



Managing Housing Counselor Certification

Office of Housing Counseling

U.S. Department of Housing and Urban Development

July 27, 2021

Webinar Instructions

- PowerPoint and webinar recording will be available on the HUD Exchange
- Participants in 'listen only' mode
- Submit content related questions in Q&A box
- For technical issues, request assistance through the Chat box

Technical Issues? Questions?

- Chat
 - Please submit any technical issues via the **Chat** box
 - Send the message to All Panelists
 - Host will work directly with you to resolve those issues
- Q&A
 - Please submit any content related questions via the **Question-and-Answer** box
- You can also send questions and comments to: housing.counseling@hud.gov with the webinar topic in the subject line

The image shows two overlapping windows from a webinar interface. The background window is titled 'Chat' and has a 'To:' dropdown menu set to 'All panelists'. The foreground window is titled 'Question and Answer' and contains a 'Welcome to Q&A' message, a text input field for questions, a 'Send anonymously' checkbox, and 'Cancel' and 'Send' buttons. Red boxes highlight the 'To: All panelists' dropdown in the Chat window and the question input field in the Q&A window.

Chat

To: All panelists ▼

Your text can only be sent to the selected recipients.

Question and Answer

Welcome to Q&A

Questions you ask will show up here. Only host and panelists will be able to see all questions.

Type your question here...

☐ Send anonymously

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 - Find by date or by topic
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Housing Counseling Training Digest

- [Visit the Training Digest](#): View upcoming training hosted by HUD and other partners



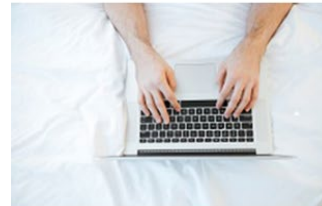
The Housing Counseling Training Digest is updated weekly to reflect trainings hosted by:

- HUD Office of Housing Counseling (OHC)
- OHC funded training partners
- Other partners that host trainings of interest to housing counselors

Please email housing.counseling@hud.gov to notify HUD about upcoming training and events for housing counselors.

Content current as of November 16, 2020

[Subscribe to the Housing Counseling Mailing List](#) to receive training updates in your inbox.



Upcoming Training Calendar

View upcoming trainings for Housing Counseling and other HUD funded programs.



Webinar Archive

View past webinars hosted by the Office of Housing Counseling and access related materials.



Online Training

Access self-paced online training modules, such as Introduction to Housing Counseling.



Jerrold H. Mayer

Director

Office of Outreach and Capacity Building

HUD Office of Housing Counseling

Purpose of Today's Webinar

- Understand the status of participating Housing Counseling Agencies (HCAs) after the final compliance date, including HCAs who receive grant funding
- Provide updates on 9902 reporting after the compliance deadline
- Provide resources available for HCAs in managing HUD certified housing counselor requirements

Presenters

- Office of Outreach and Capacity Building (OCB)
 - Kim Jakeway and Robin Penick
- Office of Oversight and Accountability (OOA): Phyllis Ford
- Office of Policy and Grant Administration (OPGA): Connie Barton
- ICF, TA Provider
 - Sid Alvarado and Rachael Laurilliard
- Q and A

Agenda

- Certification Requirements Background
- Status of HCAs After the Final Compliance Date
- Managing Systems with Certified Counselor Information
- Additional Resources
- Q and A

Polling

- There will be polling provided in Mentimeter throughout this presentation. When prompted by the icon to the right, please respond to questions at www.menti.com using your computer or smart phone.



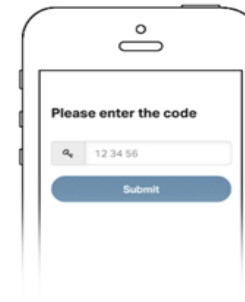
1

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3

Enter the code and vote!

**Time for
Mentimeter!**





HUD Housing Counselor Certification Requirements Background

Time for
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Recap: HUD Certified Housing Counselors

- A “HUD Certified Housing Counselor” is a housing counselor who has passed the HUD certified housing counselor exam and works for a HUD participating HCA
- Employment is validated through FHA Connection (FHAC)

What is a HUD Certified Housing Counselor?



Assistance with Certification Requirements

- **Certification requirements and study resources:** HUD published a webinar on May 25, 2021
 - It provides an overview of available certification resources to assist staff in becoming HUD certified housing counselors by the final compliance date
 - Access the slides and audio replay here: [Housing Counseling Webinar: Certification Requirements: Preparing for the Final Compliance Date](#)
- **Technical Assistance/Questions:** If you have FHAC questions or need Technical Assistance (TA) regarding certification between now and the final compliance date:
 - Email HUD at Housing.Counseling@HUD.gov: questions about compliance or FHAC User IDs/passwords
 - Email OHCTechnicalAssistance@HUDExchange.info: questions about study resources or FHAC instructions



Status of HUD Participating HCAs After the Final Compliance Date

Certification Deadline

- August 1, 2021, is the firm final compliance date for certification
- HUD is offering ongoing support to HCAs to help them certify their counselors
 - The exam and support will continue to be available after the final compliance date (some existing counselors may still need to become certified and new hires will need to comply with certification requirements)
- Agencies who have counselors who have not yet passed the exam are encouraged to continue working toward certification

What Happens After August 1, 2021?

- HCAs must [have a sufficient number of HUD certified housing counselors](#) to implement their housing counseling work plans as of August 1, 2021, to remain active in HUD's housing counseling program
 - HUD will contact HCA leadership after August 1, 2021, to inactivate HCAs who do not have any HUD certified housing counselors
 - HUD may change an HCA's status to inactive, in lieu of termination, consistent with 24 CFR 214.200, to allow the HCA time to have a sufficient number of HUD certified housing counselors to implement its housing counseling work plan
 - The "sufficient number" of counselors needed to carry out a work plan may be determined by the HCA. HUD Points of Contact (POCs) will work with HCA on an as-needed basis to understand if enough counselors are employed at the HCA
- New counselors hired after August 1, 2021, may only perform administrative duties until they are HUD certified

HCAs Inactivated After August 1, 2021

- Expenses incurred during the period an HCA is placed on inactive status are [not eligible for reimbursement](#)
- Clients counseled and activities performed while an HCA is in inactive status may not be reported on the [HUD-form 9902](#)
- What is the difference between being inactivated and being terminated?
 - Inactivated: HCAs have an opportunity to cure the deficiency and become active again, without re-applying to HUD
 - Terminated: HCAs must re-apply to HUD to participate in HUD's program in the future
- HCAs will be inactive for 90 days or until cured. After 90 days in inactive status, HCAs will be terminated

What Happens When a HUD Certified Counselor Leaves an HCA?

- HCAs should create a plan to maintain enough certified counselors to support HCA capacity. This is essential to the success of HCAs after the compliance date
- When a HUD certified housing counselor is no longer employed by a Participating HCA, the HCA must **notify their HUD POC within 15 days** of the change in staffing
 - If this is the sole counselor for the HCA, the HCA will be made inactive
- The HCA application coordinator must also validate the end of the HUD certified housing counselor's employment by signing into [FHAC](#) and complete the steps in the [instructions on the HUD Exchange](#)



Managing Systems with HUD Certified Counselor Information

Time for
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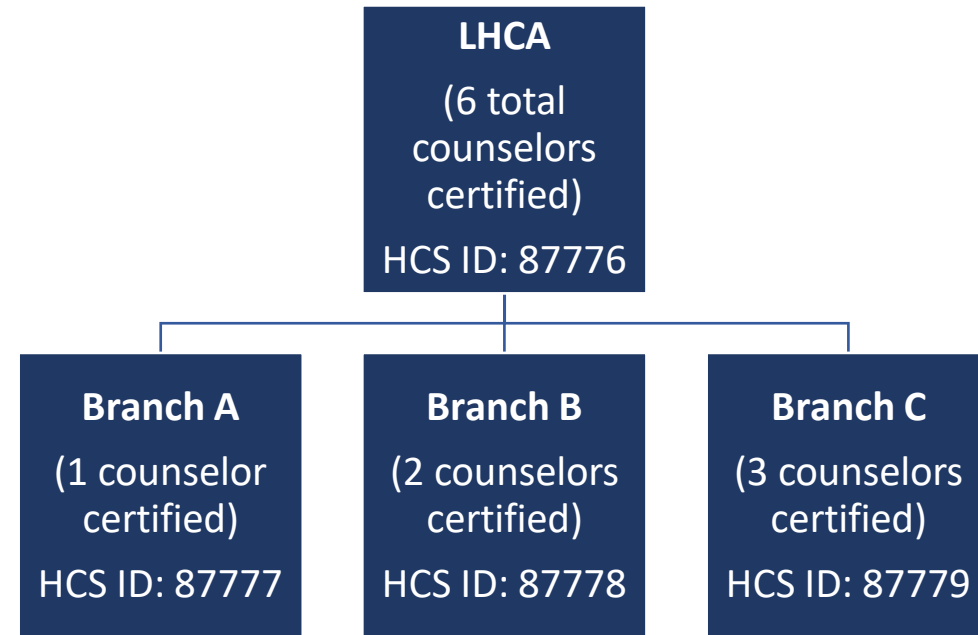
FHA Connection (FHAC) Application Coordinators

- Every HCA requires an FHAC Application Coordinator
 - Validates employment of counselors who pass exam
 - It is recommended that HCAs have at least two application coordinators
 - Counselors that act as coordinators cannot validate their own employment status in FHAC
 - Intermediaries can act as the FHAC Application Coordinator for their sub-grantees, affiliates, and branches
- [Access the full instructions for FHAC application coordinators](#)
- [Access the FHAC tip sheet](#)

Branch or Affiliate HCA

- If you are a counselor or application coordinator who works at a branch or for an affiliate HCA, please ensure you apply in FHAC for the HCA HCS ID of the branch office location(s) or affiliate HCAs for which you work
- If applicable, apply at **both** the branch/affiliate HCA HCS ID and parent/Intermediary HCA HCS ID in FHAC. Counselors may have their employment validated at multiple branches

Branch Scenario: A Local HCA (LHCA) employs 6 counselors across its 3 branches. Each counselor has passed the exam and needs to have their employment validated at the LHCA HCS ID, as well as the branch HCS ID for which they work.



Maintaining FHA Connection

- HCAs are responsible for removing certified housing counselors when they leave
 - The HCA's FHAC application coordinator must validate the end of the HUD certified housing counselor's employment by signing into [FHAC](#) and complete the steps in the [instructions on the HUD Exchange](#)
- HUD certified housing counselors and coordinators should maintain data in FHAC by updating personal information, email addresses, etc.
 - It is recommended that personal email addresses are used in FHAC so that counselors or coordinators who move to a new HCA are still able to access system notifications
- HUD certified housing counselors and coordinators must **log in at least once every 90 days** to change passwords in order to stay active
 - Create a calendar reminder to remember to do this

9902 Reporting After the Compliance Deadline

- **Starting August 1, 2021:**
 - The final rule requires HUD participating HCAs only report clients receiving one-on-one counseling by a HUD certified housing counselor
 - HCAs may only report one-on-one counseling activities conducted by a HUD certified housing counselor
- **Starting October 1, 2021:**
 - Client Management systems (CMS) systems will have a new data field* to record the HUD certified housing counselor 6-digit alpha-numeric identifier
 - If the HUD certified housing counselor ID is not provided on a client profile record, the submission(s) will fail

**This requirement is implemented in [Agency Reporting Module \(ARM\) v6 for Client Management Systems \(CMS\)](#) and in the [Housing Counseling System \(HCS\)](#) for FY 2022 reporting*




Resources

FHA Connection Instructions

[HUD Certified Housing Counselor Application Process](#)

HUD Certified Housing Counselor Application Process

Download Instructions as a PDF	
Search	
<input checked="" type="radio"/> Introduction	▼
Counselor Eligibility Requirements	
<input type="radio"/> HUD Certified Housing Counselors	▶
<input type="radio"/> FHAC Application Coordinators	▶
<input type="radio"/> Intermediary and SHFA Instructions	▶
<input type="radio"/> Print or Save Counselor Certificate	
<input type="radio"/> Public Search Functions on HUD.gov	

After passing the HUD Housing Counselor Certification Exam and transferring the exam results to the FHA Connection (FHAC), counselors must apply for certification in FHA Connection and have their employment validated by the agency FHA Connection application coordinator. Every agency must designate at least one person to serve as the agency application coordinator. This page provides detailed instructions and accompanying screenshots for Housing Counselors and Agency FHA Connection application coordinators.

You may apply as a **HUD certified housing counselor**, as an **application coordinator**, or as **both**. Each of these roles require different actions to be taken within FHA Connection.

This page has 3 different sets of instructions. Click on the icons below to go to each instruction set. **Note that both counselors and coordinators can print counselor certificates.**

HUD Certified Housing Counselors	FHAC Application Coordinators	Public Search
		
<p>Prior to applying for certification in FHA Connection (FHAC):</p> <ul style="list-style-type: none">Take the exam through HUDhousingcounselors.com.Once you pass the exam, transfer your exam results to the FHA Connection.	<p>Application coordinators have separate instructions. The purpose of the FHAC Application Coordinator is to validate the counselor's employment at the agency and to manage the data regarding the counselor's employment</p>	<p>The final section covers nation-wide public search functions on HUD.gov for HUD certified housing</p>

Exam Study Resources

- Visit HUDHousingCounselors.com for study resources
 - Note: To access the [Knowledge Assessment Tool](#) and [Training Modules](#), you must create an account and sign in to: hudhousingcounselors.com
- Bookmark the [HUD Exchange Study Groups page](#) to stay in the loop about upcoming study groups

Study Resources: HUD Exchange Training Digest

- Updated weekly with new HUD training and webinars, HUD-funded training partners, and other housing counseling industry partner training and the latest certification related courses

HUD-funded training partners include:

- [Rural Community Assistance Corporation \(RCAC\)](#)
- [UnidosUS](#)
- [National Stabilization Corporation \(NSC\)](#)
- [National Community Reinvestment Coalition \(NCRC\)](#)
- [NeighborWorks](#)



Bookmark the [training digest](#)

Additional Resources and Contacts



- [HUD Exchange Certification pages](#)
- [HUDHousingCounselors.com](#)
- [OHC Website](#)
- [The Bridge Newsletter](#)
- Email HUD at:
Housing.counseling@hud.gov
- Email for TA:
ohctechnicalassistance@hudexchange.info



Questions and Answers



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Thank You For Attending