Compliance with HUD-50058 v.2024

Supportive Services Programs – Section 17

Who is this for?

- This presentation is for Standard PHAs and those who serve them
  - (not Initial MTW, not MTW Expansion, not Multifamily/PBRA)
- With ROSS, FSS and/or Jobs Plus grants

- Slides will be posted on the FSS Resources Page - https://www.hud.gov/hud-partners/family-self-sufficiency
- We don't know if the recording will be available at this time.
- There will be program-specific trainings in November

Program-Specific Trainings

- **ROSS** – Thursday, November 5, 2026 - 2:00-3:30 Eastern
- https://events.intellor.com/?do=register&p=514504.&t=7&utm_medium=email&utm_source=govdelivery

- **FSS** – Tuesday, November 10, 2026 - 2:00-3:30 Eastern
  - https://events.intellor.com?do=register&t=7&p=514513

- **Jobs Plus** – November 19, 2026-2-3:30pm-Mark your calendar-your grant manager will be reaching out

HOTMA changes

- This presentation will not be talking about HOTMA compliance writ large
- For more information see HOTMA Resources page
  - Section 102/104 – Income and Assets
  - Section 103 – Over Income Limits

Updated IMS/PIC

- HOTMA Resources - https://www.hud.gov/hud-partners/hotma
  - HUD-50058 Instruction Booklet (updated 9/14/26)
  - HUD-50058
  - HUD-50058 MTW
  - HUD-50058 MTW Expansion
- HOTMA Sec 102/104 Compliance Notice – May 14,2026
  - Standard PHAs = PIC compliance for effective date Jan 1, 2027
    - **NOTE:** PIH Notice 2026-15 allows for HOTMA compliance using the 2024 version of the HUD-50058 or by utilizing alternative instructions on the older, 2020 HUD-50058
  - Initial MTW PHAs, Expansion MTW PHAs and PHAs exclusively using HUD Family Reporting Software (FRS) not required to comply by this date.

General Information

- This presentation is about the 2024 versions of the HUD-50058 form
  - Software vendors take the HUD-50058 form and build a system to collect the required information for upload into IMS/PIC
  - We are NOT providing information on how your particular software works
- This presentation is about how to use the 2024 versions of the HUD-50058 form to accurately report on FSS, ROSS and Jobs Plus
  - If your PHA is complying with HOTMA using alternative instructions for compliance using the 2020 version of the HUD-50058, this presentation will not apply until you start using the 2024 version of the HUD-50058

Big Change

- The 2024 versions of HUD-50058 incorporated non-HOTMA changes in Section 17 (Section 23 for 50058-MTW)
- Reporting now required for ALL PARTICIPANTS of ALL HUD-funded Supportive Services Programs (SSP)
  - FSS
  - ROSS
  - Jobs Plus
- Starting with first Annual Reexam (Action Type 2) or Interim Reexam/Mid-Cycle Changes (Action Type 3) for each family with 1/1/27 effective dates
  - Reporting start whether or not the PHA is conducting a full reexamination of income
  - or can do an Action 8 for an “enrollment” prior to re-cert.

Not a change, but a reminder for MTW PHAs…

MTW PHAs with an FSS program

– EVEN if that FSS program uses MTW flexibilities –

should report on FSS participation as FSS

(NOT as MTW Self-Sufficiency (MTWSS))

ROSS grantees & others that may sub-out the work

- For Non-Profit and Resident Association grantees - you will need to create a system to get these reports from whomever is working with the residents to the PHA. Then the PHA is responsible for submitting them.
- For PHAs that sub out FSS work, you should already have in place a system to get this data from whomever is running your FSS program.

Key for this presentation

- Blue = Question on the 50058
- Green = Options available
- Red = NOTE

When does this start?

- For FSS, continue as usual
- For ROSS or Jobs Plus, you may start reporting on Section 17 at the next reexamination (Action Type 2 or 3) or you may do an Action 8 to do an enrollment for each current participant.
  - You will not “back-date” the enrollment to when participation actually started.

Action 8 – SSP Addendum Only

- Fill out only sections 1, 2 and 3 on the HUD-50058 and then skip to Section 17

2k. Supportive Service Program Participation Now or in the last year

- For all households with a FSS, ROSS and/or Jobs Plus participant – this must be Yes
  - Otherwise - No
- If Yes – must complete the SSP Addendum (Section 17)

- NOTE! The New Instructions reflect to use this to record ONLY SSP participation NOW (and NOT in the last year)

17. Supportive Services Programs (SSP)

17a.	Participate in special programs?	17a.
17b.	SSP report category: (check no more than one) [ ] Enrollment [ ] Progress [ ] Exit	
17c.	Effective date (mm/dd/yyyy) of SSP action	
17d.	PHA code of PHA administering FSS contract (FSS only)	
17e.	PHA code of PHA that is managing the rental assistance for this FSS participant (May be different from 17d) (FSS only)	
17h.	General information (HoH = FSS HoH for FSS participants)	
(1)	Current employment status of head of household. Check the box to indicate the head of household's employment status at the time addendum completed.	17h(1).
(2)	Date (mm/dd/yyyy) current employment began	
(3)	Benefits in current employment: (check all that apply)	17h(3).
(4)	Years of school completed by the head of household. Enter the highest grade of education or years of formal schooling the head of household completed at the time Addendum is submitted. (0-25)	
(5)	Assistance currently received by the family: (check all that apply)	17h(5).
(6)	Number of children receiving childcare services	

17a. Participate in Supportive Services Program?

- DO NOT COMPLETE if family is not being served by one of these three programs (not for special purpose vouchers, not for MTWSS)
- If ANY FAMILY MEMBER is enrolled (or being served by) one of these programs, enter "Yes" for that program.
  - FSS – Yes/No
  - ROSS (including ROSS Rapid Response) – Yes/No
  - Jobs Plus – Yes/No
- If a family is being served by FSS and ROSS or Jobs Plus, ONLY CHOOSE "Yes" FOR FSS

17b. SSP Report Category

- MUST pick ONLY one
  - Enrollment
  - Progress
  - Exit
- For all programs, for all families with an ENROLLMENT – at least one PROGRESS is required each year (even if you do bi- or tri-ennial income recertifications)
- EXIT Report
  - FSS – required within 8 years of ENROLLMENT
  - ROSS – required within 4 years of ENROLLMENT
  - Jobs Plus – required within 5 years of ENROLLMENT

ONLY ONE PROGRAM (even if the family is in more than one)

- *Note: Remember, you are reporting only on ONE SSP program at a time – enrollment through exit. You may not have enrollments for more than one program at the same time.*
- *If the family is in FSS – report on FSS.*
- *If the family is in ROSS and Jobs Plus, report on the program the family has been in the longest.*

Ports – this is a change in instruction

- ROSS & Jobs Plus
  - If there is an ENROLLMENT or PROGRESS, must be an EXIT before or with a *port-out*
- FSS
  - The Receiving PHA must do a PROGRESS.
  - If there is an ENROLLMENT or PROGRESS, and the family IS taking the CoP with them, the Initial PHA must do a PROGRESS before or with a port-out. NOT AN EXIT.
  - If the family is NOT taking the FSS CoP with them, the Initial PHA must do an EXIT before or with a *port-out*.
  - Both are true regardless of which PHA will be administering the rental assistance and which PHA will be administering the FSS CoP.

17c. Effective Date of SSP Action – change!!

- 17c Effective Date of SSP Action will not be collected.
  - We will set it to the same date as 2b Effective Date of Action

This will fix a lot of the “sequencing” challenges that we had with the old FSS Section 17 reports.

17d. PHA code of PHA administering FSS CoP

- FSS ONLY (all others skip)
- This is the PHA that is providing the case management/coaching

Does not have to be the same as

- 17e. PHA code of PHA that is managing the rental assistance for this FSS participant

There is no 17f. or 17g.

17h. General Information

For FSS – where form refers to HoH, use family's designation of FSS HoH

For ROSS and Jobs Plus – where form refers to HoH, use HoH for rental assistance purposes

17h(1) Current employment status of HoH

- Full-time (32 hours per week or more at one or more jobs)
- Part-time (less than 32 hours per week or more at one or more jobs)
- Not Employed

If this is an FSS Exit report and the family Graduated, they must be employed.

If 17a – Participate in Supportive Services Program? is yes for FSS

and

17b Report Category is Exit

and

17m(1) Did family complete CoP (graduate) is Yes,

then

17h(1). Current employment status of HoH

May NOT be Unemployed.

17h(2) Date current employment began

- Enter date HoH began their longest-running job
- MUST be blank if 17h(1) - Current employment status of HoH is Not Employed

17h(3) Benefits in current employment

Choose all that apply to HoH's employment

- Health
- Retirement
- Other

Must be blank if 17h(1) - Current employment status of HoH is unemployed.

17h(4) Years of school completed by HoH

- Enter the highest grade/years of formal schooling the HoH has completed at the time of submission
  - 0-25
  - Do not count kindergarten

17h(5) Assistance currently received by the family

Yes/No for each

- TANF/Income Assistance
- General Assistance
- Food Stamps/SNAP
- Medicaid/Children’s Health Insurance
- Earned Income Tax Credit (EITC)
- Social Security Disability (SSDI) or Interim Disability Assistance (IDA)
- Supplemental Security Income (SSI)

If this is an FSS EXIT report and the family Graduated, they must not be receiving TANF or General Assistance.

If 17a – Participate in Supportive Services Program? is yes for FSS

and

17b Report Category is Exit

and

17m(1) Did family complete CoP (graduate) is Yes,

then

17h(5). Assistance currently received by the family

TANF/Income Assistance and General Assistance MUST be No

17h(6) Number of children receiving childcare services

- Only for purposes of participating in self-sufficiency activities or employment
- Must not be greater than the number of foster children + other youth under 18 listed 3h – Relation.

17i Family Services Table
(definitions for each in the Instructions Booklet)

17i. Family services table

	(1) Need (Y or N)	(2) Need Met Through Participation in Program (Y or N)
Education/Training		
GED/high school		
Post secondary		
ESL		
Employment Supports		
Job search/job placement		
Job retention		
Vocational/Job training		
Job Readiness		
Transportation		
Child care		
Personal Welfare		
Health services		
Alcohol and substance use prevention and treatment services		
Mental health		
Dental		
Health insurance		
Financial Empowerment		
Homeownership and Housing counseling		
Connected to Banking Services at a Mainstream Financial Institution (Checking or Savings)		
Financial Empowerment/coaching		
Digital Inclusion Activities		
Elderly/Persons with Disabilities		
Other		

17i Family Services Table

- On an ENROLLMENT Report
  - you MUST mark Yes or No for every (1) NEED
  - If you mark NO to a (1) NEED, you may change it to YES in a future submission
  - All (2) NEED MET indicators should be left blank

- On every PROGRESS report,
  - You must mark YES or NO for every (1) NEED
  - For every (1) NEED, you MUST indicate YES or NO for the matching (2) NEED MET category
    - A NO to (2) NEED MET may change to YES on future submissions

- On an EXIT report,
  - Treat the Family Services Table of (1) NEEDS and (2) NEEDS MET as a summary of the full enrollment period.

Services Included on FSS Family Services Table on 2020 Form Versions	Services Included on FSS Family Services Table on 2024 Form Versions
GED	Services are combined on 2024 forms – GED/High School
High school	
Post secondary	Post secondary
[Service does not appear on 2020 forms]	ESL
Vocational/Job training	Vocational/Job training
Job search/job placement	Job search/job placement
Job retention	Job retention
[Service does not appear on 2020 forms]	Job Readiness
Transportation	Transportation
Child care	Child care
Health services	Health services
Alcohol and other drug abuse prevention services	Alcohol and substance use prevention and treatment services
[Service does not appear on 2020 forms]	Mental health
Mentoring	[Service does not appear on 2024 forms]
Homeownership counseling	Homeownership and Housing counseling
Individual Development Account (IDA)	[Service does not appear on 2024 forms]
[Service does not appear on 2020 forms]	Dental
[Service does not appear on 2020 forms]	Health insurance
[Service does not appear on 2020 forms]	Connected to Banking Services at a Mainstream Financial Institution (Checking or Savings)
[Service does not appear on 2020 forms]	Financial Empowerment/coaching
[Service does not appear on 2020 forms]	Digital Inclusion Activities
[Service does not appear on 2020 forms]	Elderly/Persons with Disabilities
[Service does not appear on 2020 forms]	Other

17i Needs – definitions (Yes/No to each)

These definitions are in the Instruction Booklet

Education/Training

- **GED/High School** - remedial education; education for completion of high school or attainment of a high school equivalency certificate.
- **Post-secondary** - education in pursuit of a postsecondary degree or certificate
- **ESL** – English for speakers of other languages

Employment Supports

- **Job search/job placement** – Program participants need services to help them to search for employment or to use current employment networks for placement in a permanent position with adequate pay and benefits.
- **Job retention** - services to help retain employment, once obtained.
- **Vocational/job training** - vocational or technical school (e.g., may obtain a license or certificate but not a degree), or participate in job training classes (e.g., computer skills courses, etc.).
- **Job Readiness** – soft skills/preparedness for working, unrelated to the specific skills needed for a particular job.
- **Transportation** - transportation necessary to enable a participating family member to receive available services, or to commute to their place(s) of employment.
- **Child care** - child care assistance in order to allow family to access self-sufficiency or employment activities

17i Needs – definitions (Yes/No to each)

These definitions are in the Instruction Booklet

Personal Welfare

- **Health services** - health services to manage and/or overcome health-related barriers that hinder educational, professional, and self-sufficiency goals, or well-child and well-family regular services and check-ups. Additionally, health promotion activities.
- **Alcohol and substance abuse prevention and treatment services** - prevention and/or intervention services designed to help rehabilitate or help with drug-related problems.
- **Mental Health** - mental and behavioral health services.
- **Dental** - dental cleanings and other services including cosmetic.
- **Health Insurance** - connecting residents without health insurance to health insurance benefits or private health insurance.

Financial Empowerment

- **Homeownership and Housing counseling** – services to help participants understand housing rights and prepare for moves out of assisted housing including but not limited to homeownership.
- **Connected to Banking Services at a Mainstream Financial Institution** (Checking or Savings)
- **Financial Empowerment/Coaching** - training in financial literacy, such as financial coaching, training in financial management, asset building, and money management, including engaging in mainstream banking, reviewing and improving credit scores, etc.

17i Needs – definitions (Yes/No to each)

These definitions are in the Instruction Booklet

Digital Inclusion Activities - programs to help residents access affordable Internet in their homes, affordable devices, and the necessary digital literacy training.

Elderly/Persons with Disabilities - services to enable residents to reach and maintain their desired level of independence and to help them continue aging/remaining in place thereby avoiding more costly forms of care. For elderly, include people age 62 and above.

17i. Family Services Table - Other

- For ROSS – mark Need – Other as Yes

ONLY to indicate that the participant is enrolled in the ROSS Rapid Response program.

Then mark Need Met – Other as Yes

- For Jobs Plus – mark Need – Other as Yes

ONLY to indicate that at least one member of the family is enrolled in the Jobs Plus Rent Incentive.

Then mark Need Met – Other as Yes

If there is a change in the Head of Household (including FSS HoH) and the family will continue participating…

- DO NOT do an EXIT/new ENROLLMENT.
- Instead, just do a PROGRESS report to update any information that pertains specifically to the HoH.

17j-17m is FSS ONLY

17j. – FSS Contract of Participation

17j(1) Start date of CoP

- FSS ENROLLMENT REPORT ONLY (and required)
- First of the month after the date of CoP execution.

- What if the CoP and the most recent re-cert are effective on the same day?
  - Escrow baseline is whatever was IN EFFECT when the CoP was created and signed (executed.)
  - Even if the effective date of the re-cert is also the effective date of the CoP, it is still the date that starts the 5-year CoP clock (5 years from the next recertification of income after the execution of the CoP.)
  - Escrow may start accruing that same day if the re-cert increased the rent due to increased earned income.

17j(2) Initial end date of CoP

- Must be blank on ENROLLMENT
- Must be entered on first PROGRESS report after the first re-certification of income after the execution date of the CoP
- You may have one or more PROGRESS reports between ENROLLMENT and the PROGRESS report that established the Initial end date and this field would be left blank.

What if the CoP and the most recent income re-cert are effective on the same day?

- Escrow baseline is whatever was IN EFFECT when the CoP was created and signed (executed).
- Even if the effective date of the re-cert is also the effective date of the CoP, it is still the date that starts the 5-year CoP clock (5 years from the next recertification of income after the execution of the CoP.)
- Escrow may start accruing that same day if the re-cert increased the rent due to increased earned income.

- If this is the case, do an ENROLLMENT with a blank Initial end date of CoP and then do a PROGRESS to set the end date and start the escrow.

17j(3) Contract Date Extended to (if applicable)

- If no extension, leave blank

17j(4) Number of family members with ITSP

- Must be at least one (the FSS HoH)
- Must not be greater than the number of adults in the household
- May change over the course of the CoP

17k. FSS Escrow Account Information

If there is no escrow, enter $0

17k(1) Current FSS account monthly credit

- Dollar amount contributed each month to family's escrow account.
- This question should be updated in a PROGRESS Report every time there is a change in escrow
- If there is no escrow, enter $0
- If there is a new re-cert that will be effective on the same day as the CoP is effective, do an ENROLLMENT and then do a PROGRESS Report.

17k(2) Current FSS escrow account balance

- Current dollar amount of family's FSS escrow account based on the most recent report of account funds and activity. Include interest.
- This should be updated in a Progress Report any time there is an interim escrow disbursement.
- This amount should equal amount of escrow disbursed at graduation, before any debt owed to the PHA is deducted.

17k(3) FSS account amount disbursed to the family

- Total cumulative dollar amount of any interim disbursements made to the family.

17k(2) – Current FSS escrow account balance

Minus

17k(3) - FSS account amount disbursed to the family

Equals

Total amount escrowed through the life of the CoP

There is no 17l.

17m. FSS Exit Information

- FSS EXIT Report ONLY
- Must be blank on ENROLLMENT and PROGRESS reports
- Remember, if a family is porting their FSS CoP, do a PROGRESS, not an EXIT

17m(1) Did family complete the CoP?

- Yes or No
- Yes = graduate

17m(2) If (1) is Yes, did family move to homeownership?

- Yes or No
- Yes includes voucher homeownership

- If 17m(1) is No, 17m(2) must be No

If this is an FSS Exit report and the family Graduated, they must be employed.

If 17a – Participate in Supportive Services Program? is yes for FSS

and

17b Report Category is Exit

and

17m(1) Did family complete CoP (graduate) is Yes,

then

17h(1). Current employment status of HoH

May NOT be Unemployed.

17m(3) If (1) is No, primary reason for exit

- If 17m(1) is Yes, 17m(3) must be blank
- Left Voluntarily
- Asked by the PHA to leave program
  - Includes exit without escrow due to termination of voucher
- Portability move-out to another PHA
  - and is NOT taking CoP
  - and is NOT Termination with Escrow Disbursement – Port for Good Cause
- Termination with Escrow Disbursement
  - Essential Service was Unavailable
  - Port for Good Cause
  - FSS HoH became disabled
- CoP (including any extensions) expired but family did not fulfill obligations.

Change of HoH for Rental Assistance

- A change of Head of Household cannot be paired with an SSPEXIT report.
- If the family will continue participating in an SSP, include a PROGRESS report with the change of Head of Household.
- If the family will not continue participating in an SSP, submit an EXIT report and ensure it is accepted *before* submitting a change in Head of Household.

(remember – the family's designation of HoH for FSS is not recorded in PIC)

Challenges?

- First ask – Is it a
  - PIC question? – talk to your PIC coach
  - Software question? – talk to your Software provider
  - Program policy question? – talk to your Program Office

Questions?