Name
Apr 27 2010 11:55	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:13	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:12	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 26 2010 2:41	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 23 2010 12:03	Successful	83530	HORIZONS, A FAMILY SERVICE ALLIANCE (HORIZONS CCCS)	Paragon
Apr 20 2010 11:19	Successful	80640	SUREPATH FINANCIAL SOLUTIONS	CPR
Apr 19 2010 5:49	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:48	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:47	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:45	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR

Figure 281.A. PM – Management: ARM Submission Verification Results

ARM April 28, 2010

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) 01/01/2009 * End Date (mm/dd/yyyy) 05/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: Failed List Total: 13

Date	Status	HCS Agency Id	Agency Name	CMS Name
Apr 19 2010 5:45	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:42	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:40	Failed	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 10:09	Failed	83279	CCCS OF NH & VT	CPR
Apr 16 2010 10:53	Failed	80727	CONSUMER CREDIT COUNSELING SERVICE	CPR
Apr 14 2010 4:17	Failed	83279	CCCS OF NH & VT	CPR
Mar 18 2010 4:03	Failed	83279	CCCS OF NH & VT	CPR
Mar 17 2010 12:22	Failed	83279	CCCS OF NH & VT	CPR
Mar 17 2010 12:21	Failed	83279	CCCS OF NH & VT	CPR
Mar 9 2010 4:49	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Mar 9 2010 4:47	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Mar 9 2010 4:31	Failed	80724	CREDIT COUNSELING CENTERS OF OKLA.	CPR
Feb 1 2010 12:06	Failed	80949	Catholic Charities of Chicago	HCS

Figure 281.B. PM – Management: ARM Submission Verification – Failed List

* Start Date (mm/dd/yyyy) 06/01/2009 * End Date (mm/dd/yyyy) 06/01/2010

HCS Agency ID

Agency Name

Active CMS Name

All Submissions Failed List Success List

Report selected for active and inactive agencies: Success List Total: 56

Date	Status	HCS Agency Id	Agency Name	CMS Name
May 3 2010 2:28	Successful	80244	CCCS OF NORTH CENTRAL WEST VIRGINA	Paragon
Apr 30 2010 2:16	Successful	80941	CCCS OF DELAWARE VALLEY, INC.	CPR
Apr 30 2010 12:12	Successful	80727	CONSUMER CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 27 2010 11:55	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:13	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 27 2010 11:12	Successful	80748	CCCS/GRACEWORKS LUTHERAN SERVICES	CPR
Apr 26 2010 2:41	Successful	84573	LIFESPAN CREDIT COUNSELING SERVICE	CPR
Apr 23 2010 12:03	Successful	83530	HORIZONS, A FAMILY SERVICE ALLIANCE (HORIZONS CCCS)	Paragon
Apr 20 2010 11:19	Successful	80640	SUREPATH FINANCIAL SOLUTIONS	CPR
Apr 19 2010 5:49	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:48	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 5:47	Successful	82943	CCCS OF THE SAVANNAH AREA, INC.	CPR
Apr 19 2010 12:42	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 12:38	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:48	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:33	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 19 2010 11:31	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 16 2010 3:48	Successful	82951	CCCS, A DIVISION OF TRIANGLE FAMILY SERVICES, INC.	Paragon
Apr 16 2010 2:22	Successful	80949	Catholic Charities of Chicago	CCARM
Apr 16 2010 2:17	Successful	80949	Catholic Charities of Chicago	CCARM

Figure 281.C. PM – Management: ARM Submission Verification – Successful List

You have successfully viewed the ARM Submission Verification.

9.5.2.2 *ARM Administration*

1. From the ARM Management Menu, select the ARM Administration hyperlink.

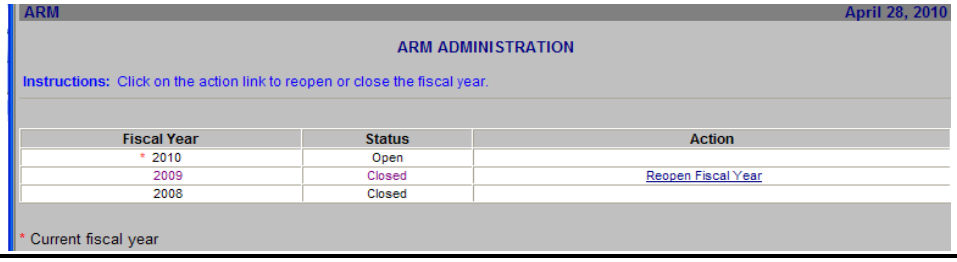


Figure 282. PM – Management: ARM Administration

2. Click the hyperlink found under the Action Column, to reopen or close the Fiscal Year. Upon clicking that hyperlink a warning Message will appear.

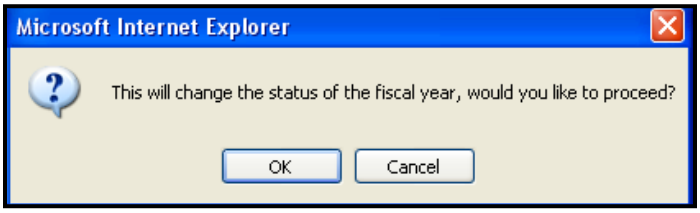


Figure 283. PM – Management: ARM Administration action warning message.

3. Should you decide you want to change the Status, click **OK**. A confirmation message will appear on the page, as illustrated below. If you do not want to change the status of the fiscal year, click **Cancel** to close without saving.

Figure 284. PM – Management: ARM Administration Fiscal Year Changed Message

9.5.2.3 *CMS Management*

1. From the ARM Management Menu, select the CMS Management hyperlink. This will allow you to perform a search based on the following criteria:
   a. Fiscal Year
   b. Agency ID
   c. Agency Type
   d. HOC
   e. CMS

2. Upon selecting your criteria click the Search button to retrieve your results.

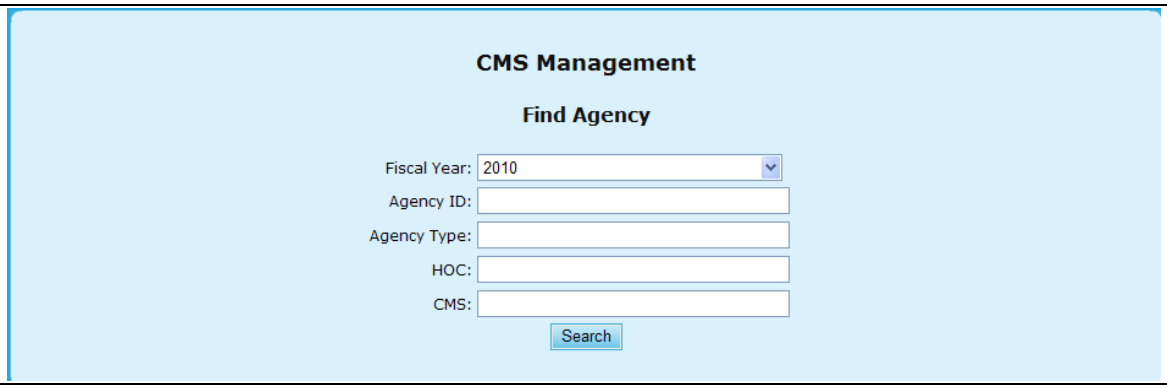


Figure 285. PM – Management: CMS Management Search

3. Once receiving your results, you will be able to see which Agency is using a particular CMS product, as well as if it is editable or not.

4. To edit Enable or Disable Edits, select which agencies you would like, and either click **Enable Edits** or **Disable Edits**.

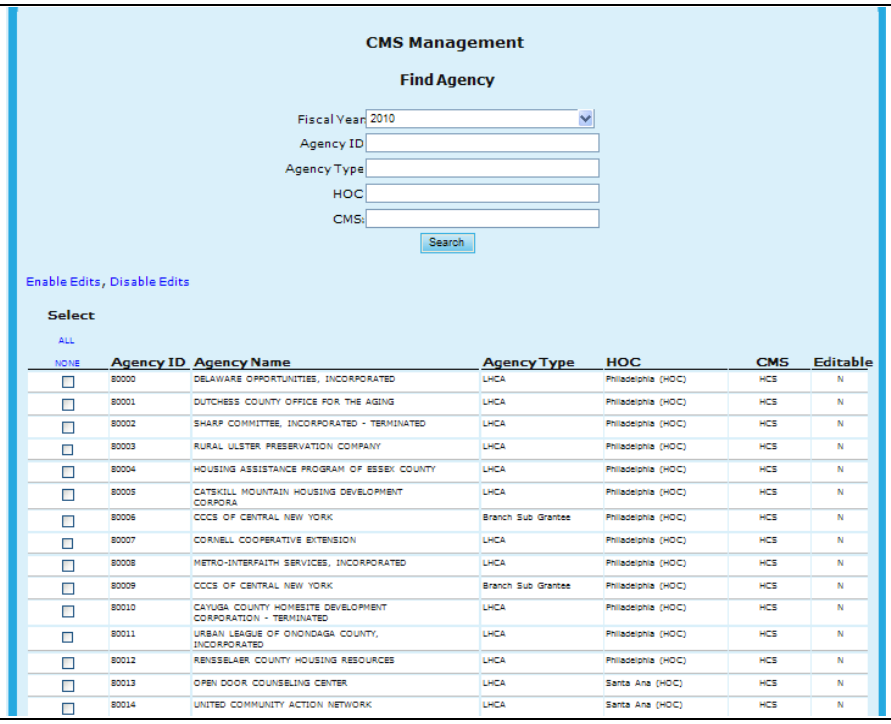


Figure 286. PM – Management: CMS Management Results

9.5.3 Grant Maintenance

9.5.3.1 *Step 1: Appropriations Setup*

This feature assigns grant appropriations to various grant types and categories in accordance with the SuperNOFA.

1. From the top navigation menu, scroll down to **Management** sub-menu. Click the **Setup Funding Appropriations** hyperlink**.** The *Setup Funding Appropriation* screen appears.

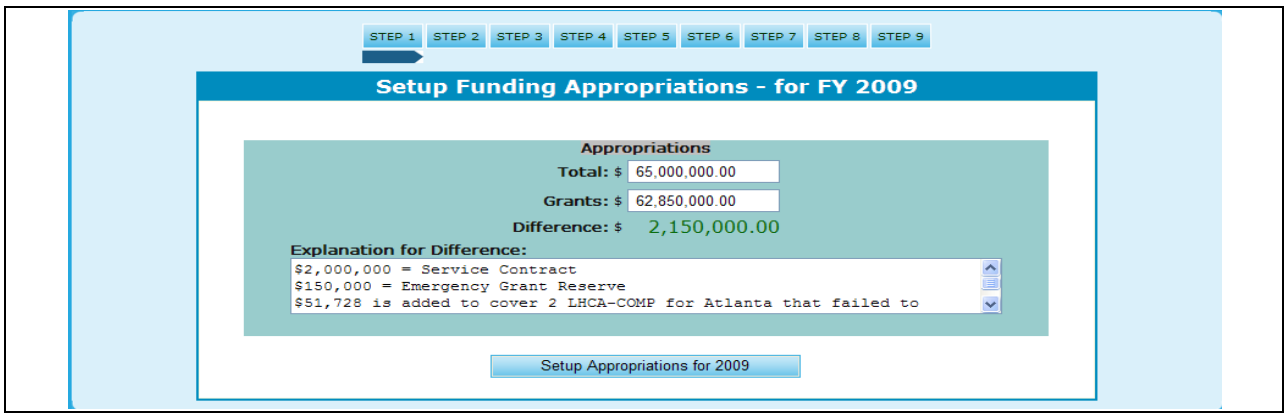


Figure 287. PM – Management: Setup Funding Appropriations Screen After Setup

9.5.3.2 *Step 2: Grant Category Setup*

This function is only applicable to Program Managers. Here HCS variables are set and funds allocated in accordance with the guidance given in the SuperNOFA.

1. From the top navigation menu, scroll down to **Management** sub-menu. Click the **Grant Category Setup** hyperlink. The *Grant Category* screen appears. If you are already in the Grant Maintenance, you can also press Step 2.

2. The Setup Grant Category function allows a Program Manager to create new grant categories, edit or delete the existing grant categories. Please note that delete a grant action will affect the entire HCS system.

3. To create a new grant category, click the **Add** hyperlink.

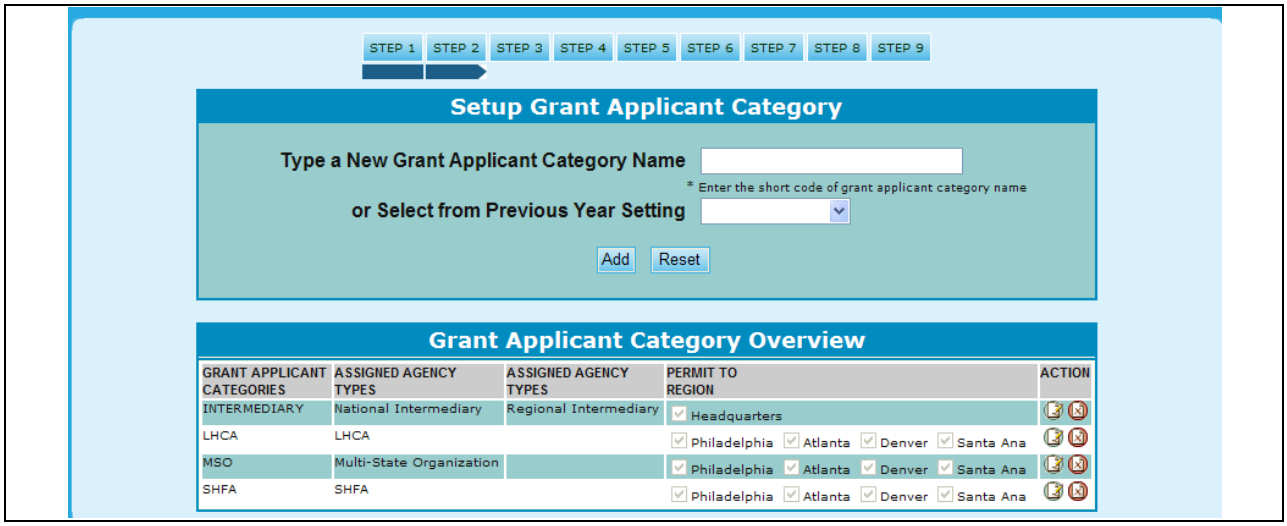


Figure 288.A. PM – Management: Setup Grant Category

4. The *Add a New Grant Category* screen appears. Complete the necessary fields in the page. Click **Submit** to save your new grant category. Click **Cancel** to cancel this action. You will be returned to the *Grant Category* screen.

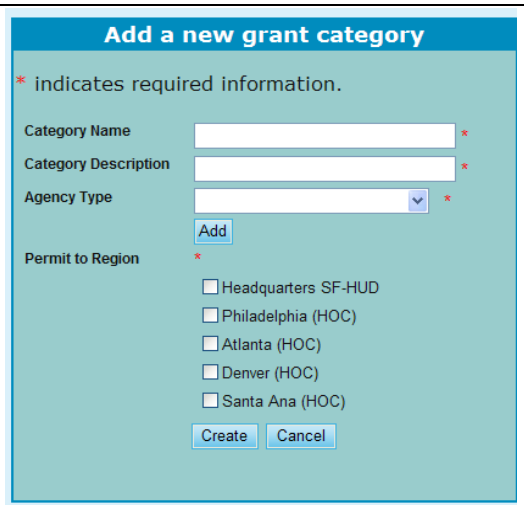


Figure 288.B.1. PM – Management: Grant Category – New

5. To edit a grant category, click the icon on the left located under the **Action** column. The *Grant Application Category – Edit* screen appears. Edit the fields that you wish to change. To save your changes, click **Submit**. To cancel these changes, click **Cancel**. You will be returned to the *Grant Category* screen.

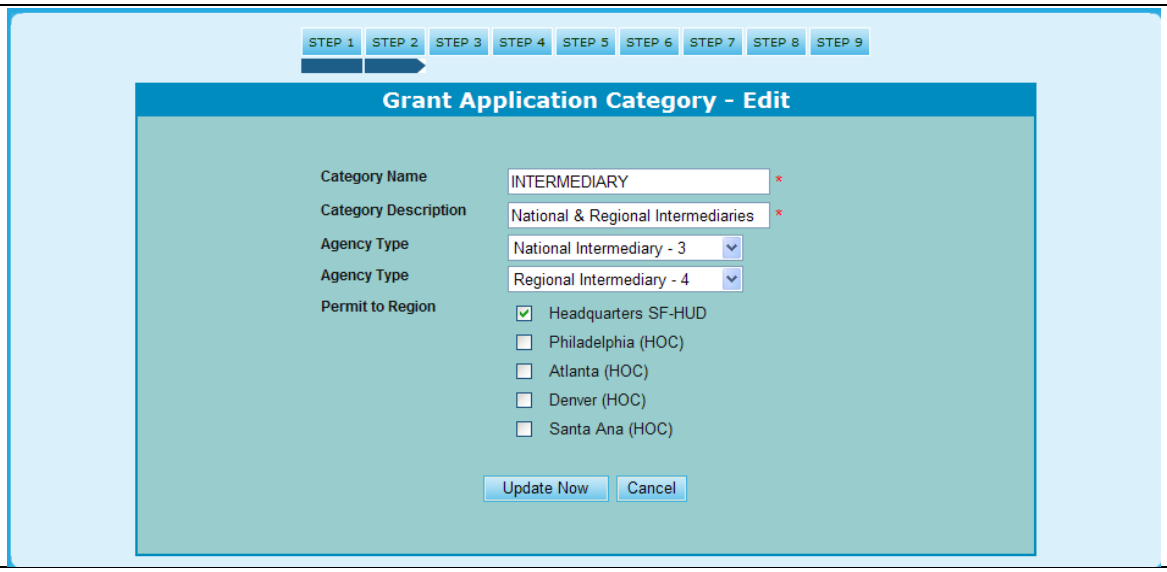


Figure 288.B.2. PM – Management: Grant Category – Edit

6. To delete a grant category, find the grant category you wish to delete from Grant Category page and click the Delete hyperlink. The Delete warning message appears.

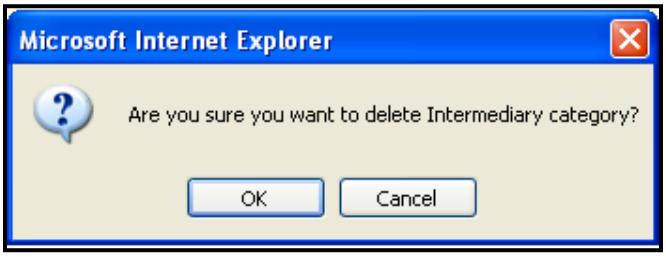


Figure 288.B.3. Setup Management: Grant Category – Delete Confirmation Message 1

a. If you are sure that you want to delete this grant category, click **OK** button; another message appears (see following screen). To cancel, click **Cancel** button.
b. To delete, click **OK** button from the second delete confirmation message. To cancel, click **Cancel** button from the second delete confirmation message.

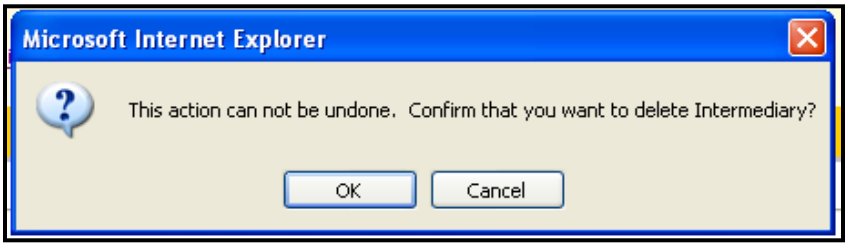


Figure 288.B.4. PM – Management: Setup Grant Category – Delete Confirmation Message 2

9.5.3.3 *Step 3: Grant Type Setup*

1. From the top navigation menu, scroll down to **Management** sub-menu. Click the **Setup Grant Type** hyperlink. The *Setup Grant Type* screen appears. If you are already in the Grant Maintenance, you can also press Step 3.

2. The Setup Grant Type function allows Program Manager to create new grant types, edit or delete the existing grant types. Please note that removes a grant type will affect the entire HCS system.

3. To create a new grant type, Click the **Add** hyperlink. The *Grant Type – New* screen appears.

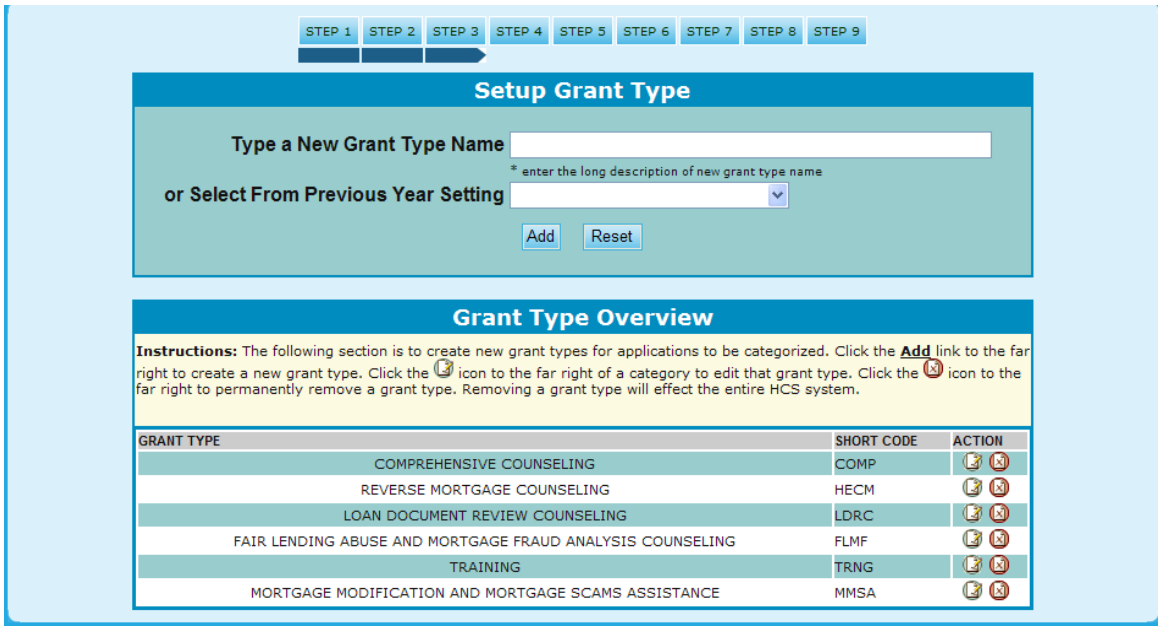


Figure 289.A. PM – Management: Setup Grant Type

4. Complete the necessary fields in the page. Click **Create** to save your new grant type. Click **Cancel** to cancel this action. You will be returned to the *Grant Type* screen.

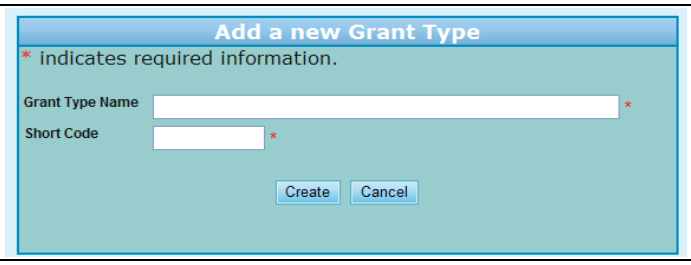


Figure 289.B.1. PM – Management: Setup Grant Type – New

5. To edit a grant type, click the **Edit** hyperlink by the name of the grant type that you want to edit. The *Grant Type – Edit* screen appears. To view the field definitions, click **Field Definitions (click to view)** hyperlink. Edit the fields that you wish to change. To save your changes, click **Submit**. To cancel these changes, click **Cancel**. You will be returned to the *Grant Type* screen.

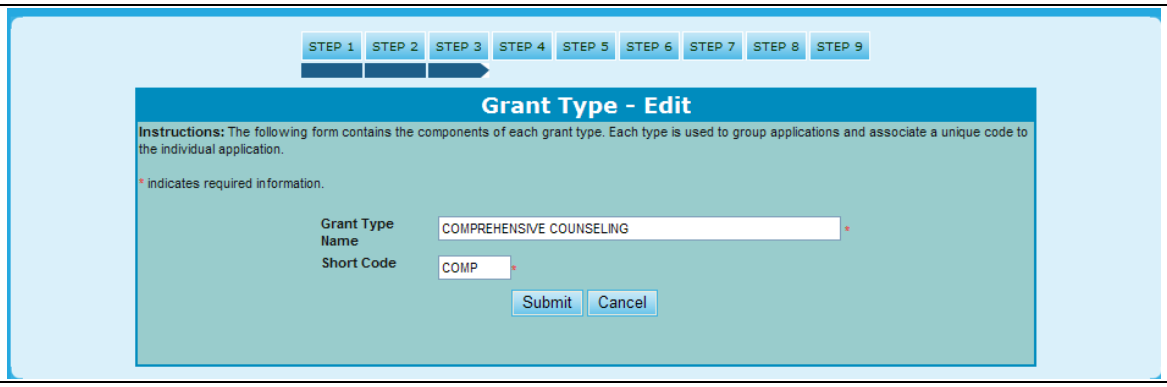


Figure 289.B.2. PM – Management: Setup Grant Type – Edit

6. To delete a grant type, find the grant category you wish to delete and click the **Delete** hyperlink. The *Delete* warning message appears.

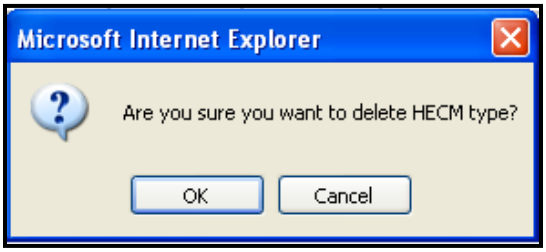


Figure 289.B.3. Management: Setup Grant Type – Delete Confirmation Message 1

7. If you are sure that you want to delete this grant type, click **OK** button; another message appears (see following screen). To cancel, click **Cancel** button**.**

8. To delete, click **OK** button from the second delete confirmation message. To cancel, click **Cancel** button from the second delete confirmation message.

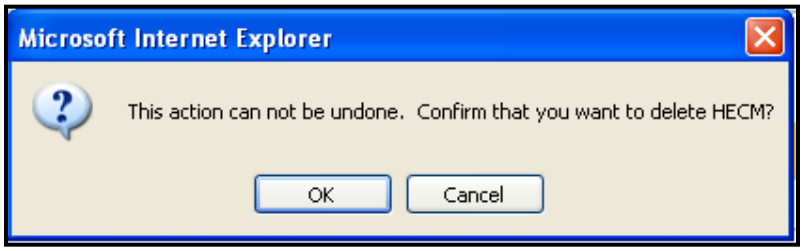


Figure 289.B.4. PM – Management: Setup Grant Type – Confirm Deletion Message 2

9.5.3.4 *Step 4: Grant Allocation Setup*

1. From the top navigation menu, scroll down to **Management** sub-menu. Click the **Grant Allocation Setup** hyperlink. The *Grant Allocation Setup* screen appears. If you are already in Grant Maintenance, you can also press Step 4.

2. Once in this screen, you will have two options for allocating grants:
   a. Grant Applicant Categories Allocation
   b. Grant Type Allocation

3. Under Grant Applicant Categories, you are able to allocate funds through four categories:
   a. Intermediary
   b. LHCA
   c. MSO
   d. SHFA

4. Once you have decided how you would like your funds allocated, you will be advised on whether or not you have exceeded your budget. As indicated to the right of the Grant Applicant Category Appropriations Total.

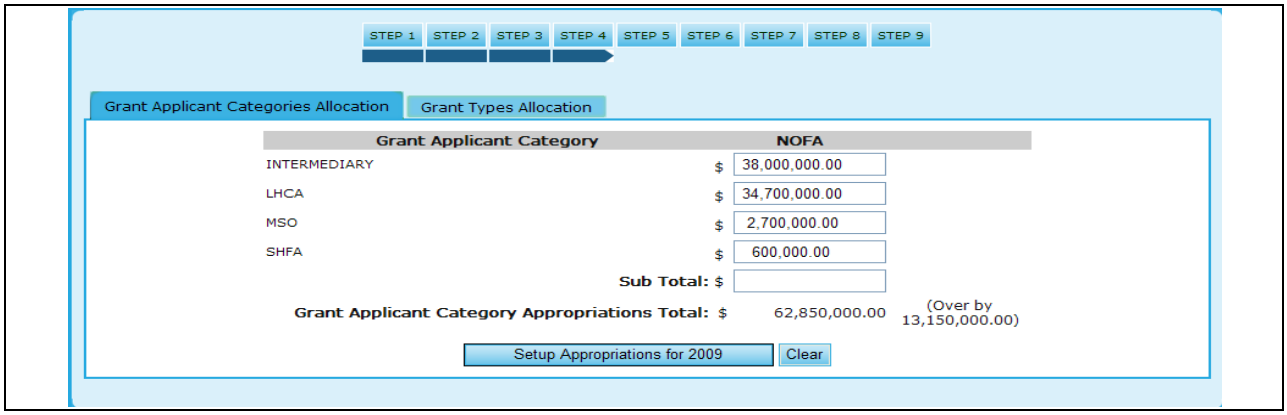


Figure 290.A. PM – Management: Setup Grant Type – Confirm Deletion Message 2

5. You are also able to allocate funds based on Grant Type, which is illustrated below. You are able to disperse this through the following Grants:
   a. COMP
   b. HECM
   c. TRNG
   d. FLMF
   e. LDRC
   f. MMSA

6. Also, as indicated in the Grant Applicant Categories, you are advised as to whether or not you have exceeded your budget. Should Sub-Total have a zero in the box next to it, you have successfully allocated funds without exceeding your budget. Click the **Setup Appropriations for 20XX** button to save changes.

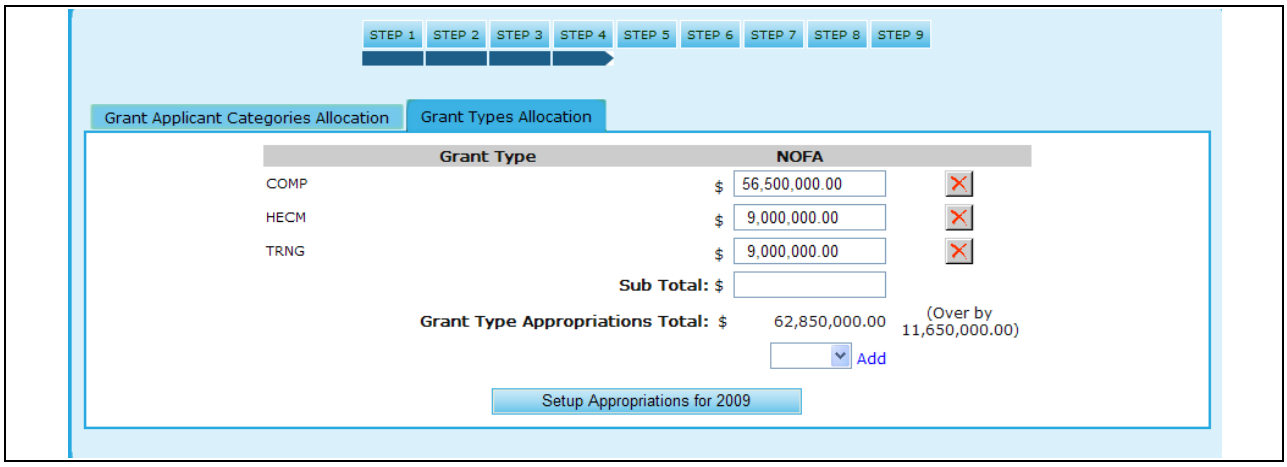


Figure 290.B. PM – Management: Setup Grant Type – Confirm Deletion Message 2

9.5.3.5 *Step 5:Grant Matrix Setup*

1. From the top navigation menu, scroll down to the **Management** sub-menu. Click the **Setup Grant Type** hyperlink. The *Grant Matrix Setup* screen appears. If you are already in Grant Maintenance, you can also press Step 5.

2. Under Grant Matrix Setup you are able to perform 4 tasks:
   a. Edit Grant & Category Relationship
   b. Delete a Grant Category
   c. Add Grant Allocation
   d. Add a Relationship

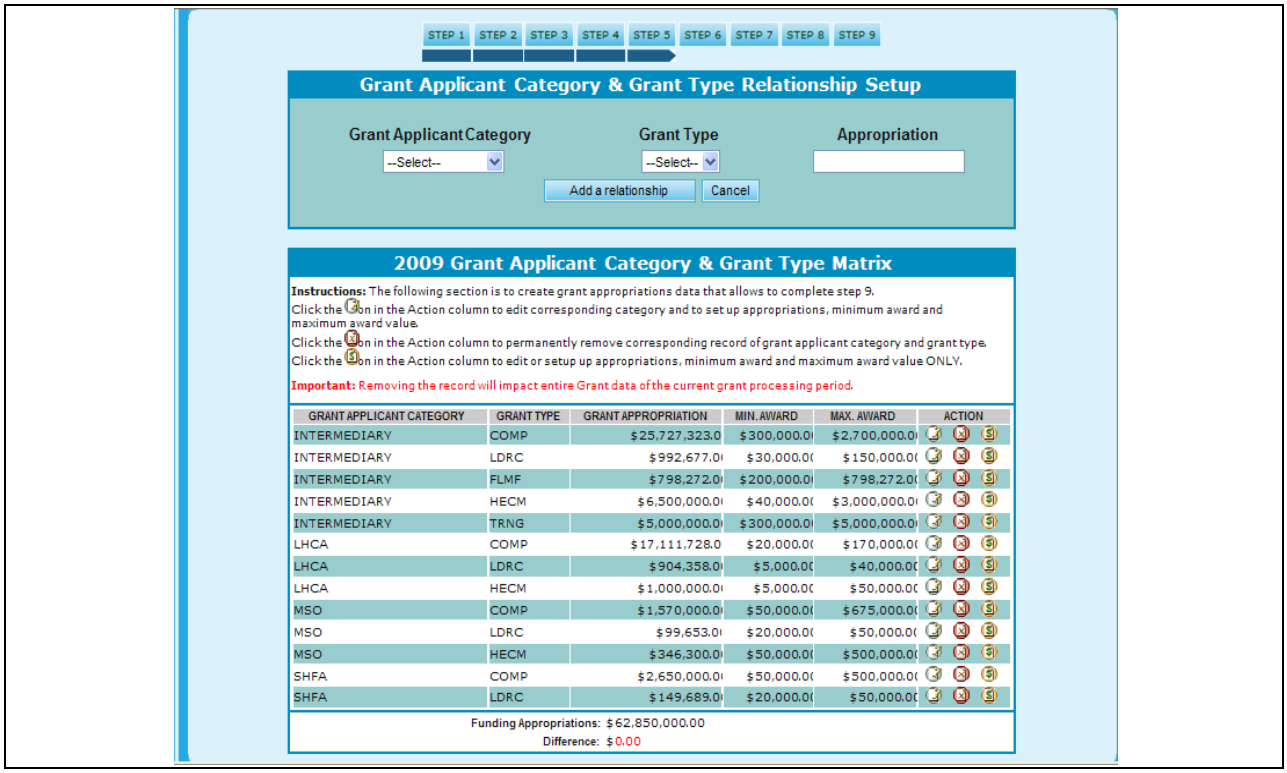


Figure 291.A. PM – Management: Grant Matrix Setup

3. To **Edit Grant & Category Relationship**, press the far left icon (image of pencil and paper) under the **Action** tab. You will be prompted to a new screen which will allow you edit the following information.
    a. Grant Application Category
    b. Grant Type
    c. Appropriation
    d. Min. Award
    e. Max. Award

4. Once you have made your desired edits, click **Submit** to save changes, or **Cancel** to return back to the Grant Matrix Setup screen.

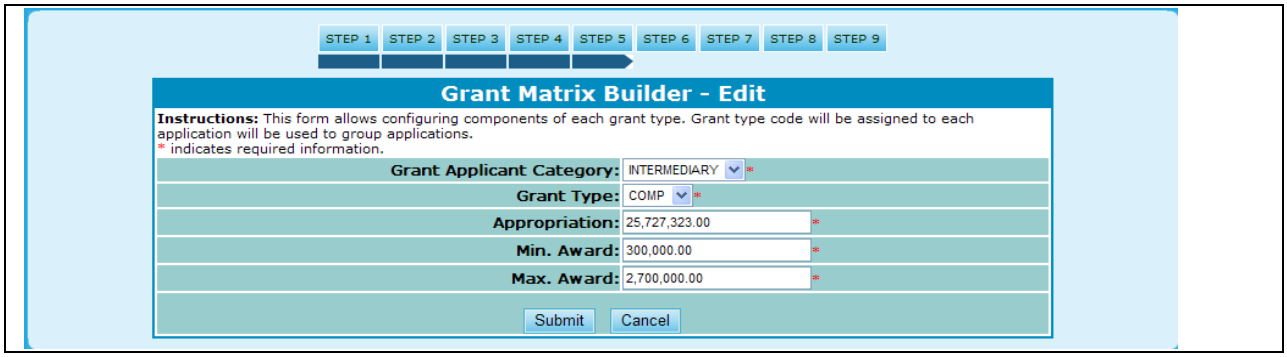


Figure 291.B. PM – Management: Grant Matrix Setup – Edit Matrix Builder

5. To **Add Grant Allocation**, press the far right icon (image of a dollar sign) under the **Action** tab. You will be prompted to a new screen which will allow you edit the following information.
    a. Appropriation

b. Min. Award
c. Max. Award

6. Once you have made your desired edits, click **Submit** to save changes, or **Cancel** to return back to the Grant Matrix Setup screen.

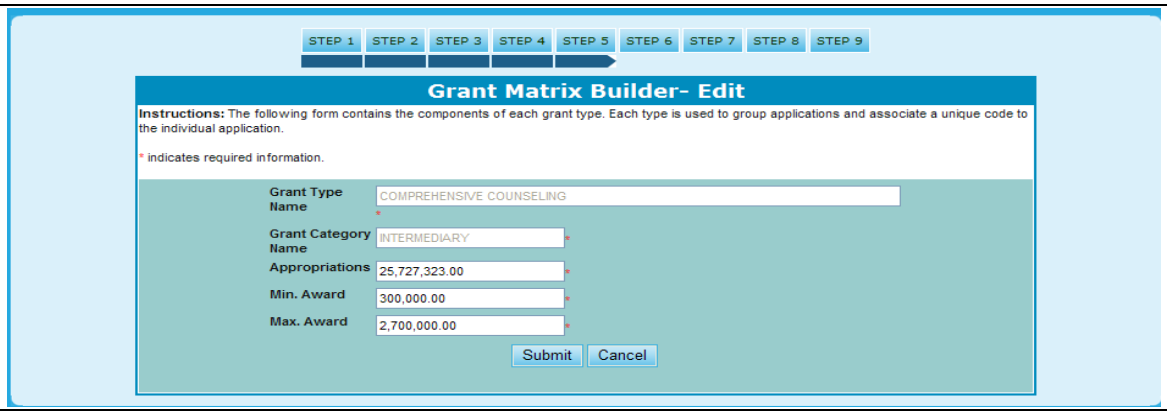


Figure 291.C. PM – Management: Grant Matrix Setup – Add Grant Allocation

7. To **Add a Relationship**, you will have to edit the following fields found on the main screen for Step 5:
   a. Grant Applicant Category
   b. Grant Type
   c. Appropriation

8. Once you have made your desired edits, click **Add a Relationship** to save changes, or **Cancel** to return back to the Grant Matrix Setup screen.

9. The added relationship will be reflected upon submission in the Matrix and will be categorized under the Grant Applicant Category you chose.

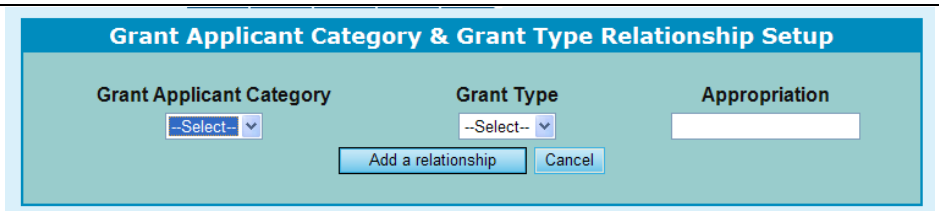


Figure 291.D. PM – Management: Grant Matrix Setup – Add a Relationship

9.5.3.6 *Step 6: Grant Strategy Setup*

1. From the top navigation menu, scroll down to the **Management** sub-menu. Click the **Grant Strategy Type** hyperlink. The *Grant Strategy Setup* screen appears. If you are already in Grant Maintenance, you can also press Step 6.

2. Once prompted to the Grant Strategy screen, you have two tab options to choose from:
   a. HOC Offices
   b. Funding Strategy

3. If all HOC Offices are currently setup under the strategy, your options are limited to deleting a specific office. To delete an office press the button.

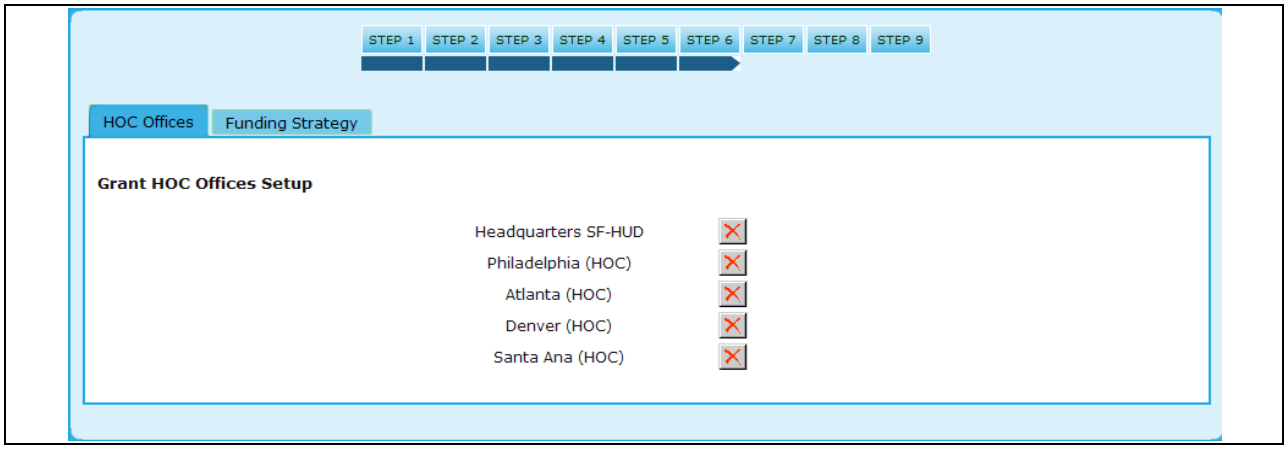


Figure 292.A. PM – Management: Grant Strategy Setup

4. If not all HOC Offices have been setup, you will be able to set those up by adding them, as demonstrated below. Once you have selected the HOC office not originally included, click the **Add** button to include that into the Grant Strategy.

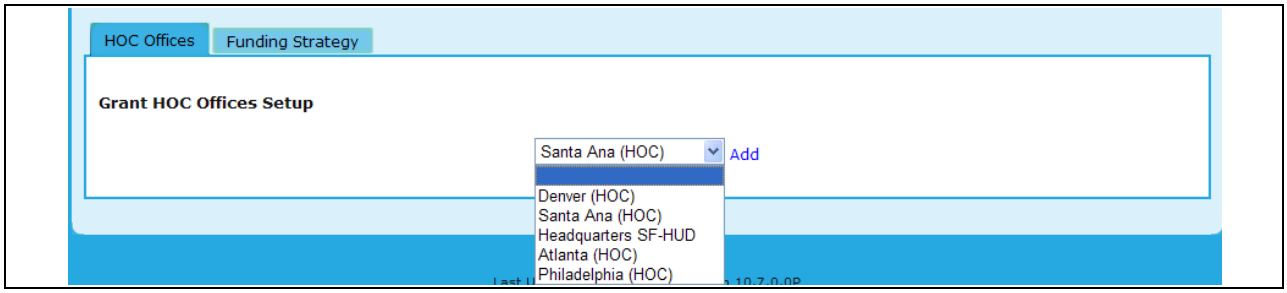


Figure 292.B. PM – Management: Grant Strategy Setup – Add a HOC Office

5. Under the Funding Strategy tab, you will be able to select a new Funding Strategy for the Grants. Your options include either HUD or HOC. Once you have decided upon strategy, click the **Setup Appropriations for 20XX** to reflect changes.

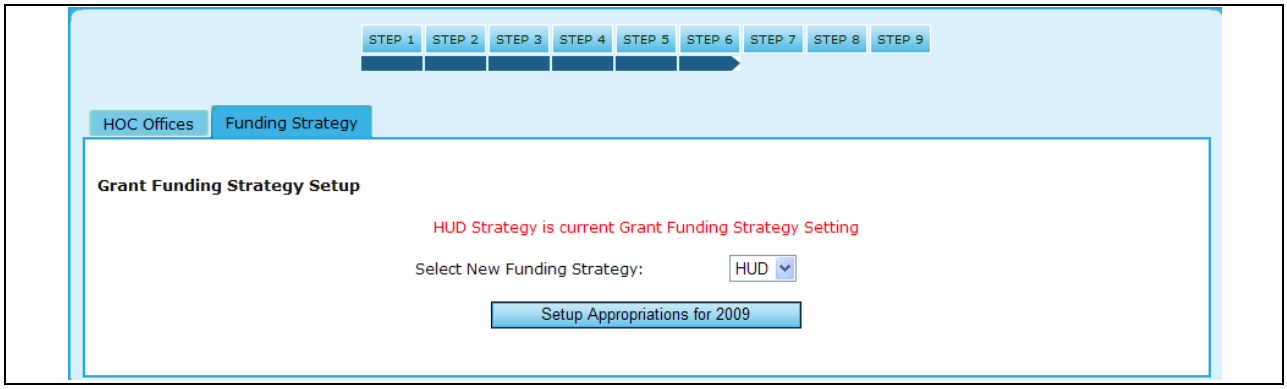


Figure 292.C. PM – Management: Grant Strategy Setup – Funding Strategy

9.5.3.7 *Step 7: Grant Allocations*

As a Program Manager at Headquarters you enter all of the funding allocations according to grant type and HUD office.

1. From the top navigation menu, scroll down to the **Management** sub-menu. Click the **Grant Allocations** hyperlink. The *Grant Funding Allocation 20XX* screen appears. Following is a Funding Allocation page using allocation by Grant Type only**.**

2. Key in funding allocation amounts to fill in all the editable fields on the page. The editable fields are the result of Funding Appropriations setup. Click the **Submit** button to save data on this page. Following is the page after the input data is saved. The TOTAL amounts are calculated by the system for display only. All funds must be allocated resulting in zero balance to account for each grant dollar.

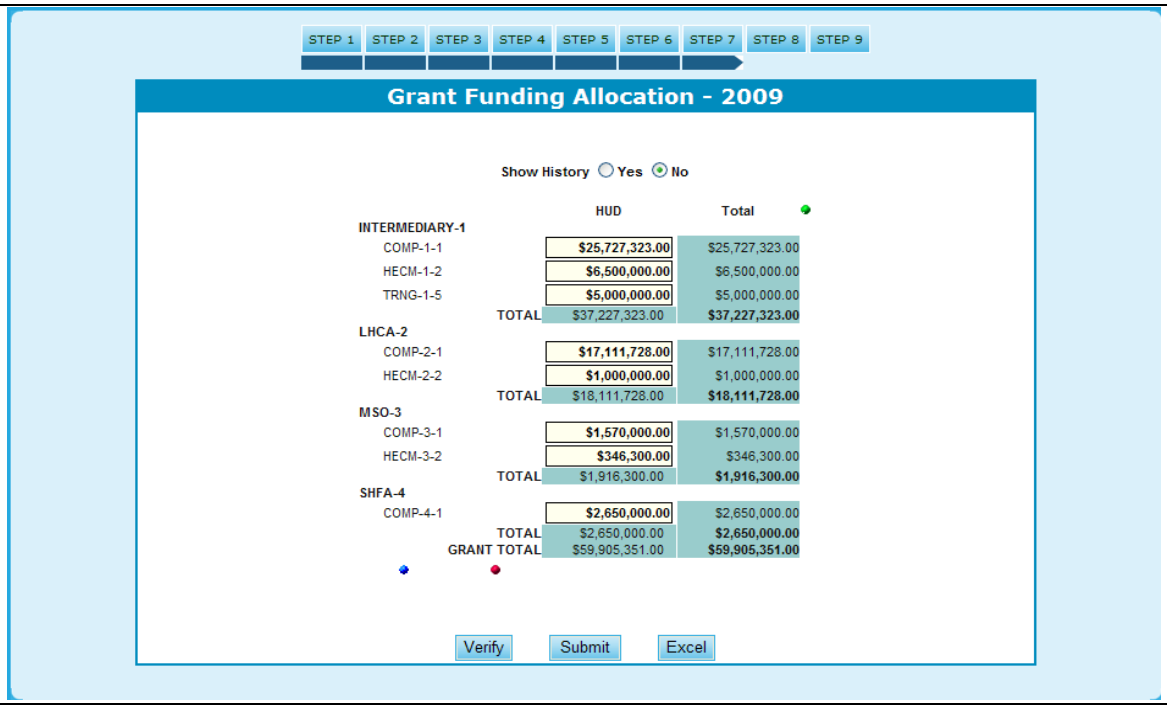
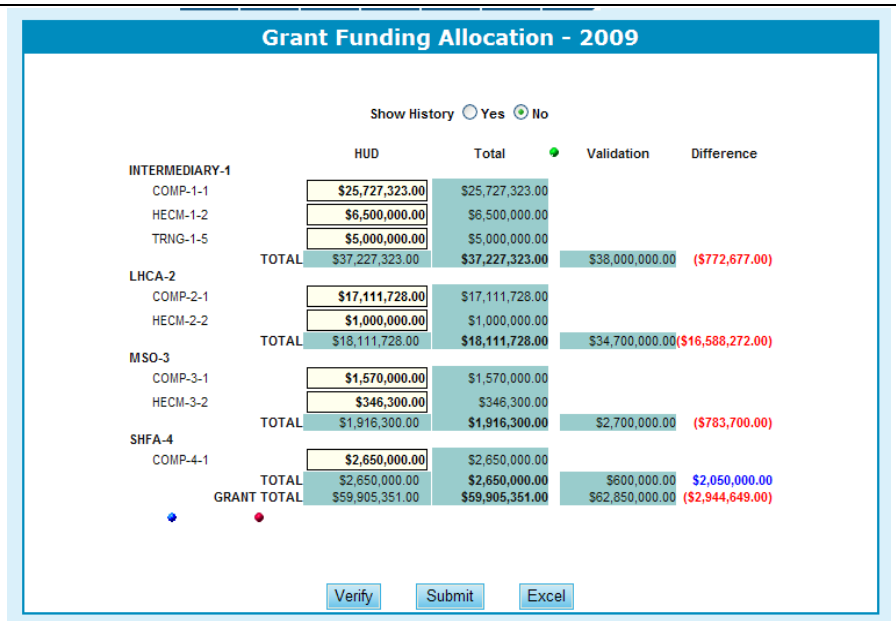


Figure 293.A. PM – Management: Add a HOC Office Funding Allocation by Grant Type

3. To see additional information (such as the validation, difference, or information about Comprehensive and HECM grants), click the green dots. The additional information is applicable to either method of funding allocations. More information appears.



Grant Funding Allocation - 2009

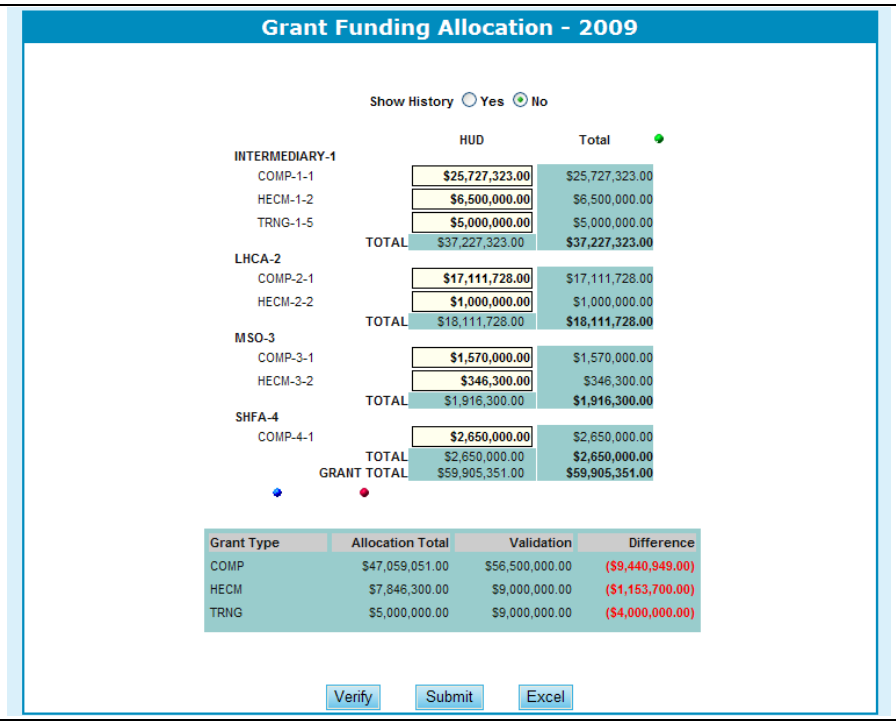
Show History ○ Yes ◉ No

	HUD	Total	Validation	Difference
INTERMEDIARY-1				
COMP-1-1	$25,727,323.00	$25,727,323.00		
HECM-1-2	$6,500,000.00	$6,500,000.00		
TRNG-1-5	$5,000,000.00	$5,000,000.00		
TOTAL	$37,227,323.00	$37,227,323.00	$38,000,000.00	($772,677.00)
LHCA-2				
COMP-2-1	$17,111,728.00	$17,111,728.00		
HECM-2-2	$1,000,000.00	$1,000,000.00		
TOTAL	$18,111,728.00	$18,111,728.00	$34,700,000.00	($16,588,272.00)
MSO-3				
COMP-3-1	$1,570,000.00	$1,570,000.00		
HECM-3-2	$346,300.00	$346,300.00		
TOTAL	$1,916,300.00	$1,916,300.00	$2,700,000.00	($783,700.00)
SHFA-4				
COMP-4-1	$2,650,000.00	$2,650,000.00		
TOTAL	$2,650,000.00	$2,650,000.00	$600,000.00	$2,050,000.00
GRANT TOTAL	$59,905,351.00	$59,905,351.00	$62,850,000.00	($2,944,649.00)

Verify Submit Excel

Figure 293.B. PM – Management: Funding Allocation – Validation Numbers

4. To view further detail regarding Grant Type Validation Reference, press the red circle located under Grant Total.
   a. To check if Funding Allocations are distributed accurately, ensure that the difference column indicates "0" (zero) for the end row.



Grant Funding Allocation - 2009

Show History ○ Yes ◉ No

	HUD	Total
INTERMEDIARY-1		
COMP-1-1	$25,727,323.00	$25,727,323.00
HECM-1-2	$6,500,000.00	$6,500,000.00
TRNG-1-5	$5,000,000.00	$5,000,000.00
TOTAL	$37,227,323.00	$37,227,323.00
LHCA-2		
COMP-2-1	$17,111,728.00	$17,111,728.00
HECM-2-2	$1,000,000.00	$1,000,000.00
TOTAL	$18,111,728.00	$18,111,728.00
MSO-3		
COMP-3-1	$1,570,000.00	$1,570,000.00
HECM-3-2	$346,300.00	$346,300.00
TOTAL	$1,916,300.00	$1,916,300.00
SHFA-4		
COMP-4-1	$2,650,000.00	$2,650,000.00
TOTAL	$2,650,000.00	$2,650,000.00
GRANT TOTAL	$59,905,351.00	$59,905,351.00

Grant Type	Allocation Total	Validation	Difference
COMP	$47,059,051.00	$56,500,000.00	($9,440,949.00)
HECM	$7,846,300.00	$9,000,000.00	($1,153,700.00)
TRNG	$5,000,000.00	$9,000,000.00	($4,000,000.00)

Verify Submit Excel

Figure 293.C. PM – Management: Funding Allocation – Grant Type Validation Reference

5. To view further detail regarding Grant Matrix Validation References, press the blue circle located to left of the red button just pressed to view Grant Type Validations.

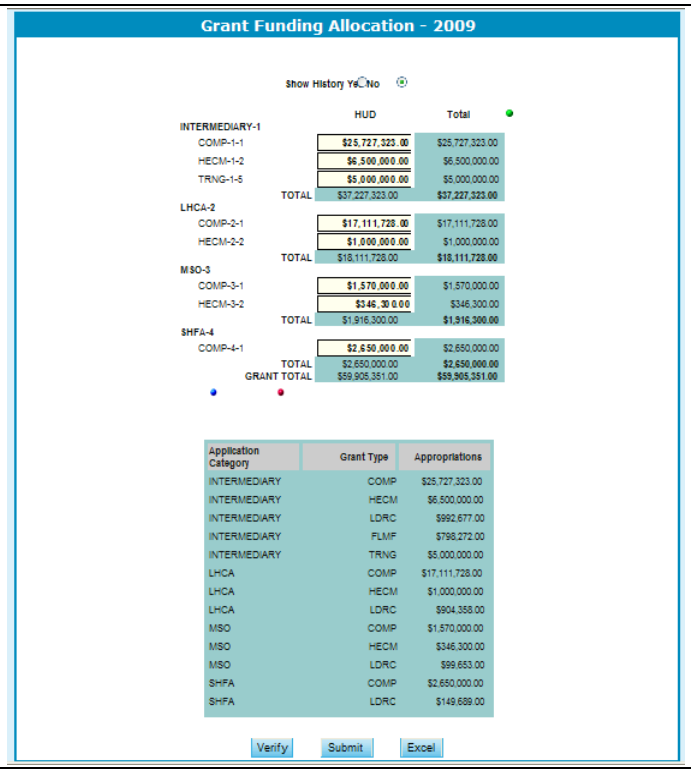


Figure 293.D. PM – Management: Funding Allocation – Grant Matrix Validation Reference

6. To see the history of this funding allocation, click **Yes** next to Show History. The history appears at the bottom of the screen.

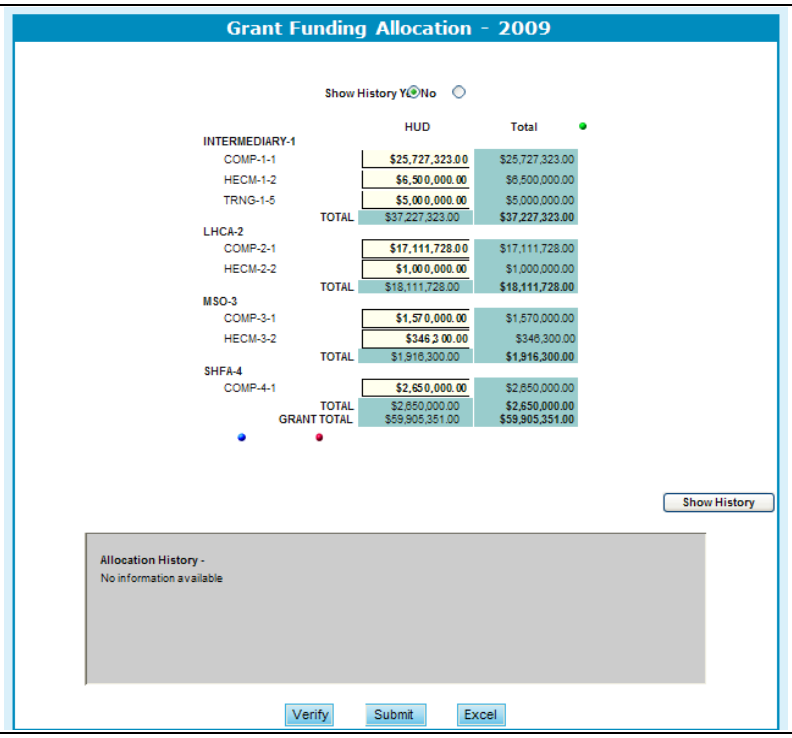


Figure 293.E. PM – Management: Funding Allocation – Show History

7. To view this information in Excel format, press the **Excel** hyperlink found at the bottom of the page, and you will be prompted to this information in its entirety in Excel format.

A1 Grant Funding Allocation - 2009

	A	B	C	D	E	F	G	H
3			HUD		Total		Validation	Difference
4	INTERMEDIARY-1							
5	COMP-1-1				$25,727,323.00			
6	HECM-1-2				$6,500,000.00			
7	TRNG-1-5				$5,000,000.00			
8		TOTAL	$37,227,323.00		$37,227,323.00		$38,000,000.00	($772,677.00)
9	LHCA-2							
10	COMP-2-1				$17,111,728.00			
11	HECM-2-2				$1,000,000.00			
12		TOTAL	$18,111,728.00		$18,111,728.00		$34,700,000.00	($16,588,272.00)
13	MSO-3							
14	COMP-3-1				$1,570,000.00			
15	HECM-3-2				$346,300.00			
16		TOTAL	$1,916,300.00		$1,916,300.00		$2,700,000.00	($783,700.00)
17	SHFA-4							
18	COMP-4-1				$2,650,000.00			
19		TOTAL	$2,650,000.00		$2,650,000.00		$600,000.00	$2,050,000.00
20		GRANT TOTAL	$59,905,351.00		$59,905,351.00		$62,850,000.00	($2,944,649.00)

Grant Type	Allocation Total	Validation	Difference
COMP	$47,059,051.00	$56,500,000.00	($9,440,949.00)
HECM	$7,846,300.00	$9,000,000.00	($1,153,700.00)
TRNG	$5,000,000.00	$9,000,000.00	($4,000,000.00)

Application Category	Grant Type	Appropriations
INTERMEDIARY	COMP	$25,727,323.00
INTERMEDIARY	HECM	$6,500,000.00
INTERMEDIARY	LDRC	$992,677.00
INTERMEDIARY	FLMF	$798,272.00
INTERMEDIARY	TRNG	$5,000,000.00
LHCA	COMP	$17,111,728.00

Figure 294. PM – Management: Funding Allocation – Show History

9.5.3.8 *Step 8: Modify Scoring Criteria*

This screen sets up the application"s score card. Each graded Factor is listed and a maximum score is assigned to it. Bonus points can also be assigned to each Factor if required.

Note: The scoring criteria are used for grant applications scoring by reviewers and final scoring by primary reviewers. The data of Factor Name, Max Points, and Instructions displayed in this page are carried over from previous fiscal year. Should any criteria of these three categories for the new (current) fiscal year is changed from previous fiscal year, edit it and save the change to the database. All the Max Bonus Points data in this page are initially set to zero for the new fiscal year. Edit them as appropriate and save the data to the database.

1. From the top navigation menu, scroll down to **Management** sub-menu. Click the **Modify Scoring Criteria** hyperlink, the *Modify Scoring Criteria* screen appears.
2. Under each Factor Name you are able to view each Sub Factor associated with it. This can be performed by selecting the + | − buttons.

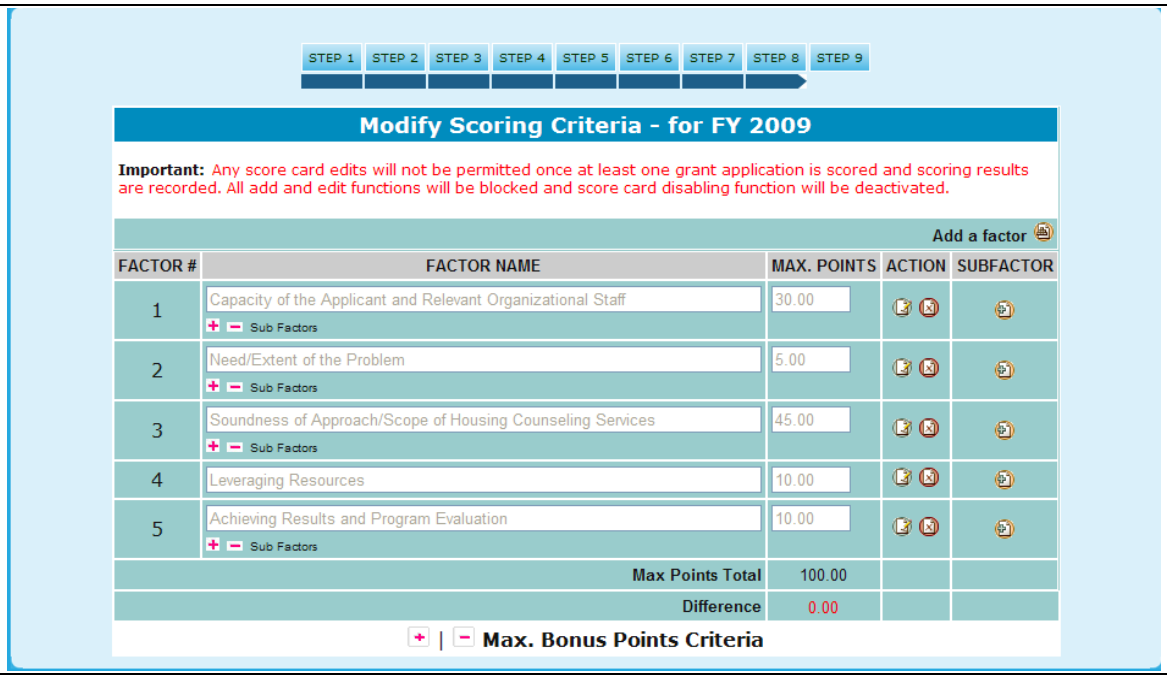


Figure 295.A.1. PM – Management: Modify Scoring Criteria for FY 2009

3. In the **Action** column, click the **Edit** hyperlink by the factor that you wish to edit. The *Change Instructions for Factor X* screen appears in a separate window.

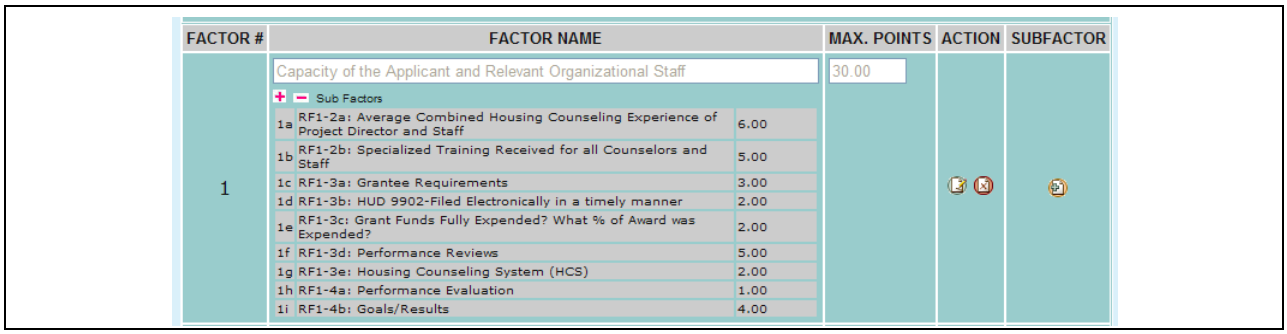


Figure 295.A.2. PM – Management: Modify Scoring Criteria for FY 2009 – Sub Factors

4. Edit the instructions. Click the **Update** button to save your changes, or Click the **Cancel** button to exit the window without saving. You will return to the Modify *Scoring Criteria* screen. Text can be copied from Microsoft Word and pasted in this section for east of editing.

5. After you edit the data in Modify Scoring Criteria page, Click the **Save** button. You will see a confirmation notice as shown in 295.B.2.

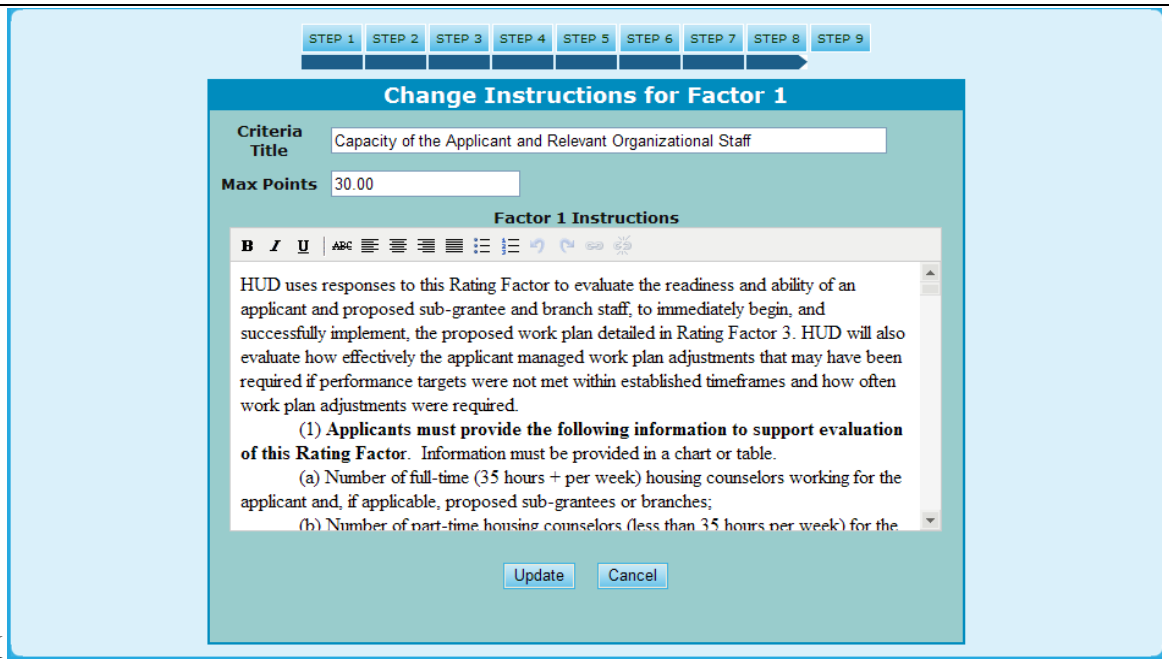


Figure 295.B.1. PM – Management: Modify Scoring Criteria – Change Instructions for Factor 1

6. Click the **OK** button to close the popup message. The updated data is saved.

Figure 295.B.2. PM – Management: Scoring Criteria Data Update Confirmation Message

7. Once prompted back to the Grant Scoring Criteria page, you will notice you can also **Add New Factor**, as well as **Sub Factor**. Above the Sub Factor column, you will find you the text: **Add a Factor**. By selecting the icon next to that text, you will be prompted to a new screen enabling you to create that factor. Once entering your select information you can either press **Update** to include that factor into your decision process, or **Cancel** to erase those edits.

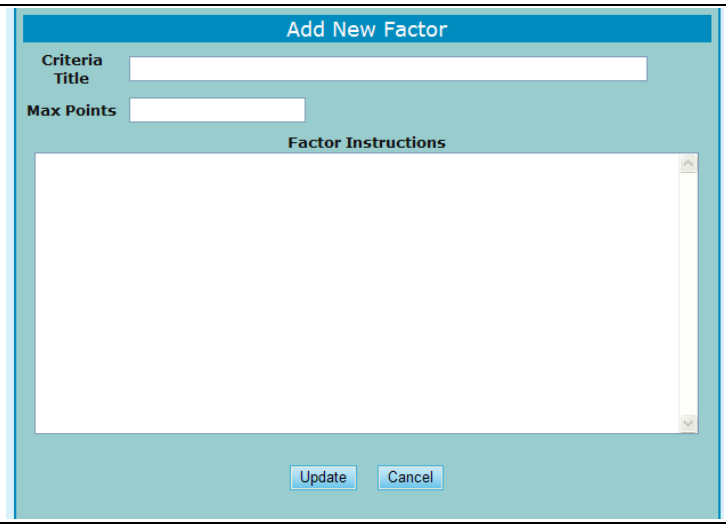


Figure 295.C. PM – Management: Modify Scoring Criteria – Add New Factor

8. For creating a Sub Factor, select the icon under the Sub Factor column, and in the same Factor row where you would like to add it. You will be prompted to the below screen, where you can define your category based on:
    a. Sub Factor Name
    b. Sub Max Point
    c. Instructions

9. Once you are done editing your information, click **Done** to save changes, or **Cancel** to lose your changes.

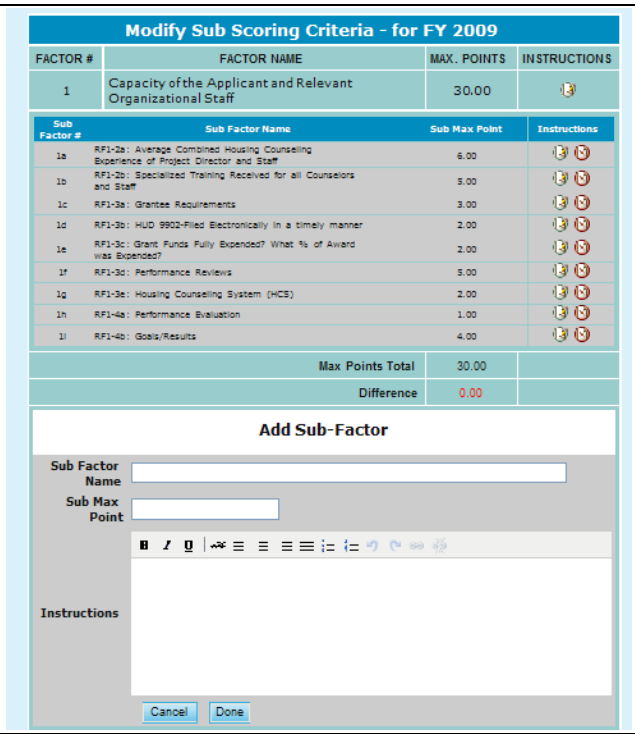


Figure 295.D. PM – Management: Modify Scoring Criteria – Add Sub-Factor

10. You are also able to edit current Sub-Factors, by clicking a specific Sub-Factor under the Instructions column. Once you have made your desired changes, click **Submit** to save changes, or **Cancel** to return back to the Sub-Factor menu without saving changes.

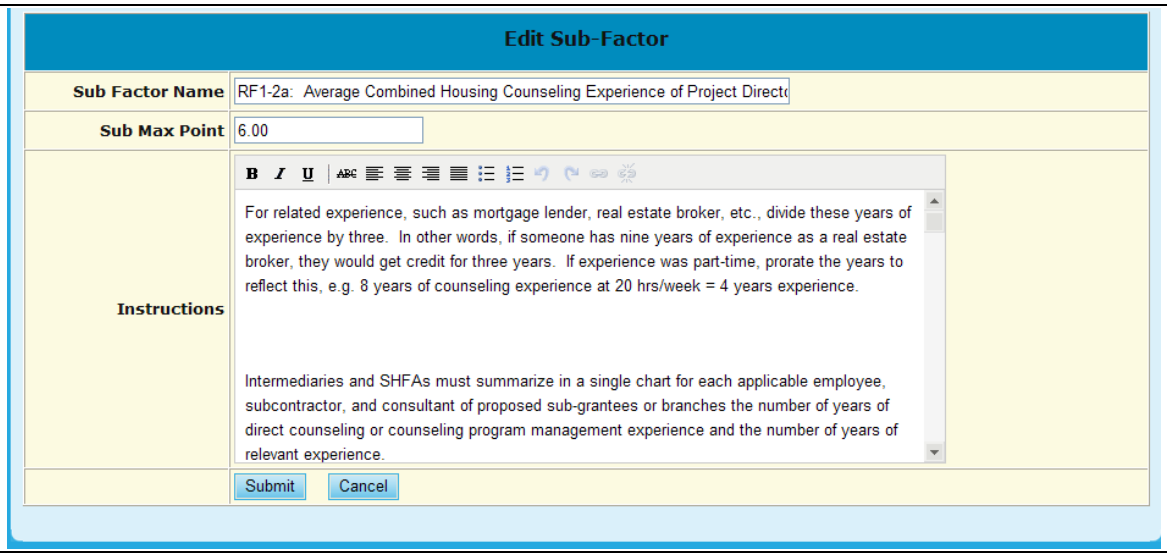


Figure 295.E. PM – Management: Modify Scoring Criteria – Edit Sub-Factor

9.5.3.9 *Step 9: Recommended Award*

This feature allows the Recommended Awarded calculation to be executed by one of two methods. Ratio calculation divides all applications together according to their final scores. Proportion calculation determines awards by first calculating each grouping (proportion), so the top scores get their maximum amount of award before the lower scored applications are calculated.

1. From the upper navigation menu, scroll down to **Management** sub-menu. Click the Setup Recommend Award Criteria hyperlink, the Setup Recommended Award Criteria screen appears. Provided below shows the Setup Recommended Award Criteria page after setup is completed.

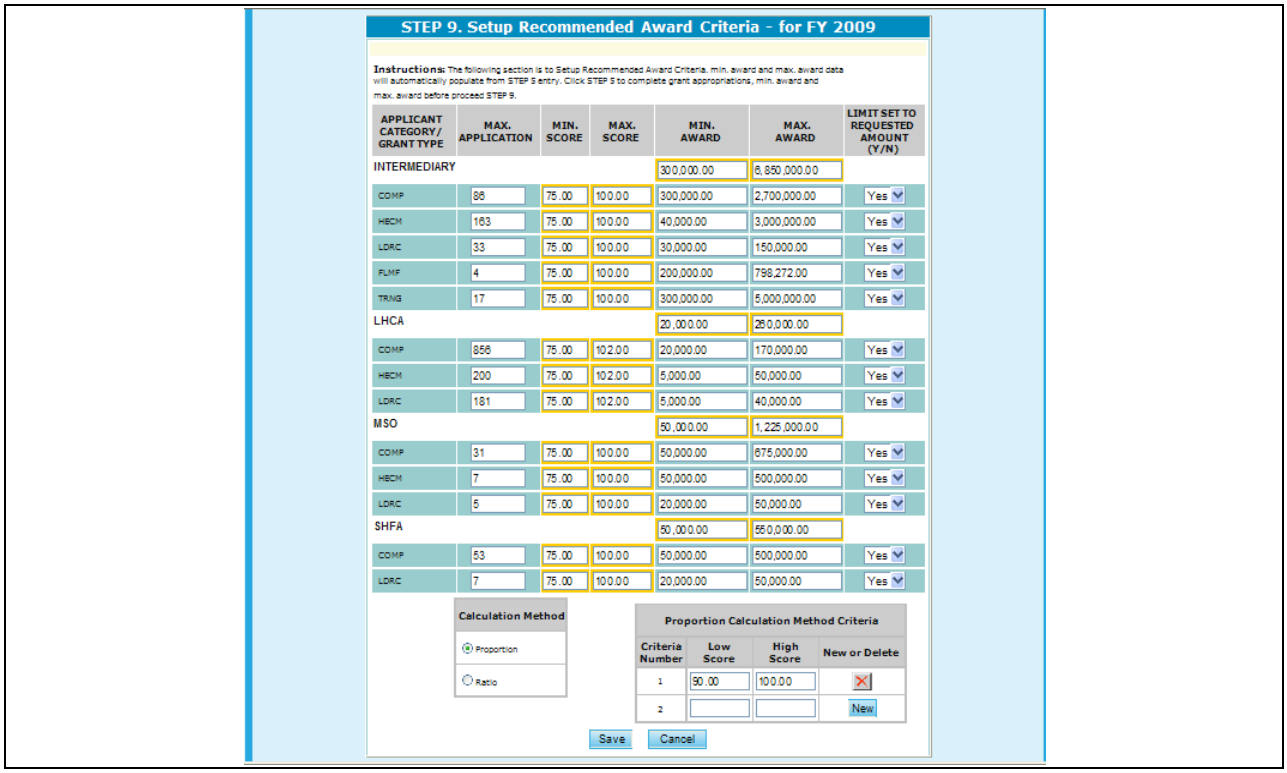


Figure 296.A. PM – Management: Setup Recommended Award Criteria – After Setup

2. To delete a Proportion Calculation Method Criteria entry, click the button next to the criteria that you wish to delete. The following message appears.

3. If you wish to delete, click **OK** button. To cancel, click **Cancel** button.

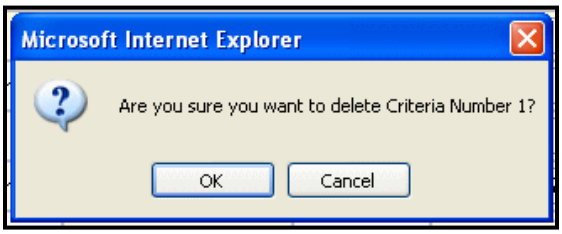


Figure 296.B. PM – Management: Setup Recommended Award Criteria – Confirm Delete Message 1

4. If you want to change the Calculation Method from Proportion to Ratio while there is data in the Proportion Calculation Method Criteria section, following confirmation message appears.

5. If you are sure you want to change the calculation method, click **OK** button. To cancel this action, and close without deleting the Proportion Calculation Method criteria, click **Cancel** button.

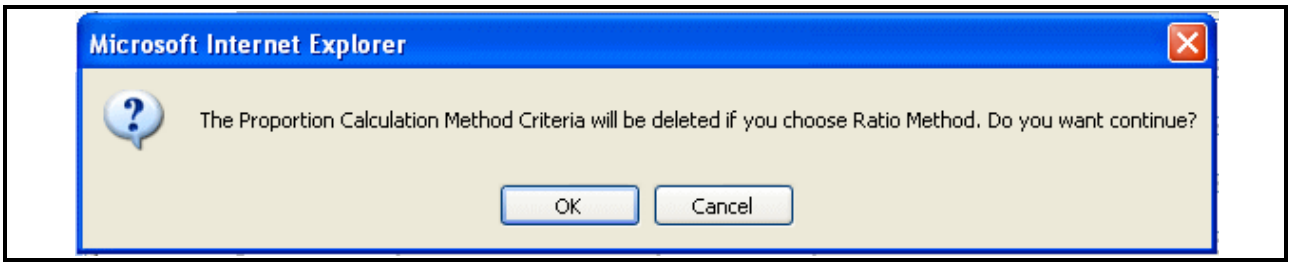


Figure 296.C. PM – Management: Setup Recommended Award Criteria – Confirm Delete Message 2

9.5.4 Agency Type Setup

1. From the upper navigation menu, scroll down to **Management** sub-menu. Click the **Agency Type Setup** hyperlink, and the *Agency Type* screen appears. Provided below is an example of the Agency Type screen.

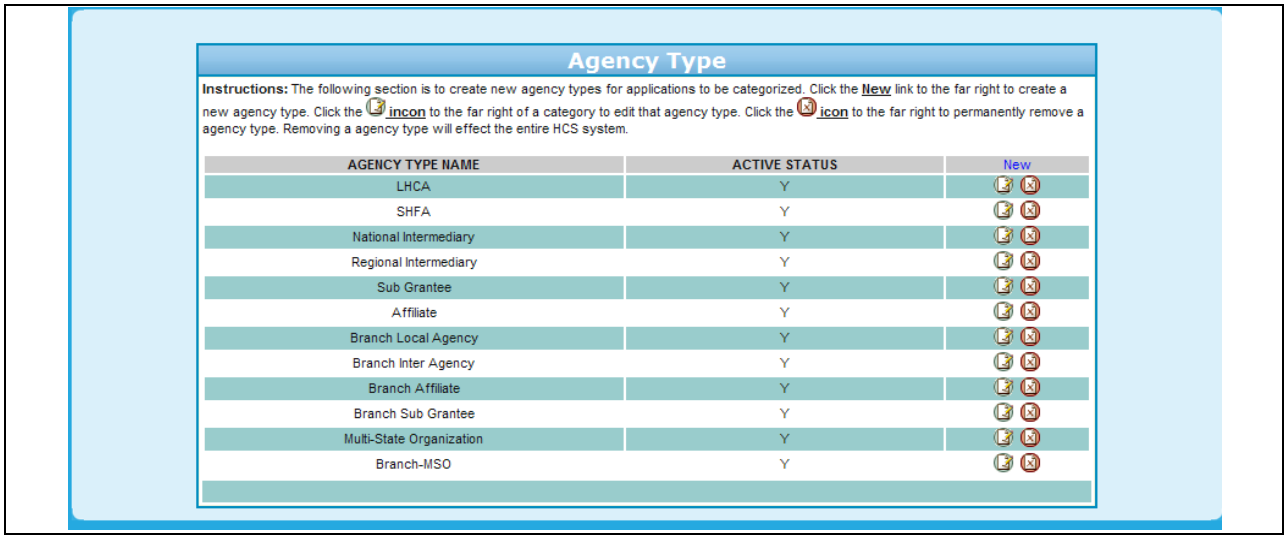


Figure 297.A. PM – Management: Agency Type Status

2. To edit the information for an Agency Type, select the icon under the **New** column, and you will be prompted to the Agency Type edit screen. From here you will only be able to edit the Agency Type Name. Once finished click the **Submit** hyperlink to save changes, or click **Cancel** to return back to the Agency Type screen.

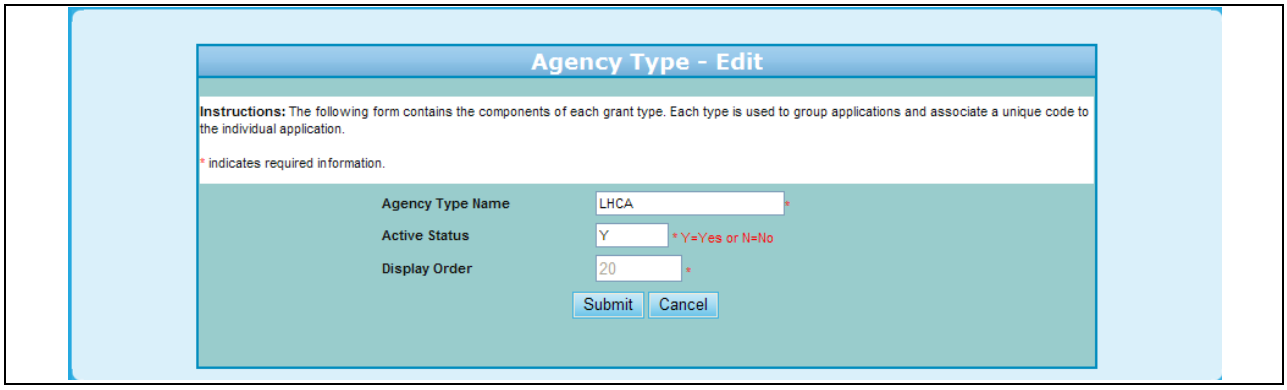


Figure 297.B. PM – Management: Agency Type Status – Edit

3. To Delete an Agency type, press the button. A warning screen will be prompted as demonstrated below. To continue with deleting press **OK**, or to cancel hit the **Cancel** button.

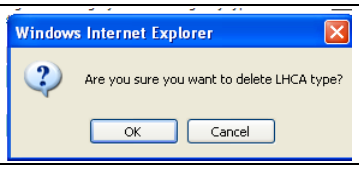


Figure 297.C. PM – Management: Agency Type Status – Delete Warning

4. To add a new agency type, click the **New** hyperlink found as the header of the third column. This will direct the following screen which will allow you to:
   a. Add an Agency Type Name
   b. Add an Active Status
   c. Display Order

5. Once you have made the necessary additions, click **Submit** to save changes, or **Cancel** to return back to the Agency Type screen.

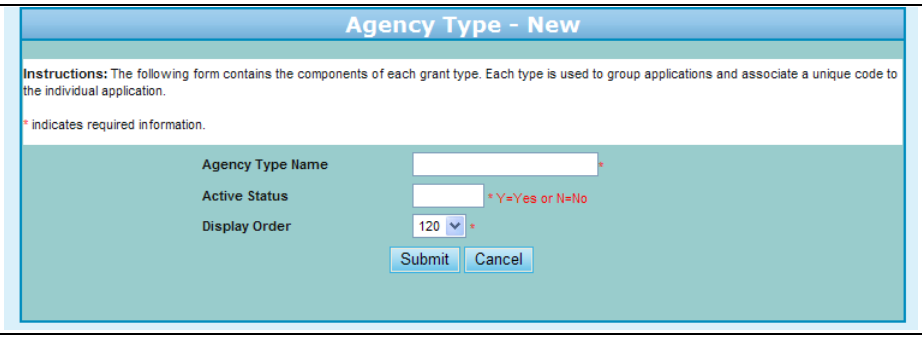
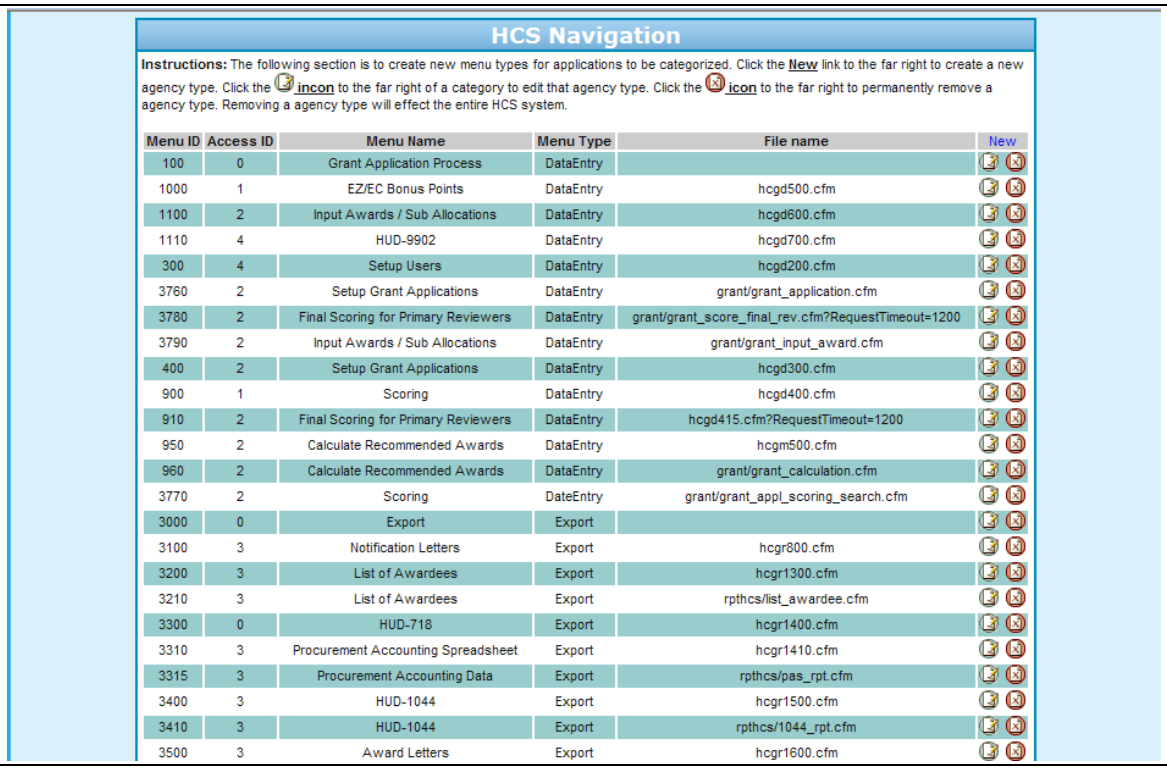


Figure 297.D. PM – Management: Agency Type Status – New

9.5.5 HCS Menu Control

1. From the upper navigation menu, scroll down to **Management** sub-menu. Click the **HCS Menu Control** hyperlink, and the HCS Navigation screen appears. Provided below is an example of the HCS Navigation screen.

2. From this screen you will be able to:
   a. Edit the HCS Menu
   b. Add a New Menu option
   c. Delete a Menu option



HCS Navigation

Instructions: The following section is to create new menu types for applications to be categorized. Click the New link to the far right to create a new agency type. Click the icon to the far right of a category to edit that agency type. Click the icon to the far right to permanently remove a agency type. Removing a agency type will effect the entire HCS system.

Menu ID	Access ID	Menu Name	Menu Type	File name	New
100	0	Grant Application Process	DataEntry		
1000	1	EZ/EC Bonus Points	DataEntry	hcgd500.cfm	
1100	2	Input Awards / Sub Allocations	DataEntry	hcgd600.cfm	
1110	4	HUD-9902	DataEntry	hcgd700.cfm	
300	4	Setup Users	DataEntry	hcgd200.cfm	
3760	2	Setup Grant Applications	DataEntry	grant/grant_application.cfm	
3780	2	Final Scoring for Primary Reviewers	DataEntry	grant/grant_score_final_rev.cfm?RequestTimeout=1200	
3790	2	Input Awards / Sub Allocations	DataEntry	grant/grant_input_award.cfm	
400	2	Setup Grant Applications	DataEntry	hcgd300.cfm	
900	1	Scoring	DataEntry	hcgd400.cfm	
910	2	Final Scoring for Primary Reviewers	DataEntry	hcgd415.cfm?RequestTimeout=1200	
950	2	Calculate Recommended Awards	DataEntry	hcgm500.cfm	
960	2	Calculate Recommended Awards	DataEntry	grant/grant_calculation.cfm	
3770	2	Scoring	DateEntry	grant/grant_appl_scoring_search.cfm	
3000	0	Export	Export		
3100	3	Notification Letters	Export	hcgr800.cfm	
3200	3	List of Awardees	Export	hcgr1300.cfm	
3210	3	List of Awardees	Export	rpthcs/list_awardee.cfm	
3300	0	HUD-718	Export	hcgr1400.cfm	
3310	3	Procurement Accounting Spreadsheet	Export	hcgr1410.cfm	
3315	3	Procurement Accounting Data	Export	rpthcs/pas_rpt.cfm	
3400	3	HUD-1044	Export	hcgr1500.cfm	
3410	3	HUD-1044	Export	rpthcs/1044_rpt.cfm	
3500	3	Award Letters	Export	hcgr1600.cfm	

Figure 298.A. PM – Management: HCS Menu Control

3. To edit an HCS Menu option, click the button. This will prompt you to the edit screen, as depicted below. From here you will be able to edit the:
    a. Menu ID
    b. Menu Access Group
    c. Menu Name
    d. Menu Level
    e. Menu Category
    f. File Name URL
    g. Menu Sequence
    h. Fiscal Year

4. Once you have made the desired edits, either click the **Submit** button to save changes, or **Cancel** to return back to the HCS Navigation menu without keeping your changes.

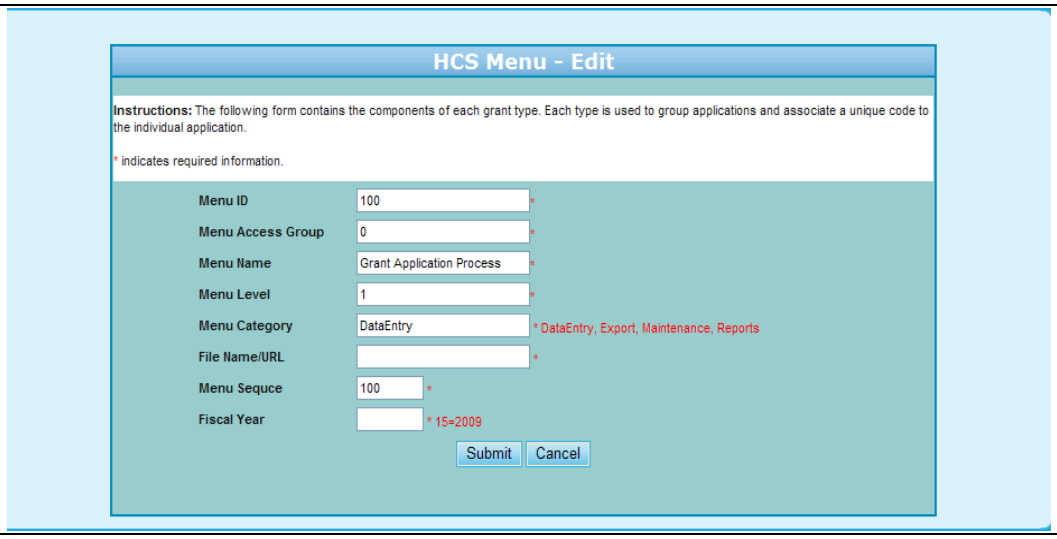


Figure 298.B. PM – Management: HCS Menu Control – Edit

5. To Delete an HCS Menu option, press the button. A warning screen will be prompted as demonstrated below. To continue with deleting press **OK**, or to cancel hit the **Cancel** button.

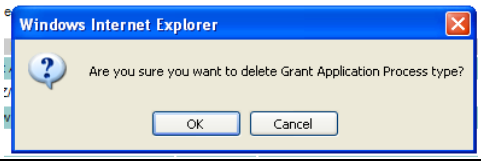


Figure 298.C. PM – Management: HCS Menu Control – Delete warning

6. To add a HCS Menu option, click the **New** hyperlink found as the header of the sixth column. This will direct you to the following screen which will allow you to edit the same functions as stated in Step 4.
7. Once you have made the necessary additions, click Submit to save changes, or Cancel to return back to the Agency Type screen.

Figure 298.D. PM – Management: HCS Menu Control – New HCS Menu

9.5.6 CMS Management

1. From the upper navigation menu, scroll down to Management sub-menu. Click the **CMS Management** hyperlink, and the HUD certified CMS products of HUD housing counseling Agency use screen appears. Provided below is an example of the aforementioned screen.

2. To edit CMS information, click the hyperlink under the CMS column and you will be able to change the following information:
   a. CMS Full Name
   b. CMS Short Name
   c. CMS Vendor List
   d. Dataset Version
   e. Availability
   f. Product Certification
   g. Public
   h. CMS Email
   i. CMS Web Address
   j. CMS Phone
   k. CMS User ID
   l. Contact First Name
   m. Contact Last Name

From this screen you will be able to:

- Edit the CMS information
- Add a New CMS
- Export CMS List
- Access Vendor website

HUD CERTIFIED CMS PRODUCTS FOR HUD HOUSING COUNSELING AGENCY USE

Total 45 records

Add new CMS | Export CMS List

Listed below are CMS products that successfully met HUD□s standards and have completed testing. Agencies using these products are able to transmit their data to HUD at this time.

CMS	DATASET VERSION	VENDOR	POC	EMAIL	WEB SITE	AVAILABILITY
CCARM	3.1	Catholic Charities	Donna Drinka	ddrinka@catholiccharities	www.catholiccharities.net	Exclusive
COMS	3.0	CIL Orlando	Ryan Dan	dryan@cilorlando.org	www.cilorlando.org	Public
CPR	3.1	Cooperative Processing Resources	Campion Kate	kate@cprops.com	www.cprops.com	Public
DebtLogic	3.0	Integrant, Inc.	Lacomble Ben	blacomble@integrantinc.c	www.integrantinc.com	Exclusive
FMS	3.1	GreenPath, Inc	McNeill Donna	DMcNeill@greenpath.com	www.greenpath.com	Exclusive
HRS	3.1	DLBNetwork	Daniel Bajema	dbajema@dlbnetwork.com	www.dlbnetwork.com	Exclusive
Paragon	3.1	Money Management International	Sandoval Darrin	Darrin.Sandoval@MoneyM	www.paragondms.com	Public

Figure 299.A. PM – Management: CMS Management: HUD Certified Products

Listed below are CMS products that are in the process of meeting HUD□s standards but have not completed testing. Agencies using these products are not able to transmit their data to HUD at this time.

CMS	DATASET VERSION	VENDOR	POC	EMAIL	WEB SITE	AVAILABILITY
AdSysTech	3.0	AdSysTech	James Rushton	rjames@adsystech.com	www.adsystech.com	Public
ACCLIVCTR	3.0	Access Living in Chicago	Stu Landrum	mitware@swbell.net		Exclusive
ASPEN	3.1	The Brainard Group	Bob Osborn	bob@brainardgroup.com	www.brainardgroup.com	Public
Agate Software	3.1	Agate Software	Shea Bill	bshea@agatesoftware.com	www.intelligrants.com	Public
Budget Your Dream	3.0	Budget Your Dream, INC.	Stephon Lee	stephonlee@budgetyourdr	www.budgetyourdream.cor	Public
CAP-SYS	3.1	Spokane Neighborhood Action Programs	McFarland Alan	alanmcf@well.com		Exclusive
CAPNA	3.0	Community Action Partnership of North Alabama	Jack Green	jgreen@capna.org	www.dbafacspro.com	Exclusive
CCCS OF DALLAS	3.1	Cyfun Media	Robert Wier	rwier@cccs.net	www.cccs.net	Exclusive
CCCS OF GREATER ATLANTA	3.1	CCCS OF GREATER ATLANTA	Michelle Jones	michelle.jones@cccsinc.o		Exclusive
CCHR	3.1	Pin Technology, Inc.	Brite Lee	brite.lee@pintechnology.c	www.pintechnology.com	Exclusive
CCOA	3.1	FBS Inc.	Britt Fogg	brittf@shilohtech.com		Exclusive
Community Networks	3.1	Community Networks Corporation	Pamela Roy	proy@cnetworks.com	www.cnetworks.com	Exclusive

Figure 299.B. PM – Management: CMS Management: Products awaiting certification

3. Once you have made desired changes, click **Update CMS Info** to save changes, **Reset** to return information prior to edits, or **Back** to return to the CMS Management screen.

HUD CERTIFIED CMS PRODUCTS FOR HUD HOUSING COUNSELING AGENCY USE

CMS Full Name: Catholic Charities of Chicago CMS S*
CMS Short Name: CCARM
CMS Vendor Name: Catholic Charities
Dataset Version: 3.1
Availability: Yes
Product Certification: Yes
Public: No
CMS Email: jdoe@catholiccharities.ne
CMS Web Address: www.catholiccharities.net
CMS Phone: 847-555-4165
CMS User ID
Contact First Name Jane
Contact Last Name Doe
Update CMS Info | Reset | Back

Figure 300. PM – Management: CMS Management: CMS Edit

4. To add a new CMS product, select the **Add new CMS** hyperlink. This will prompt you to the following screen which allows you to provide input for the same functional areas as previously stated in Step 2.

5. Once you have made desired additions, click **Add CMS** to save changes, **Reset** to return information prior to edits, or **Back** to return to the CMS Management screen.

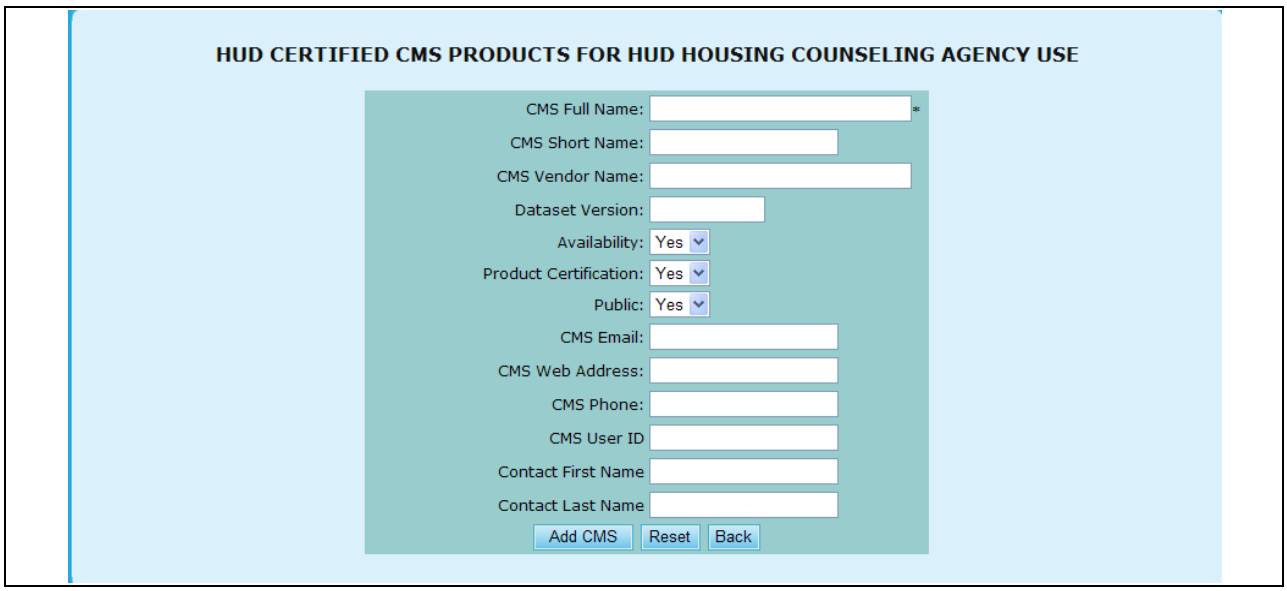
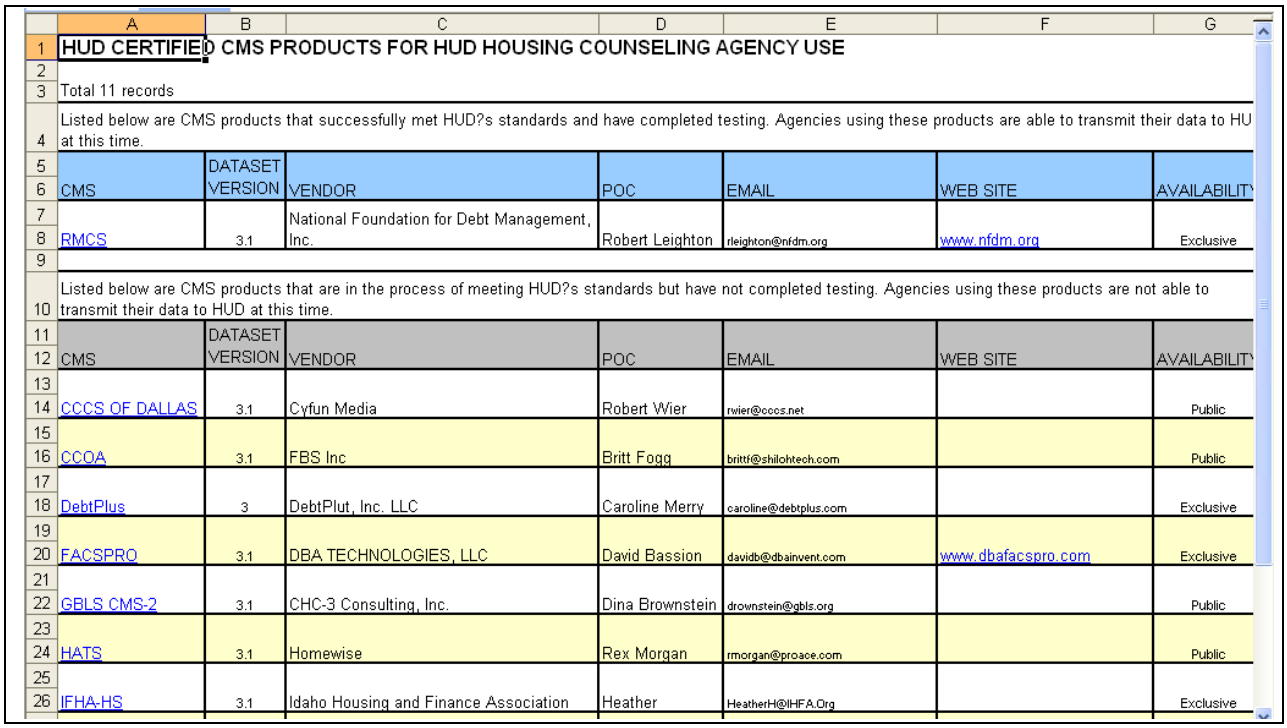


Figure 301. PM – Management: CMS Management: Add new CMS

6. To view these lists in Excel format, click the **Export CMS List** button and a new screen will be prompted with them in an Excel format.

7. To view a Vendor website, click the hyperlink for the desired agency, under the Website column.



	A	B	C	D	E	F	G
1	HUD CERTIFIED CMS PRODUCTS FOR HUD HOUSING COUNSELING AGENCY USE						
2							
3	Total 11 records						
4	Listed below are CMS products that successfully met HUD?s standards and have completed testing. Agencies using these products are able to transmit their data to HU at this time.						
5							
6	CMS	DATASET VERSION	VENDOR	POC	EMAIL	WEB SITE	AVAILABILIT
7							
8	RMCS	3.1	National Foundation for Debt Management, Inc.	Robert Leighton	rleighton@nfdm.org	www.nfdm.org	Exclusive
9							
10	Listed below are CMS products that are in the process of meeting HUD?s standards but have not completed testing. Agencies using these products are not able to transmit their data to HUD at this time.						
11							
12	CMS	DATASET VERSION	VENDOR	POC	EMAIL	WEB SITE	AVAILABILIT
13							
14	CCCS OF DALLAS	3.1	Cyfun Media	Robert Wier	rwier@ccos.net		Public
15							
16	CCOA	3.1	FBS Inc	Britt Fogg	brittf@shilohtech.com		Public
17							
18	DebtPlus	3	DebtPlut, Inc. LLC	Caroline Merry	caroline@debtplus.com		Exclusive
19							
20	FACSPRO	3.1	DBA TECHNOLOGIES, LLC	David Bassion	davidb@dbainvent.com	www.dbafacspro.com	Exclusive
21							
22	GBLS CMS-2	3.1	CHC-3 Consulting, Inc.	Dina Brownstein	drownstein@gbls.org		Public
23							
24	HATS	3.1	Homewise	Rex Morgan	rmorgan@proace.com		Public
25							
26	IFHA-HS	3.1	Idaho Housing and Finance Association	Heather	HeatherH@IHFA.Org		Exclusive

Figure 302. PM – Management: CMS Management: Export CMS List

9.5.7 AD HOC Query

1. From the **Management** menu, click the **AD HOC Query** hyperlink. The *AD HOC Query* page appears.
2. From the Available Tables list, select the table you wish to extract data from.
3. After clicking on a table from the Available Tables list, the Available Columns list is populated with all the columns available in the selected table.
4. Select the columns you wish to extract data from.
5. After selecting the columns you wish to extract, Click thee of the following

buttons to fine tune your Selected Columns list. Repeat table and column selection until all data you desire has been selected.

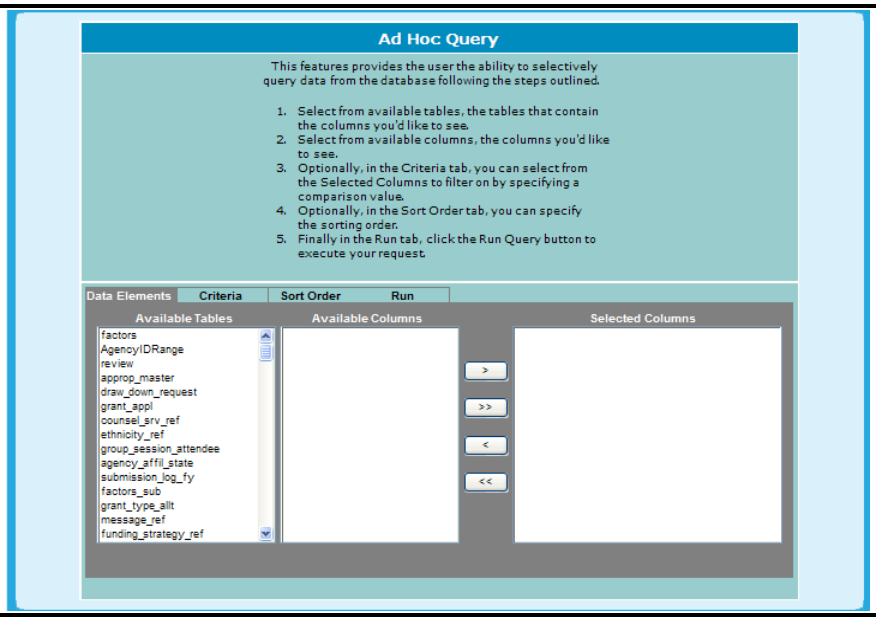


Figure 303.A. PM – Management: Ad Hoc Query

The Ad Hoc Query features provides the user a way to extract raw data from the System. This feature requires a deep understanding of the database structural layout of the System as well as all the reference data identifiers. To use the Ad Hoc Query feature following the instructions below:

6. Click the **Criteria** tab and specify any filtering criteria. From here you are able to edit Data Elements based off of your selections on the previous tab. You can specify how you would like data displayed based on a comparison. You can compare data through the following ways:
    a. Is Equal To
    b. Is Less Than
    c. Is Less Than or Equal To
    d. Is Greater Than
    e. Is Greater Than or Equal To

f. Not Equal To
g. One Of
h. Is Null
i. Is Not Null

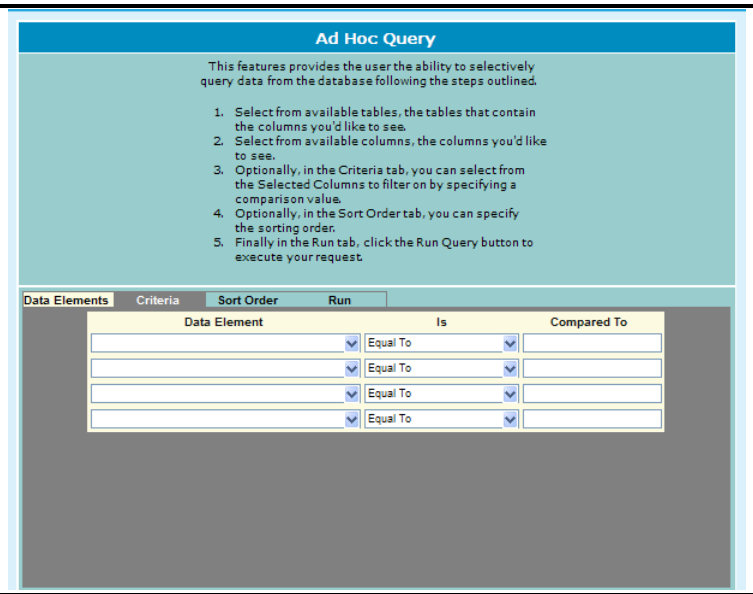


Figure 303.B. PM – Management: Ad Hoc Query Criteria

7. Optionally, click the **Sort Order** to determine how you would like your result set sorted. This will be determined on the Data Elements you previously chose.

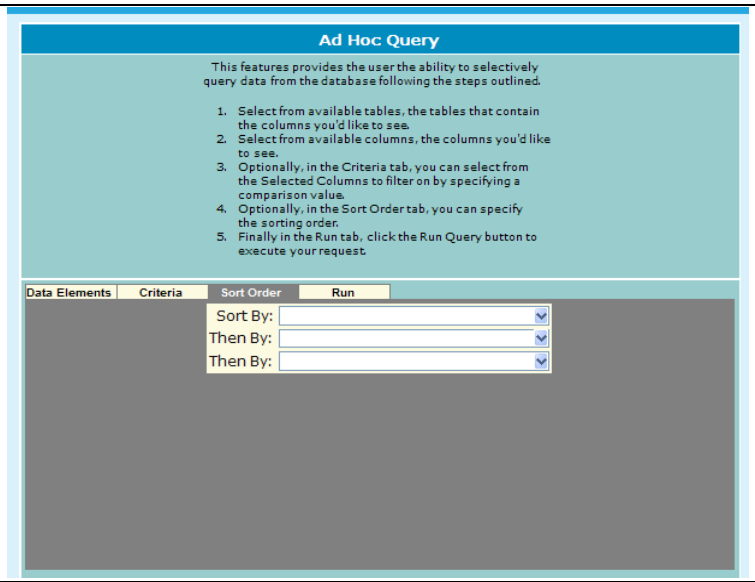


Figure 303.C. PM – Management: Ad Hoc Query Rank Order

8. Finally, click the **Run** tab and click the **Run Query** button and a spreadsheet is displayed with resulting data.

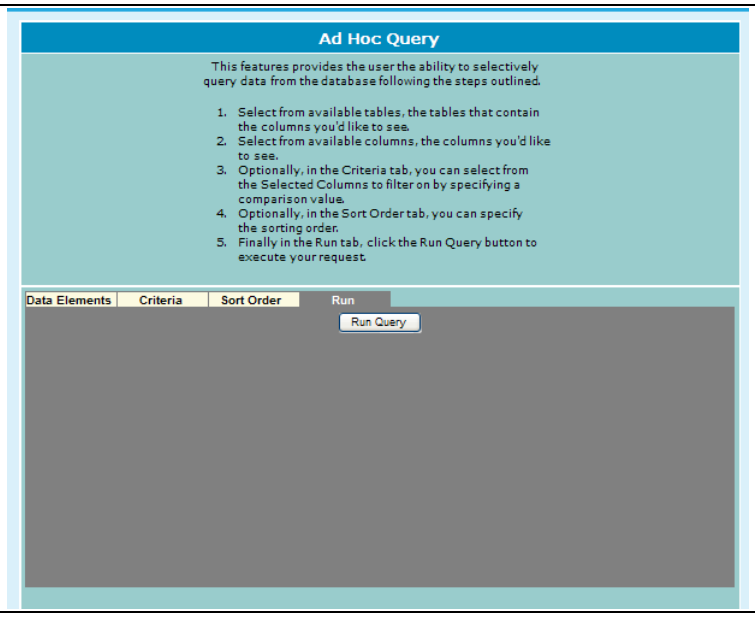


Figure 303.D. PM – Management: Ad Hoc Query Run

Note: The System tries to ascertain the relationships between tables through Foreign Keys first and then by common field names second. This can be effective when selecting data from two tables but can become ineffective if too many tables with similar FK relationships and common field names are specified. To collect data from multiple tables, it is advised to extract from a few set of tables and then manually join the data in a spreadsheet.

9.5.8 Change Office Defaults

1. From the Management Functions menu, click the **Change Office Defaults** hyperlink. The *Change Office Defaults* page appears.

2. Click the HUD Office under Office Name column that you wish to change. The *Default Office Information* screen appears.

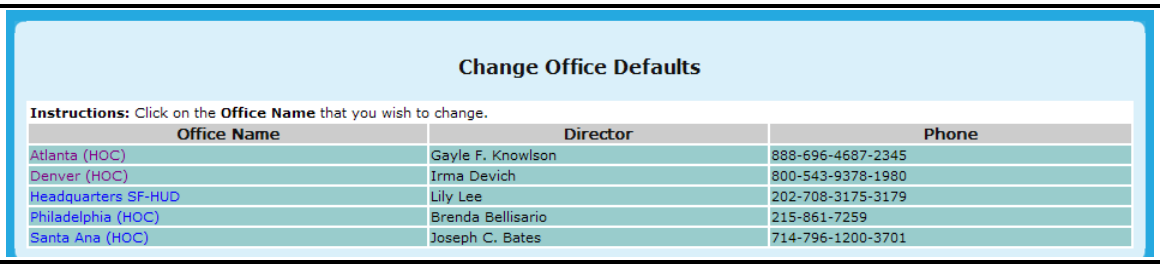


Figure 304. PM – Management: Change Office Defaults

3. Fill out all of the fields in the form. Then click **OK** to save or **Cancel** to cancel.

Default Office Information

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

Office Name:	Atlanta (HOC)
Grant Application Review Rules:	
Address: Five Points Plaza; 40 Marietta Street, 10th Floor	**City:** Atlanta; **State:** Georgia; **Zip:** 30303-2806
Director: Liz Henry; **Director's Title:** Director, Program Support Division; **Phone:** 888 - 555 - 4687 x 65	**Program Director:** Liz Henry; **Program Director's Title:** Director, Program Support Division; **Program Director's Phone:** 888 - 555 - 4687 x 65
Program Support Division Director Name: Jen Smith; **Program Support Division Director Title:** Director, Program Support Division; **Program Support Division Director's Phone:** 404 - 556 - 1263 x 23	**Single Family Housing Program Development Director Name:** Jane Doe; **Single Family Housing Program Development Director Title:** Director, Office of SF Program Development; **Single Family Housing Program Development Director's Phone:** 202 - 708 - 2121 x 3989
Email: liz_f._henry@hud.gov	

Figure 305.A. PM – Management: Default Office Information

4. Click the **Validate** button in the States Covered section, a message like following appears. It warns you that the listed states or territories are not assigned to any HOC office.

States Covered:* Validate

☑ Alabama - Atlanta (HOC)	☑ Kentucky - Atlanta (HOC)	☑ Not Selected - Atlanta (HOC)
☑ Alaska - Santa Ana (HOC)	☑ Louisiana - Denver (HOC)	☑ Ohio - Philadelphia (HOC)
☑ American Samoa - Santa Ana (HOC)	☑ Maine - Philadelphia (HOC)	☑ Oklahoma - Denver (HOC)
☑ Arizona - Santa Ana (HOC)	☐ Marshall Islands	☑ Oregon - Santa Ana (HOC)
☑ Arkansas - Denver (HOC)	☑ Maryland - Philadelphia (HOC)	☐ Palau
☑ California - Santa Ana (HOC)	☑ Massachusetts - Philadelphia (HOC)	☑ Pennsylvania - Philadelphia (HOC)
☑ Colorado - Denver (HOC)	☑ Michigan - Philadelphia (HOC)	☑ Puerto Rico - Atlanta (HOC)
☑ Connecticut - Philadelphia (HOC)	☑ Minnesota - Denver (HOC)	☑ Rhode Island - Philadelphia (HOC)
☑ Delaware - Philadelphia (HOC)	☑ Mississippi - Atlanta (HOC)	☑ South Carolina - Atlanta (HOC)
☑ District of Columbia - Philadelphia (HOC)	☑ Missouri - Denver (HOC)	☑ South Dakota - Denver (HOC)
☐ Federated States of Micronesia	☑ Montana - Denver (HOC)	☑ Tennessee - Atlanta (HOC)
☑ Florida - Atlanta (HOC)	☑ Nebraska - Denver (HOC)	☑ Texas - Denver (HOC)
☑ Georgia - Atlanta (HOC)	☑ Nevada - Santa Ana (HOC)	☑ Utah - Denver (HOC)
☑ Guam - Santa Ana (HOC)	☑ New Hampshire - Philadelphia (HOC)	☑ Vermont - Philadelphia (HOC)
☑ Hawaii - Santa Ana (HOC)	☑ New Jersey - Philadelphia (HOC)	☑ Virgin Islands - Atlanta (HOC)
☑ Idaho - Santa Ana (HOC)	☑ New Mexico - Denver (HOC)	☑ Virginia - Philadelphia (HOC)
☑ Illinois - Atlanta (HOC)	☑ New York - Philadelphia (HOC)	☑ Washington - Santa Ana (HOC)
☑ Indiana - Atlanta (HOC)	☑ North Carolina - Atlanta (HOC)	☑ West Virginia - Philadelphia (HOC)
☑ Iowa - Denver (HOC)	☑ North Dakota - Denver (HOC)	☑ Wisconsin - Denver (HOC)
☑ Kansas - Denver (HOC)	☑ Northern Mariana Islands - Santa Ana (HOC)	☑ Wyoming - Denver (HOC)

OK Cancel

Figure 305.B. PM – Management: Change Office Defaults – States Covered

Figure 305.C. PM – Management: Change Office Defaults – Information Message.

9.6 Reports

The HCS system comes with a variety of reports. These reports can be viewed, printed, and exported to Excel spreadsheet. These reports provide management with a view of the application process. Also, these reports are excellent views of the post-processing results. Below are instructions on how to generate, print, and export reports. Also, the sections below show a sample of each report and details about what information each report contains.

9.6.1 Viewing Reports

To view any of the HCS system reports, take the following steps:

1. From the upper navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click **Application Progress Status** hyperlink from the menu, the *Application Status for FY 20XX* screen appears.

Application Status for FY 2009

Total 790 records

Reset **Not Evaluated** **Evaluated**

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 306. PM – Reports: Applications Status for FY 20XX

9.6.1.1 *Printing Reports*

You can print any of the HCS system reports by following these steps:

1. From the top navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click **Application Progress Status** hyperlink from menu, the *Application Status for FY 20XX* screen appears.

Application Status for FY 2009

Total 790 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 307. PM – Reports: Application Progress Status for FY 20XX

2. Click the **Print** button. The *Print* dialog box similar to follow appears. Once you have selected your printing criteria, click Print to have a printout of the document.

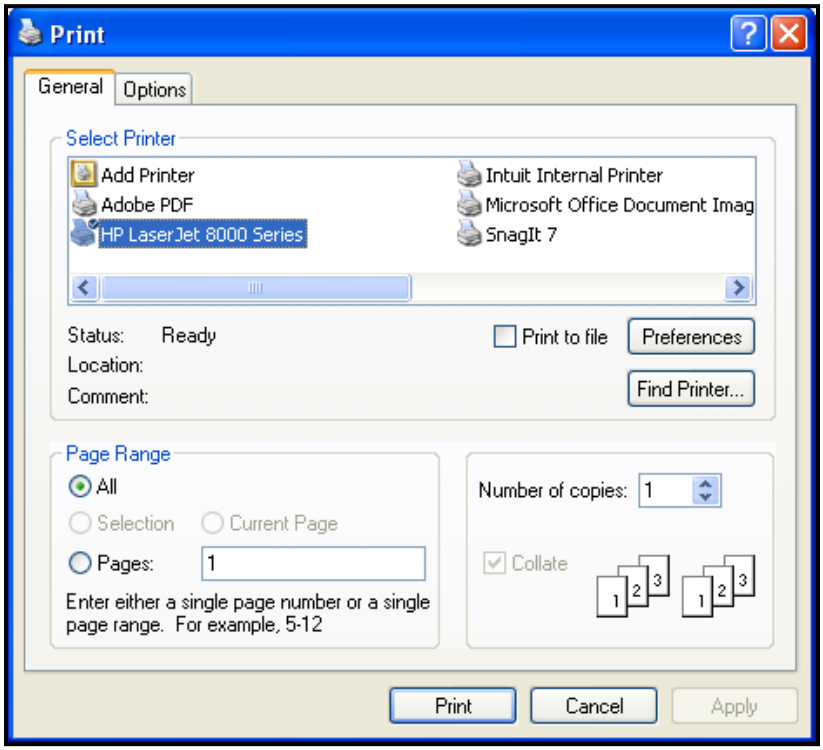


Figure 308. PM – Reports: Print Dialog Box.

You have now successfully printed a report. Repeat these steps to print any of the other reports available.

9.6.1.2 *Exporting Reports*

You can export any of the HCS system reports to Excel spreadsheet by following these steps:

1. From the top navigation menu, scroll down to the **Reports** section. Click the hyperlink of the report you want to generate from the **Reports** sub-menu in top navigation frame. For example, if you click the **Applications Progress Status** hyperlink from the menu, the Applications Status for FY 20XX screen appears.

2. Click the **Export** button. The *File Download* dialog box appears.

Application Status for FY 2009

Total 790 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 309. PM – Reports: Application Progress Status for FY 20XX

3. Click the **Open** button to open the spreadsheet in HCS web page. Or, click the **Save** button and follow the instruction to save the report to a Microsoft Excel file.

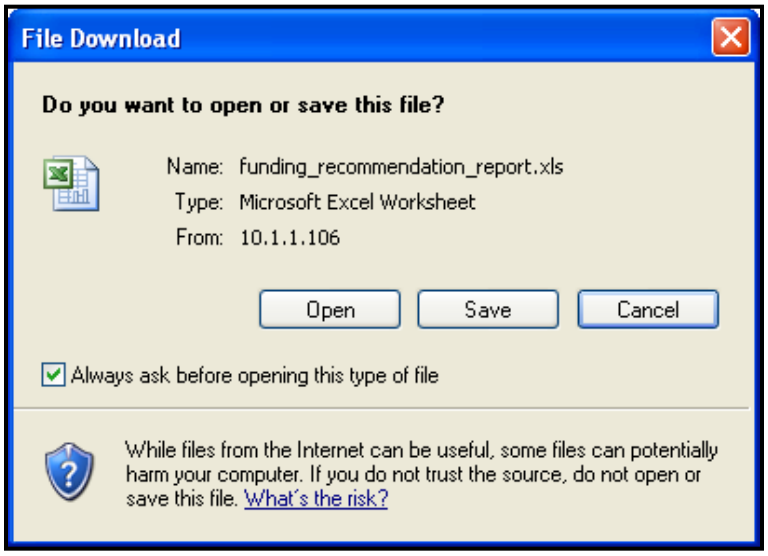


Figure 310. PM – Reports: File Download Dialog Box.

You have now exported an HCS system report. Follow these steps again to export any of the other reports.

9.6.2 Report Examples

9.6.2.1 *Application Progress Status*

Application Progress Status report shows the dates when each assigned reviewer and primary reviewer completed their evaluation.

1. From the upper navigation menu, under **Reports** sub-menu, click **Application Progress Status** hyperlink, the Grant *Applications Status Search* screen appears. Enter the criteria that you would like to search for and click the **Search** button to retrieve your results, or **Clear** to erase the data you had input.

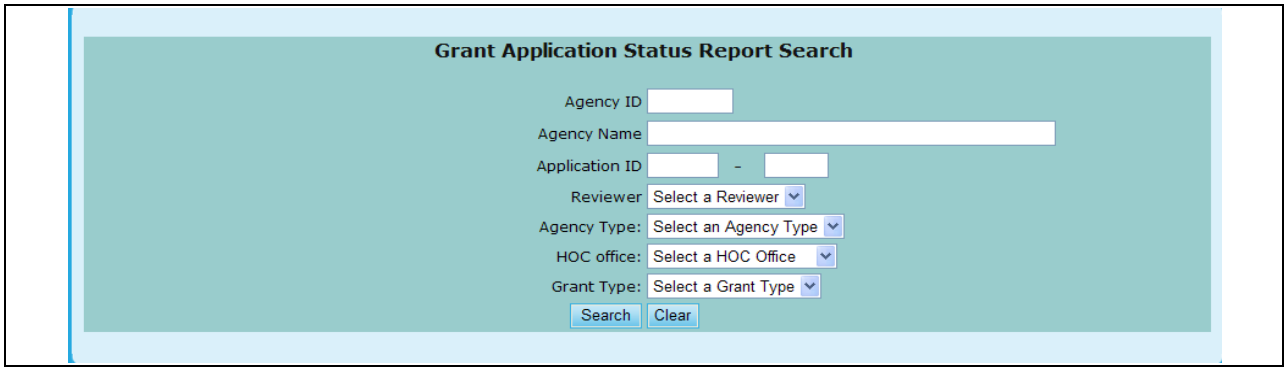


Figure 311. PM – Reports: Application Progress Status Search

2. To sort this list:
   a. Click the **Agency Name** hyperlink will sort the list first in Agency Name order, and then in TIN number and Application ID order.
   b. Click the **TIN** hyperlink will sort the list first in TIN number order, and then in Agency Name and Application ID order.

c. Click the **Appl ID** hyperlink will sort the list first in Application ID order, and then in Agency Name and TIN number order.

d. Click the **Prim Rvwr** hyperlink will sort the list first in Primary Reviewer"s last name and first name order, and then in Agency Name, TIN number, and Application ID order.

Application Status for FY 2009

Total 790 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0821-105		08/25/2009	Dahlia Martinez	08/19/2009	Delia Linan	09/16/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	COMP	0321-002			David Dwyer	08/11/2009	George Bridgeman	08/19/2009		
YWCA DELAWARE	Philadelphia (HOC)	80961	LHCA	LDRC	0323-001			David Dwyer		George Bridgeman	08/19/2009		

Print Export Primary Reviewer Statistics

Figure 311.A. PM – Reports: Application Progress Status for FY 20XX

3. Click the **Primary Reviewer Statistics** button on the report, the *Primary Reviewers Statistics for FY 20XX* screen appears.

Primary Reviewers Statistics for FY 2009

Primary Reviewer		# of Applications	# of Incomplete	# of Complete	% in HUD Office
First Name	Last Name				
Brian	Siebenlist	49	48	1	98%
Ruth	Roman	1	1	0	2%
Headquarters SF-HUD Totals:		50	49	1	100%
Annette	Panasiuk	39	35	4	14%
Beth	Eilers	2	0	2	1%
Elizabeth	Cahall	35	26	9	12%
Glen	Stopera	25	0	25	9%
Janice	Skinner	30	30	0	11%
Jennifer	Sica	23	0	23	8%
John	Niebieszczanski	12	10	2	4%
Maryanne	Daniel	30	3	27	11%
Robert	Wright	31	31	0	11%
Sharon	Farrow	23	0	23	8%
Tamie	Contois	31	31	0	11%
Philadelphia (HOC) Totals:		281	166	115	100%
Jason	Willey	85	85	0	35%
Kendel	King	3	3	0	1%
Tracy	Fields	65	65	0	27%
Vivien	King	88	88	0	37%
Atlanta (HOC) Totals:		241	241	0	100%
Donna	Martin	5	0	5	7%
Gail	Osgood	6	0	6	8%
Kristin	Johnsen	9	0	9	13%
Lorraine	Griscavage-Frisbee	7	1	6	10%
Mark	Escalante	8	0	8	11%
Marykay	Kelley	8	0	8	11%
Myrna	Pascual	7	0	7	10%
Pauline	Louie	6	6	0	8%
William	McKee	9	0	9	13%
dawn	golik	7	2	5	10%
Santa Ana (HOC) Totals:		72	9	63	100%
Grand Totals:		790	465	325	

Print Export

Figure 311.B. PM – Reports: Primary Reviewers Statistics for FY 20XX

4. To view the list of applications which evaluations have not been completed yet, click **Not Evaluated** button. The *Application Status for FY 20XX (Not Evaluated)* page is displayed. Any application that has one or more scores missing is listed.

Application Status for FY 2009

Total 592 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ABYSSINIAN DEVELOPMENT CORPORATION	Philadelphia (HOC)	83751	LHCA	COMP	0321-146			Phyllis Ford	08/15/2009	George Bridgeman	08/03/2009		
ACCESS LIVING OF METROPOLITAN CHICAGO	Atlanta (HOC)	82063	LHCA	COMP	0421-119			Shirley Barnes	08/16/2009	Rachel Allen	09/02/2009	Kendel King	
ACCOMACK-NORTHAMPTON PLANNING DISTRICT C	Philadelphia (HOC)	83967	LHCA	COMP	0321-170			Virginia Holman	08/19/2009	Karen Fondersmith	08/18/2009		
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	COMP	0011-016			Terri Ames	08/10/2009	Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	LDRC	0013-006			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACORN HOUSING CORPORATION	Headquarters SF-HUD	80753	National Intermediary	FLMF	0014-007			Terri Ames		Ronald Bedoya	09/02/2009	Jennifer Smith	
ACTION FOR BOSTON COMMUNITY DEVELOPMENT,	Philadelphia (HOC)	84865	LHCA	COMP	0321-199			Chris Cline		John Olmstead			
ADMINISTRATION OF RESOURCES AND CHOICES	Santa Ana (HOC)	81052	LHCA	COMP	0921-024			Joy Padiernos	09/11/2009	Marisabel Almer		Lawrence Roselle	
ADMINISTRATION OF RESOURCES AND CHOICES	Santa Ana (HOC)	81052	LHCA	HECM	0922-005		08/24/2009	Joy Padiernos	09/11/2009	Marisabel Almer		Lawrence Roselle	
ADMINISTRATION OF RESOURCES AND CHOICES	Santa Ana (HOC)	81052	LHCA	LDRC	0923-011		08/23/2009	Joy Padiernos		Marisabel Almer	08/27/2009	Lawrence Roselle	

Figure 311.C. PM – Reports: Application Status for FY 20XX (Not Evaluated)

5. To view the list of applications which evaluations have been completed, click **Evaluated** button. The *Application Status for FY 20XX (Evaluated)* page is displayed. Applications with all scores posted are listed.

Application Status for FY 2009

Total 198 records

Reset Not Evaluated Evaluated

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr	Scoring Complete	Asst. Rvwr #1	Scoring Complete	Asst. Rvwr #2	Scoring Complete	Asst. Rvwr #3	Scoring Complete
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0821-008		08/04/2009	Patricia Heiser	08/05/2009	Douglas Neff	08/04/2009		
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	LDRC	0823-002		08/04/2009	Patricia Heiser	08/11/2009	Douglas Neff	08/06/2009		
ALLIED CHURCHES TEACHING SELF-EMPOWERMEN	Denver (HOC)	84715	LHCA	COMP	0821-062		08/07/2009	Patricia Heiser	08/07/2009	Douglas Neff	08/07/2009		
ANOKA COUNTY COMMUNITY ACTION PROGRAM, I	Denver (HOC)	81092	LHCA	COMP	0821-074		08/27/2009	Sharon Hebenstreit	08/11/2009	Julie Rice	08/19/2009		
ARROWHEAD ECONOMIC OPPORTUNITY AGENCY, I	Denver (HOC)	84091	LHCA	COMP	0821-075		08/10/2009	Sharon Hebenstreit	08/13/2009	Julie Rice	09/14/2009		
ASIAN INCORPORATED	Santa Ana (HOC)	82197	LHCA	COMP	0921-002		08/21/2009	Felicidad Rodarte	08/27/2009	Chandeng Hour	08/28/2009	Christopher Taliaferro	08/27/2009
ASIAN INCORPORATED	Santa Ana (HOC)	82197	LHCA	LDRC	0923-004		08/21/2009	Felicidad Rodarte	08/26/2009	Chandeng Hour	08/28/2009	Christopher Taliaferro	08/24/2009
ASSIST AGENCY	Denver (HOC)	84801	LHCA	COMP	0821-029		08/11/2009	Dahlia Martinez	08/18/2009	Delia Linan	08/19/2009		
AUSTIN TENANTS' COUNCIL	Denver (HOC)	80543	LHCA	COMP	0821-041		08/13/2009	Gifford Dunn	08/10/2009	John Thorston	08/13/2009		

Figure 311.D. PM – Reports: Applications Status for FY 20XX (Evaluated)

6. If the Applications Status report you are working on is current fiscal year, Primary Reviewer"s name is a hyperlink.

9.6.2.2 *Application Score Status*

This report lists all the scores for each application for a comprehensive view of on all applications that were processed.

1. From the upper navigation menu, under **Reports** sub-menu, click the **Scores Status** hyperlink. The *Scores Status Report for Fiscal Year 20XX* screen appears. Enter the criteria that you would like to search for and click the **Search** button to retrieve your results, or **Clear** to erase the data you had input.

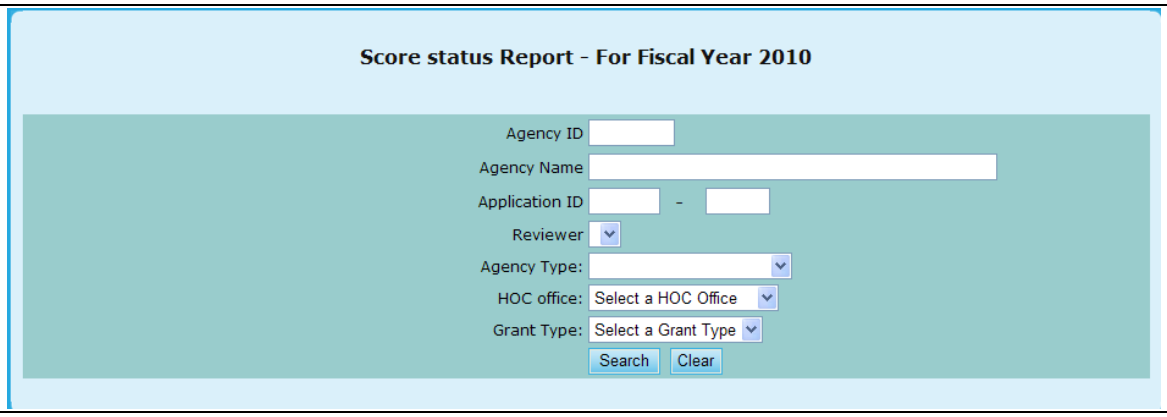
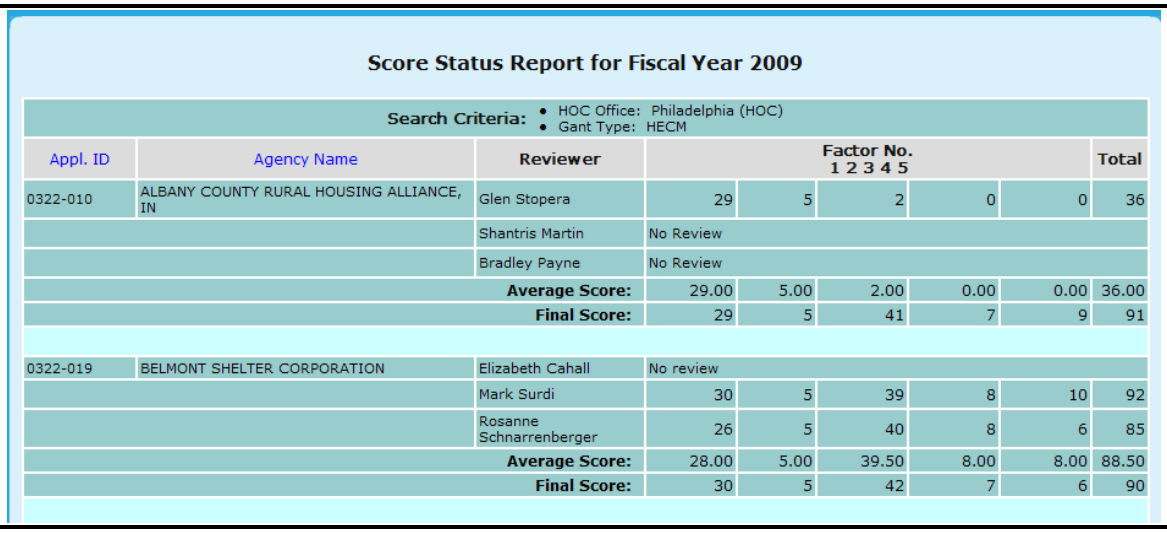


Figure 312. PM – Reports: Scores Status Search

Note: Provided below is an example of a search result.



Score Status Report for Fiscal Year 2009

Search Criteria: • HOC Office: Philadelphia (HOC) • Gant Type: HECM

Appl. ID	Agency Name	Reviewer	Factor No. 1	2	3	4	5	Total
0322-010	ALBANY COUNTY RURAL HOUSING ALLIANCE, IN	Glen Stopera	29	5	2	0	0	36
		Shantris Martin	No Review					
		Bradley Payne	No Review					
		Average Score:	29.00	5.00	2.00	0.00	0.00	36.00
		Final Score:	29	5	41	7	9	91
0322-019	BELMONT SHELTER CORPORATION	Elizabeth Cahall	No review					
		Mark Surdi	30	5	39	8	10	92
		Rosanne Schnarrenberger	26	5	40	8	6	85
		Average Score:	28.00	5.00	39.50	8.00	8.00	88.50
		Final Score:	30	5	42	7	6	90

Figure 313. PM – Reports: Scores Status

9.6.2.3 *Awards Recommendation*

This report provides a view of Final scores, Recommended awards and Requested grant amount.

1. From the top navigation menu, under the **Reports** sub-menu, Click the **Funding Recommendation** hyperlink, the *Funding Recommendation Report for Fiscal Year 20XX* appears.

AWARDS RECOMMENDATION REPORT
For Fiscal Year 2009

Agency Name(Application ID)	Final Score	Recommended	Requested
CATHOLIC CHARITIES USA (0011-001)	87.00	$2,147,090.28	$2,147,090.28
STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO (0011-002)	94.00	$2,499,995.00	$2,499,995.00
MON VALLEY INITIATIVE (0011-003)	88.00	$855,000.00	$855,000.00
HOMEOWNERSHIP PRESERVATION FOUNDATION (0011-004)	93.00	$2,700,000.00	$2,700,000.00
CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC. (0011-005)	90.00	$1,431,926.00	$1,431,926.00
NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS (0011-006)	85.00	$1,113,528.00	$1,113,528.00
NEIGHBORHOOD REINVESTMENT CORPORATION (0011-007)	88.00	$2,700,000.00	$2,700,000.00
NATIONAL COUNCIL OF LA RAZA (0011-008)	88.00	$2,700,000.00	$2,700,000.00
HOUSING PARTNERSHIP NETWORK (0011-009)	98.00	$2,675,123.00	$2,675,123.00
NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC (0011-010)	79.00	$1,200,000.00	$1,200,000.00
THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC. (0011-011)	75.00	$300,000.00	$2,346,655.00
WEST TENNESSEE LEGAL SERVICES, INCORPORATED (0011-012)	88.00	$2,700,000.00	$2,700,000.00
NATIONAL URBAN LEAGUE (0011-013)	90.00	$2,700,000.00	$2,700,000.00
HOMEFREE - U S A (0011-014)	88.00	$1,995,000.00	$1,995,000.00
CCCS OF GREATER ATLANTA - MAIN OFFICE (0011-015)	90.00	$2,700,000.00	$2,700,000.00
ACORN HOUSING CORPORATION (0011-016)	96.00	$2,700,000.00	$2,700,000.00
NACA (NEIGHBORHOOD ASSISTANCE CORPORATION OF AMERICA) (0011-017)	90.00	$2,700,000.00	$2,700,000.00
NUEVA ESPERANZA (0011-018)	75.00	$300,000.00	$1,927,498.00
MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE (0011-019)	75.00	$300,000.00	$1,300,000.00
MISSION OF PEACE (0011-020)	84.00	$1,600,000.00	$1,600,000.00
NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC. (0011-021)	95.00	$2,700,000.00	$2,700,000.00
CLEARPOINT FINANCIAL SOLUTIONS, INC. (0011-022)	80.00	$2,700,000.00	$2,700,000.00
RURAL COMMUNITY ASSISTANCE CORPORATION (0011-023)	86.00	$1,215,966.00	$1,215,966.00
MONEY MANAGEMENT INTERNATIONAL INC. (0011-024)	85.00	$2,700,000.00	$2,700,000.00
Santa Ana (SHFA - COMP) Total:		$237,896.46	$773,695.00
WASHINGTON STATE HOUSING FINANCE COMMISSION (0943-001)	83.00	$29,999.80	$30,000.00
Santa Ana (SHFA - LDRC) Total:		$29,999.80	$30,000.00

Print Export

Figure 314. PM – Reports: Funding Recommendation Report

9.6.2.4 *Awards Report*

This report compares Allocated funds against Awarded funds at the grant category level showing balance to check that all grant funds have been allocated.

1. From the top navigation menu, under **Reports** sub-menu, click **Funding Report** hyperlink, the *Funding Report for Fiscal Year 20XX appears.*

FUNDING REPORT
For Fiscal Year 2009

Office Name	Requested	Allocated	Awarded	To be Returned
INTERMEDIARY				
Intermediary (COMP)	$53,474,994.28	$25,727,323.00	$25,727,323.00	$0.00
Intermediary (HECM)	$8,580,390.00	$6,500,000.00	$6,500,000.00	$0.00
Intermediary (LDRC)	$1,209,220.00	$992,677.00	$992,677.00	$0.00
Intermediary (FLMF)	$6,410,896.00	$798,272.00	$798,272.00	$0.00
Intermediary (TRNG)	$8,000,000.00	$5,000,000.00	$5,000,000.00	$0.00
INTERMEDIARY Totals:	$77,675,500.28	$39,018,272.00	$39,018,272.00	$0.00
LHCA				
Philadelphia (LHCA - COMP)	$15,746,509.33	$17,111,728.00	$6,082,506.00	$11,029,222.00
Philadelphia (LHCA - HECM)	$331,077.00	$1,000,000.00	$281,077.00	$718,923.00
Philadelphia (LHCA - LDRC)	$923,396.80	$904,358.00	$289,322.00	$615,036.00
Atlanta (LHCA - COMP)	$13,697,823.00	$0.00	$5,899,008.00	- $5,899,008.00
Atlanta (LHCA - HECM)	$452,000.00	$0.00	$322,342.00	- $322,342.00
Atlanta (LHCA - LDRC)	$971,721.00	$0.00	$332,743.00	- $332,743.00
Denver (LHCA - COMP)	$8,751,328.00	$0.00	$3,736,178.00	- $3,736,178.00
Denver (LHCA - HECM)	$230,508.00	$0.00	$197,700.00	- $197,700.00
Denver (LHCA - LDRC)	$416,720.00	$0.00	$160,428.00	- $160,428.00
Santa Ana (LHCA - COMP)	$4,168,568.61	$0.00	$1,394,036.00	- $1,394,036.00
Santa Ana (LHCA - HECM)	$198,881.00	$0.00	$198,881.00	- $198,881.00
Santa Ana (LHCA - LDRC)	$385,102.00	$0.00	$121,865.00	- $121,865.00
LHCA Totals:	$46,273,634.74	$19,016,086.00	$19,016,086.00	$0.00
SHFA				
Philadelphia (SHFA - COMP)	$2,342,638.39	$2,650,000.00	$1,218,439.00	$1,431,561.00
Philadelphia (SHFA - LDRC)	$50,000.00	$149,689.00	$50,000.00	$99,689.00
Atlanta (SHFA - COMP)	$790,000.00	$0.00	$460,643.00	- $460,643.00
Atlanta (SHFA - LDRC)	$0.00	$0.00	$0.00	$0.00
Denver (SHFA - COMP)	$1,081,034.63	$0.00	$770,673.00	- $770,673.00
Denver (SHFA - LDRC)	$69,689.20	$0.00	$69,689.00	- $69,689.00
Santa Ana (SHFA - COMP)	$773,695.00	$0.00	$200,245.00	- $200,245.00
Santa Ana (SHFA - LDRC)	$30,000.00	$0.00	$30,000.00	- $30,000.00
SHFA Totals:	$5,137,057.22	$2,799,689.00	$2,799,689.00	$0.00
Grand Totals:	$132,397,227.24	$62,850,000.00	$62,850,000.00	$0.00

Print Export

Figure 315. PM – Reports: Funding Report

9.6.2.5 *Awards Report by Agency*

This report provides an excellent summary of awards using drill down screens. The initial screen provides a comprehensive summary of the grant processing year at one glance, providing number of agencies applying, those awarded and comparing awards with Requested and Recommended Awards. This shows all application results regardless of if they are awarded or not.

1. From the top navigation menu, under **Reports** sub-menu, Click the **Awards Report by Agency** hyperlink, the *Awards Report by Agency* appears. This statistic matrix displays awards and related information in each HUD office, and HUD totals. The data shown in **# Agencies** column is the number of HUD-Approved Independent Agencies who are qualified to apply for grant in the fiscal year.

2. Click HUD office name hyperlink, the report is drilled down to HUD office level. For example, click **HOC 2 – Atlanta** hyperlink, a list of agencies applied for grants and their relevant data are displayed in agency name order.

AWARDS REPORT BY AGENCY For Fiscal Year 2009

Office	# Agencies	# Agencies Applying	# Agencies Awarded	# Sub Agencies Funded	# Applications Awarded	Amount Allotted	Amount Requested	Amount Recommended	Amount Awarded
HQ	24	25	25	837	43	$ 39,018,272.00	$ 77,675,500.28	$ 59,381,231.28	$ 39,018,272.00
HOC 1 - Philadelphia	357	211	179	119	238	$ 0.00	$ 20,368,621.52	$ 2,392,638.39	$ 8,628,011.00
HOC 2 - Atlanta	334	178	153	39	206	$ 0.00	$ 15,911,544.00	$- 1,011,569.47	$ 7,014,736.00
HOC 3 - Denver	230	111	101	25	135	$ 0.00	$ 11,274,279.83	$ 1,200,723.82	$ 5,235,293.00
HOC 4 - Santa Ana	85	44	41	44	67	$ 0.00	$ 7,167,281.61	$ 663,849.26	$ 2,953,688.00
TOTAL	1030	569	499	1064	689	$ 62,850,000.00	$132,397,227.24	$ 62,626,873.28	$ 62,850,000.00

Print Export

Figure 316.A. PM – Reports: Awards Report by Agency

3. To sort the list of agencies in HUD office level:
   a. Click the **Agency** hyperlink will sort the list in Agency Name order.
   b. Click the **Agency ID** hyperlink will sort the list in Agency ID order.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY AGENCY For Fiscal Year 2009

Office: HOC 2 - Atlanta	Total Agencies Applying: 178	Total Agencies Awarded: 153
Amount Allotted: $ 0.00	Amount Requested: $ 15,911,544.00	Total Awarded: $ 7,014,736.00

Agency Search Print Export Back

Agency	Agency ID	# Sub Agencies Funded	Office	Grant Category	Grant Types	Requested	Recommended	Awarded
ACCESS LIVING OF METROPOLITAN CHICAGO	82063	0	HOC 2 - Atlanta	LHCA	COMP	$ 45,000.00	$ 0.00	$ 45,000.00
AFFORDABLE HOUSING CORPORATION	81929	0	HOC 2 - Atlanta	LHCA, LHCA	COMP, LDRC	$ 86,000.00	$ 0.00	$ 65,960.00
AFFORDABLE HOUSING ENTERPRISES, INC.	82241	0	HOC 2 - Atlanta	LHCA	COMP	$ 30,000.00	$ 0.00	$ 30,000.00
ALABAMA COUNCIL ON HUMAN RELATIONS, INC	80576	0	HOC 2 - Atlanta	LHCA	COMP	$ 30,000.00	$ 0.00	$ 30,000.00
ALLIANCE CREDIT COUNSELING	84342	0	HOC 2 - Atlanta	LHCA	COMP	$ 151,712.00	$ 0.00	$ 0.00
APPALACHIAN HOUSING AND REDEVELOPMENT CORPORATION	81266	0	HOC 2 - Atlanta	LHCA	COMP	$ 46,963.00	$ 0.00	$ 42,724.00
AREA COMMITTEE TO IMPROVE OPPORTUNITIES NOW, INC.	82510	0	HOC 2 - Atlanta	LHCA	COMP	$ 52,862.00	$ 0.00	$ 42,724.00
B & D TRAINING SERVICES	83806	0	HOC 2 - Atlanta	LHCA, LHCA	COMP, LDRC	$ 125,000.00	$ 0.00	$ 43,085.00
BRIGHTON CENTER, INCORPORATED	80145	0	HOC 2 - Atlanta	LHCA, LHCA, LHCA	COMP, HECM, LDRC	$ 109,250.00	$ 0.00	$ 86,131.00
BROWARD COUNTY HOUSING AUTHORITY	80586	0	HOC 2 - Atlanta	LHCA	COMP	$ 76,250.00	$ 0.00	$ 40,976.00
CAMPBELLSVILLE HOUSING AND REDEVELOPMENT AUTHORITY	80146	0	HOC 2 - Atlanta	LHCA	COMP	$ 23,479.00	$ 0.00	$ 23,479.00
WILSON COMMUNITY IMPROVEMENT ASSOCIATION, INC.	80957	0	HOC 2 - Atlanta	LHCA	COMP	$ 50,000.00	$ 0.00	$ 50,000.00
WOODBINE COMMUNITY ORGANIZATION	81758	0	HOC 2 - Atlanta	LHCA, LHCA, LHCA	COMP, HECM, LDRC	$ 98,000.00	$ 0.00	$ 47,197.00
ALL			HOC 2 - Atlanta					

Figure 316.B. PM – Reports: Awards Report by Agency

4. From the *Awards Report by Agency* in HUD Office level, as shown in Figure 316.B., click an agency name hyperlink under **Agency** column. The award report for the selected agency is displayed.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY AGENCY

For Fiscal Year 2009

Back

Agency	Agency ID	HOC	Agency Type	Appl ID	Grant Type	Requested	Recommended	Awarded	Difference
ACCESS LIVING OF METROPOLITAN CHICAGO	82063	HOC 2 - Atlanta	LHCA	0421-119	COMP	$ 45,000.00	$ 0.00	$ 45,000.00	0.00
			TOTAL		1	$ 45,000.00	$ 0.00	$ 45,000.00	$ 0.00

Print Export Save Back

Figure 316.C. PM – Reports: Awards Report by Agency: for One Selected Agency

5. To search for a particular agency or multiple agencies, click the **Agency Search** button at the bottom of the *Awards Report by Agency* page. The *Awards Report by Agency: Agency Search* page appears.

6. In Agency Search page, key in search criteria and click the **Search** button. For example, key in „ADVANC" to Agency Name field and click the **Search** button (see Figure 316.D.). A list of agencies that contain „ADVANC" in their agency name are displayed (see Figure 316.E.). Notice that in Figure 250, the Awards Report is drilled down to agency level. It lists all the grant types available for the fiscal year you are working on, and displays data of the grant type(s) that is/are applicable to each agency in the list. For the grant type(s) the agency didn't apply, zero dollar amount is shown.

Awards Report by Agency for FY 2010 - Agency Search
HQ

Search for Agency ID and Name using the criteria below.	
Agency ID	
Application ID	-
Agency Name	advanc
Agency List	Select Agency
Grant Applicant Type	☐ INTERMEDIARY ☐ LHCA ☐ MSO ☐ SHFA
Grant Type	☐ COMP ☐ HECM ☐ LDRC ☐ FLMF ☐ TRNG ☐ MMSA

Search Clear Cancel

Figure 316.D. PM – Reports: Awards Report by Agency: Agency Search for Agency Name 'ADVANC'

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY AGENCY

For Fiscal Year 2009

Back

Agency	Agency ID	HOC	Agency Type	Appl ID	Grant Type	Requested	Recommended	Awarded	Difference
PHILADELPHIA COUNCIL FOR COMMUNITY ADVANCEMENT	80072	HOC 1 - Philadelphia	LHCA	0321-092	COMP	$ 75,000.00	$ 0.00	$ 37,480.00	- 37,520.00
				0322-008	HECM	$ 5,000.00	$ 0.00	$ 5,000.00	0.00
			TOTAL		2	$ 80,000.00	$ 0.00	$ 42,480.00	$- 37,520.00

Print Export Save Back

Figure 316.E. PM – Reports: Awards Report by Agency: Result of Agency Search for Agency Name 'ADVANC'

9.6.2.6 *Awards Report by Office*

This report lists agencies that are awarded a grant and listed in respective of their assigned HUD office.

1. From the top navigation menu, under **Reports** sub-menu, click **Awards Report by Office** hyperlink, the *Awards Report by Office for Fiscal Year 20XX appears.*

AWARDS REPORT BY OFFICE
For Fiscal Year 2009

Appl. ID	Agency Name	Requested	Recommended	Awarded
0011-001	CATHOLIC CHARITIES USA	$2,147,090.28	$2,147,090.28	$1,057,385.00
0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO	$2,499,995.00	$2,499,995.00	$1,499,193.00
0011-003	MON VALLEY INITIATIVE	$855,000.00	$855,000.00	$855,000.00
0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION	$2,700,000.00	$2,700,000.00	$1,436,078.00
0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.	$1,431,926.00	$1,431,926.00	$1,246,732.00
0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS	$1,113,528.00	$1,113,528.00	$931,154.00
0011-007	NEIGHBORHOOD REINVESTMENT CORPORATION	$2,700,000.00	$2,700,000.00	$1,120,501.00
0011-008	NATIONAL COUNCIL OF LA RAZA	$2,700,000.00	$2,700,000.00	$1,120,501.00
0011-009	HOUSING PARTNERSHIP NETWORK	$2,675,123.00	$2,675,123.00	$1,751,655.00
0011-010	NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC	$1,200,000.00	$1,200,000.00	$552,462.00
0011-011	THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC.	$2,346,655.00	$300,000.00	$300,000.00
0011-012	WEST TENNESSEE LEGAL SERVICES, INCORPORATED	$2,700,000.00	$2,700,000.00	$1,120,501.00
0011-013	NATIONAL URBAN LEAGUE	$2,700,000.00	$2,700,000.00	$1,246,732.00
0011-014	HOMEFREE - U S A	$1,995,000.00	$1,995,000.00	$1,120,501.00
0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE	$2,700,000.00	$2,700,000.00	$1,183,615.00
0011-016	ACORN HOUSING CORPORATION	$2,700,000.00	$2,700,000.00	$1,625,424.00
0011-017	NACA (NEIGHBORHOOD ASSISTANCE CORPORATION OF AMERICA)	$2,700,000.00	$2,700,000.00	$1,246,732.00
0011-018	NUEVA ESPERANZA	$1,927,498.00	$300,000.00	$300,000.00
0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE	$1,300,000.00	$300,000.00	$300,000.00
0011-020	MISSION OF PEACE	$1,600,000.00	$1,600,000.00	$868,039.00
0011-021	NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	$2,700,000.00	$2,700,000.00	$1,562,309.00
0011-022	CLEARPOINT FINANCIAL SOLUTIONS, INC.	$2,700,000.00	$2,700,000.00	$615,577.00
0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION	$1,215,966.00	$1,215,966.00	$994,270.00
0011-024	MONEY MANAGEMENT INTERNATIONAL INC.	$2,700,000.00	$2,700,000.00	$931,154.00
0011-025	NATIONAL COUNCIL ON THE AGING (NCOA)	$1,467,213.00	$1,467,213.00	$741,808.00
	Intermediary (COMP) Totals:	$53,474,994.28	$48,800,841.28	$25,727,323.00
0941-002	WASHINGTON STATE HOUSING FINANCE COMMISSION	$470,000.00	$470,000.00	$136,881.00
	Santa Ana (SHFA - COMP) Totals:	$773,695.00	$237,896.46	$200,245.00
0943-001	WASHINGTON STATE HOUSING FINANCE COMMISSION	$30,000.00	$29,999.80	$30,000.00
	Santa Ana (SHFA - LDRC) Totals:	$30,000.00	$29,999.80	$30,000.00
	Grand Totals:	$119,845,892.40	$62,626,873.28	$62,850,000.00

Print Export

Figure 317. PM – Reports: Awards Report by Office

9.6.2.7 *Awards Report by State*

This report groups all agencies that are awarded a grant in respective to their State they are located in.

1. From the top navigation menu, under **Reports** sub-menu, click **Awards Report by State** hyperlink, the *Awards Report by State for Fiscal Year 20XX* appears.

AWARDS REPORT BY STATE
For Fiscal Year 2009

City/State	Agency Name(Application ID)	Awarded
Auburn, AL	ALABAMA COUNCIL ON HUMAN RELATIONS, INC (0421-011)	$30,000.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0421-007)	$39,228.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0423-039)	$9,314.00
Birmingham, AL	JEFFERSON COUNTY HOUSING AUTHORITY (0421-008)	$26,992.00
Decatur, AL	COMMUNITY ACTION PARTNERSHIP OF NORTH ALABAMA, INC. (0421-004)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0421-002)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0422-001)	$47,671.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0423-001)	$7,745.00
Huntsville, AL	COMMUNITY ACTION PARTNERSHIP, HUNTSVILLE/MADISON & LIMESTONE COUNTIES, INC (0421-006)	$20,000.00
Huntsville, AL	FAMILY SERVICES CENTER, INC. (0421-001)	$51,750.00
Mobile, AL	MOBILE HOUSING BOARD (0421-003)	$53,500.00
Mobile, AL	MOBILE HOUSING BOARD (0422-008)	$10,000.00
Mobile, AL	MOBILE HOUSING BOARD (0423-037)	$7,000.00
Troy, AL	ORGANIZED COMMUNITY ACTION PROGRAM, INC (0421-009)	$30,488.00
Tuscaloosa, AL	COMMUNITY SERVICE PROGRAMS OF WEST ALABAMA, INC. (0421-005)	$40,976.00
	State Total:	$446,128.00
Casper, WY	INTERFAITH OF NATRONA COUNTY, INCORPORATED (0821-070)	$20,000.00
Casper, WY	WYOMING HOUSING NETWORK, INC. (0821-071)	$51,464.00
	State Total:	$71,464.00
	Grand Total:	$62,850,000.00

Print Export

Select a State Go

Figure 318.A. PM – Reports: Awards Report by State

2. To search for agency/agencies locate in a state, select the specific state from the **Select a State** dropdown at the bottom of the page, and click **Go** button. A list of agency/agencies awarded in the selected state is displayed.

AWARDS REPORT BY STATE (AL)
For Fiscal Year 2009

City/State	Agency Name(Application ID)	Awarded
Auburn, AL	ALABAMA COUNCIL ON HUMAN RELATIONS, INC (0421-011)	$30,000.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0421-007)	$39,228.00
Birmingham, AL	JEFFERSON COUNTY COMMITTEE FOR ECONOMIC OPPORTUNITY (0423-039)	$9,314.00
Birmingham, AL	JEFFERSON COUNTY HOUSING AUTHORITY (0421-008)	$26,992.00
Decatur, AL	COMMUNITY ACTION PARTNERSHIP OF NORTH ALABAMA, INC. (0421-004)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0421-002)	$35,732.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0422-001)	$47,671.00
Greensboro, AL	HALE EMPOWERMENT AND REVITALIZATION ORGANIZATION (HERO) (0423-001)	$7,745.00
Huntsville, AL	COMMUNITY ACTION PARTNERSHIP, HUNTSVILLE/MADISON & LIMESTONE COUNTIES, INC (0421-006)	$20,000.00
Huntsville, AL	FAMILY SERVICES CENTER, INC. (0421-001)	$51,750.00
Mobile, AL	MOBILE HOUSING BOARD (0421-003)	$53,500.00
Mobile, AL	MOBILE HOUSING BOARD (0422-008)	$10,000.00
Mobile, AL	MOBILE HOUSING BOARD (0423-037)	$7,000.00
Troy, AL	ORGANIZED COMMUNITY ACTION PROGRAM, INC (0421-009)	$30,488.00
Tuscaloosa, AL	COMMUNITY SERVICE PROGRAMS OF WEST ALABAMA, INC. (0421-005)	$40,976.00
	State Total:	$446,128.00
	Grand Total:	$446,128.00

Print Export

AL - Alabama Go

Figure 318.B. PM – Reports: Awards Report by State – Result Page of State Search

9.6.2.8 *Funding Report by Filter*

This report lists agencies that are awarded a grant and listed in respective of their assigned HUD office.

1. From the top navigation menu, under **Reports** sub-menu, click the **Funding Report by Filter** hyperlink, the *Funding Report Search for Fiscal Year 20XX appears.*

Note: The search screen will allow you to narrow down your results based on the following criteria:

- Agency ID
- HOC Office
- Agency Name
- Agency Type
- Counseling Services
- City
- State
- Zip Code

2. Once you have entered your criteria click the **Search** button to retrieve your results, the **Clear** button to erase the information already type in, or **Cancel** to return to Awards Report by Agency.

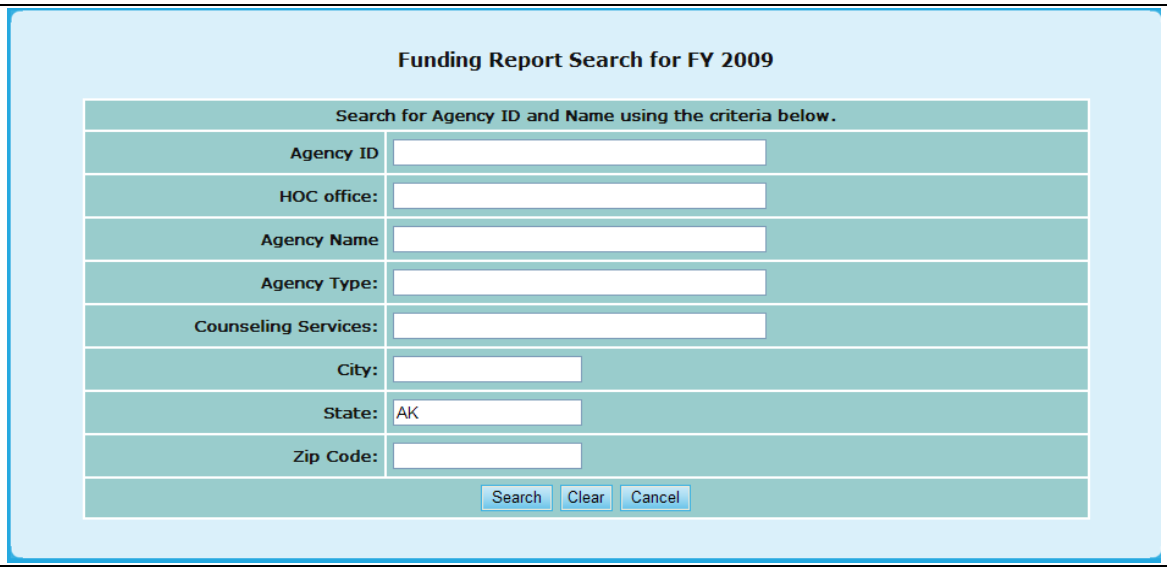


Figure 319. PM – Reports: Funding Report by Filter – Search

3. From this screen you will also be able to view this information in Excel form, by clicking the **Excel Format** hyperlink, or return back to the search function, but clicking **Search Again**.

FUNDING REPORT SEARCH FOR FISCAL YEAR 2009

Search Criteria: • State: AK

5 Record(s) Found

Excel Format

Agency ID	Agency Name	Agency type	Total Awarded	Total Funding			Grant Type	City/State
				Admin. Allocation	Indirect Cost	Allocation		
80206	ALASKA COMMUNITY DEVELOPMENT CORPORATION	Sub Grantee	$0.00	$0.00	$0.00	$22,276.00	INTERMEDIARY - COMP	PALMER - AK
80207	NEIGHBORWORKS ANCHORAGE FORMERLY ANCHORAGE NEIGHBORHOOD HOUSING SERVICES	Sub Grantee	$0.00	$0.00	$0.00	$11,409.09	INTERMEDIARY - COMP	Anchorage - AK
80208	CCCS OF ALASKA	LHCA	$0.00	$0.00	$0.00	$3,416.67	INTERMEDIARY - LDRC	Anchorage - AK
80208	CCCS OF ALASKA	LHCA	$0.00	$0.00	$0.00	$23,603.44	INTERMEDIARY - COMP	Anchorage - AK
81107	FAIRBANKS NEIGHBORHOOD HOUSING SERVICES, INC	Sub Grantee	$0.00	$0.00	$0.00	$11,409.09	INTERMEDIARY - COMP	Fairbanks - AK
		Total:	$0.00	$0.00	$0.00	$72,114.29		

SEARCH AGAIN

Figure 320. PM – Reports: Funding Report by Filter – Results

9.6.2.9 *Reviewers Final Report*

1. From the top navigation menu, under **Reports** sub-menu, click the **Reviewers Final Report** hyperlink, the Select a Grant Application for Fiscal Year 20XX appears.

2. This will prompt you to a list of Grant Applications arranged by Agency. To view an Agency report, click the hyperlink for that Agency under the **Agency Name** column.

Select a Grant Application for FY 2009

Instructions: Click on the Agency Name that you wish to generate the report.

Agency ID	Application ID	Agency Name (Application ID)
80750	0011-001	CATHOLIC CHARITIES USA
82359	0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO
80084	0011-003	MON VALLEY INITIATIVE
84081	0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION
81504	0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.
84539	0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS
80989	0011-009	HOUSING PARTNERSHIP NETWORK
81639	0011-013	NATIONAL URBAN LEAGUE
84538	0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0011-016	ACORN HOUSING CORPORATION
84546	0011-018	NUEVA ESPERANZA
82507	0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE
81276	0011-020	MISSION OF PEACE
82559	0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION
84538	0012-002	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0013-006	ACORN HOUSING CORPORATION
80753	0014-007	ACORN HOUSING CORPORATION
80961	0321-002	YWCA DELAWARE
80219	0321-003	UNIVERSITY LEGAL SERVICES
80570	0321-004	NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC
84173	0321-005	CHRISTIAN ACTIVITIES COUNCIL
84654	0321-006	OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.
84534	0321-007	MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS
82095	0321-012	BERKSHIRE COUNTY REGIONAL HOUSING AUTHORITY-H

Figure 321.A. PM – Reports: Reviewers Final Report

Note: Provided below is an example of a Final Reviewer Report.

Under each Factor, there are six places for comments based on the following criteria:

- Primary R. Strength
- Reviewers Strength
- Final Primary Reviewer Strength

- Primary R. Weakness
- Reviewers Weakness
- Final Primary Reviewer Weakness

Primary Reviewer Final Comment - Chairman Reports

Instructions: + –

Agency ID:	82456		
Agency Name:	HRS	**Application ID:**	0321-030
Grant Category:	LHCA	**Grant Type:**	COMP
Reviewer:	Maryanne Daniel (Prim. Rvwr)		
Reviewer(s):	Tom Hardy David Gallian		

Rating Factor	Score	Bonus Points	Max Points	Max Bonus Points	Other Scores	
1. Capacity of the Applicant and Relevant Organizational Staff	27	0	30	2	**TH** 0	**DG** 26
1a. RF1-2a: Average Combined Housing Counseling Experience of Project Director and Staff	6		6		0	6
1b. RF1-2b: Specialized Training Received for all Counselors and Staff	5		5		0	3
1c. RF1-3a: Grantee Requirements	2		3		0	1
1d. RF1-3b: HUD 9902-Filed Electronically in a timely manner	1		2		0	0
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?	2		2		0	3
1f. RF1-3d: Performance Reviews	5		5		0	0
1g. RF1-3e: Housing Counseling System (HCS)	2		2		0	0
1h. RF1-4a: Performance Evaluation	0		1		0	0
1i. RF1-4b: Goals/Results	4		4		0	0

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

2. Need/Extent of the Problem	4	0	5		**TH** 0	**DG** 4
2a. RF2-1: Needs Data	3		3		0	6
2b. RF2-2: Departmental Policy Priorities	1		2		0	3

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

3. Soundness of Approach/Scope of Housing Counseling Services	37	0	45		**TH** 0	**DG** 39
3a. RF3-1a: Average Number of Hours per Client/per Counseling Type	1		2		0	6
3b. RF3-1b: Types of Counseling	4		4		0	3
3c. RF3-1c: Group vs One-on-One	0		1		0	1
3d. RF3-1d: Marketing and Outreach	1		1		0	0
3e. RF3-2a: Cost Per Client	6		6		0	3
3f. RF3-2b: Capacity	1		1		0	0

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

4. Leveraging Resources	10	0	10		**TH** 0	**DG** 10

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

5. Achieving Results and Program Evaluation	10	0	10		**TH** 0	**DG** 10
5a. RF5-1a: Outputs/Services	3		3		0	6
5b. RF5-1b: Outcomes	3		3		0	3
5c. RF5-1c: Logic Model Projections	3		3		0	1
5d. RF5-1d: Evaluation Tools	1		1		0	0

Primary R. Strength: + –
Reviewers Strength: + –
Final Primary Reviewer Strength: + –

Primary R. Weakness: + –
Reviewers Weakness: + –
Final Primary Reviewer Weakness: + –

Total	88	0	100	2	**TH** 0	**DG** 89

Print

Figure 321.B. PM – Reports: Reviewers Final Report Result

Note: In order to maximize or minimize these comments either select the + –. Provided below is an example of the comments boxes maximized in order to read the comments by those who reviewed this agency‟s request.

Primary R. Strength: + –

2 bilingual counselors on staff; no performanc review conducted last year. Director has more than 8 yrs of experience. Most of the counselors have certifications.

Reviewers Strength: + –

this rating factor was well organized and easy to read. applicant addressed most of the questions.

Final Primary Reviewer Strength: + –

Primary R. Weakness: + –

Lost point for timeliness of 9902

Figure 321.C. PM – Reports: Reviewers Final Report Result – Strengths and Weaknesses

Note: If a primary reviewer has not reviewed a specific application, you will see the following message at the top of a report.

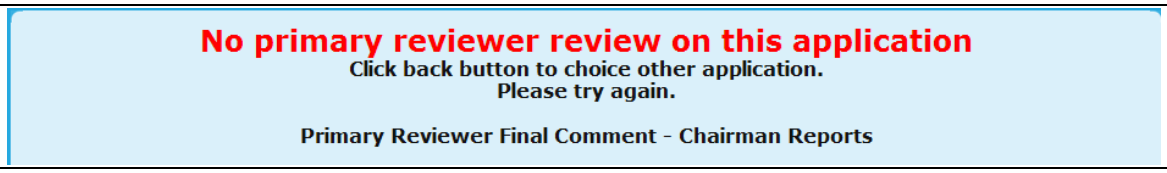


Figure 321.D. OM – Reports: Reviewers Final Report Result – No Review Alert

9.6.2.10 *Reviewers Report*

1. From the top navigation menu, under **Reports** sub-menu, click **Reviewers Report** hyperlink, following prompt appears. If **OK** button is clicked, the Strength and Weakness comments will be included in the report. If **Cancel** button is clicked, the Strength and Weakness comments will not be included in the report.

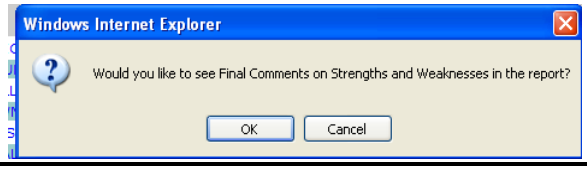
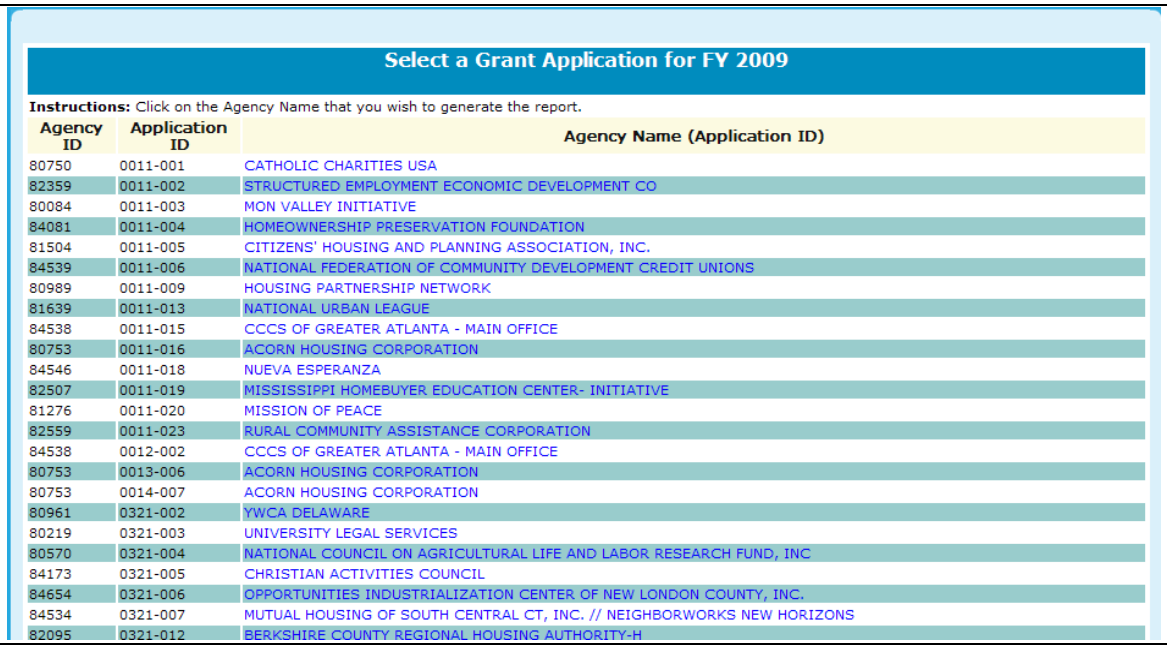


Figure 322. PM – Reports: Reviewers Report – Whether to Show Strengths and Weaknesses in the Report Prompt

2. Upon selecting Ok or Cancel, you will be prompted to the Select a Grant Application for FY 20XX screen. From here, like in Final Reviewers Report, you have the ability to choose a report based on an Agency.



Select a Grant Application for FY 2009

Instructions: Click on the Agency Name that you wish to generate the report.

Agency ID	Application ID	Agency Name (Application ID)
80750	0011-001	CATHOLIC CHARITIES USA
82359	0011-002	STRUCTURED EMPLOYMENT ECONOMIC DEVELOPMENT CO
80084	0011-003	MON VALLEY INITIATIVE
84081	0011-004	HOMEOWNERSHIP PRESERVATION FOUNDATION
81504	0011-005	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.
84539	0011-006	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS
80989	0011-009	HOUSING PARTNERSHIP NETWORK
81639	0011-013	NATIONAL URBAN LEAGUE
84538	0011-015	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0011-016	ACORN HOUSING CORPORATION
84546	0011-018	NUEVA ESPERANZA
82507	0011-019	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE
81276	0011-020	MISSION OF PEACE
82559	0011-023	RURAL COMMUNITY ASSISTANCE CORPORATION
84538	0012-002	CCCS OF GREATER ATLANTA - MAIN OFFICE
80753	0013-006	ACORN HOUSING CORPORATION
80753	0014-007	ACORN HOUSING CORPORATION
80961	0321-002	YWCA DELAWARE
80219	0321-003	UNIVERSITY LEGAL SERVICES
80570	0321-004	NATIONAL COUNCIL ON AGRICULTURAL LIFE AND LABOR RESEARCH FUND, INC
84173	0321-005	CHRISTIAN ACTIVITIES COUNCIL
84654	0321-006	OPPORTUNITIES INDUSTRIALIZATION CENTER OF NEW LONDON COUNTY, INC.
84534	0321-007	MUTUAL HOUSING OF SOUTH CENTRAL CT, INC. // NEIGHBORWORKS NEW HORIZONS
82095	0321-012	BERKSHIRE COUNTY REGIONAL HOUSING AUTHORITY-H

Figure 323.A. PM – Reports: Reviewers Report – Select a Grant Application for FY 20XX

3. Once you have selected the agency to review you will be prompted to the Reviewer Scoring and Comment Summary Report. In order to view a specific Reviewers report, you will have to choose a name that has a hyperlink attached. This can be found in the Other Reviewers row.

Reviewer Scoring and Comment Summary Report

Agency ID:	80753		
Agency Name:	ACORN HOUSING CORPORATION	**Application ID:**	0011-016
Grant Category:	INTERMEDIARY	**Grant Type:**	COMP
Reviewer:	Ronald Bedoya		
Other Reviewer(s):	Brian Siebenlist (Prim. Rvwr) Terri Ames Jennifer Smith		

Rating Factor	Scored	Bonus Points	Max Points	Max Bonus Points
1. Capacity of the Applicant and Relevant Organizational Staff	28		30	
1a. RF1-2a: Average Combined Housing Counseling Experience of Project Director and Staff	5		6	
1b. RF1-2b: Specialized Training Received for all Counselors and Staff	5		5	
1c. RF1-3a: Grantee Requirements	3		3	
1d. RF1-3b: HUD 9902-Filed Electronically in a timely manner	2		2	
1e. RF1-3c: Grant Funds Fully Expended? What % of Award was Expended?	2		2	
1f. RF1-3d: Performance Reviews	4		5	
1g. RF1-3e: Housing Counseling System (HCS)	2		2	
1h. RF1-4a: Performance Evaluation	1		1	
1i. RF1-4b: Goals/Results	4		4	
Strength: + −				
Weakness: + −				
2. Need/Extent of the Problem	5		5	
2a. RF2-1: Needs Data	3		3	
2b. RF2-2: Departmental Policy Priorities	2		2	
Strength: + −				
Weakness: + −				
3. Soundness of Approach/Scope of Housing Counseling Services	44		45	
3a. RF3-1a: Average Number of Hours per Client/per Counseling Type	2		2	
3b. RF3-1b: Types of Counseling	4		4	
3c. RF3-1c: Group vs One-on-One	1		1	
3d. RF3-1d: Marketing and Outreach	1		1	
3e. RF3-2a: Cost Per Client	6		6	
3f. RF3-2b: Capacity	1		1	
3g. RF3-2c: Training Expenditures	2		2	
3h. RF3-2d: Percentage of Grant Funding Passed Through	1		1	
3i. RF3-2e: Geographic Coverage, # of States	0		1	
3j. RF3-3a: Types of Counseling and Eduction Services	5		5	
3k. RF3-3b: Average Number of Hours per Client/per Counseling Type	2		2	
3l. RF3-3c: Sufficient Staff to Carry Out Proposed Activities & Number of Clients	0		1	
3m. RF3-3d: Training	1		1	
3n. RF3-3e: Plans to Effectively Serve and/or Communicate with Persons with Limited English and Disabilities	1		1	
3o. RF3-3f: Budget Explanation	1		1	
3p. RF3-4a: Cost per Client	4		4	
3q. RF3-4b: Projected Performance - Group Education and One-on-One Counseling	1		2	
3r. RF3-4c: Marketing and Outreach	2		2	
3s. RF3-5a: Partnerships and Efforts to Coordinate Proposed Activities	2		2	
3t. RF3-5b: Complementing Other HUD Programs	2		2	
3u. RF3-5c: Plans to Avoid Conflicts of Interest	2		2	
3v. RF3-6a: Percent of Grant Funding to be Passed Through	2		3	
3w. RF3-6b: Capacity	1		1	
Strength: + −				
Weakness: + −				
4. Leveraging Resources	10		10	
Strength: + −				
Weakness: + −				
5. Achieving Results and Program Evaluation	9		10	
5a. RF5-1a: Outputs/Services	2		3	
5b. RF5-1b: Outcomes	3		3	
5c. RF5-1c: Logic Model Projections	3		3	
5d. RF5-1d: Evaluation Tools	1		1	
Strength: + −				
Weakness: + −				
Total	96		100	0

Print

Figure 323.B. PM – Reports: Reviewers Report – Reviewer Scoring and Comment Summary Report

9.6.2.11 *Application Number Reference*

This report breaks down the Office ID, Office Name, and whether or not a table exists for this application.

1. From the top navigation menu, under **Reports** sub-menu, click the **Application Number Reference** hyperlink, the Grant Application Number Reference – for Fiscal Year 20XX appears.

Grant Application Number Reference - for FY 2009

Instructions: This page allows for viewing of which offices have or have not been created from the Funding Appropriation page.

Office ID	Office Name	Exists In Table
0011	Intermediary (COMP)	YES
0013	Intermediary (LDRC)	YES
0014	Intermediary (FLMF)	YES
0012	Intermediary (HECM)	YES
0015	Intermediary (TRNG)	YES
0321	Philadelphia (LHCA - COMP)	YES
0323	Philadelphia (LHCA - LDRC)	YES
0322	Philadelphia (LHCA - HECM)	YES
0331	Philadelphia (MSO - COMP)	YES
0333	Philadelphia (MSO - LDRC)	YES
0332	Philadelphia (MSO - HECM)	YES
0341	Philadelphia (SHFA - COMP)	YES
0343	Philadelphia (SHFA - LDRC)	YES
0421	Atlanta (LHCA - COMP)	YES
0423	Atlanta (LHCA - LDRC)	YES
0422	Atlanta (LHCA - HECM)	YES
0431	Atlanta (MSO - COMP)	YES
0433	Atlanta (MSO - LDRC)	YES
0432	Atlanta (MSO - HECM)	YES
0441	Atlanta (SHFA - COMP)	YES
0443	Atlanta (SHFA - LDRC)	YES
0821	Denver (LHCA - COMP)	YES
0823	Denver (LHCA - LDRC)	YES
0822	Denver (LHCA - HECM)	YES
0831	Denver (MSO - COMP)	YES
0833	Denver (MSO - LDRC)	YES
0832	Denver (MSO - HECM)	YES

Figure 324. PM – Reports: Application Number Reference

9.7 Export

This section creates required fixed reports at the conclusion of the grant processing period. This section produces reports using the Export functions to share with various offices and departments to execute the grant awards. You can perform a variety of tasks as needed, which include viewing and/or exporting following HCS data:

- Agency Award/No Award Letters– official announcement given to each agency, providing the results of their grant applications.
- Agency Name Check Review – Need Definition
- Application Data– complete data in spreadsheet to allow unique analysis.
- Congressional Report Data– Fixed report sent to HUD congressional liaison office.
- Draw Down Report Processing– Function to record agencies" draw down activities.
- Funding Aggregate Report– Complete comprehensive aggregate spreadsheet.
- HUD-1044– Award document each agency must sign.
- IRS Delinquent Data– Fixed report sent to HUD Grant office for IRS
- List of Awardees– Text report listing agencies in the format to be published in the Federal Register.
- Procurement Accounting Data– Spreadsheet given to CFO.
- Public Affairs Report– Fixed report sent to Public Affairs office announcing awarded agencies.

9.7.1 Agency Award/No Award Letter

This is the official announcement to each application stating the results of the grant processing. These letters use the merge function. Care should be taken to ensure the letters are updated before executing the mail merge.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Agency Award/No Award Letters Data** hyperlink, the Agency Award/No Award Letters Data for 20XX options selection screen appears.

2. Select what type of data to search for, **Agency Award Letters Data, Agency No Award Letters Data**, or **Both**, and then Click **OK** button**.**

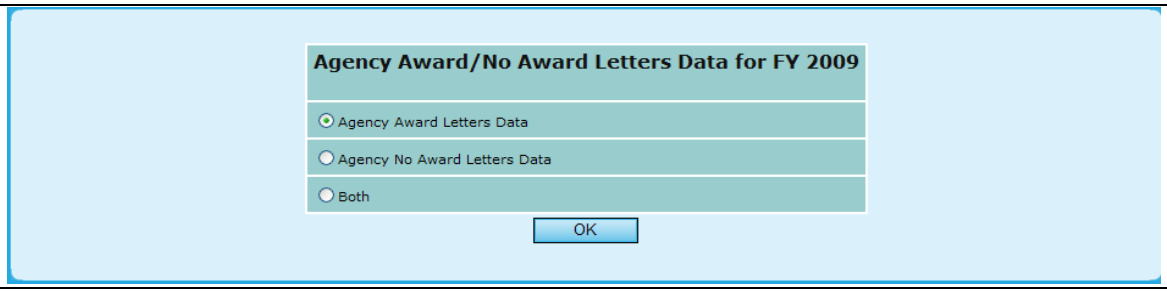


Figure 325.A. PM – Export: Agency Award/No Award Letters Data for FY 20XX

3. The Agency Award/No Award Letters Data Filter screen appears. Set the desired data filter and click the **OK** button.

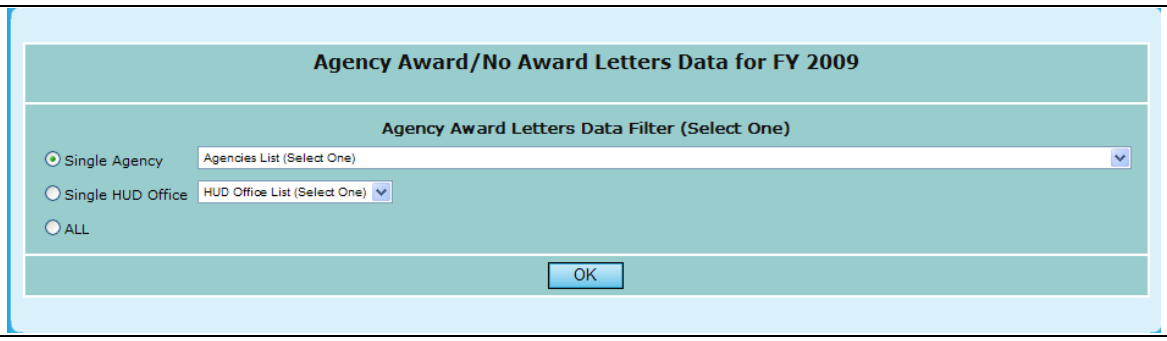


Figure 325.B. PM – Export: Agency Award/No Award Letters Data – Data Filter Screen

4. Once your parameters have been set, and you click **OK**, you will be presented with the Download for your search criteria.

5. Click **AWDDATA.DOC** data file hyperlink. The File Download window appears.

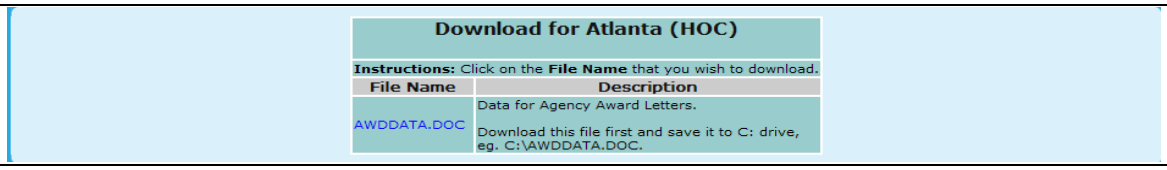


Figure 326.A. PM – Export: Agency Award/No Award Letters – Download Screen

6. To open the document, click the **Open** button. To save it, Click the **Save** button. To cancel file download, Click the **Cancel** button. When the **Open** button is clicked, following data page is displayed in HCS main display area. The data is listed by agency name.

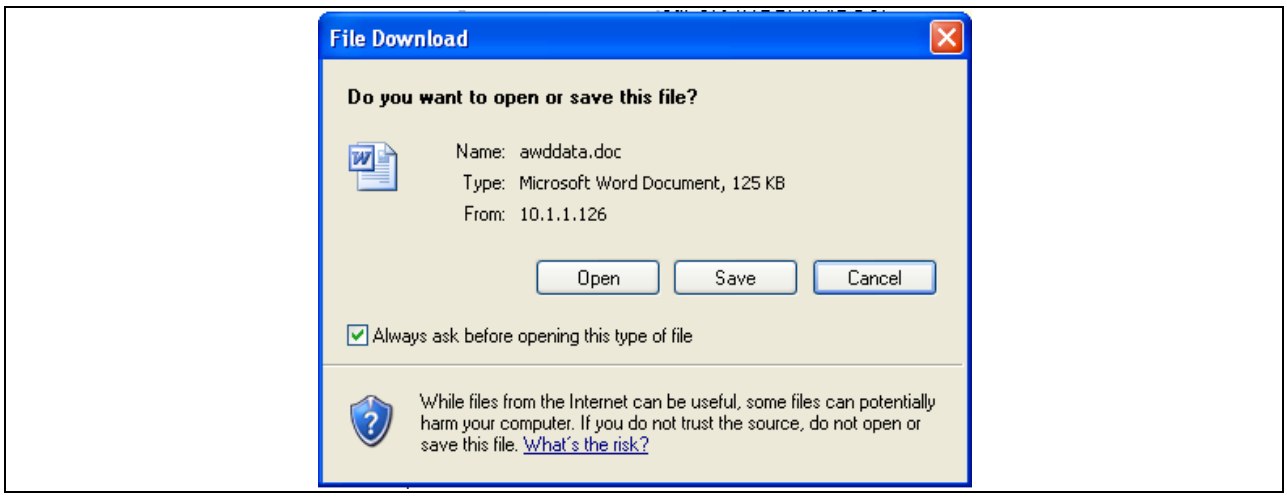
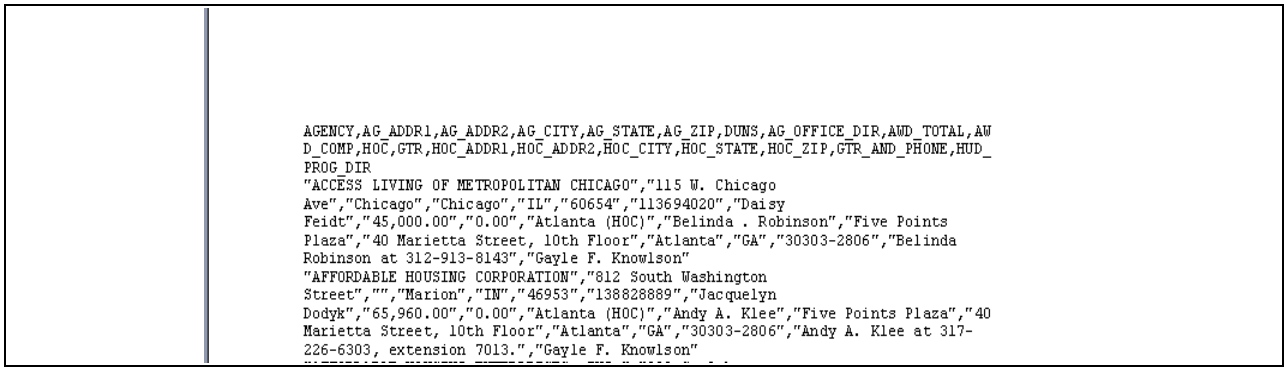


Figure 326.B. PM – Export: Agency Award/No Award Letters Data – File Download Window

7. Following the data downloading, your information will be provided in .doc form.



```
AGENCY,AG_ADDR1,AG_ADDR2,AG_CITY,AG_STATE,AG_ZIP,DUNS,AG_OFFICE_DIR,AWD_TOTAL,AW
D_COMP,HOC,GTR,HOC_ADDR1,HOC_ADDR2,HOC_CITY,HOC_STATE,HOC_ZIP,GTR_AND_PHONE,HUD_
PROG_DIR
"ACCESS LIVING OF METROPOLITAN CHICAGO","115 W. Chicago
Ave","Chicago","Chicago","IL","60654","113694020","Daisy
Feidt","45,000.00","0.00","Atlanta (HOC)","Belinda . Robinson","Five Points
Plaza","40 Marietta Street, 10th Floor","Atlanta","GA","30303-2806","Belinda
Robinson at 312-913-8143","Gayle F. Knowlson"
"AFFORDABLE HOUSING CORPORATION","812 South Washington
Street","","Marion","IN","46953","138828889","Jacquelyn
Dodyk","65,960.00","0.00","Atlanta (HOC)","Andy A. Klee","Five Points Plaza","40
Marietta Street, 10th Floor","Atlanta","GA","30303-2806","Andy A. Klee at 317-
226-6303, extension 7013.","Gayle F. Knowlson"
```

Figure 326.C. PM – Export: Agency Award/No Award Letters Data

9.7.2 Agency Name Check Review

This is the official announcement to each application stating the results of the grant processing. These letters use the merge function. Care should be taken to ensure the letters are updated before executing the mail merge.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Agency Name Check Review** hyperlink, this report appears in Excel format allowing you to view the following information:
   - Agency Name
   - Address
   - City
   - State
   - Zip Code
   - TIN Number
   - DUNS Number
   - HUD Office
   - Contact Name
   - Contact Phone Number

A1 AGENCIES NAME CHECK REVIEW REPORTING

	A	B	C	D	E	F	
1	AGENCIES NAME CHECK REVIEW REPORTING						
2	Single Family Housing Counseling Grant Awards FY 2009						
3	Agency	Address 1	Address 2	City	State	Zip	TIN
4	ABYSSINIAN DEVELOPMENT CORPORATION	4 W. 125 Street		New York	NY	10027	13-3
5	ACCESS LIVING OF METROPOLITAN CHICAGO	115 W. Chicago Ave	Chicago	Chicago	IL	60654	36-3
6	ACCOMACK-NORTHAMPTON PLANNING DISTRICT COMMISSSION	23372 Front Street	P.O. Box 417	Accomac	VA	23301	54-0
7	ACORN HOUSING CORPORATION	846 N Broad St, 2nd floor		Philadelphia	PA	19130-2234	72-1
8	ADAMS COUNTY HOUSING AUTHORITY	7190 Colorado Blvd 6th Fl		Commerce City	CO	80022-1812	84-0
9	ADMINISTRATION OF RESOURCES AND CHOICES	3003 S Country Club Suite 207		Tucson	AZ	85713	86-0
10	AFFORDABLE HOMES OF MILLVILLE ECUMENICAL	400 East Main St.	P.O. Box 241	Millville	NJ	08332	22-3
11	AFFORDABLE HOUSING ALLIANCE OF NEW JERSEY	59 Broad Street		Eatontown	NJ	07724	22-3
12	AFFORDABLE HOUSING CORPORATION	812 South Washington Street		Marion	IN	46953	35-1
13	AFFORDABLE HOUSING ENTERPRISES, INC.	333 S. 9th Street		Griffin	GA	30224	58-2
14	AFFORDABLE HOUSING, EDUCATION AND DEVELOPMENT, INC. (AHEAD)	161 Main St.		Littleton	NH	03561	22-3
15	ALABAMA COUNCIL ON HUMAN RELATIONS, INC	319 W Glenn Ave	PO Box 409	Auburn	AL	36831-0409	63-0
16	ALBANY COUNTY RURAL HOUSING ALLIANCE, INC.	24 Martin Road	PO Box 407	Voorheesville	NY	12186	14-1
17	ALLEGANY COUNTY COMMUNITY OPPORTUNITIES AND RURAL DEVELOPMENT (ACCORD) CORP.	84 Schuyler Street	P.O. Box 573	Belmont	NY	14813-1051	22-2
18	ALLIED CHURCHES TEACHING SELF-EMPOWERMENT CDC	1445 North 24th Street		Milwaukee	WI	52305-1803	39-1
	ANOKA COUNTY COMMUNITY ACTION						

agency_chk_rpt

Figure 327. PM – Export: Agency Name Check Review

9.7.3 Application Data

This report provides a spreadsheet of all relevant information for the grant processing period. It is useful for creating unique reports, validating information and sharing information.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Application Data** hyperlink, and the following spreadsheet appears.

Note: Figures 328.A. through 328.J. are continuation of Figure 272 horizontally.

	A	B	C	D	E
1	Agency ID	Agency	Fiscal Year	Address 1	Address 2
2	80003	RURAL HOUSING COUNSELING AGENCY	2006	200 Fair St	
3	80008	FAITHFUL HOUSING COUNSELING AGNECY	2006	21 New St.	

(data abbreviated)

394	82441	CENTRAL VERMONT HOUSING COUNSELING AGENCY	2006	105 US Route 302 - Berlin	

(data abbreviated)

Figure 328.A. PM – Export: Applications Data – Part 1

	F	G	H	I	J	K	L	M	N	O
1	City	State	Zip	TIN	DUNS #	Phone	Email	Application ID	Project #	Agency Type Name
2	Kingston	NY	12401-	22-2222222	122990980	845-333-0029-103	mallen@rhca.org	0398-123	HC060398123	LHCA
3	Binghamton	NY	13903-	16-1809090	089877879	607-790-0902	ssmith@aol.com	0398-128	HC060398128	LHCA

(data abbreviated)

394	Barre	VT	05641-	03-0123456	021343551	802-723-0934	msmith@cvhca.org	0398-063	HC060398063	LHCA

(data abbreviated)

Figure 328.B. PM – Export: Applications Data – Part 2

	P	Q	R	S	T	U	V	W	X	Y
1	Grant Type	Office Director	Office CEO/President	Delinquent	Faith Base	Colonias	Migrant Workers	HUD Office	Requested Amt.	Recommend Amt.
2	Comprehensive	Kevin O'Connor		N				Philadelphia (HOC)	56671	33014.6
3	Comprehensive	Laura Rhinehart		N				Philadelphia (HOC)	20000	20000

(data abbreviated)

394	Comprehensive	Mary Smith		N				Philadelphia (HOC)	50000	30411.68

(data abbreviated)

Figure 328.C. PM – Export: Applications Data – Part 3

Z	AA	AB	AC	AD	AE	AF	AG
Awarded Amt.	User ID of Award	User Name of Award	Award Date & Time	Affiliate of	Affiliate Name	Counseling Types	Primary Reviewer
33015	H00468	Donald Gillett	Aug 18 2006 8:08AM			RC PRL PPC PC MDM LM HOM HIR HEP HEC FHA DFC	H03232
20000	H00468	Donald Gillett	Aug 15 2006 2:35PM			RC PRL PPC PC MDM HIR HEP HEC DRC DFC	H03232

(data abbreviated)

394	30412	H00468	Donald Gillett	Aug 18 2006 7:45AM			PPC PC HOM HEC DRC DFC	H02102

(data abbreviated)

Figure 328.D. PM – Export: Applications Data – Part 4

	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ
1	Primary Rvwr Score	Reviewer 1	Rev 1 Score	Reviewer 2	Rev 2 Score	Reviewer 3	Rev 3 Score	Avg Score	Final Score	Client Projection that will be served
2	88	H02646	95	H06763	91			45.5	95	
3	96	H02646	94	H06763	96			48	95	

(data abbreviated)

394	87	H02134	90	H02122	87			43.5	91	858

(data abbreviated)

Figure 328.E. PM – Export: Applications Data – Part 5

	AR	AS	AT	AU
1	Client Projection (Committed) that will be served	Client Projection of Pre-Purchase Counseling that will purchase home	Client Projection (Committed) of Pre-Purchase Counseling that will purchase home	Client Projection of Pre-Purchase Counseling that are working and will become mortgage ready
2				
3				

(data abbreviated)

394		50		0

(data abbreviated)

Figure 328.F. PM – Export: Applications Data – Part 6

	AV	AW	AX	AY
1	Client Projection (Committed) of Pre-Purchase Counseling that are working and will become mortgage ready	Client Projection of Pre-Purchase Counseling that will not purchase a home	Client Projection (Committed) of Pre-Purchase Counseling that will not purchase a home	Client Projection of Default Counseling successfully avoiding foreclosure
2				
3				
(data abbreviated)				
394		0		0

(data abbreviated)

Figure 328.G. PM – Export: Applications Data – Part 7

	AZ	BA	BB	BC
1	Client Projection (Committed) of Default Counseling successfully avoiding foreclosure	Client Projection of Rental Counseling	Client Projection (Committed) of Rental Counseling	Client Projection of Predatory Lending Counsel that have their mortgage modify, refinanced, or other to avoid foreclosure
2				
3				
(data abbreviated)				
394		0		

(data abbreviated)

Figure 328.H. PM – Export: Applications Data – Part 8

	BD	BE	BF	BG	BH	BI	BJ	BK	BL	BM	BN	BO	BP	BQ	BR	BS	BT	BU	BV
1	Client Projection (Committed) of Predatory Lending Counsel that have their mortgage modify, refinanced, or other to avoid foreclosure	Zip 1	Zip 2	Zip 3	Zip 4	Zip 5	Zip 6	Zip 7	Zip 8	Zip 9	Zip 10	Zip 11	Zip 12	Zip 13	Zip 14	Zip 15	Zip 16	Zip 17	Zip 18
2		00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000
3		00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000
(data abbreviated)																			
394		05031	05032	05033	05036	05038	05039	05045	05051	05060	05065	05068	05072	05075	05077	05086	05442	05464	05602

(data abbreviated)

Figure 328.I. PM – Export: Applications Data – Part 9

	BW	BX	BY	BZ	CA	CB	CC	CD	CE	CF	CG	CH	CI	CJ	CK	CL	CM	CN	CO	CP	CQ	CR
1	Zip 19	Zip 20	Zip 21	Zip 22	Zip 23	Zip 24	Zip 25	Zip 26	Zip 27	Zip 28	Zip 29	Zip 30	Zip 31	Zip 32	Zip 33	Zip 34	Zip 35	Zip 36	Zip 37	Zip 38	Zip 39	Zip 40
2	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000
3	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000	00000
(data abbreviated)																						
394	05602	05633	05641	05647	05648	05649	05651	05653	05655	05656	05660	05661	05663	05667	05669	05672	05676	05678	05747	05748	05767	05772

Figure 328.J. PM – Export: Applications Data – Part 10

9.7.4 Congressional Report Data

Report formatted by and given to HUD‟s Congressional liaison office to forward to Congress.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Congressional Report Data** hyperlink, and the following spreadsheet appears.

2. The following screen shows Congressional Report Data export spreadsheet. It displays agency information for those who received grant award(s), and their award(s) amount. If an agency received more than one award of different grant types, each award is displayed in one entry. The data is listed by State, and then by Recipient/Agency name.

	A	B	C	D	E	F	G	H	I	J	K	L
1	State	Recipient	Address	City	County	ZipCode	GrantType	GrantNumber	Amount	District	ContactName	ContactPhone
2	AK	HOUSING COUNSELING SERVICE OF ALASKA	208 E 4th Ave	Anchorage		99501	Comprehensive	0998-004	$55,162		Sharon Camarata	()
3	AL	ALABAMA HOUSING COUNSELING AGENCY	200 W Glenn Ave, PO Box 202	Auburn		36831	Comprehensive	0498-037	$23,400		Mishelle Kwang	()
4	AL	NORTHWEST ALABAMA HOUSING COUNSELING AGENCY	295 Thompson St	Florence		35630	Comprehensive	0498-120	$30,000		Ammy Deppe	()

(data abbreviated)

Figure 329. PM – Export: Congressional Report Data

9.7.5 Draw Down Report Processing

Draw down processing is a tool to track and review agencies‟ spending of their grant award. When an agency submits their quarterly grant report, data should be entered into this section to record their results.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Draw Down Report Processing** hyperlink, the *Draw Down Reporting HUD Summary* screen appears, with the Agency Search function located in the second half of the screen.

2. To list agencies in a HUD Office, click the **HUD Office** name hyperlink under Office column.

Draw Down Reporting
HUD Summary
Draw Down Year : 2010

Office	Awarded Agencies	Total Grant	LOCCS Disbursements $(%)	Voucher Requests Q1 $(%)	Mid-Term $(%)	Q3 $(%)	Final $(%)	LOCCS Balance $(%)
Headquarters SF-HUD	25	$ 39,018,272.00	$ 0.00 (0.00%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 39,018,272.00 (100.00%)
Philadelphia (HOC)	179	$ 8,628,011.00	$ 0.00 (0.00%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 8,628,011.00 (100.00%)
Atlanta (HOC)	153	$ 7,014,736.00	$ 9,973.42 (0.14%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 7,004,762.58 (99.86%)
Denver (HOC)	101	$ 5,235,293.00	$ 0.00 (0.00%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 5,235,293.00 (100.00%)
Santa Ana (HOC)	41	$ 2,953,688.00	$ 0.00 (0.00%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 0.00 (0%)	$ 2,953,688.00 (100.00%)
All Offices	499	$ 62,850,000.00	$ 9,973.42 (0.02%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 62,840,026.58 (99.98%)

Print Export

Agency Search

Search Field: --Select-- | Is | Compare Value | Add Another Criteria

Search Reset

Figure 330. PM – Export: Draw Down Reporting – HUD Summary

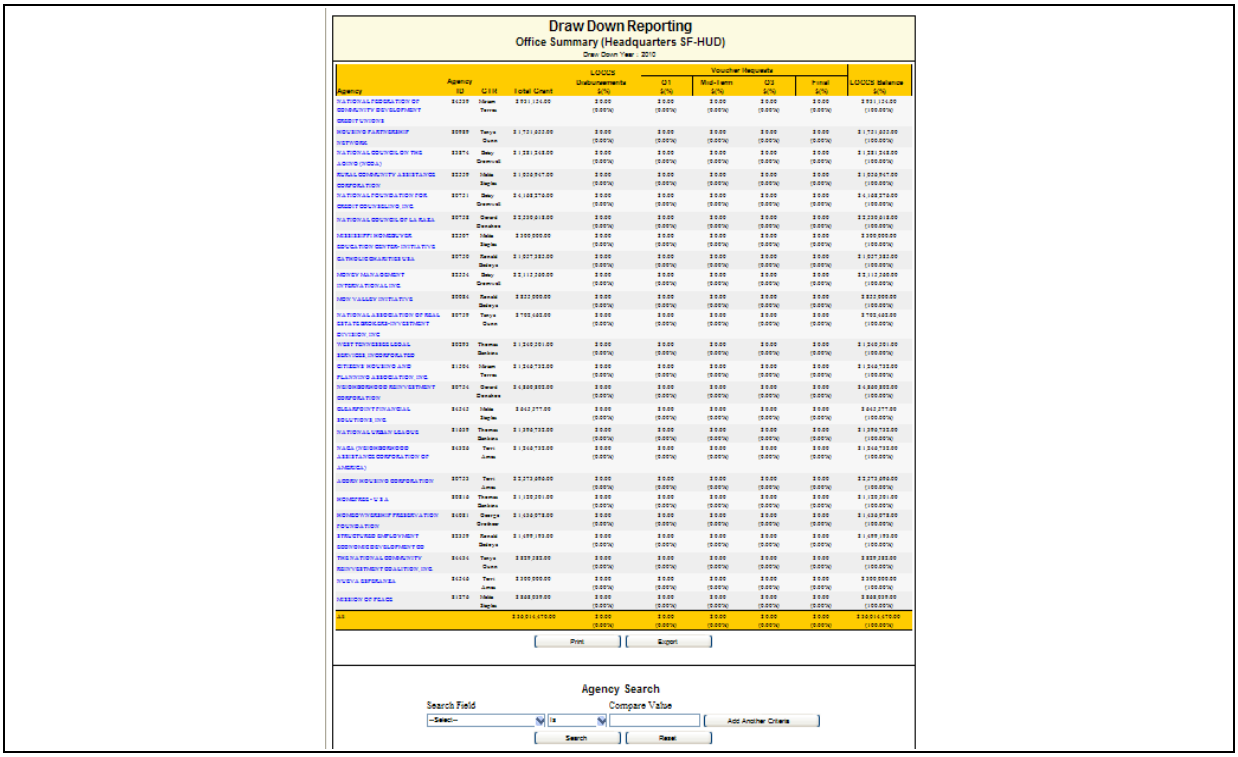


Figure 331. PM – Export: Draw Down Reporting – HUD Office HQ Summary

3. To export this data, Click the **Export** button**.** The *File Download* screen appears.

4. To open the document, Click the **Open** button. The Draw Down Reporting Excel file appears (see below). To save the file, Click the **Save** button**.** To cancel file download, Click the **Cancel** button.

Note: To perform a search, skip ahead to step 5.

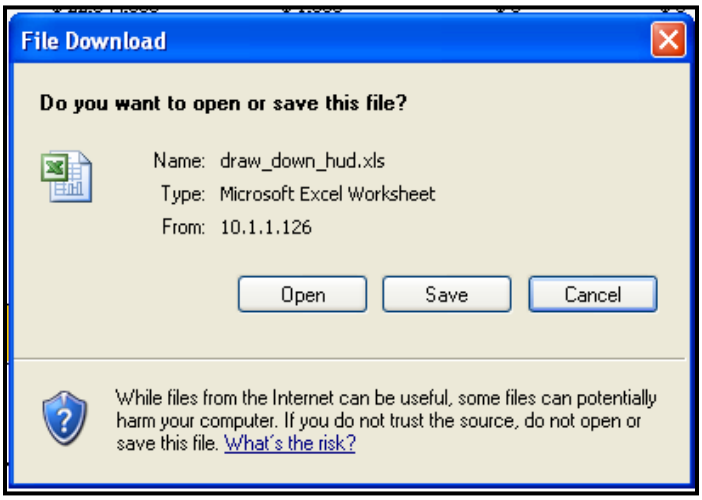


Figure 332.A. PM – Export: Draw Down Report Processing – File Download

	A	B	C	D	E	F	G	H	I	J
1	Draw Down Reporting									
2	Office Summary (Headquarters SF-HUD)									
3	Draw Down Year : 2010									
4							Voucher Requests			
5	Agency	Agency ID	GTR	Total Grant	LOCCS Disbursements	Q1	Mid-Term	Q3	Final	LOCCS Balance
6	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS	84539	Miriam Torres	$931,154.00	$0.00	$0.00	$0.00	$0.00	$0.00	$931,154.00
7	HOUSING PARTNERSHIP NETWORK	80989	Tanya Gunn	$1,751,655.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,751,655.00
8	NATIONAL COUNCIL ON THE AGING (NCOA)	83874	Betsy Cromwell	$1,281,248.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,281,248.00
9	RURAL COMMUNITY ASSISTANCE CORPORATION	82559	Melita Staples	$1,056,947.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,056,947.00
10	NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	80751	Betsy Cromwell	$4,168,276.00	$0.00	$0.00	$0.00	$0.00	$0.00	$4,168,276.00
11	NATIONAL COUNCIL OF LA RAZA	80758	Gerard Donahoe	$2,530,618.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,530,618.00
12	MISSISSIPPI HOMEBUYER EDUCATION CENTER- INITIATIVE	82507	Melita Staples	$300,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$300,000.00
13	CATHOLIC CHARITIES USA	80750	Ronald Bedoya	$1,057,385.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,057,385.00
14	MONEY MANAGEMENT INTERNATIONAL INC.	82554	Betsy Cromwell	$2,115,560.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,115,560.00
15	MON VALLEY INITIATIVE	80084	Ronald Bedoya	$855,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$855,000.00
16	NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC	80759	Tanya Gunn	$702,462.00	$0.00	$0.00	$0.00	$0.00	$0.00	$702,462.00
17	WEST TENNESSEE LEGAL SERVICES, INCORPORATED	80293	Thomas Bankins	$1,240,501.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,240,501.00
18	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.	81504	Miriam Torres	$1,246,732.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,246,732.00
19	NEIGHBORHOOD REINVESTMENT CORPORATION	80754	Gerard Donahoe	$4,860,802.00	$0.00	$0.00	$0.00	$0.00	$0.00	$4,860,802.00

Figure 332.B. PM – Export: Draw Down Reporting Export example

5. To search for agencies, complete your search criteria and Click the **Search** button**.** If no results are found, the follow screen appears.

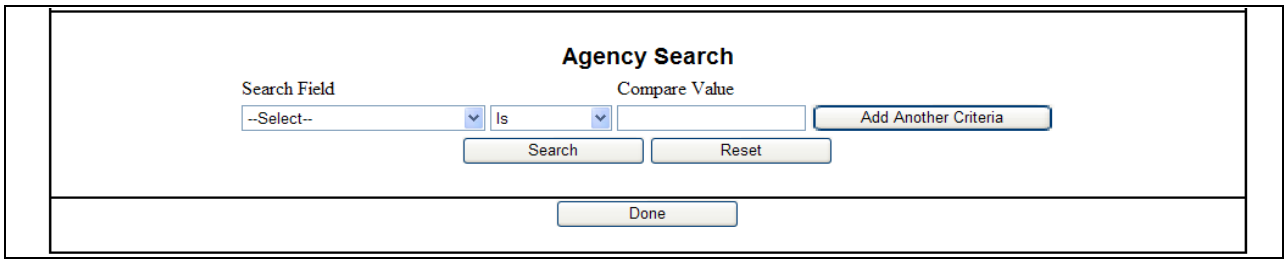


Figure 333.A. PM – Export: Draw Down Reporting Agency Search

6. If the system does find results matching your criteria for Agency Search, the following screen appears.

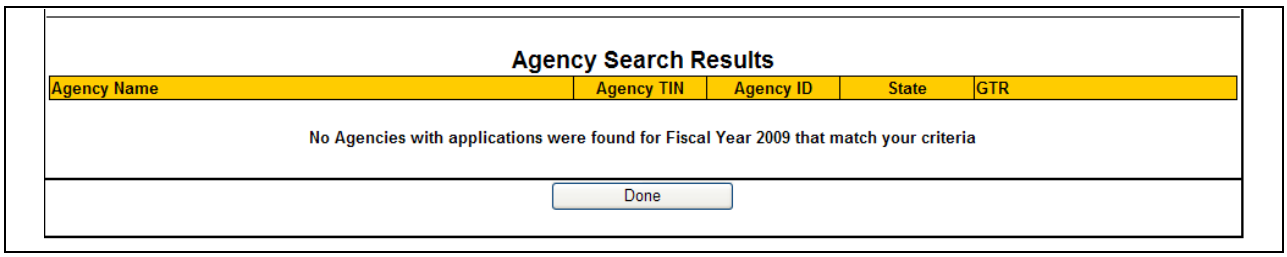


Figure 333.B. PM – Export: Draw Down Reporting Agency Search Results (No results)

7. To view an agency, Click on a hyperlink in the **Agency Name** column. The *Draw Down Reporting Agency Summary* screen appears.

Agency Search Results

Agency Name	Agency TIN	Agency ID	State	GTR
ABYSSINIAN DEVELOPMENT CORPORATION	13-3552154	83751	NY	Juan Bautista
ACCESS LIVING OF METROPOLITAN CHICAGO	36-3310774	82063	IL	Belinda Robinson
ACCOMACK-NORTHAMPTON PLANNING DISTRICT COMMISSSION	54-0886952	83967	VA	Virginia Holman
ACORN HOUSING CORPORATION	72-1048321	80753	PA	Terri Ames
ACTION FOR BOSTON COMMUNITY DEVELOPMENT, INC.	04-2304133	84865	MA	Chris Cline
ADAMS COUNTY HOUSING AUTHORITY	84-0701701	80209	CO	Ben Detterman
ADMINISTRATION OF RESOURCES AND CHOICES	86-0735999	81052	AZ	Lucille Ochoa
AFFORDABLE HOMES OF MILLVILLE ECUMENICAL	22-3150733	81646	NJ	Annette Panasiuk
AFFORDABLE HOUSING ALLIANCE OF NEW JERSEY	22-3114280	82133	NJ	Stuart Mindes
AFFORDABLE HOUSING CORPORATION	35-1966459	81929	IN	Andy Klee
AFFORDABLE HOUSING ENTERPRISES, INC.	58-2019026	82241	GA	Conni Perteet
AFFORDABLE HOUSING, EDUCATION AND DEVELOPMENT, INC. (AHEAD)	22-3159643	82773	NH	George Bridgeman
ALABAMA COUNCIL ON HUMAN RELATIONS, INC	63-0378133	80576	AL	Debbie Creel
ALBANY COUNTY RURAL HOUSING ALLIANCE, INC.	14-1635645	80029	NY	Glen Stopera
ALLEGANY COUNTY COMMUNITY OPPORTUNITIES AND RURAL DEVELOPMENT (ACCORD) CORP.	22-2218884	83459	NY	Mark Surdi
ALLIANCE CREDIT COUNSELING	56-2196261	84342	NC	William Snelling
ALLIED CHURCHES TEACHING SELF-EMPOWERMENT CDC	39-1837474	84715	WI	Patricia Common
ANOKA COUNTY COMMUNITY ACTION PROGRAM, INC	41-6048575	81092	MN	Anita Olson
APPALACHIAN HOUSING AND REDEVELOPMENT CORPORATION	58-2346048	81266	GA	Conni Perteet

Figure 334.A. PM – Export: Draw Down Report Processing – Agency Search Results (with results)

Note: Provided below is an example of a Draw Down Reporting Agency Summary.

Draw Down Reporting
Agency Summary
(ABYSSINIAN DEVELOPMENT CORPORATION)

Draw Down Fiscal Year: 2010
GTR: Juan Bautista
Address: 4 W. 125 Street
New York, NY 10027
HUD Office: Philadelphia (HOC)
Agency ID: 83751
Agency Type: LHCA
Last Voucher Update:

Narrative Submission
First Quarter:
Mid-Term:
Third Quarter:
Final:
Update

Total Grant	$ 21,748.00
Administrative Cost	($ 0.00)
Indirect Cost	($ 0.00)
Total Draw Down Requested	($ 0.00)
Balance	$ 21,748.00

[New Voucher Request][Edit LOCCS Disbursements][Edit Admin Allocation/Indirect Costs]

Grant Type	Application Number	Grant	LOCCS Disbursements $(%)	Voucher Requests Q1 $(%)	Mid-Term $(%)	Q3 $(%)	Final $(%)	LOCCS Balance $(%)
	0321-146	$ 21,748.00	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 21,748.00 (100.00%)
Sub-Total		$ 21,748.00	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 0.00 (0.00%)	$ 21,748.00 (100.00%)

Print Export

Done

Figure 334.B. PM – Export: Draw Down Reporting – Agency Summary

8. To make a new voucher request, click **New Voucher Request**. The *New Voucher Request* screen appears.

9. Complete the form and Click the **Save** button to save the request. Click **Cancel** button to cancel it. You will return to the *Draw Down Reporting* screen.

Draw Down Reporting
Voucher Request Entry

Agency Name: ABYSSINIAN DEVELOPMENT CORPORATION
Quarter: --Select--
Grant Type: --Select--
Requested Amount($): 0.00
Voucher Number:
Save | Cancel

Figure 335.A. PM – Export: Draw Down Reporting – Voucher Request Entry

Draw Down Reporting
Agency Summary
(HOUSING COUNSELING SERVICE OF ALASKA)

Draw Down Fiscal Year: 2007
GTR: Sean Robinson
Address: 208 E 4th Ave
Anchorage, AK 99501
HUD Office: Santa Ana (HOC)
Agency ID: 80208
Agency Type: LHCA
Last Voucher Update: 02/20/2007

Narrative Submission
First Quarter:
Mid-Term:
Third Quarter:
Final:
Update

Total Grant	$ 55,162
Administrative Cost	($ 0)
Indirect Cost	($ 0)
Total Draw Down Requested	($ 15,000)
Balance	$ 40,162

[New Voucher Request][Edit LOCCS Disbursements][Edit Admin Allocation/Indirect Costs]

Grant Type	Application Number	Grant	LOCCS Disbursements $(%)	Voucher Requests Q1 $(%)	Mid-Term $(%)	Q3 $(%)	Final $(%)	LOCCS Balance $(%)
Comprehensive	0998-004	$ 55,162	$ 0 (0.00%)	$ 15,000 (27.19%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 55,162 (100.00%)
Sub-Total		$ 55,162	$ 0 (0.00%)	$ 15,000 (27.19%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 55,162 (100.00%)

Print | Export

Comprehensive

Draw Down Request	Voucher Number	Quarter	Date	Action
$ 15,000	2007-001	Q1	02/20/2007	[Edit][Delete]
$ 15,000	*Sub-Total*			

Done

Figure 335.B. PM – Export: Draw Down Reporting – Agency Summary with Voucher Information

10. To edit a LOCCS Disbursement Update, click **Edit LOCCS Disbursements** hyperlink. The *Draw Down Reporting LOCCS Disbursement* screen appears.

11. Edit the current LOCCS disbursement amount in the **Current LOCCS Disbursement Amount** field. Click the **Save** button to save, or **Cancel** button to cancel. You will return to the *Draw Down Reporting Agency Summary* screen.

Draw Down Reporting
LOCCS Disbursements Update

Agency Name: ABYSSINIAN DEVELOPMENT CORPORATION

Grant Type	Previous LOCCS Disbursement Amount	Current LOCCS Disbursement Amount
	$ 0.00	$

Save Cancel

Figure 336.A. PM – Export: Draw Down Reporting LOCCS Disbursements Update

12. To edit the Administrative Allocation/Indirect Costs, click **Edit Admin Allocation/Indirect Costs** hyperlink. The *Draw Down Reporting Grant Application Selection* screen appears.

[New Voucher Request][Edit LOCCS Disbursements][Edit Admin Allocation/Indirect Costs]

Grant Type	Application Number	Grant	LOCCS Disbursements $(%)	Voucher Requests Q1 $(%)	Mid-Term $(%)	Q3 $(%)	Final $(%)	LOCCS Balance $(%)
Comprehensive	0998-004	$ 55,162	$ 10,000 (18.13%)	$ 15,000 (27.19%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 45,162 (81.87%)
Sub-Total		$ 55,162	$ 10,000 (18.13%)	$ 15,000 (27.19%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 0 (0.00%)	$ 45,162 (81.87%)

Print Export

Figure 336.B. PM – Export: Draw Down Reporting – LOCCS Information in Agency Summary Page

13. Click the **Edit** hyperlink in the **Grant Type** entry you wish to input/edit the Administrative Allocation and/or Indirect Costs. The *Sub-Agency Grant Allocation* screen appears.

Draw Down Reporting
Grant Application Selection

Agency Name: ABYSSINIAN DEVELOPMENT CORPORATION

Grant Type	Grant Awarded	
	$ 21,748.00	Edit

Cancel

Figure 337.A. PM – Export: Draw Down Reporting – Grant Application Selection

14. Key in data into Administrative Allocation and Indirect Cost fields, and click the Submit button. The screen is refreshed with data have been saved message. Following is the screen of relevant section.

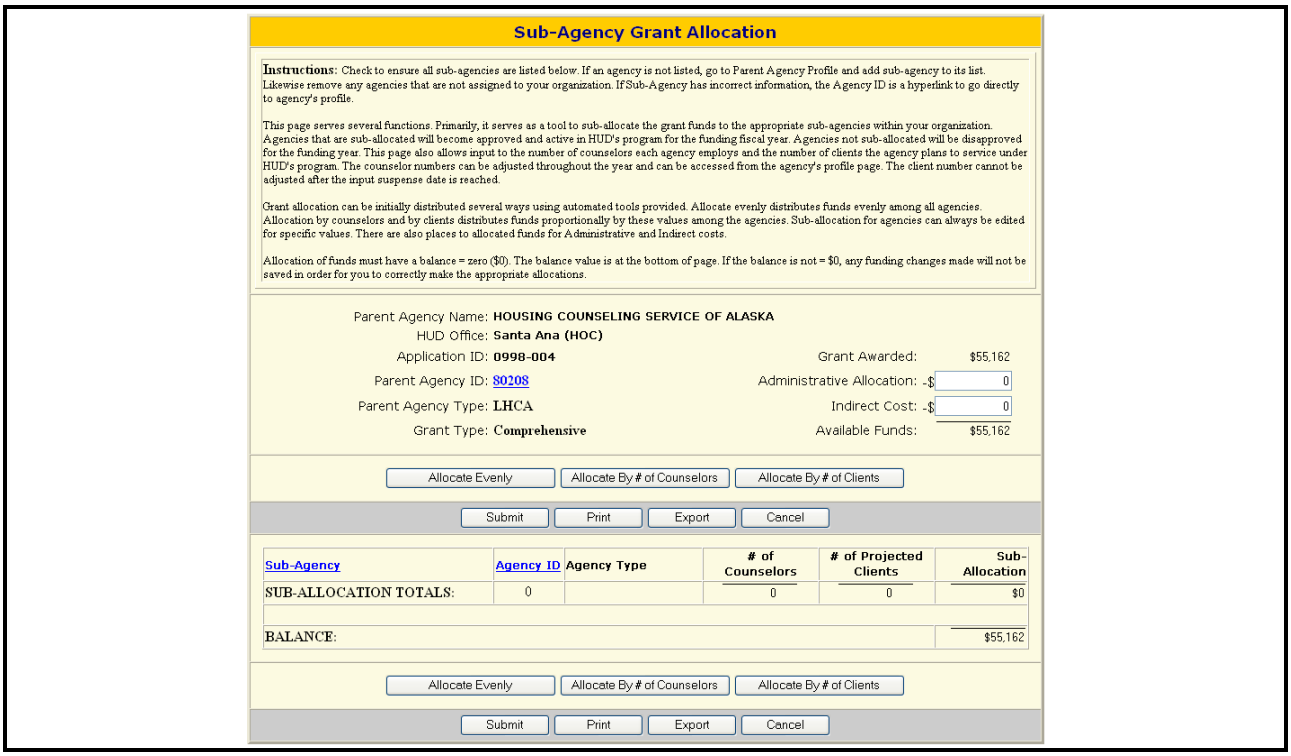


Figure 337.B. PM – Export: Draw Down Reporting – Sub-Agency Grant Allocation Screen

15. Check to ensure all sub-agencies are listed below. If an agency is not listed, go to Parent Agency Profile and add sub-agency to its list. Likewise remove any agencies that are not assigned to your organization. If Sub-Agency has incorrect information, the Agency ID is a hyperlink to go directly to agency's profile.

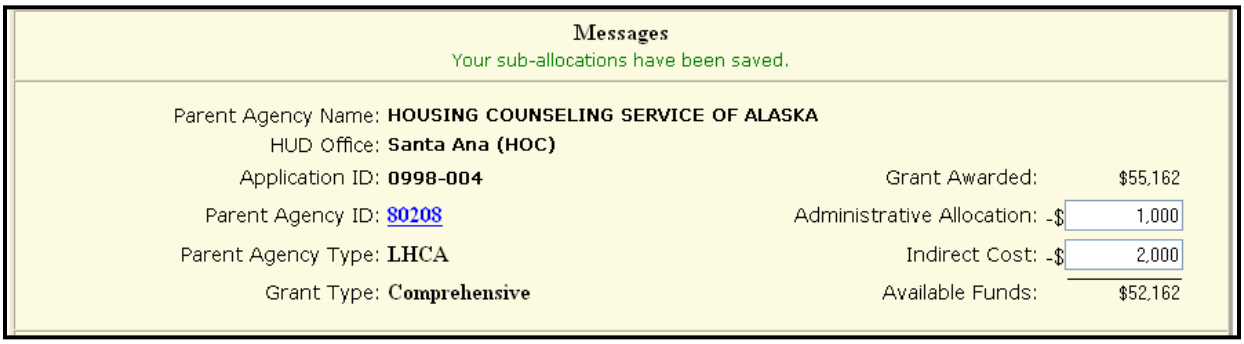


Figure 337.C. PM – Export: Draw Down Reporting – Sub-Agency Grant Allocation Screen – Administrative Allocation and Indirect Cost Input section

9.7.6 Funding Aggregate Report

A complete summary report displaying totals for each category, type and office listed. This is a great snap shot view of the results.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Funding Aggregate Report** hyperlink, the *File Download* screen appears.

2. To open the file, click the **Open** button; the spreadsheet opens in HCS main display area. To save the file, Click the **Save** button. To cancel file download, Click the **Cancel** button.

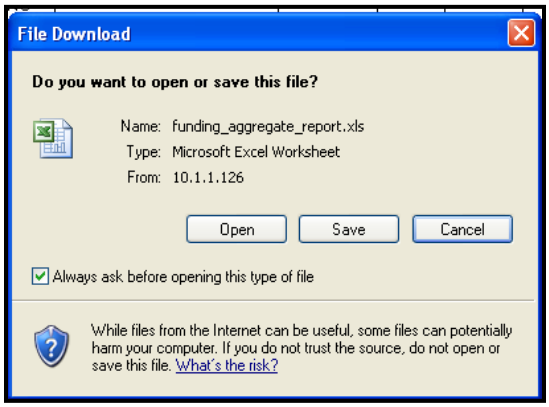


Figure 338.A. PM – Export: Funding Aggregate Report – File Download Window

Note: Following is the report displayed in HCS main display area.

A1 U.S. Department of Housing and Urban Development

U.S. Department of Housing and Urban Development
FY 2010 Housing Counseling Grants
FY 2009 Funds Awarded

Application Type	HUD-Approved Independent Agencies	Grant Request Agencies	Awarded Agencies	Requested Applications	Awarded Applications	NOFA Allocated	Requested	Recommended	Awarded
National/Regional Intermediary									
Intermediary (COMP)		25	25	25	25	$25,727,323.00	$53,474,994.28	$48,800,841.28	$25,727,323.00
Intermediary (HECM)		5	5	5	5	$6,500,000.00	$8,580,390.00	$8,580,390.00	$6,500,000.00
Intermediary (LDRC)		9	9	9	9	$992,677.00	$1,209,220.00	$1,000,000.00	$992,677.00
Intermediary (FLMF)		8	1	8	1	$798,272.00	$6,410,896.00	$1,000,000.00	$798,272.00
Intermediary (TRNG)		3	3	3	3	$5,000,000.00	$8,000,000.00	$0.00	$5,000,000.00
HQ Intermediary Total	23	25	25	50	43	$39,018,272.00	$77,675,500.28	$59,381,231.28	$39,018,272.00
LHCA									
Philadelphia (LHCA - COMP)		201	169	201	169	$17,111,728.00	$15,746,509.33	$0.00	$6,082,506.00
Philadelphia (LHCA - HECM)		18	17	18	17	$1,000,000.00	$331,077.00	$0.00	$281,077.00
Philadelphia (LHCA - LDRC)		50	40	50	40	$904,358.00	$923,396.80	$0.00	$289,322.00
Philadelphia LHCA Total	343	201	169	269	226	$19,016,086.00	$17,000,983.13	$0.00	$6,652,905.00
Atlanta (LHCA - COMP)		174	149	174	149	$0.00	$13,697,823.00	$0.00	$5,899,008.00
Atlanta (LHCA - HECM)		16	13	16	13	$0.00	$452,000.00	$0.00	$322,342.00
Atlanta (LHCA - LDRC)		47	40	47	40	$0.00	$971,721.00	$0.00	$332,743.00
Atlanta LHCA Total	326	174	149	237	202	$0.00	$15,121,544.00	$0.00	$6,554,093.00
Denver (LHCA - COMP)		105	95	105	95	$0.00	$8,751,328.00	$0.00	$3,736,178.00
Denver (LHCA - HECM)		12	12	12	12	$0.00	$230,508.00	$0.00	$197,700.00
Denver (LHCA - LDRC)		20	19	20	19	$0.00	$416,720.00	$0.00	$160,428.00
Denver LHCA Total	224	105	95	137	126	$0.00	$9,398,556.00	$0.00	$4,094,306.00
Santa Ana (LHCA - COMP)		40	37	40	37	$0.00	$4,168,568.61	$0.00	$1,394,036.00
Santa Ana (LHCA - HECM)		8	8	8	8	$0.00	$198,881.00	$0.00	$198,881.00
Santa Ana (LHCA - LDRC)		17	15	17	15	$0.00	$385,102.00	$0.00	$121,865.00

hcgr1810 / Sheet2 / Sheet3

Figure 338.B. PM – Export: Funding Aggregate Report

9.7.7 HUD-1044

This report is the grant award agreement each agency must sign.

This is a form using Microsoft Mail Merge function. Review the 1044 document and enter any common information that will be in all documents created to save time and effort. Unique information will be merge creating individual agency 1044 forms.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **HUD-1044** hyperlink, the *Data Filter* screen appears.

2. Select the proper data filter and click the **OK** button, the *Download* screen appears. If you prefer to create one agency report at a time, select the „Single Agency". To create in mass all reports within a HOC, select the „Single HOC" button.

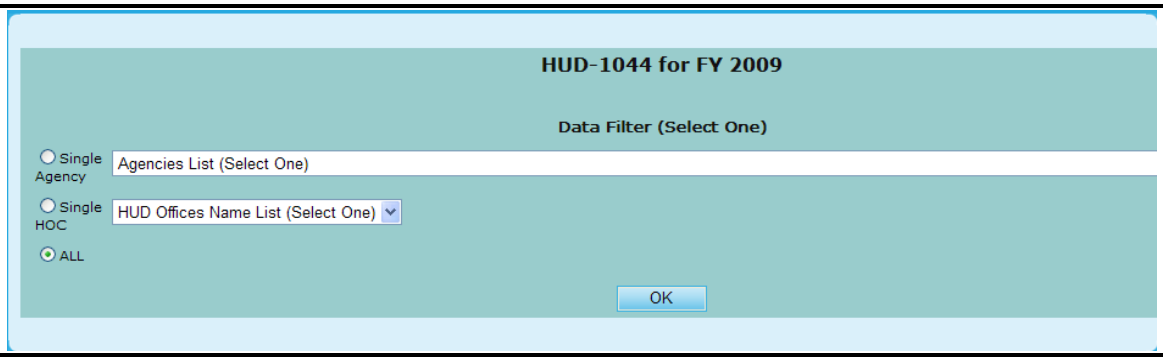
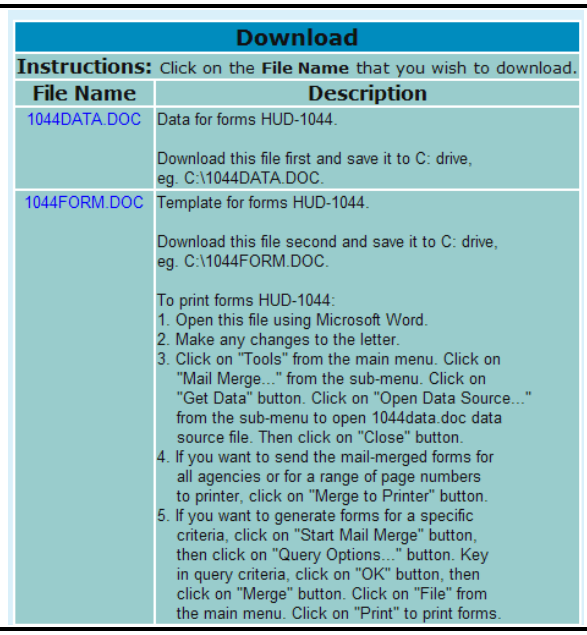


Figure 339. PM – Export: HUD-1044 – Data Filter

3. You can Click the **1044DATA.DOC** hyperlink to download HUD-1044 data to a Microsoft Word file. Or, you can Click the **1044FORM.DOC** hyperlink to download mail merge template of HUD-1044 form to a Microsoft Word file. If you Click the **1044DATA.DOC** hyperlink, following *File Download* screen appears.



Download

Instructions: Click on the **File Name** that you wish to download.

File Name	Description
1044DATA.DOC	Data for forms HUD-1044. Download this file first and save it to C: drive, eg. C:\1044DATA.DOC.
1044FORM.DOC	Template for forms HUD-1044. Download this file second and save it to C: drive, eg. C:\1044FORM.DOC. To print forms HUD-1044: 1. Open this file using Microsoft Word. 2. Make any changes to the letter. 3. Click on "Tools" from the main menu. Click on "Mail Merge..." from the sub-menu. Click on "Get Data" button. Click on "Open Data Source..." from the sub-menu to open 1044data.doc data source file. Then click on "Close" button. 4. If you want to send the mail-merged forms for all agencies or for a range of page numbers to printer, click on "Merge to Printer" button. 5. If you want to generate forms for a specific criteria, click on "Start Mail Merge" button, then click on "Query Options..." button. Key in query criteria, click on "OK" button, then click on "Merge" button. Click on "File" from the main menu. Click on "Print" to print forms.

Figure 340.A. PM – Export: HUD-1044 – Download Screen

4. To open the file, click the **Open** button, the data file appears in a separate window (see the figure below, in which data is ordered by State code, city name, and then by agency name). To save the

file to your hard drive or other device, click the **Save** button. To cancel the file download, click the **Cancel** button.

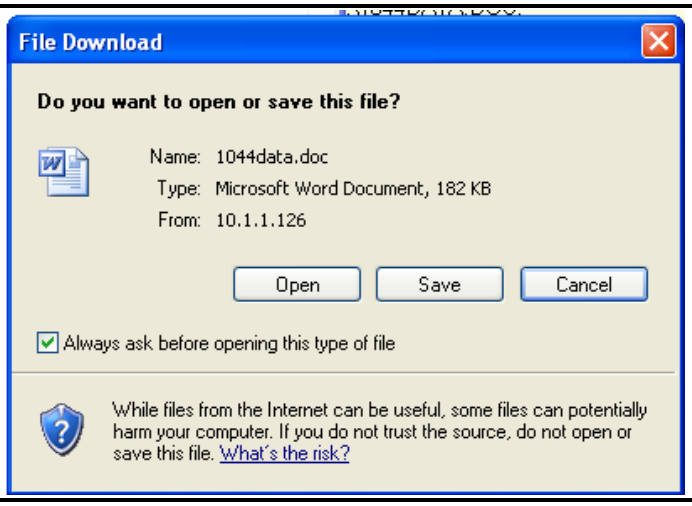
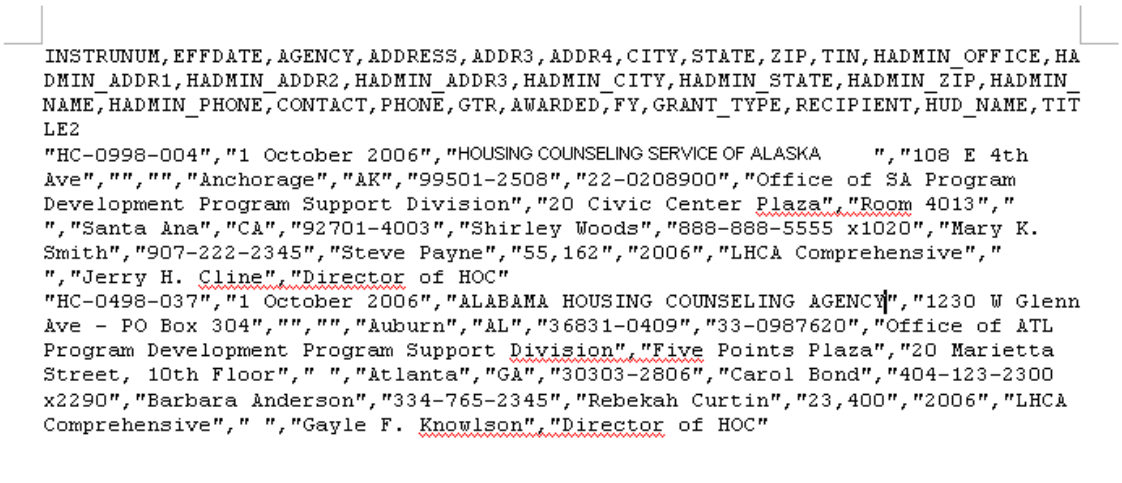


Figure 340.B. PM – Export: HUD-1044 Download – File Download Window

Note: Provided below is an example of the HUD-1044 document.



```
INSTRUNUM,EFFDATE,AGENCY,ADDRESS,ADDR3,ADDR4,CITY,STATE,ZIP,TIN,HADMIN_OFFICE,HA
DMIN_ADDR1,HADMIN_ADDR2,HADMIN_ADDR3,HADMIN_CITY,HADMIN_STATE,HADMIN_ZIP,HADMIN_
NAME,HADMIN_PHONE,CONTACT,PHONE,GTR,AWARDED,FY,GRANT_TYPE,RECIPIENT,HUD_NAME,TIT
LE2
"HC-0998-004","1 October 2006","HOUSING COUNSELING SERVICE OF ALASKA     ","108 E 4th
Ave","","","Anchorage","AK","99501-2508","22-0208900","Office of SA Program
Development Program Support Division","20 Civic Center Plaza","Room 4013","
","Santa Ana","CA","92701-4003","Shirley Woods","888-888-5555 x1020","Mary K.
Smith","907-222-2345","Steve Payne","55,162","2006","LHCA Comprehensive","
","Jerry H. Cline","Director of HOC"
"HC-0498-037","1 October 2006","ALABAMA HOUSING COUNSELING AGENCY","1230 W Glenn
Ave - PO Box 304","","","Auburn","AL","36831-0409","33-0987620","Office of ATL
Program Development Program Support Division","Five Points Plaza","20 Marietta
Street, 10th Floor"," ","Atlanta","GA","30303-2806","Carol Bond","404-123-2300
x2290","Barbara Anderson","334-765-2345","Rebekah Curtin","23,400","2006","LHCA
Comprehensive"," ","Gayle F. Knowlson","Director of HOC"
```

(data abbreviated)

Figure 340.C. PM – Export: HUD-1044 Data File

5. If you select to download the HUD-1044 form template, the HUD-1044 mail merge template screen appears.

Assistance Award/Amendment

U.S. Department of Housing and Urban Development
Office of Administration

1. Assistance Instrument ☐ Cooperative Agreement ☒ Grant	2. Type of Action ☒ Award ☐ Amendment
3. Instrument Number «INSTRUNUM» 4. Amendment Number	5. Effective Date of this Action «EFFDATE» 6. Control Number
7. Name and Address of Recipient «AGENCY» «ADDRESS» «ADDR3» «ADDR4» «CITY», «STATE» «ZIP» TIN NUMBER: «TIN»	8. HUD Administering Office «HADMIN_OFFICE» «HADMIN_ADDR1» «HADMIN_ADDR2» «HADMIN_ADDR3» «HADMIN_CITY», «HADMIN_STATE» «HADMIN_ZIP» 8a. Name of Administrator: «HADMIN_NAME» 8b. Telephone Number: «HADMIN_PHONE»
10. Recipient Project Manager «CONTACT» «PHONE»	9. HUD Government Technical Representative «GTR»
11. Assistance Arrangement ☒ Cost Reimbursement ☐ Cost Sharing ☐ Fixed Price 12. Payment Method ☐ Treasury Check Reimbursement ☐ Advance Check ☒ Automated Clearinghouse	13. HUD Payment Office CFO Accounting Center/HUD PO Box 901013 Fort Worth, TX 76101
14. Assistance Amount	15. HUD Accounting and Appropriation Data
Previous HUD Amount $	15a. Appropriation Number / 15b. Reservation number
HUD Amount this action $«AWARDED»	
Total HUD Amount $«AWARDED»	Amount Previously Obligated $
Recipient Amount $	Obligation by this action $«AWARDED»
Total Instrument Amount $«AWARDED»	Total Obligation $«AWARDED»

16. Description

FY «FY» - HOUSING COUNSELING GRANT VOUCHER UNDER LOCCS BUDGET LINE ITEM 9500.

GRANT TYPE: «GRANT_TYPE»

17. ☒ Recipient is required to sign and return three (3) copies of this document to the HUD Administering Office	18. ☐ Recipient is not required to sign this document.
19. Recipient (By Name) «RECIPIENT»	20. HUD (By Name) «HUD_NAME»
Signature & Title / Date (mm/dd/yyyy)	Signature & Title: «TITLE2» / Date (mm/dd/yyyy)

form HUD-1044 (8/90)
ref. Handbook 2210.17

Figure 340.D. PM – Export: HUD-1044 Form – Mail Merge Template

9.7.8 IRS Delinquent Data

The report formatted by and given to the HUD Grant Office who forwards it to the IRS. Coordinate with the HUD Grant Office to ensure the format is correct and no changes are required.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **IRS Delinquent Data** hyperlink, the *Delinquent Federal Debt Agency List for FY 2006* options selection screen appears.

2. Select to search on either **Agencies that Indicate YES** or **Agencies that Indicate NO**, and then Click the **OK** button. The *File Download* window appears.

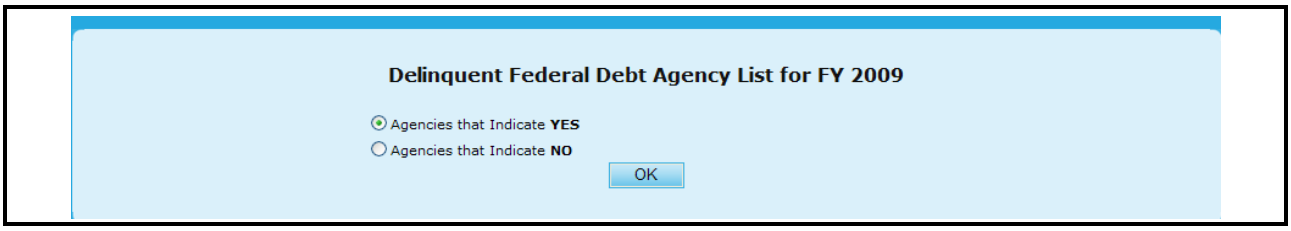


Figure 341. PM – Export: IRS Delinquent Data – Options Selection Screen

3. To open the file, Click the **Open** button; the file is displayed in HCS main display area. To save file, Click the **Save** button. To cancel file download, Click the **Cancel** button**.**

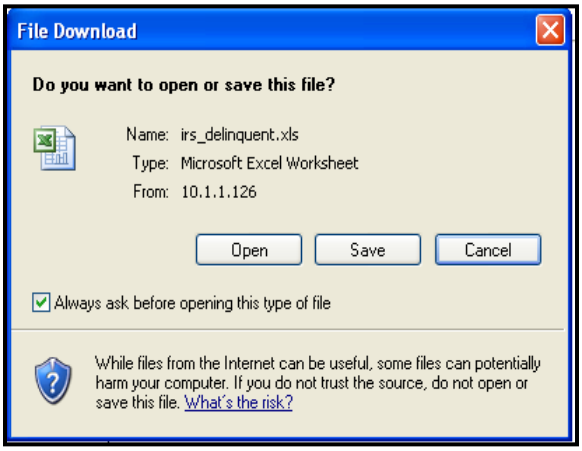


Figure 342.A. PM – Export: IRS Delinquent Data – File Download Window

4. The following screen shows the IRS Delinquent Data export spreadsheet for agency that has delinquent federal debt. It displays agency information for those who received grant award(s), and their total awarded amount. The data is listed by agency name.

	A	B	C	D	E	F	G	H	I	J	K	L
1	FEDERAL DEBT - AGENCIES REPORTING - YES											
2	Single Family Housing Counseling Grant Awards FY 2006											
3	Agency	Address 1	Address 2	City	State	Zip	TIN	DUNS #	HUD Office	Contact Name	Contact Phone	Award Amount
4	AREA COMMITTEE HOUSING COUNSELING AGENCY	200 Main Street		Athens	GA	30603	55-0978790	079898989	Atlanta (HOC)	John Hildreth	706-555-6666-20	$32,017

Figure 342.B. PM – Export: IRS Delinquent Data

5. If there is no data returned for the selection option, following message appears.

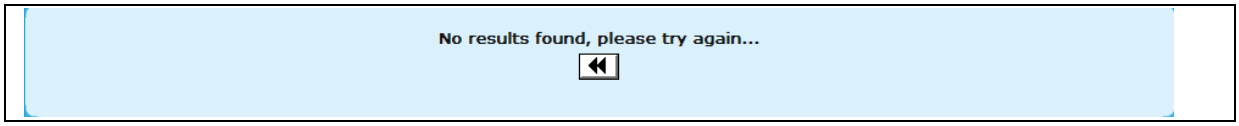


Figure 343. PM – Export: IRS Delinquent Data – No Results Message

9.7.9 List of Awardees

This is a report to be published in the Federal Register announcing awarded agencies.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **List of Awardees** hyperlink, the *Download* screen appears.
2. Click the **REGIDATA.DOC** hyperlink located in the **File Name** column, following *File Download* window appears.

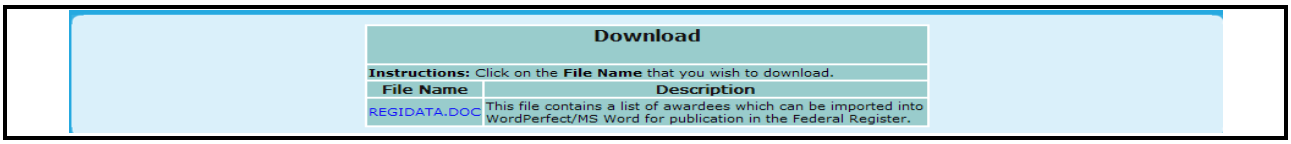


Figure 344. PM – Export: List of Awardees – Download

3. Click **Open** button, the file content is displayed in HCS main display area. Click **Save** button, a *Save As* window appears; follow the direction to save the file to hard drive or other storage device. Click **Cancel** button to cancel file download. . This saved file will be forwarded to appropriate office to have it published in the Federal Register.

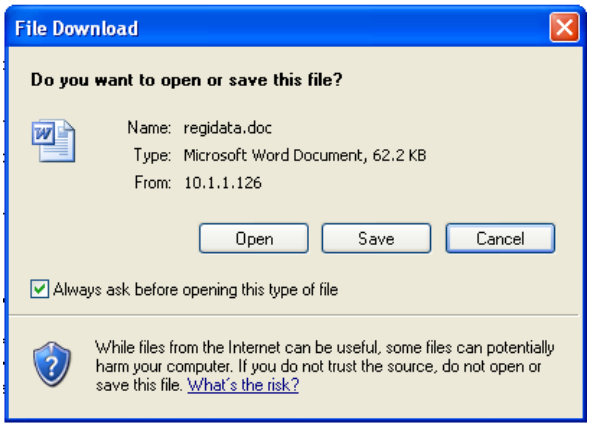


Figure 345.A. PM – Export: List of Awardees -File Download window

4. In the file, data is listed by grant type, grant category, HUD office name, and agency name order. As following figure shows, each data block contains agency name, address, grant type, and awarded grant amount.

```
INTERMEDIARY ORGANIZATIONS (17)

Headquarters SF-HUD

ADVANCED HOUSING COUNSELING CORPORATION
800 N Broad St, 2nd floor
Philadelphia, PA 19130-2234
Grant Type: Comprehensive
Amount Awarded:   $1,821,596

ADVANCING COUNCIL CORPORATION
800 12th Street, NW, Suite 200
Washington, DC 20036-
Grant Type: Comprehensive
Amount Awarded:   $1,145,894

CITIZEN HOUSING COUNSELING ORGANIZATION
10 Tremont Street, Suite 202
Boston, MA 02108-
Grant Type: Comprehensive
Amount Awarded:     $901,000

HOMEFREE HOUSING COUNSELING CORPORATION
300 Riggs Rd NE
Washington, DC 20011-2534
Grant Type: Comprehensive
Amount Awarded:   $1,218,655

INTERNATIONAL CHARITIES ORGANIZATION
1200 King Street
Alexandria, VA 22314
Grant Type: Comprehensive
Amount Awarded:     $782,088

MISSION HOUSING COUNSELING ORGANIZATION
805 East Fifth Avenue
Flint, MI 48503-
Grant Type: Comprehensive
Amount Awarded:     $563,805

MON STREAM HOUSING COUNSELING, INC.
301 E. 8th Avenue
Homestead, PA 15120-1517
Grant Type: Comprehensive
Amount Awarded:   $1,000,000
```

Figure 345.B. PM – Export: List of Awardees

9.7.10 Procurement Accounting Spreadsheet

This report is formatted and sent to the CFO to reserve grant funding. It is necessary to coordinate with the finance office to gather updates and added information necessary to add into columns that HCS does not populate.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Procurement Accounting Spreadsheet** hyperlink, to view this file.

Note: The following figures show the content of Procurement Accounting Spreadsheet. Please note that Figures 346.A. through 346.D. are a continuation of Figure 258 horizontally.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	BATCH-ID	TRANS-CODE	TRANS-MOD	PROG-CODE	FISCYR	ALOT-NO	RO-NO	AO-NO	DOC-NO	PROJ-NO	AMOUNT	EFF-DATE	FED-NON	FILLER
2	3	3	2	3	1	1	2	2	6	15	13	8	1	
3					8	6	00	97	NEW	HC060000001	782,088			
4					8	6	00	97	NEW	HC060000002	1,145,894			
5					8	6	00	97	NEW	HC060000003	1,291,416			

Figure 346.A. PM – Export: Procurement Accounting Spreadsheet, Part I

	O	P	Q	R	S	T	U	V	W	X
1	SCHED-NO	LOCCS-IND	BATCH-I	METRO-ID	CONTRACT-TYPE	UNITS	APPLICANT-NAME	CONTR-AUTH	TERM	ELDER-UNITS
2										
3							INTERNATIONAL CHARITIES ORGANIZATION			
4							ADVANCING COUNCIL CORPORATION			
5							NEIGHBORHOOD REINVESTMENT CORPORATION			

Figure 346.B. PM – Export: Procurement Accounting Spreadsheet, Part 2

	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	SECOND-PRO	STATE	FILLE	CONTINUS-MARK	BATCH	OBJECT-CLASS	FISCAL-YR-END	EXECUT-DATE	INIT-CONTR-DATE	CONTR-EXPIRE-DATE
2		2								
3		VA								
4		DC								
5		DC								

Figure 346.C. PM – Export: Procurement Accounting Spreadsheet, Part 3

AI	AJ	AK	AL	AM	AN
INIT-EXECUT-DATE	CONTRACT-NO	PROJ-RESV	176-FLAG	FILL	CONTINUE-MARK2

Figure 346.D. PM – Export: Procurement Accounting Spreadsheet, Part 4

9.7.11 Public Affairs Report

This report is given to the Public Affairs office to be published showing awarded agencies. This office dictates on the format of the report.

1. From the top navigation menu, scroll down to **Export** sub-menu. Click the **Public Affairs Report** hyperlink, the *Public Affairs Report for FY 20XX* options selection screen appears.

2. Select to search on **National & Regional Housing Counseling Grantees**, **Local Housing Counseling Grantees**, **Multi-State Agencies**, **State Housing Finance Agencies**, or **All** and then Click the **OK** button.

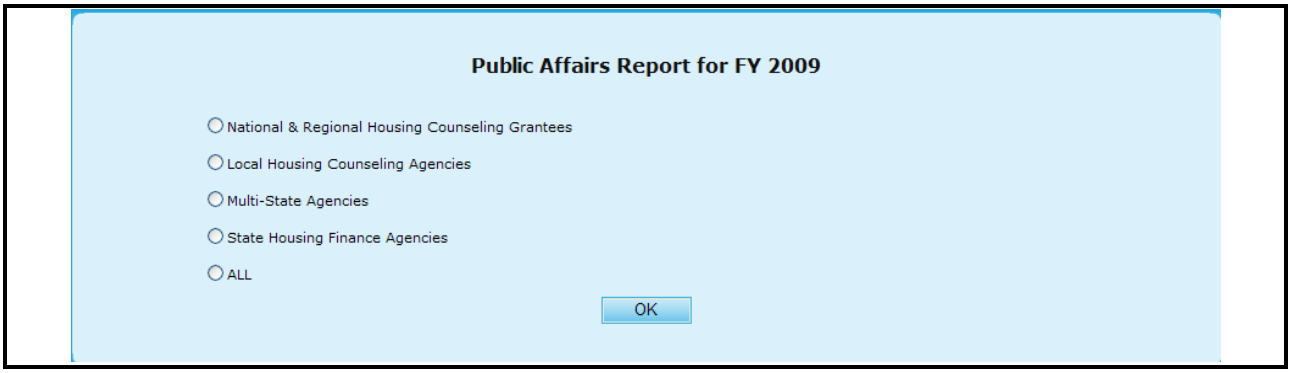


Figure 347. PM – Export: Public Affairs Report – Options Selection Screen

Note: The following screen shows the report of National & Regional Housing Counseling Grantees, which is listed by State and then by City order.

HOUSING COUNSELING GRANTEES
FOR FISCAL YEAR 2009

STATE	CITY	NATIONAL & REGIONAL HOUSING COUNSELING GRANTEES	AWARDED	GRANT TYPE
CALIFORNIA				
California	Oakland	NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC	$552,462.00	COMP
California	Oakland	NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC	$150,000.00	LDRC
California	West Sacramento	RURAL COMMUNITY ASSISTANCE CORPORATION	$994,270.00	COMP
California	West Sacramento	RURAL COMMUNITY ASSISTANCE CORPORATION	$62,677.00	LDRC
		STATE TOTAL	1759409	
DC				
District of Columbia	Washington	NATIONAL COUNCIL OF LA RAZA	$1,120,501.00	COMP
District of Columbia	Washington	NATIONAL COUNCIL OF LA RAZA	$150,000.00	LDRC
District of Columbia	Washington	NATIONAL COUNCIL OF LA RAZA	$1,260,117.00	TRNG
District of Columbia	Washington	NATIONAL COUNCIL ON THE AGING (NCOA)	$741,808.00	COMP
District of Columbia	Washington	NATIONAL COUNCIL ON THE AGING (NCOA)	$539,440.00	HECM
District of Columbia	Washington	NEIGHBORHOOD REINVESTMENT CORPORATION	$1,120,501.00	COMP
District of Columbia	Washington	NEIGHBORHOOD REINVESTMENT CORPORATION	$500,000.00	HECM
District of Columbia	Washington	NEIGHBORHOOD REINVESTMENT CORPORATION	$3,240,301.00	TRNG
District of Columbia	Washington	THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC.	$300,000.00	COMP
District of Columbia	Washington	THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC.	$30,000.00	LDRC
District of Columbia	Washington	THE NATIONAL COMMUNITY REINVESTMENT COALITION, INC.	$499,582.00	TRNG
		STATE TOTAL	9502250	

(data abbreviated)

Figure 348. PM – Export: Public Affairs Report

9.8 HCS Archive

Upon selecting the HCS Archive hyperlink, you will be prompted to a new screen where you will be able to access archived reports. The specific reports are:

- Application Progress Status
- Application Score Status
- Awards Report by Agency
- Awards Report by Office
- Awards Report by State
- Funding Recommendation
- Strength/Weakness All Factors
- Strength/Weakness by Factor

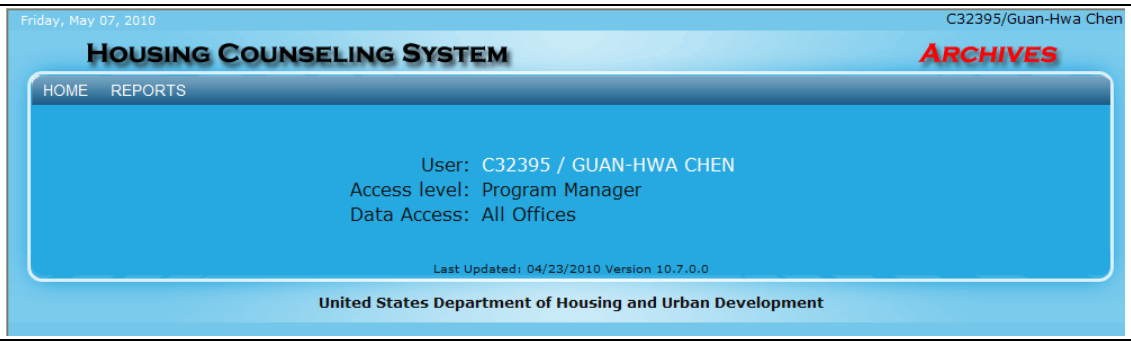


Figure 349. PM – HCS Archive: Home Screen

9.8.1 Reports

Provided below is a display of your Report options as found on the menu.

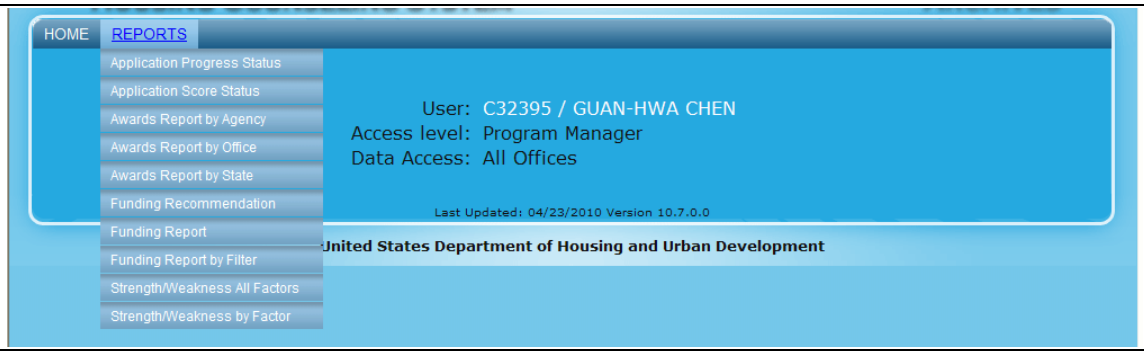
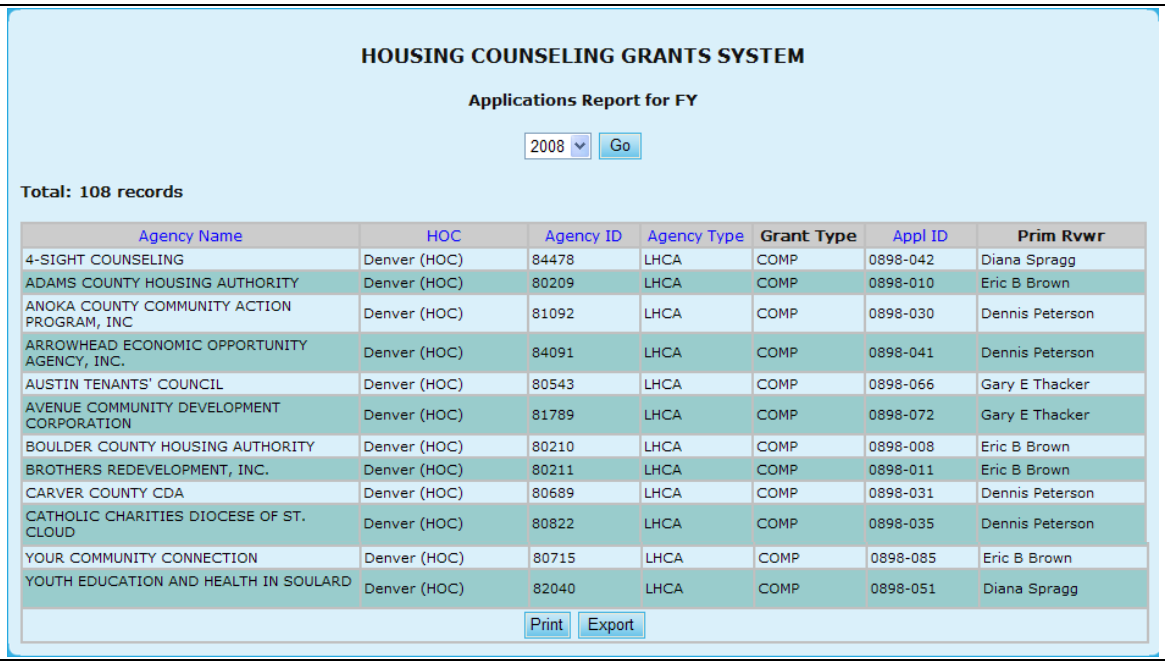


Figure 350. PM – HCS Archive: Report Options

9.8.1.1 *Application Progress Status*

Provided below is an example of an Application Progress Status Report

1. To change between years, select which year you would like your data to reflect, and click **Go**. To print this report, click the **Print** button at the bottom of the report, or to Export to Excel, click the **Export** button.



HOUSING COUNSELING GRANTS SYSTEM

Applications Report for FY

2008 Go

Total: 108 records

Agency Name	HOC	Agency ID	Agency Type	Grant Type	Appl ID	Prim Rvwr
4-SIGHT COUNSELING	Denver (HOC)	84478	LHCA	COMP	0898-042	Diana Spragg
ADAMS COUNTY HOUSING AUTHORITY	Denver (HOC)	80209	LHCA	COMP	0898-010	Eric B Brown
ANOKA COUNTY COMMUNITY ACTION PROGRAM, INC	Denver (HOC)	81092	LHCA	COMP	0898-030	Dennis Peterson
ARROWHEAD ECONOMIC OPPORTUNITY AGENCY, INC.	Denver (HOC)	84091	LHCA	COMP	0898-041	Dennis Peterson
AUSTIN TENANTS' COUNCIL	Denver (HOC)	80543	LHCA	COMP	0898-066	Gary E Thacker
AVENUE COMMUNITY DEVELOPMENT CORPORATION	Denver (HOC)	81789	LHCA	COMP	0898-072	Gary E Thacker
BOULDER COUNTY HOUSING AUTHORITY	Denver (HOC)	80210	LHCA	COMP	0898-008	Eric B Brown
BROTHERS REDEVELOPMENT, INC.	Denver (HOC)	80211	LHCA	COMP	0898-011	Eric B Brown
CARVER COUNTY CDA	Denver (HOC)	80689	LHCA	COMP	0898-031	Dennis Peterson
CATHOLIC CHARITIES DIOCESE OF ST. CLOUD	Denver (HOC)	80822	LHCA	COMP	0898-035	Dennis Peterson
YOUR COMMUNITY CONNECTION	Denver (HOC)	80715	LHCA	COMP	0898-085	Eric B Brown
YOUTH EDUCATION AND HEALTH IN SOULARD	Denver (HOC)	82040	LHCA	COMP	0898-051	Diana Spragg

Print Export

Figure 351. PM – HCS Archive: Application Status

9.8.1.2 *Application Score Status*

Provided below is an example of an Application Score Status Report:

1. To change between years, select which year you would like your data to reflect, and click **Go**. You can also export this list to Excel, by clicking the **Export** button.

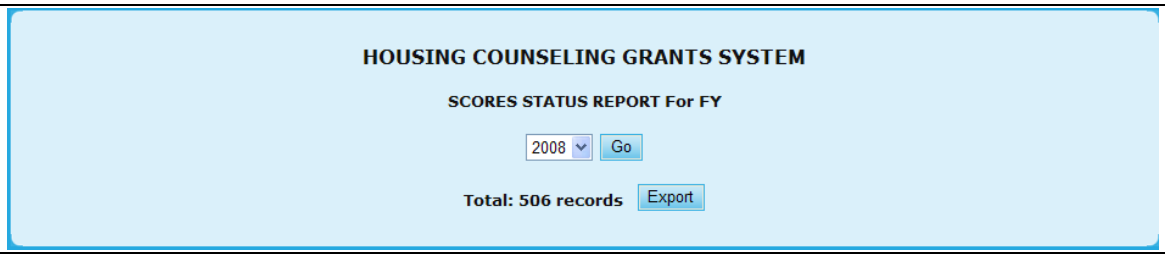
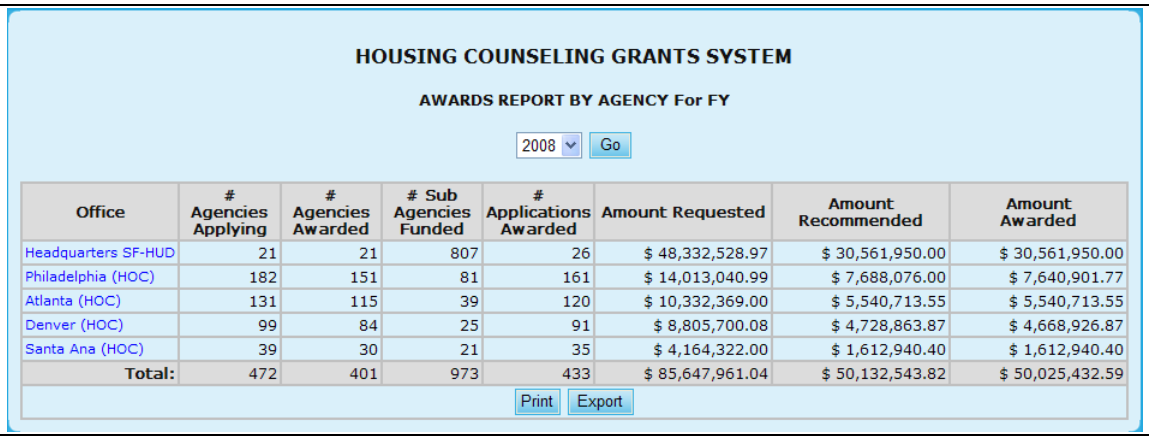


Figure 352. PM – HCS Archive: Scoring Status

9.8.1.3 *Awards Report by Agency*

Provided below is an example of an Awards Report by Agency:

1. To change between years, select which year you would like your data to reflect, and click **Go**.



HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY AGENCY For FY

2008 Go

Office	# Agencies Applying	# Agencies Awarded	# Sub Agencies Funded	# Applications Awarded	Amount Requested	Amount Recommended	Amount Awarded
Headquarters SF-HUD	21	21	807	26	$ 48,332,528.97	$ 30,561,950.00	$ 30,561,950.00
Philadelphia (HOC)	182	151	81	161	$ 14,013,040.99	$ 7,688,076.00	$ 7,640,901.77
Atlanta (HOC)	131	115	39	120	$ 10,332,369.00	$ 5,540,713.55	$ 5,540,713.55
Denver (HOC)	99	84	25	91	$ 8,805,700.08	$ 4,728,863.87	$ 4,668,926.87
Santa Ana (HOC)	39	30	21	35	$ 4,164,322.00	$ 1,612,940.40	$ 1,612,940.40
Total:	472	401	973	433	$ 85,647,961.04	$ 50,132,543.82	$ 50,025,432.59

Print Export

Figure 353. PM – HCS Archive: Awards Report by Agency

9.8.1.4 *Awards Report by Office*

Provided below is an example of an Awards Report by Office:

1. To change between years, select which year you would like your data to reflect, and click **Go**.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY OFFICE For FY

2008 Go

Total: 433 records

Appl. ID	Agency Name	Requested	Recommended	Awarded
0000-001	HOMEOWNERSHIP PRESERVATION FOUNDATION	$2,400,000.00	$1,308,434.51	$1,308,434.51
0000-002	CATHOLIC CHARITIES USA	$2,026,200.00	$1,056,325.88	$1,056,325.88
0000-003	WEST TENNESSEE LEGAL SERVICES, INCORPORATED	$2,500,000.00	$1,245,407.36	$1,245,407.36
0000-004	CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.	$1,132,900.00	$1,132,900.00	$1,132,900.00
0000-005	MON VALLEY INITIATIVE	$1,270,000.00	$1,270,000.00	$1,270,000.00
0000-006	RURAL COMMUNITY ASSISTANCE CORPORATION	$947,028.00	$947,028.00	$947,028.00
0000-007	NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDI	$969,300.00	$804,217.26	$804,217.26
0000-008	NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	$2,500,000.00	$1,623,570.30	$1,623,570.30
0000-009	NATIONAL COUNCIL ON THE AGING (NCOA)	$1,208,689.00	$804,217.26	$804,217.26
0000-010	MONEY MANAGEMENT INTERNATIONAL INC.	$1,706,104.97	$1,056,325.88	$1,056,325.88
0000-011	NATIONAL COUNCIL OF LA RAZA	$2,300,000.00	$1,371,461.67	$1,371,461.67
0000-012	NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVEST	$2,300,000.00	$678,162.94	$678,162.94
0000-013	NEIGHBORHOOD REINVESTMENT CORPORATION	$2,500,000.00	$1,056,325.88	$1,056,325.88
0000-014	ACORN HOUSING CORPORATION	$2,500,000.00	$1,623,570.30	$1,623,570.30
0000-015	HOUSING PARTNERSHIP NETWORK	$2,494,229.00	$1,749,624.61	$1,749,624.61
0000-016	NACA (NEIGHBORHOOD ASSISTANCE CORPORATION OF AMERI	$2,500,000.00	$1,119,353.04	$1,119,353.04
0000-017	HOMEFREE - U S A	$1,965,500.00	$993,298.73	$993,298.73
0000-018	NATIONAL URBAN LEAGUE	$1,600,000.00	$1,245,407.36	$1,245,407.36
0000-019	MISSION OF PEACE	$1,200,000.00	$867,244.41	$867,244.41
0999-001	IDAHO HOUSING AND FINANCE ASSOCIATION	$192,295.00	$127,823.53	$127,823.53
0999-002	WASHINGTON STATE HOUSING FINANCE COMMISSION	$450,000.00	$93,235.29	$93,235.29
	Santa Ana (SHFA - COMP) Totals:	$642,295.00	$221,058.82	$221,058.82
	Grand Totals:	$80,147,604.34	$50,072,606.82	$50,025,432.59

Print Export

Figure 354. PM – HCS Archive: Awards Report by Office

9.8.1.5 *Awards Report by State*

Provided below is an example of an Awards Report by State:

1. To change between years, select which year you would like your data to reflect, and click **Go**. You also have the option to narrow your search based on State. The main page represents all states, and under that drop-down function is the ability to narrow down based on state. Once you have corresponded State and Fiscal Year, click **Go** to retrieve your results.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT BY STATE

All in Fiscal Year 2008 Go

Total: 91 records

City/State	Agency Name (Application ID)	Awarded
Arkadelphia, AR	SOUTH ARKANSAS COMMUNITY DEVELOPMENT (0898-004)	$42,000.00
Fort Smith, AR	CRAWFORD SEBASTIAN COMMUNITY DEVELOPMENT COUNCIL (0898-002)	$28,662.00
Jonesboro, AR	JONESBORO URBAN RENEWAL AND HOUSING AUTHORITY HOUS (0898-003)	$50,326.30
Pine Bluff, AR	SOUTHERN GOOD FAITH FUND (0898-005)	$50,000.00
Russellville, AR	UNIVERSAL HOUSING DEVELOPMENT CORPORATION (0898-006)	$46,956.71
	State Total:	$217,945.01
Aurora, CO	CITY OF AURORA COMMUNITY DEVELOPMENT DIVISION (0898-007)	$63,804.66
Boulder, CO	BOULDER COUNTY HOUSING AUTHORITY (0898-008)	$60,435.07
Colorado Springs, CO	PARTNERS IN HOUSING, INC. (0898-009)	$34,000.00
Commerce City, CO	ADAMS COUNTY HOUSING AUTHORITY (0898-010)	$90,761.37
Denver, CO	BROTHERS REDEVELOPMENT, INC. (0898-011)	$26,739.18
Denver, CO	COLORADO HOUSING ASSISTANCE CORPORATION (0898-012)	$26,739.18
Denver, CO	DENVER HOUSING AUTHORITY (0898-013)	$20,000.00
Denver, CO	NORTHEAST DENVER HOUSING CENTER (0898-014)	$43,587.12
Denver, CO	SOUTHWEST IMPROVEMENT COUNCIL (0898-015)	$57,065.48
Durango, CO	HOUSING SOLUTIONS FOR THE SOUTHWEST (0898-016)	$59,811.00
Fort Collins, CO	NEIGHBOR TO NEIGHBOR (0898-017)	$56,330.00
	State Total:	$539,273.06
Glenwood City, WI	WEST CENTRAL WISCONSIN COMMUNITY ACTION AGENCY, IN (0898-088)	$43,587.12
Janesville, WI	COMMUNITY ACTION, INCORPORATED OF ROCK AND WALWORT (0898-089)	$25,000.00
Madison, WI	TENANT RESOURCE CENTER (0898-090)	$23,369.59
Milwaukee, WI	SCI-TECH DEVELOPMENT, INC. (SDI) DBA SDI (0892-007)	$10,000.00
Milwaukee, WI	SCI-TECH DEVELOPMENT, INC. (SDI) DBA SDI (0898-091)	$60,435.07
	State Total:	$162,391.78
Casper, WY	INTERFAITH OF NATRONA COUNTY, INCORPORATED (0898-093)	$23,369.59
	State Total:	$23,369.59
	Grand Total:	$4,668,926.87

Print Export

Figure 355. PM – HCS Archive: Awards Report by State

9.8.1.6 *Funding Recommendation*

Provided below is an example of a Funding Recommendation Report:

1. To change between years, select which year you would like your data to reflect, and click **Go**.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS RECOMMENDATION REPORT For FY 2008 Go

Total: 108 records

Agency Name(Application ID)	Final Score	Recommended	Requested
JUSTINE PETERSEN HOUSING AND REINVESTMENT COR (0892-001)	96.00	$15,000.00	$15,000.00
LEGAL AID OF WESTERN MISSOURI (0892-002)	97.00	$6,521.00	$6,521.00
HIGH PLAINS COMMUNITY DEVELOPMENT, CORP. (0892-004)	96.00	$25,190.00	$25,190.00
CITY OF FORT WORTH HOUSING DEPARTMENT (0892-005)	85.00	$30,000.00	$30,000.00
CCCS OF N CENTRAL TEXAS (0892-006)	75.00	$5,000.00	$30,000.00
SCI-TECH DEVELOPMENT, INC. (SDI) DBA SDI (0892-007)	85.00	$10,000.00	$10,000.00
EL PASO COMMUNITY ACTION PROGRAM, PROJECT BRAVO, I (0892-008)	84.00	$29,937.00	$29,937.00
COMMUNITY ACTION PARTNERSHIP OF SUBURBAN HENNEPIN (0892-009)	81.00	$30,000.00	$30,000.00
COMMUNITY ACTION SERVICES (0892-010)	90.00	$8,500.00	$8,500.00
Denver (LHCA - HECM) Total:		$160,148.00	$185,148.00
MONTANA BOARD OF HOUSING (0899-001)	86.00	$145,117.65	$180,000.00
SOUTH DAKOTA HOUSING DEVELOPMENT AUTHORITY (0899-002)	87.00	$153,764.71	$266,351.00
IOWA FINANCE AUTHORITY (0899-003)	89.00	$171,058.82	$177,993.00
NORTH DAKOTA HOUSING FINANCE AGENCY (0899-004)	90.00	$179,705.88	$193,030.00
NEW MEXICO MORTGAGE FINANCE AUTHORITY (0899-005)	88.00	$162,411.76	$277,350.00
Denver (SHFA - COMP) Total:		$812,058.82	$1,094,724.00

Print Export

Figure 356. PM – HCS Archive: Funding Recommendation Report

9.8.1.7 *Funding Report*

Provided below is an example of a Funding Report:

1. To change between years, select which year you would like your data to reflect, and click **Go**.

HOUSING COUNSELING GRANTS SYSTEM

AWARDS REPORT For FY 2008 Go

Total: 3 catogories

Office Name	Requested	Recommended	Awarded
LHCA			
Denver (LHCA - COMP)	$7,525,828.08	$3,756,657.05	$3,756,657.05
Denver (LHCA - HECM)	$185,148.00	$160,148.00	$100,211.00
LHCA Totals:	$7,710,976.08	$3,916,805.05	$3,856,868.05
SHFA			
Denver (SHFA - COMP)	$1,094,724.00	$812,058.82	$812,058.82
SHFA Totals:	$1,094,724.00	$812,058.82	$812,058.82
Grand Totals:	$8,805,700.08	$4,728,863.87	$4,668,926.87

Print Export

Figure 357. PM – HCS Archive: Funding Report

9.8.1.8 *Strength/Weakness All Factors*

Provided below is an example of a Strengths/Weakness All Factors report:

1. By clicking this menu function, you will be prompted to an options menu, for Fiscal Year, and Agency you would like. To change year, select which year you would like and click **Go**.

2. Once you have done that Click the hyperlink for the Agency you would like to view.

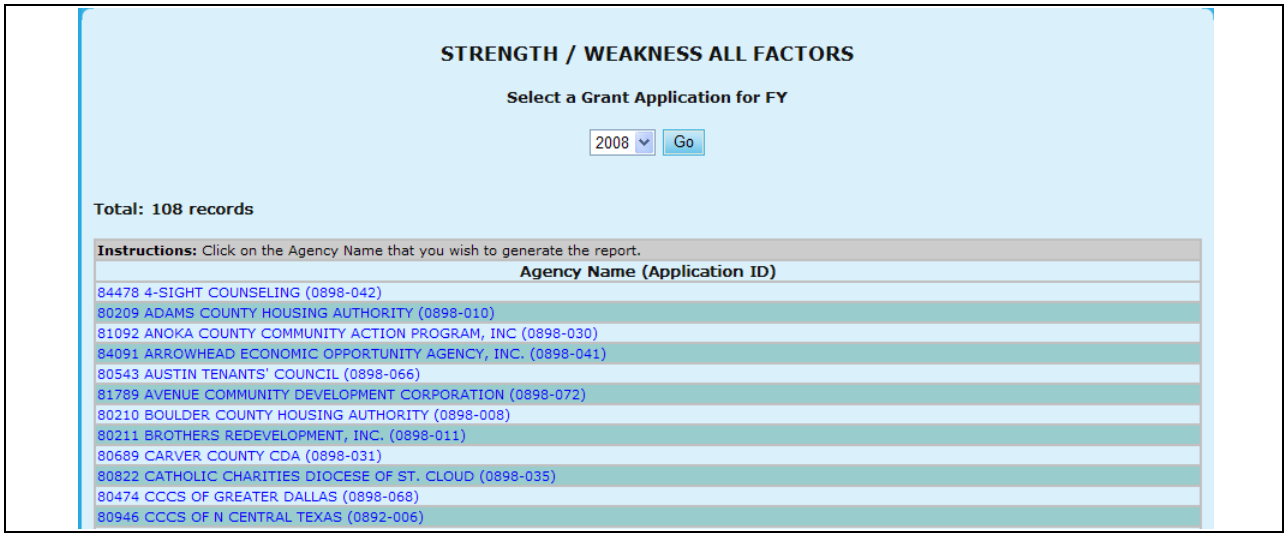


Figure 358.A. PM – HCS Archive: Strength/Weakness All Factors Report

3. After clicking the Agency hyperlink the report for Strength/Weakness All Factors will be retrieved.

STRENGTH/WEAKNESS ALL FACTORS DETAIL REPORT

For Fiscal Year 2008

Agency: 84478 4-SIGHT COUNSELING (0898-042)

Factors	1. Capacity of the Applicant and Relevant Organizational Staff
Primary Reviewer Score	27.00
Primary Reviewer Strength	Both counselors have attended recent training. Although this is a newly approved counseling agency - both counselors have been increasing their knowledge by not only attending NeighborWorks Classes but also viewing HUD's on-line training.
Primary Reviewer Weakness	No bilingual couselors. Narrative was not double spaced.
1st Secondary Reviewer Score	24.00
1st Secondary Reviewer Strength	
1st Secondary Reviewer Weakness	
2nd Secondary Reviewer Score	25.00
2nd Secondary Reviewer Strength	
2nd Secondary Reviewer Weakness	This is a newly approved agency and a lot of statistics are not available.
3rd Secondary Reviewer Score	No review
3rd Secondary Reviewer Strength	
3rd Secondary Reviewer Weakness	
Factors	2. Need/Extent of the Problem
Primary Reviewer Score	5.00
Primary Reviewer Strength	
Primary Reviewer Weakness	Did not submit HUD 27300. Limited demographic and needs info - also, limited sources for needs data. Note: Narrative not double spaced.
1st Secondary Reviewer Score	2.00
1st Secondary Reviewer Strength	
1st Secondary Reviewer Weakness	
2nd Secondary Reviewer Score	4.00
2nd Secondary Reviewer Strength	
2nd Secondary Reviewer Weakness	Needs Data is not as detailed as it should be. Did not provide other programs and not just HUD's programs for providing increased homeownership and rental opportunities. The Agency also did not provide names of other organizations who they work with in providing access to grassroots, faith based organizations.
3rd Secondary Reviewer Score	No review
3rd Secondary Reviewer Strength	
3rd Secondary Reviewer Weakness	
Factors	3. Soundness of Approach/Scope of Housing Counseling Services
Primary Reviewer Score	29.00
Primary Reviewer Strength	
Primary Reviewer Weakness	Applicant did not provide average hours of counseling (projected). Also, did not indicated what percentage of grant to be used for salaries/benefits (historical). Note: Narrative was not double spaced.
1st Secondary Reviewer Score	30.00
1st Secondary Reviewer Strength	
1st Secondary Reviewer Weakness	
2nd Secondary Reviewer Score	32.00
2nd Secondary Reviewer Strength	
2nd Secondary Reviewer Weakness	The 9902 was not completed correctly - the totals wer not right and did not match narrative.
3rd Secondary Reviewer Score	No review
3rd Secondary Reviewer Strength	
3rd Secondary Reviewer Weakness	
Factors	4. Leveraging Resources
Primary Reviewer Score	7.00
Primary Reviewer Strength	
Primary Reviewer Weakness	
1st Secondary Reviewer Score	7.00
1st Secondary Reviewer Strength	
1st Secondary Reviewer Weakness	
2nd Secondary Reviewer Score	7.00
2nd Secondary Reviewer Strength	
2nd Secondary Reviewer Weakness	

Figure 358.B. PM – HCS Archive: Strength/Weakness All Factors Detail Report

9.8.1.9 *Strength/Weakness by Factor*

Provided below is an example of a Strength/Weakness by Factor Report:

1. By clicking this menu function, you will be prompted to an options menu, for Fiscal Year, and Factor you would like search. To change year, select which year you would like and click **Go**.

2. Once you have done that Click the hyperlink for the Factor you would like to search for.

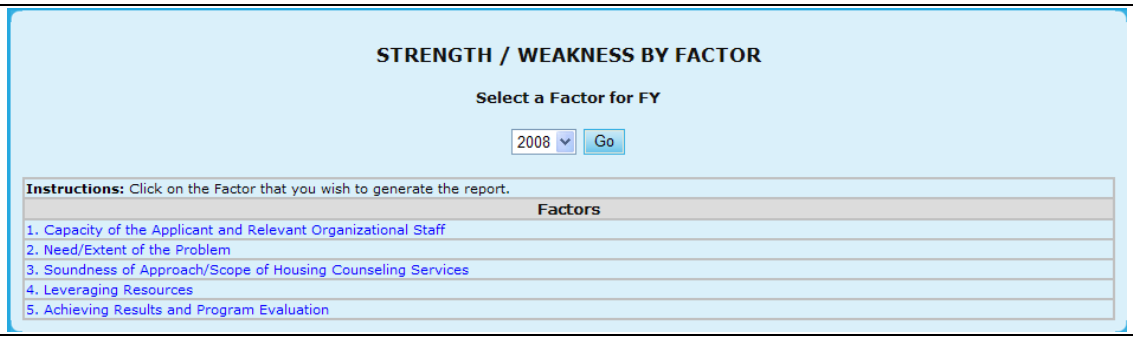


Figure 359.A. PM – HCS Archive: Strength/Weakness by Factors Options

3. This will prompt you to a search screen, which allows you to narrow your results based on:
   a. Agency ID
   b. Application ID
   c. Agency Name

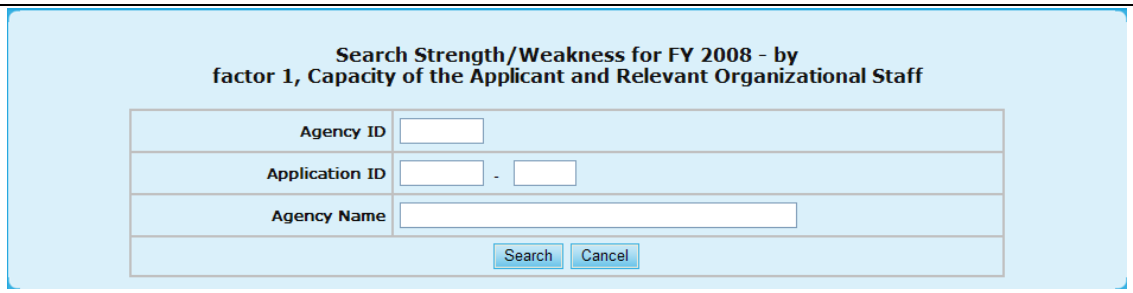


Figure 359.B. PM – HCS Archive: Strength/Weakness by Factors Search

4. In order to retrieve your results, click **Search**. To return back to the previous screen click **Cancel**. Once you click Search, your result will be retrieved for you.

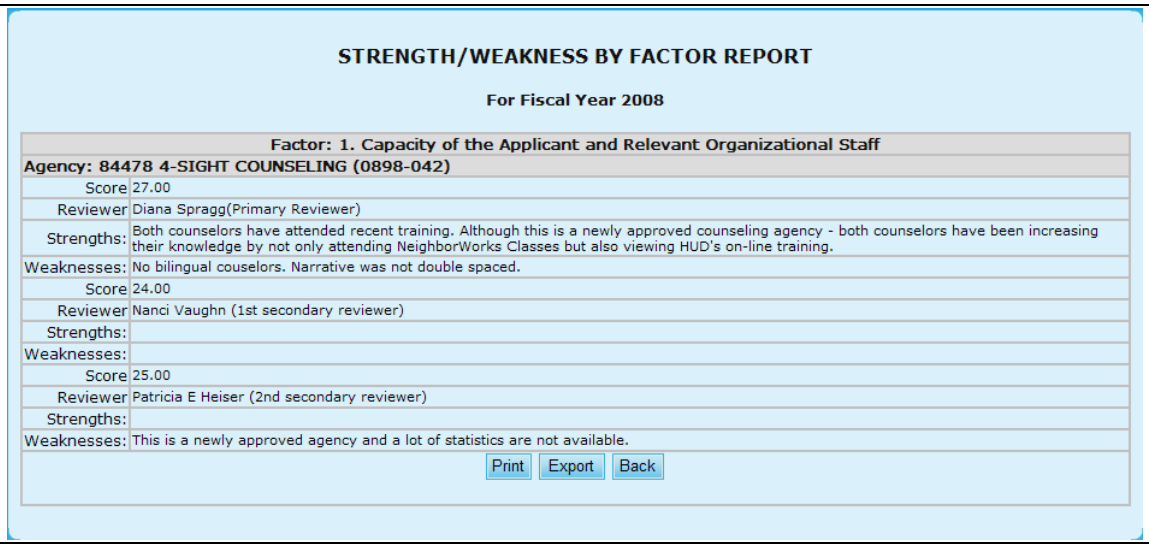


Figure 359.C. PM – HCS Archive: Strength/Weakness by Factors Report

10.0 QUERYING

10.0 QUERYING

This system has querying or search capabilities for some of the individual HCS user functions. Please refer to chapter 4.0 for more information.

11.0 REPORTING

11.0 REPORTING

You can generate, export, view, and print a variety of reports using the HCS system. For more information on reporting, please refer to Chapter 3.0. There, you will find four reporting sections (one for each user type: Agency User, GTR, Office Manager, and Program Manger).

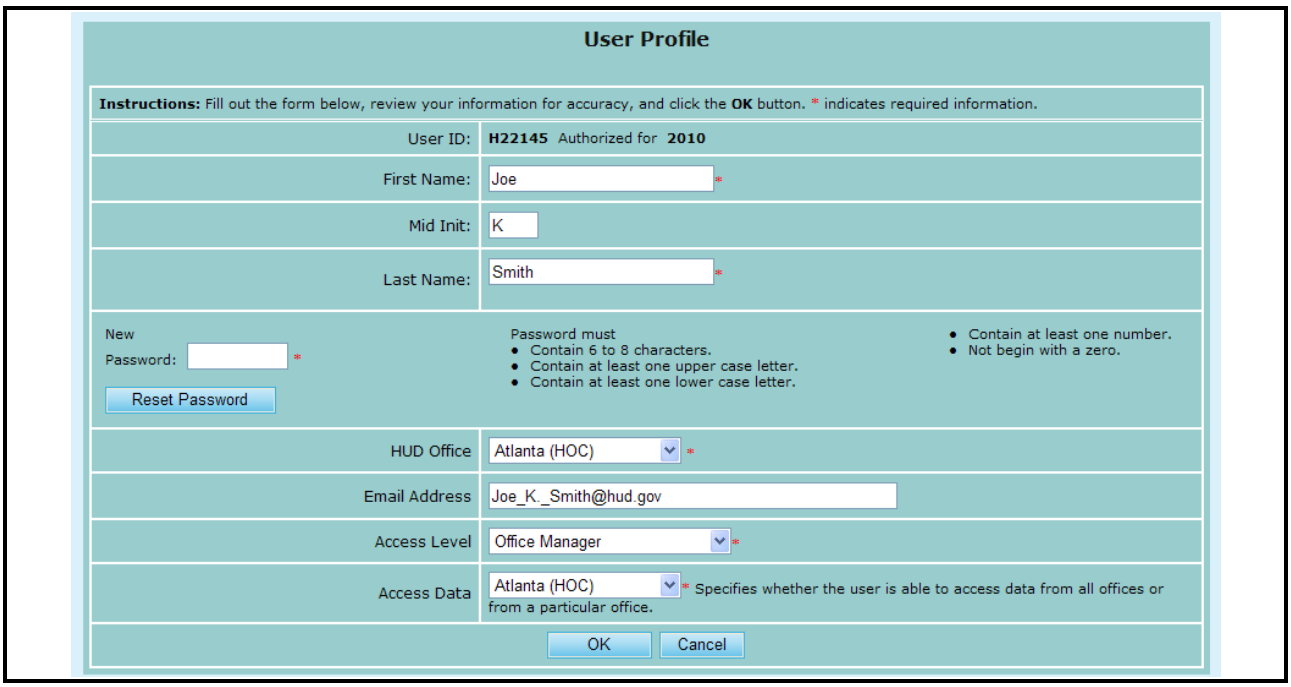
12.0 TROUBLE SHOOTING

12.0 TROUBLE SHOOTING

12.1 User Cannot Access HCS

Corrective Action – Reset user password

Select User Information menu item and access the user profile. In the user profile click the „Reset Password". This will reset the password to default and is displayed for reference. Wait 20-30 minutes before trying to access HCS.



12.2 Agency Information is not Posted on HUD's Web Site

There can be several reasons for an agency to be excluded from the list on the web site. Make the following checks in the order that best suits the user.

- Check the web site and confirm agency is not listed. Often agencies forget that the list is in alphabetical order by the city.
- Check the agency profile to determine if agency is currently active having one of the following status
    - Approved
    - Participating
    - Conditional
- Check the agency profile to determine if the control boxes to post/not post agency information at the bottom of the page. If unmarked, mark the appropriate boxes.

- Check the agency profile for critical missing information that will preclude the agency from being posted:
    - Address
    - City
    - State
    - Zip Code
    - Phone Number

12.3 Counseling Services Agency 9902 Report is Not Available

Only approved agencies of certain agency types must report their 9902 report.

- Check the agency profile:
    - Is the status not listed as terminated?
        - Approved
        - Participating
        - Conditional
        - Inactive
- Is the agency type an appropriate designation?
- If the agency is a sub-agency, is it affiliated/assigned to a parent organization?