Carr, Terry M
Thank you for joining us and we are excited that so many of you want to come and learn about 9902 reporting because we are really within the office trying to give it a higher priority.

0:35:41.50 --> 0:35:51.690
Carr, Terry M
We want to make sure that everybody understands how to report and how to report our accurately, so we're going to use this time today to give you some tips and tricks to make sure you know how to report.

0:35:51.910 --> 0:35:58.670
Carr, Terry M
We're also going to make sure you know how to access resources if you're having trouble, and it's all for a good reason.

0:35:59.420 --> 0:36:14.150
Carr, Terry M
The 9902 data really helps us tell the story of the good work we're doing in the community, and a lot of people pay attention to it when we brief people on the hill, they are often paying attention to what's showing up on our dashboards, on how to exchange.

0:36:14.160 --> 0:36:20.870
Carr, Terry M
And you know, they're not many programs that have the ability to say, here's who we're helping.

0:36:20.940 --> 0:36:22.480
Carr, Terry M
Here's their economic level.

0:36:22.750 --> 0:36:24.380
Carr, Terry M
Here's the deck demographics.

0:36:24.390 --> 0:36:28.0
Carr, Terry M
Here are the kinds of services that we are providing.

0:36:28.110 --> 0:36:31.460
Carr, Terry M
Here are the kinds of services that people seem to need the most right now.

0:36:31.470 --> 0:36:39.240
Carr, Terry M
So when the economic cycle changes or housing housing supply is shorter, it's more difficult to purchase a home.

0:36:39.250 --> 0:36:43.570
Carr, Terry M
Or it's more difficult to stay in your home that comes through in our data.

0:36:43.580 --> 0:36:51.540
Carr, Terry M
And so we sometimes become our because of our data, we get to be the early warning, we get to let people know what we think is coming up on the horizon.

0:36:51.550 --> 0:37:1.390
Carr, Terry M
And so that's just one of the many reasons that we think reporting reporting on time reporting accurately is important and why we wanted to hold this training.

0:37:2.60 --> 0:37:15.570
Carr, Terry M
The only other thing I want to do is just encourage you that by reporting and telling our story, we really get to help people understand the important role that housing counselors play in general.

0:37:16.360 --> 0:37:18.10
Carr, Terry M
They're our housing.

0:37:18.20 --> 0:37:22.630
Carr, Terry M
Housing, obviously, is an extraordinary way to make a difference in your life.

0:37:22.640 --> 0:37:28.880
Carr, Terry M
Owning a home in this country and the services that our counselors provide, whether it's for housing or anything else or really important.

0:37:29.230 --> 0:37:32.760
Carr, Terry M
And so this is an opportunity to get the message out.

0:37:32.770 --> 0:37:34.300
Carr, Terry M
And so with that, I'm just gonna say.

0:37:36.100 --> 0:37:38.380
Carr, Terry M
Thanks for joining us and turn it over to Tracy.

0:37:41.290 --> 0:37:41.600
Oaks, Tracie R
Great.

0:37:41.610 --> 0:37:42.400
Oaks, Tracie R
Thank you, Terry.

0:37:43.0 --> 0:37:43.920
Oaks, Tracie R
Good morning everyone.

0:37:43.930 --> 0:37:45.360
Oaks, Tracie R
My name is Tracy Oakes.

0:37:45.370 --> 0:37:59.40
Oaks, Tracie R
Ross, I am a housing program specialist here in the Office of Policy and Grant Administration office policy counseling, and I will be presenting this information to you today, along with my colleague Gabriella Ramon.

0:37:59.430 --> 0:38:2.90
Oaks, Tracie R
She's also in the Office of Policy and grant administration.

0:38:4.570 --> 0:38:5.240
Oaks, Tracie R
And except.

0:38:6.390 --> 0:38:6.800
Oaks, Tracie R
OK.

0:38:6.810 --> 0:38:12.240
Oaks, Tracie R
So on today's agenda, again we'll be going over 9902 reporting systems.

0:38:12.970 --> 0:38:15.640
Oaks, Tracie R
We'll take a look at the 9902 form.

0:38:15.650 --> 0:38:25.290
Oaks, Tracie R
We'll provide an overview of 9902 reporting, including a case study that will be led by Gabriella will, identify some of the common errors that we see.

0:38:25.300 --> 0:38:47.500
Oaks, Tracie R
We'll take a look at some of the data quality checks that are available to you when you're submitting your when you're transmitting your 9902 data, along with taking a quick look or providing some resources to the data displays along with other resources that are available to you and that could assist you in your pocket that are available to you in your pocket to assist you with your 9902 submissions.

0:38:47.920 --> 0:38:52.70
Oaks, Tracie R
And then at the end, if we have time, we'll respond to some of the questions in the chat.

0:38:52.80 --> 0:39:3.670
Oaks, Tracie R
We'll also take a look at some of the more frequently asked questions that we see that come in from many of you through your POC throughout the course of the of the quarter and the fiscal year.

0:39:4.340 --> 0:39:11.780
Oaks, Tracie R
But before we get started, we want to start with just a couple of polling questions for our audience that Ben's gonna kick us off of that.

0:39:14.500 --> 0:39:18.60
Yanetta, Benjamin T
Alright, so you should see a pop up on your screen with a pull.

0:39:18.640 --> 0:39:20.550
Yanetta, Benjamin T
The names are now recorded.

0:39:20.560 --> 0:39:25.330
Yanetta, Benjamin T
You can provide any response, but there's nothing here that you would wanna keep secret.

0:39:25.340 --> 0:39:27.20
Yanetta, Benjamin T
We're just asking what kind of.

0:39:29.250 --> 0:39:32.880
Yanetta, Benjamin T
Organization you represent could be one of the four.

0:39:33.380 --> 0:39:35.970
Yanetta, Benjamin T
Are you an LHC a an intermediary?

0:39:36.30 --> 0:39:37.960
Yanetta, Benjamin T
A subgrantee or affiliate?

0:39:38.170 --> 0:39:43.90
Yanetta, Benjamin T
Or are you not a currently a HUD approved agency in our network.

0:39:50.430 --> 0:39:52.220
Yanetta, Benjamin T
I am gathering responses right now.

0:39:55.520 --> 0:40:1.770
Yanetta, Benjamin T
Looks like about 200 or so people have voted and I'm gonna close it out.

0:40:1.780 --> 0:40:15.950
Yanetta, Benjamin T
It looks like the majority are LCA's uh, so 62% of the audience today is an LCA with 17% being intermediaries and 19% being a sub.

0:40:15.960 --> 0:40:20.860
Yanetta, Benjamin T
Grantees are affiliates, and 2% of the audience are looking to become 100%.

0:40:22.30 --> 0:40:22.430
Oaks, Tracie R
It's good.

0:40:24.730 --> 0:40:25.230
Oaks, Tracie R
Thank you, Ben.

0:40:29.980 --> 0:40:30.910
Oaks, Tracie R
Let's go on to the next one.

0:40:33.230 --> 0:40:37.980
Oaks, Tracie R
Umm, so we're going to start the presentation off by talking about 9902 reporting systems.

0:40:37.990 --> 0:40:45.110
Oaks, Tracie R
But again, before we do that, I think it's helpful for us to bins gonna kick us off with one more.

0:40:45.940 --> 0:40:47.150
Oaks, Tracie R
Umm Paul.

0:40:47.160 --> 0:40:51.420
Oaks, Tracie R
We just wanna get a sense of how you're submitting your 9902 reporting.

0:40:53.200 --> 0:40:53.750
Yanetta, Benjamin T
OK.

0:40:53.760 --> 0:40:55.240
Yanetta, Benjamin T
Again, another poll is launching.

0:40:55.250 --> 0:40:56.730
Yanetta, Benjamin T
You should see the pop up.

0:40:56.920 --> 0:40:59.900
Yanetta, Benjamin T
Here is a multiple choice response.

0:40:59.950 --> 0:41:4.360
Yanetta, Benjamin T
Are you using your client management system to submit your 9902?

0:41:4.460 --> 0:41:8.10
Yanetta, Benjamin T
Are you submitting it directly through HCS?

0:41:8.760 --> 0:41:15.970
Yanetta, Benjamin T
Are you completing a paper form 99 or two, or are you not sure what 9902 data is?

0:41:18.600 --> 0:41:19.270
Yanetta, Benjamin T
And we'll get you.

0:41:19.280 --> 0:41:21.60
Yanetta, Benjamin T
Take a moment to gather responses.

0:41:26.450 --> 0:41:28.980
Yanetta, Benjamin T
Pretty expected response here.

0:41:29.50 --> 0:41:41.580
Yanetta, Benjamin T
About 70% are using their client management system to submit their 99 oh twos, about a quarter or going directly through NCS to submit their 99 oh twos.

0:41:41.700 --> 0:41:49.690
Yanetta, Benjamin T
Some are still using a paper form and some are wondering what on Earth 99020 data is and you're in for a treat because you're going to learn all about them today.

0:41:49.750 --> 0:41:51.960
Yanetta, Benjamin T
For you lucky 4%, all right.

0:41:51.620 --> 0:41:53.930
Oaks, Tracie R
And we're seeing some folks that can't see the polls.

0:41:53.940 --> 0:42:0.880
Oaks, Tracie R
So if you can't see the poll, we apologize for that, but go on and type your response and the chat will will, will be we're taking a look at that too.

0:42:1.640 --> 0:42:3.330
Yanetta, Benjamin T
There might be some hiccups.

0:42:8.350 --> 0:42:8.620
Oaks, Tracie R
Umm.

0:42:17.300 --> 0:42:18.150
Oaks, Tracie R
Yeah, absolutely.

0:42:3.770 --> 0:42:18.500
Yanetta, Benjamin T
Ohh techwise, if you're using a different type of platform that won't allow the tools to answer, but we did get 264 responses so I'm happy to see that a lot of you were able to to provide us that information in a close the poll down.

0:42:21.90 --> 0:42:21.410
Oaks, Tracie R
Right.

0:42:24.630 --> 0:42:24.830
Oaks, Tracie R
What?

0:42:24.840 --> 0:42:25.430
Oaks, Tracie R
Thank you, Ben.

0:42:28.110 --> 0:42:31.500
Oaks, Tracie R
So let's go on and get started and that's fine.

0:42:33.990 --> 0:42:43.180
Oaks, Tracie R
Umm, so we're going to start the the presentation off by just giving you all the refresher on CMS and HHS and what those things are.

0:42:43.190 --> 0:42:46.510
Oaks, Tracie R
So the CMS is the client management system.

0:42:46.990 --> 0:43:6.390
Oaks, Tracie R
It's the application that all participating agencies are required to use, and it's used to collect and submit your 9902 reporting along with your client level data, and so using your CMS ensures that you are entering again the information correctly accurately.

0:43:6.400 --> 0:43:7.790
Oaks, Tracie R
It's recording your information.

0:43:7.800 --> 0:43:35.130
Oaks, Tracie R
It's cumulative data throughout the federal fiscal year, and this is how we take a look at your client level data for the for the for the clients that are being served throughout your program, all CMS that are used in OHC are certified by HUD and one other point I wanna make is that it is required that all CMS is integrate with HCS which we'll talk about in a second.

0:43:35.140 --> 0:43:53.730
Oaks, Tracie R
With HCS is our housing counseling system, so one thing I just wanna echo the remarks made by our by Terry Carr again is emphasizing the importance of of reporting accurately reporting complete data and reporting timely data because again that data.

0:43:55.710 --> 0:44:2.200
Oaks, Tracie R
Allows us to demonstrate the impact of the housing counseling program to stakeholders and to Congress.

0:44:2.930 --> 0:44:14.130
Oaks, Tracie R
So again, it's very, very important that you all are using a CMS that does transmit your data appropriately through through NCS next line.

0:44:16.360 --> 0:44:20.510
Oaks, Tracie R
And here is just a screen shot of the CMS resource page that's on the HUD.

0:44:20.520 --> 0:44:21.230
Oaks, Tracie R
Exchange.

0:44:21.760 --> 0:44:26.670
Oaks, Tracie R
It has a lot of helpful information, a lot of resources on client management systems.

0:44:26.680 --> 0:44:33.630
Oaks, Tracie R
If you are not familiar with the HUD exchange, I would definitely recommend that you do familiarize yourself with that with that Web page.

0:44:34.30 --> 0:44:45.680
Oaks, Tracie R
And if you've never gone through the CMS guidance that's on the HUD exchange because a lot of valuable information, a lot of resources we we absolutely recommend that you all spend some time and go through that information.

0:44:48.770 --> 0:44:49.260
Oaks, Tracie R
Thanks.

0:44:50.520 --> 0:44:59.230
Oaks, Tracie R
And so ECS is the housing counseling system, and it's a real time web application that we use to manage the housing, counseling program data.

0:44:59.580 --> 0:45:8.130
Oaks, Tracie R
And as I mentioned before, and you'll hear this fruit a few times today, it is required that the CMS that you are using interface with HCS.

0:45:8.420 --> 0:45:9.10
Oaks, Tracie R
OK.

0:45:9.960 --> 0:45:23.100
Oaks, Tracie R
So in addition to the client level data that's transmitted that's transmitted into HCS, some other functions of HCS are that one, if you're a grantee, that's where you're gonna find your grant application information.

0:45:23.540 --> 0:45:33.540
Oaks, Tracie R
And for every agency that's in our program, there's also information and HS with respect to your agency status, your approval status, your agencies performance reviews.

0:45:33.550 --> 0:45:40.960
Oaks, Tracie R
If you have a performance review, there's information that's very valuable there in ECS, so a lot of very good information is collected in ECS.

0:45:40.970 --> 0:45:45.940
Oaks, Tracie R
So if you are not familiar with that system, it this is also a very good time.

0:45:45.950 --> 0:45:50.900
Oaks, Tracie R
A reminder for folks to go into HCS and take a look at all the information that's available to you in the system.

0:45:52.50 --> 0:45:52.450
Oaks, Tracie R
Next slide.

0:45:56.570 --> 0:46:5.400
Oaks, Tracie R
And so each agency is assigned when you sign up in ACS, each agency is assigned 1 user ID, which can be used for your agency.

0:46:5.410 --> 0:46:12.920
Oaks, Tracie R
So again, we do not assign individual HCS ID to staff members again on the screen.

0:46:12.930 --> 0:46:25.50
Oaks, Tracie R
Here is a screenshot of the HUD exchange page and on that page you'll find again a lot of good resources if you need to reset your password, you'll find some instructions there on the HUD exchange page.

0:46:25.780 --> 0:46:28.150
Oaks, Tracie R
Umm lastly, I wanna remind folks.

0:46:30.70 --> 0:46:36.200
Oaks, Tracie R
That you are required to validate your profile once every 90 days.

0:46:36.250 --> 0:46:41.80
Oaks, Tracie R
OK, so we wanna make sure that all the information in HCS is kept up to date.

0:46:41.90 --> 0:46:56.630
Oaks, Tracie R
So if there's a change in your personnel at your agency, if there's a change in your contact information, if you've updated your work plan and there's a change in the type of services that you provide you need, you must go into the system and validate your profile.

0:46:56.640 --> 0:46:56.980
Oaks, Tracie R
OK.

0:46:56.990 --> 0:46:58.580
Oaks, Tracie R
And again, we take a look at that.

0:46:59.190 --> 0:47:3.510
Oaks, Tracie R
It's it and we review it during our novel scoring and during performance reviews.

0:47:3.520 --> 0:47:11.470
Oaks, Tracie R
So you wanna make sure that you are going into HCS and validating your profile at least once every 90 days, OK.

0:47:14.650 --> 0:47:18.570
Oaks, Tracie R
So next we're going to take a look at the 9902 form next.

0:47:20.520 --> 0:47:25.90
Oaks, Tracie R
So the HUD form 9902 is the housing counseling activity report.

0:47:25.100 --> 0:47:36.890
Oaks, Tracie R
And again, this is the tool that we use to track the housing counseling program and it's what you all use to report your one on one clients and your group education clients throughout the fiscal year.

0:47:37.100 --> 0:47:37.440
Oaks, Tracie R
So.

0:47:37.900 --> 0:47:48.350
Oaks, Tracie R
So all 9902 activities that are reported must be reported as cumulative throughout the entire fiscal year for every quarter.

0:47:48.360 --> 0:47:54.460
Oaks, Tracie R
And again, that applies to all one on one clients and all of your group education clients.

0:47:54.730 --> 0:47:55.300
Oaks, Tracie R
OK.

0:47:55.450 --> 0:48:3.580
Oaks, Tracie R
So reporting cumulative data is something that you all are going to hear repeated today several times throughout the training.

0:48:3.770 --> 0:48:7.450
Oaks, Tracie R
And we're actually gonna walk through an example of what that should look like as well.

0:48:9.570 --> 0:48:20.740
Oaks, Tracie R
And that applies to not only again reporting your one on one in education clients, but that also applies to the demographic information that you report on your 9902 as well.

0:48:21.30 --> 0:48:21.460
Oaks, Tracie R
Next slide.

0:48:24.260 --> 0:48:26.850
Oaks, Tracie R
Umm, so here are the sections of the 9902.

0:48:26.860 --> 0:48:36.170
Oaks, Tracie R
If you're not familiar, Section 3 through 7 on the screen is the the demographic information, such as ethnicity, race, income levels.

0:48:36.930 --> 0:48:45.870
Oaks, Tracie R
If your client is located in a rural area, or if they're have limited English proficiency, a couple things to point out when you're entering your client data.

0:48:45.880 --> 0:48:55.640
Oaks, Tracie R
The number of clients that are entered under sections 3 through 7 must equal the total clients that are reported in sections 8 and 9 combined.

0:48:55.700 --> 0:49:22.590
Oaks, Tracie R
So what that means is the total clients and Section 3 should equal the total number of clients reported in Section 4, which should equal the total number of clients in Section 5, Section 6 and Section 7, and those totals for each of those sections should equal the total number of clients that were reported in Section 8, which is group education and Section 9, which is 1 on one counseling which takes me to Section 8 which is group education.

0:49:22.920 --> 0:49:31.750
Oaks, Tracie R
This is where you're going to record the households that attend and complete an educational workshop, whether that's in person or whether that's online education.

0:49:32.140 --> 0:49:32.320
Oaks, Tracie R
OK.

0:49:33.220 --> 0:49:33.850
Oaks, Tracie R
Umm.

0:49:34.80 --> 0:49:35.520
Oaks, Tracie R
And we'll talk about this in a little bit.

0:49:35.530 --> 0:49:53.10
Oaks, Tracie R
But if a household completes multiple distinct courses of group education that each of those courses should be reported on your 9902 OK, and then Section 9 is for households that receive one on one counseling.

0:49:53.80 --> 0:50:7.650
Oaks, Tracie R
OK, this differs from education in that one on one, counseling is tailored uniquely to the circumstances of an individual client and it's important to to understand that distinction because there's very different reporting requirements on the 9902.

0:50:8.490 --> 0:50:20.510
Oaks, Tracie R
If you're providing one on one counseling and there's very different requirements in terms of client file documentation for a consumers that are receiving one on one counseling versus group education.

0:50:22.750 --> 0:50:28.700
Oaks, Tracie R
And then section 10 is where you report the outcomes of your counseling services.

0:50:28.710 --> 0:50:31.580
Oaks, Tracie R
And I know in the past we used the term impact.

0:50:31.790 --> 0:50:45.560
Oaks, Tracie R
If you take a look at our 9902 forms moving forward or or that were more recently published than some of our other training tools, we now we now refer to the to this as Ms Outcomes as opposed to impact.

0:50:45.880 --> 0:50:56.920
Oaks, Tracie R
And I think it's important to remind folks that when we say, umm, counseling, we are specifically referring to one on one counseling, OK.

0:50:56.930 --> 0:51:1.220
Oaks, Tracie R
And there's a distinction that I think needs to be made between counseling and education.

0:51:1.230 --> 0:51:4.240
Oaks, Tracie R
Whenever you hear us talk about counseling, you heard it a lot.

0:51:4.250 --> 0:51:9.740
Oaks, Tracie R
If you were on the training yesterday for the homeowner initiative, no foe, we had a lot of questions.

0:51:9.750 --> 0:51:25.410
Oaks, Tracie R
Folks were asking us about that distinction, but that is a very important distinction in our office when we're talking about specifically the word counseling, we're talking about one on one counseling in section 10 is only used to report outcomes of 1 on one counseling.

0:51:25.800 --> 0:51:30.480
Oaks, Tracie R
OK, it's not used to report a group education.

0:51:31.790 --> 0:51:40.290
Oaks, Tracie R
Umm, the second thing that's important to point out is that a one on one counseling activity can have more than one outcome in section 10 during the continuum of Council.

0:51:42.240 --> 0:51:52.170
Oaks, Tracie R
And we highly, highly encourage our counselors to select as many outcomes that apply to each household that is being counseled through one on one.

0:51:52.180 --> 0:51:52.670
Oaks, Tracie R
Counseling.

0:51:52.680 --> 0:51:59.690
Oaks, Tracie R
Now, some of those outcomes can be reported immediately, while other outcomes require follow up with the client.

0:51:59.700 --> 0:52:21.500
Oaks, Tracie R
But again, Section 10 is the only section on the 9902 form that does not have to match the other totals, and if you recall, as I mentioned earlier, under sections 3 through 7, uh, those clients reported the total number of clients reported must equal the total number of clients reported in sections 8 and nine.

0:52:21.820 --> 0:52:22.280
Oaks, Tracie R
OK.

0:52:22.840 --> 0:52:24.120
Oaks, Tracie R
And this is the more.

0:52:24.130 --> 0:52:32.300
Oaks, Tracie R
This is one of the more common errors that we see and so as the part of the training today, Gabriella is actually gonna lead us through a case study.

0:52:33.520 --> 0:52:44.240
Oaks, Tracie R
Umm so that we can see how you should report those outcomes and at what point during the counseling of that client should those outcomes should those outcomes be reported?

0:52:45.450 --> 0:52:46.200
Oaks, Tracie R
OK, next one.

0:52:48.970 --> 0:52:51.960
Oaks, Tracie R
Next, we'll talk about we'll give an overview of 9902 reporting.

0:52:54.960 --> 0:52:55.250
Oaks, Tracie R
Umm.

0:52:55.260 --> 0:53:3.930
Oaks, Tracie R
So 9902 reporting is required for all participating agencies and that's whether you are a grantee or non granteed.

0:53:4.360 --> 0:53:10.790
Oaks, Tracie R
Everyone is required to transmit their 9902 data through their CMS every quarter.

0:53:11.140 --> 0:53:22.790
Oaks, Tracie R
OK, so if you're in local housing counseling agency or an LCA, your quarterly 9902 report must include all the activities for both your main office and for your branches.

0:53:22.900 --> 0:53:29.180
Oaks, Tracie R
OK, we do not require your branches to submit or file independent 99 Altos.

0:53:29.190 --> 0:53:29.460
Oaks, Tracie R
OK.

0:53:29.470 --> 0:53:38.680
Oaks, Tracie R
So that's 19902 for an A local housing counseling agency for our participating parent organizations.

0:53:38.690 --> 0:53:46.640
Oaks, Tracie R
So that includes our intermediaries, our multi state organizations or Msos, our state housing finance agencies or HFA.

0:53:47.270 --> 0:53:54.900
Oaks, Tracie R
Each of your program affiliates are required to transmit individual 9902 for each quarter.

0:53:55.70 --> 0:53:55.640
Oaks, Tracie R
OK.

0:53:55.830 --> 0:53:58.460
Oaks, Tracie R
And that also applies for the branch office of the intermediary.

0:53:58.470 --> 0:54:18.880
Oaks, Tracie R
So when you log into ACS or when we log into HCS every quarter before the quarter ends, then after the quarter has ended, we log into HCS and we can review for every port for every parent organization how many of your Affiliates have transmitted their 9902 data.

0:54:19.370 --> 0:54:25.620
Oaks, Tracie R
And you, you're probably seeing a lot more emails from your pox if you're.

0:54:25.630 --> 0:54:43.820
Oaks, Tracie R
If you do have an affiliate within your network that did not submit their 9902 reports for the quarter, and because this is important and we want to, as Terry mentioned at the beginning of the presentation, we want to increase consistently increase the number of agencies that are reporting timely.

0:54:43.830 --> 0:54:46.540
Oaks, Tracie R
So again, it is something that we're taking a look at.

0:54:46.550 --> 0:54:50.280
Oaks, Tracie R
So if you do receive an email from your pocket, it's important that you're very responsive to them.

0:54:50.830 --> 0:55:2.140
Oaks, Tracie R
And that you reach out to your failures to remind them of this requirement of submitting their 9902 data quarterly because again, we are taking a very, very close look at that next slide.

0:55:10.820 --> 0:55:11.100
Oaks, Tracie R
Thank you.

0:55:12.40 --> 0:55:25.570
Oaks, Tracie R
Again, this is just a reminder that all participating agencies you need to use a hug compliance CMS to transmit your 9902 data and we recommend folks to submit their data early.

0:55:25.580 --> 0:55:30.650
Oaks, Tracie R
This will allow you time to review your data to make sure that it's correct to fix any errors.

0:55:30.920 --> 0:55:41.470
Oaks, Tracie R
If you need to reach out to your CMS provider for technical assistance, or if you need to reach out to your pop, you wanna make sure that you allow yourself time to do that before the 99.

0:55:41.480 --> 0:55:42.760
Oaks, Tracie R
Oh, to report is due.

0:55:46.240 --> 0:55:54.650
Oaks, Tracie R
A second, if you discover an error in your 9902 reporting, it should in it should be corrected in your CMS, not an HHS.

0:55:54.660 --> 0:56:2.190
Oaks, Tracie R
OK, so you want to log back into your CMS and then retransmit that data to come through the the housing counseling system.

0:56:2.630 --> 0:56:22.280
Oaks, Tracie R
And then last thing I want to point out and just remind folks, I think it's just a very good practice that after you submit your data through CMS, you should get into a habit of logging into HCS to verify that the data has been tremendous, has been transmitted, that it's accurate and that you've validated it in ACS.

0:56:22.290 --> 0:56:22.710
Oaks, Tracie R
And I don't.

0:56:22.720 --> 0:56:29.250
Oaks, Tracie R
There's some I don't think everyone is aware of the multiple validations in the housing counseling system.

0:56:29.260 --> 0:56:44.960
Oaks, Tracie R
There's a validation feature for your profile, but there's also a validation feature on your 99 or two reporting, so it's very, very important that once you've transmitted your data through your CMS, because this is some of the feedback that we received from agencies, they'll tell us, oh, I transmitted it.

0:56:44.970 --> 0:56:45.640
Oaks, Tracie R
I transmitted it.

0:56:45.650 --> 0:56:49.440
Oaks, Tracie R
I got the confirmation but it did not come through the housing counseling system.

0:56:49.450 --> 0:56:53.810
Oaks, Tracie R
So again, you want to log in to make sure that that data it comes through correctly.

0:56:55.920 --> 0:56:56.510
Oaks, Tracie R
And except.

0:56:59.10 --> 0:57:7.220
Oaks, Tracie R
Umm so again as I just mentioned, everyone is required to submit a 9902 data whether you're a grantee or non grantee.

0:57:7.410 --> 0:57:17.810
Oaks, Tracie R
OK, even if you did not have any activity to report for that quarter, you still need to log into your CMS and enter in zeros.

0:57:18.210 --> 0:57:18.840
Oaks, Tracie R
OK.

0:57:19.110 --> 0:57:22.660
Oaks, Tracie R
And then log in to HTTPS to validate that information.

0:57:22.870 --> 0:57:30.750
Oaks, Tracie R
If you do not go through that process, the system on our end indicates to us that you did not submit your 9902 data.

0:57:31.190 --> 0:57:31.810
Oaks, Tracie R
OK.

0:57:31.900 --> 0:57:36.840
Oaks, Tracie R
And on our end, it will show that you failed to report for that quarter.

0:57:37.260 --> 0:57:49.910
Oaks, Tracie R
So again, even if you did not serve any clients for the quarter, you still need to log into your CMS, entering zeros for that quarter and log into HCS to validate that data.

0:57:50.330 --> 0:57:50.740
Oaks, Tracie R
OK.

0:57:51.500 --> 0:57:57.650
Oaks, Tracie R
And then again reminding folks all your data needs to be cumulative for the fiscal year.

0:57:58.20 --> 0:57:58.650
Oaks, Tracie R
OK.

0:57:58.760 --> 0:58:9.470
Oaks, Tracie R
So the quarter that you're reporting must include clients from the previous quarter of that fiscal year and we're going to take a look at an example of that in a second.

0:58:10.380 --> 0:58:16.730
Oaks, Tracie R
And then the last point that I want to make on this is in terms of oversight and compliance, right?

0:58:16.740 --> 0:58:23.500
Oaks, Tracie R
So, umm, when you don't submit your 9902 report that does impact you negatively, right?

0:58:23.510 --> 0:58:27.20
Oaks, Tracie R
It could have a negative impact on your Housing Council on your approval status.

0:58:27.290 --> 0:58:36.60
Oaks, Tracie R
In our program, it is a regulatory requirement, one for you to use a hook compliance CMS, but also for you to submit your data quarterly.

0:58:36.430 --> 0:58:48.520
Oaks, Tracie R
OK, if you were a grantee and you fail to submit your 9902 report, that could have, that could impact your your possibility to process your voucher. Right?

0:58:48.960 --> 0:58:53.750
Oaks, Tracie R
OK, so you wanna make sure that you submit your 9902 reports every single quarter.

0:58:54.260 --> 0:59:0.670
Oaks, Tracie R
Also for grantees, we take a look at that when we're when we're evaluating your nofa application as well.

0:59:0.730 --> 0:59:5.450
Oaks, Tracie R
So again, very, very important to submit timely and accurate.

0:59:5.860 --> 0:59:8.140
Oaks, Tracie R
Umm, reporting next slide.

0:59:10.890 --> 0:59:14.540
Oaks, Tracie R
Umm, so here is just a reminder of the quarterly reporting due dates for the fiscal year.

0:59:15.370 --> 0:59:32.50
Oaks, Tracie R
Umm for the first second and third quarter, you reports you did not 30 days after the quarter ends for the fourth quarter reports are due 90 days after the quarter ends and just I want to clarify one thing because we do receive this question a lot.

0:59:32.530 --> 0:59:36.800
Oaks, Tracie R
The 9902 is based on the federal fiscal year, OK.

0:59:36.810 --> 0:59:40.400
Oaks, Tracie R
And so that always starts on October 4th 1st.

0:59:40.450 --> 0:59:43.800
Oaks, Tracie R
I'm sorry and it's always cumulative.

0:59:43.810 --> 0:59:46.540
Oaks, Tracie R
Except, of course, for the first quarter, right?

0:59:47.320 --> 0:59:59.390
Oaks, Tracie R
So the first quarter report is always going to start on October 1st through December 31st and then the second quarter October 1st through March 31st.

0:59:59.400 --> 1:0:5.180
Oaks, Tracie R
So again, we're talking about federal fiscal years and not the grant period of performance.

1:0:5.190 --> 1:0:7.210
Oaks, Tracie R
These are very, very different things.

1:0:7.840 --> 1:0:21.850
Oaks, Tracie R
We do receive a lot of questions around this because sometimes they don't align, but everyone is required to submit 9902 quarterly reporting within the period of time that those activities occurred.

1:0:21.860 --> 1:0:25.230
Oaks, Tracie R
Again, it's independent of your of your grant.

1:0:25.240 --> 1:0:28.610
Oaks, Tracie R
If you are a grant recipient, OK, next slide.

1:0:31.40 --> 1:0:35.270
Oaks, Tracie R
Umm, so we're just going to walk through a very simple example here.

1:0:35.280 --> 1:0:37.750
Oaks, Tracie R
UM of 9902 reporting.

1:0:38.200 --> 1:0:44.410
Oaks, Tracie R
Just keeping in mind that all 9902 reporting again needs to be cumulative for the fiscal year.

1:0:44.420 --> 1:0:51.190
Oaks, Tracie R
So on the left side of the screen or the four quarters of the federal fiscal year, OK.

1:0:51.200 --> 1:0:55.590
Oaks, Tracie R
So each quarter covers three months for the 12 month period.

1:0:56.0 --> 1:1:10.440
Oaks, Tracie R
So starting on October 1st through September 30th is the first is is the federal fiscal year on the right side is the period that is covered for each quarterly 9902 report for the fiscal year.

1:1:10.450 --> 1:1:17.10
Oaks, Tracie R
So for this example, let's start with the first quarter, which is October to December.

1:1:17.240 --> 1:1:22.190
Oaks, Tracie R
And in this example, our agency saw 30 clients, right?

1:1:22.200 --> 1:1:31.780
Oaks, Tracie R
They saw 30 clients in the first quarter when it's time for them to report on their 9902, which is due no later than January 31st.

1:1:33.250 --> 1:1:38.260
Oaks, Tracie R
The client is going to report, the agency is going to report those 30 clients, OK?

1:1:38.270 --> 1:1:40.890
Oaks, Tracie R
Because that's what they served within that first quarter.

1:1:41.810 --> 1:1:48.550
Oaks, Tracie R
OK, so now that the first quarter has ended, we're in the second quarter, which starts on January 1st and goes through March 31st.

1:1:49.10 --> 1:1:52.620
Oaks, Tracie R
Our agency has served 42 clients for that period.

1:1:53.50 --> 1:2:0.150
Oaks, Tracie R
OK, so when it's time for them to report those clients again, again reminding every everyone that you're reporting must be cumulative.

1:2:0.970 --> 1:2:7.180
Oaks, Tracie R
Your CMS you're not only pull forward the 30 clients from the first quarter, but the 42 clients from the second quarter.

1:2:7.190 --> 1:2:13.860
Oaks, Tracie R
So for a total of 72 clients have been served from October 1st through March 31st.

1:2:14.150 --> 1:2:14.600
Oaks, Tracie R
OK.

1:2:15.330 --> 1:2:17.280
Oaks, Tracie R
And that's the same for the third quarter.

1:2:17.290 --> 1:2:21.950
Oaks, Tracie R
So let's say that your agency served 25 clients between April 1st and June 30th.

1:2:22.290 --> 1:2:33.70
Oaks, Tracie R
You're third quarter cumulative total starts again from the beginning of the federal fiscal year, which is October 1st through the 30th of June.

1:2:33.80 --> 1:2:42.920
Oaks, Tracie R
The end of the third quarter for a total of 97 clients, so that's 30 clients in the first quarter, you're 42 clients in the second quarter and then you're 25 clients in the third quarter.

1:2:42.990 --> 1:2:45.640
Oaks, Tracie R
OK, remember you're reporting must be cumulative.

1:2:46.410 --> 1:2:54.30
Oaks, Tracie R
So now that we're in the last quarter of the fiscal year, let's say you're agency didn't serve any clients in the first in the fourth quarter.

1:2:55.170 --> 1:2:58.600
Oaks, Tracie R
This is one of the more common reporting errors that we see.

1:2:59.10 --> 1:3:10.30
Oaks, Tracie R
Again, as I mentioned earlier, agencies not logging into their CMS to enter in that they did not serve any clients for that quarter and to carry forward the clients from previous quarters.

1:3:10.40 --> 1:3:15.920
Oaks, Tracie R
So for this example, again, the agency did not serve any clients from July 1st to September 30th.

1:3:16.910 --> 1:3:28.110
Oaks, Tracie R
However, when it's time to complete the fourth quarter cumulative reporting again, which covers the entire fiscal year, the agency must report the clients that reserved in the 1st 3/4.

1:3:28.540 --> 1:3:33.400
Oaks, Tracie R
So I know I'm sounding redundant, but again, you want to carry forward those clients.

1:3:33.410 --> 1:3:44.120
Oaks, Tracie R
So you're 30 clients in the first quarter, you're 42 clients, you're 25 clients and then you did not serve any clients in the fourth quarter, but your fourth quarter total shifts.

1:3:44.130 --> 1:3:48.760
Oaks, Tracie R
So the 97 clients that were served throughout the fiscal year.

1:3:49.400 --> 1:4:2.920
Oaks, Tracie R
And so this is important because if your fourth quarter is not cumulative, if it's not reported cumulatively, you're really not getting credit right for all the work that you did throughout the entire fiscal year.

1:4:4.170 --> 1:4:18.540
Oaks, Tracie R
And that's why it again, it's also important to use your CMS because your CMS will automatically calculate your your reporting cumulative for you, not just your clients, but your client level data as well.

1:4:18.870 --> 1:4:38.680
Oaks, Tracie R
If you're reporting manually, as many of you may be doing, you do know that you've had this experience that you have to actually go in and manually calculate and carry forward those totals, which is one of the more common errors that we see is because folks, they're manually entering in their data.

1:4:38.690 --> 1:4:52.600
Oaks, Tracie R
So again, the takeaway from this is we really want to emphasize one, the use of your CMS, right and 2nd is the importance of reporting cumulative data every single quarter.

1:4:53.50 --> 1:4:53.290
Oaks, Tracie R
OK.

1:4:54.730 --> 1:5:3.130
Oaks, Tracie R
With that, I'm going to turn the presentation over to Gabriela and she's going to walk us through a pre purchase uh client case study.

1:5:8.600 --> 1:5:11.910
Roman, Gabriela
Hi everyone and thank you for joining us on this trip.

1:5:11.960 --> 1:5:13.430
Roman, Gabriela
I'm very important training.

1:5:13.580 --> 1:5:23.270
Roman, Gabriela
And as an aside, I used to work in the housing counseling industry and I had to do the 9902 report.

1:5:23.280 --> 1:5:26.770
Roman, Gabriela
So I feel all of your pain, but thank you for joining us.

1:5:27.40 --> 1:5:28.90
Roman, Gabriela
I'm next slide please.

1:5:29.410 --> 1:5:38.820
Roman, Gabriela
So what I'm gonna be doing is I'm going to provide a case study of the 9902 reporting.

1:5:38.940 --> 1:5:40.150
Roman, Gabriela
Next slide, please.

1:5:40.970 --> 1:5:58.80
Roman, Gabriela
So I'm gonna go over a prepurchase counseling case study, and this is a a common scenario out in the field, but also it's a good practice for agencies to review some of these scenarios and see how your counselors do.

1:5:58.310 --> 1:6:11.910
Roman, Gabriela
So our scenario for today is a client visits your agency for one on one prepurchase counseling before they had attended the home Buyer Education Workshop.

1:6:12.820 --> 1:6:22.200
Roman, Gabriela
So during the calcium session, the certified counselor covered the following they worked with the client to establish a household budget.

1:6:22.720 --> 1:6:36.970
Roman, Gabriela
They encourage the client to start saving part of each paycheck to establish an emergency fund, and they provided information about down payment assistance programs that help them achieve their homeownership goal.

1:6:37.460 --> 1:6:48.800
Roman, Gabriela
So we're gonna look at the hub for 9902, and we're gonna look at section 10, and we're gonna see what outcomes apply.

1:6:48.810 --> 1:6:50.30
Roman, Gabriela
So next slide please.

1:6:53.370 --> 1:7:1.980
Roman, Gabriela
So one of the outcomes is households receive one on one counseling and also received education services.

1:7:2.390 --> 1:7:5.540
Roman, Gabriela
And yes, I will mark, you should mark that one.

1:7:5.850 --> 1:7:18.860
Roman, Gabriela
The reason you're marking that one is because you're already mentioned in the notes that the person received group education before receiving the one on one counseling.

1:7:18.870 --> 1:7:30.520
Roman, Gabriela
So the client file don't support this and it's also very important to note the importance of your counselor notes.

1:7:30.730 --> 1:7:37.40
Roman, Gabriela
Your counselor notes should corroborate whatever you are marking in the 9902.

1:7:37.50 --> 1:7:43.710
Roman, Gabriela
I I know that that's something that a lot of counselors are work on.

1:7:43.720 --> 1:7:56.800
Roman, Gabriela
There are some counselors that are really great at this and you should have your top counselors help and encourage others share their notes.

1:7:57.70 --> 1:8:12.260
Roman, Gabriela
That will help your agency document the work that you do, and for the next one, households that received information on fair housing and lending, we didn't see anything on the notes about fair housing and lending.

1:8:13.310 --> 1:8:24.350
Roman, Gabriela
So but as a side notes, you know this is a good you know when you're looking at this, this is a good opportunity to see what it is that.

1:8:26.450 --> 1:8:41.890
Roman, Gabriela
The information that your agency and is providing and maybe you should standardize this section, Tom, as you know, our housing counselors umm, there are some certified one of the six areas is fair housing.

1:8:42.100 --> 1:8:54.10
Roman, Gabriela
So our housing counselors have some basic fair housing knowledge, but it is also good to partner with housing, counseling agency and with fair housing agencies in your area.

1:8:54.20 --> 1:9:0.270
Roman, Gabriela
If there are any, but for right now, since you didn't put any information, the answer would be no.

1:9:1.160 --> 1:9:2.610
Roman, Gabriela
So you would not check it off.

1:9:3.60 --> 1:9:4.230
Roman, Gabriela
Umm, the next one?

1:9:4.280 --> 1:9:10.770
Roman, Gabriela
Households for whom the counselor develop a budget customized to the client's current information.

1:9:11.0 --> 1:9:12.650
Roman, Gabriela
You did have that in the notes.

1:9:12.740 --> 1:9:14.430
Roman, Gabriela
So yes, Mark, that off.

1:9:14.800 --> 1:9:16.30
Roman, Gabriela
I'm next question.

1:9:17.140 --> 1:9:18.30
Roman, Gabriela
Excuse me, next slide.

1:9:20.320 --> 1:9:27.280
Roman, Gabriela
Umm for D households improve their financial capacity after receiving housing counseling.

1:9:27.690 --> 1:9:31.0
Roman, Gabriela
Now we did start working with the client.

1:9:31.50 --> 1:9:32.460
Roman, Gabriela
They did start.

1:9:32.470 --> 1:9:40.80
Roman, Gabriela
We did start talking to them about saving for emergencies, but that is not something that the client actually started.

1:9:40.90 --> 1:10:1.530
Roman, Gabriela
So I I wouldn't note that this is something that the counselor should follow up with the client for the next time they meet, and they can determine if by then that we can check that box for E households that can access to resources to help improve their housing situation.

1:10:2.20 --> 1:10:10.890
Roman, Gabriela
So we provided them information about down payment assistance program in the first session, but they haven't follow up.

1:10:10.900 --> 1:10:22.180
Roman, Gabriela
Then on that and that's something that in the follow the next session, you can follow up with them and see if they have actually applied for the down payment assistance program.

1:10:22.190 --> 1:10:33.700
Roman, Gabriela
And I actually know that many of our agencies actually, you know, they don't send the clients out a lot of our agencies actually help them apply for the down payment assistance program.

1:10:33.770 --> 1:10:35.540
Roman, Gabriela
So that's something to follow up.

1:10:35.550 --> 1:10:37.320
Roman, Gabriela
But for right now, we don't report it.

1:10:37.330 --> 1:10:39.260
Roman, Gabriela
That could be something in the future.

1:10:39.770 --> 1:10:40.590
Roman, Gabriela
Next slide please.

1:10:42.590 --> 1:10:42.930
Roman, Gabriela
Umm.

1:10:43.30 --> 1:10:49.0
Roman, Gabriela
And by the way, I'm not going through all the all the sections because some of them don't apply right?

1:10:49.70 --> 1:10:50.200
Roman, Gabriela
We're doing pre purchase.

1:10:50.210 --> 1:10:51.640
Roman, Gabriela
Rental doesn't apply.

1:10:51.790 --> 1:10:53.780
Roman, Gabriela
Foreclosure doesn't apply.

1:10:54.150 --> 1:10:59.650
Roman, Gabriela
Disaster recovery right now there's an apply for a household.

1:10:59.660 --> 1:11:4.380
Roman, Gabriela
They gain access to non housing resources after receiving housing counseling.

1:11:4.750 --> 1:11:14.590
Roman, Gabriela
You did not discuss this, so I would not check this off, but you know that could be something that in the follow up section that you could further discuss with the client.

1:11:15.570 --> 1:11:18.700
Roman, Gabriela
I'm for Kate households that receive rental counseling.

1:11:18.710 --> 1:11:23.370
Roman, Gabriela
As I mentioned, it doesn't apply, so no, it wouldn't be appropriate next slide.

1:11:25.500 --> 1:11:34.830
Roman, Gabriela
And for for M households that received pre purchase, home buying, counseling and purchased home after receiving housing counseling.

1:11:34.980 --> 1:11:54.840
Roman, Gabriela
So I mean the you you really you should not mark this that's a no because they're just working towards buying a home that may be something that in the future they and we hope they will be able to do but that will be in follow up sessions next slide.

1:11:57.40 --> 1:12:18.70
Roman, Gabriela
So as a summary, we marked off 8F completed home buying Education Workshop 9C Prepurchase home buying in counseling 10A households that receive one on one counseling and then also received education Services 10.

1:12:18.70 --> 1:12:24.620
Roman, Gabriela
C households for whom households develop a budget customized through the clients current situation.

1:12:25.500 --> 1:12:26.80
Roman, Gabriela
Next slide.

1:12:27.840 --> 1:12:30.200
Roman, Gabriela
Uh, and then four.

1:12:32.170 --> 1:12:35.100
Roman, Gabriela
And very common in your agencies.

1:12:35.690 --> 1:12:39.780
Roman, Gabriela
Of course, clients come more than one time, so.

1:12:41.520 --> 1:12:52.870
Roman, Gabriela
So in the next follow up session, the counselor confirmed that the client is saving part of each paycheck, and they also received approval for down payment assistance program.

1:12:53.40 --> 1:12:56.680
Roman, Gabriela
So how do we report that under 9902?

1:12:57.300 --> 1:13:21.490
Roman, Gabriela
Next slide, as I mentioned it, it is important that every time the counselor meets with the client, they review the outcomes and that they determine if anything has changed, if anything has gone from a note tool, just make the appropriate changes so you know you're encouraged the client to save and they confirmed that they save.

1:13:21.500 --> 1:13:27.950
Roman, Gabriela
So now you can mark the households that improve their financial capacity after receiving housing counseling.

1:13:28.280 --> 1:13:31.150
Roman, Gabriela
And you can also mark out E households.

1:13:31.160 --> 1:13:35.840
Roman, Gabriela
They gain access to resources to help improve their housing situation.

1:13:37.360 --> 1:13:47.310
Roman, Gabriela
So you provided information about the down payment assistance program and they also confirmed that they were approved for the down Payment Assistance program.

1:13:47.320 --> 1:13:49.110
Roman, Gabriela
So yes, you can mark that off.

1:13:49.200 --> 1:14:2.30
Roman, Gabriela
So as I mentioned important it is a very important to make sure that you write out all the details of what you discuss with your client in your notes so that they could collaborate.

1:14:2.100 --> 1:14:5.270
Roman, Gabriela
Whatever is the outcome that you mark next slide.

1:14:9.730 --> 1:14:18.320
Roman, Gabriela
So the summary for pre purchase, the second counseling session, we added two more outcomes.

1:14:18.330 --> 1:14:30.780
Roman, Gabriela
We added the House 10D household, improved their financial capacity, and we added 10 E the households gain access to resources to help improve this their healthy situation.

1:14:31.370 --> 1:14:31.910
Roman, Gabriela
Next slide.

1:14:33.830 --> 1:14:42.320
Roman, Gabriela
So before we go on to the next section, just want to know that you know it is important to follow up with the session.

1:14:43.130 --> 1:15:0.970
Roman, Gabriela
You know, after the sessions are are done, it is important to follow up with the clients to see if they closed on on their property that they were purchasing and then also once you have the confirmation report that appropriately, umm, OK, so next slide please.

1:15:1.80 --> 1:15:21.710
Roman, Gabriela
I'm gonna be talking about common reporting errors and giving you some tips so some of the errors that we are seeing and when we reviewed the 9902 by the way, me and Tracy, we we we get a report with all the 9902 reports, every single one of your reports.

1:15:21.900 --> 1:15:34.900
Roman, Gabriela
So some of the errors that we are seeing is undercounting in outcomes of section 10 as we know it it section 10 can have multiple outcomes.

1:15:35.70 --> 1:15:39.260
Roman, Gabriela
So please report as many as apply.

1:15:39.910 --> 1:15:46.520
Roman, Gabriela
That's the only section where you know the number doesn't match the other numbers, and that's because you can have multiple outcomes.

1:15:47.930 --> 1:15:54.900
Roman, Gabriela
Other errors of the reporting outcomes for section 10 do not align with counseling activities.

1:15:54.910 --> 1:16:10.170
Roman, Gabriela
You know, reporting in section 9, for example, the section 10 is supposed to be about counseling outcomes and you should not be reporting workshop outcomes or something that's an unrelated category.

1:16:10.950 --> 1:16:29.470
Roman, Gabriela
Umm, another error that we see often and is clients choose not to respond in the demographic category I we should really make sure to have the client self identify a category we want to use.

1:16:29.480 --> 1:16:35.920
Roman, Gabriela
The do not chose not to respond category as minimally as possible.

1:16:36.820 --> 1:16:37.320
Roman, Gabriela
Next slide.

1:16:40.200 --> 1:16:47.480
Roman, Gabriela
And other errors committing data in the incorrect touch fiscal year or quarter.

1:16:47.490 --> 1:16:54.420
Roman, Gabriela
Umm if that happens, please contact your HUD point of contact your POC and they will help you out with that.

1:16:54.430 --> 1:16:55.920
Roman, Gabriela
But this does happen.

1:16:56.830 --> 1:16:59.420
Roman, Gabriela
Another one is late reporting.

1:17:0.110 --> 1:17:19.470
Roman, Gabriela
Please make sure you follow our timeline that Tracy previously went over and make sure that you give yourself ample time to reports and you know, take into account that sometimes you know there could be errors that you have to fix.

1:17:19.480 --> 1:17:21.310
Roman, Gabriela
So take that into account.

1:17:22.160 --> 1:17:30.730
Roman, Gabriela
I'm also not Tracy mentioned, not including cumulative data when manually submitted in HCS.

1:17:30.740 --> 1:17:37.230
Roman, Gabriela
That's a big one that we see and really you should be reporting through your CMS system.

1:17:37.300 --> 1:17:44.520
Roman, Gabriela
Yeah, many of you pay good money for that CMS system, so it should be working for you.

1:17:46.700 --> 1:17:57.910
Roman, Gabriela
And another common error is counting won't client twice if a group education session is divided into 2 sessions.

1:17:58.300 --> 1:18:9.200
Roman, Gabriela
For example, if a home buyer class is done in two days, it's still should be one session even though they had to come in twice.

1:18:10.510 --> 1:18:11.290
Roman, Gabriela
Next slide please.

1:18:14.270 --> 1:18:15.700
Roman, Gabriela
More common errors.

1:18:15.710 --> 1:18:16.140
Roman, Gabriela
Wow.

1:18:16.510 --> 1:18:29.500
Roman, Gabriela
Inaccurate or out of date HCA information, you really need to make sure that all your data is validated quarterly, that the contact information is accurate.

1:18:30.450 --> 1:18:35.610
Roman, Gabriela
We might be sending out notices, so we have to make sure that that we have the correct person.

1:18:35.620 --> 1:18:39.340
Roman, Gabriela
Make sure that your budget information is correct as well.

1:18:39.570 --> 1:18:44.560
Roman, Gabriela
We use it for other purposes, so make sure you validate for quarterly.

1:18:45.820 --> 1:18:52.970
Roman, Gabriela
Also, the reporting services not approve under the housing counseling agencies work plan.

1:18:53.140 --> 1:19:7.830
Roman, Gabriela
If if you feel that there's a need to change your work plan, if there have been changes in your community which you want to address as as a HUD housing counseling agency, please reach out to your POC.

1:19:8.590 --> 1:19:20.0
Roman, Gabriela
And if you work plan needs updated updating, please discuss with your pocket and and make sure that you update your work plan and that it you submitted to your pot.

1:19:20.870 --> 1:19:21.250
Roman, Gabriela
Umm.

1:19:21.650 --> 1:19:33.260
Roman, Gabriela
Other reporting errors, reporting, marketing and outreach activities, we are only supposed to report housing, counseling, activities and workshops.

1:19:33.350 --> 1:19:34.700
Roman, Gabriela
I'm not marketing and outreach.

1:19:36.850 --> 1:19:38.410
Roman, Gabriela
Also another error.

1:19:39.160 --> 1:19:43.30
Roman, Gabriela
Umm, we we can count online education.

1:19:43.40 --> 1:19:52.690
Roman, Gabriela
The online education must be administered by the housing counseling agencies and maybe recorded the ASK group education.

1:19:53.220 --> 1:20:11.380
Roman, Gabriela
The one area that we see is that they might not be collecting that the demographics, even though you have online education, please make sure that you collect all the demographics needed for the 9902 and make sure that you keep a workshop file just as if it were an in person file.

1:20:12.620 --> 1:20:15.870
Roman, Gabriela
Next slide please and.

1:20:17.810 --> 1:20:22.170
Roman, Gabriela
So we're gonna talk a little bit about, you know, we talked about errors.

1:20:22.180 --> 1:20:23.770
Roman, Gabriela
Let let's talk about some of the tips.

1:20:24.240 --> 1:20:32.670
Roman, Gabriela
So it is a best practice to assign a person or a team to conduct 99 or two quality control before submission.

1:20:33.320 --> 1:20:42.650
Roman, Gabriela
One of the things you can do is download the client level data in the Excel format of the data can be sorted by date by activity by Counselor.

1:20:42.920 --> 1:20:44.580
Roman, Gabriela
You can check for missing fields.

1:20:44.590 --> 1:20:46.650
Roman, Gabriela
You can check for duplicates.

1:20:47.260 --> 1:21:6.600
Roman, Gabriela
So it's a, it's a great way for, you know, maybe program director, maybe executive director to be looking at the data and we want to also make sure that if if you know if you're seeing a common errors, you know it's it's a good opportunity for training.

1:21:6.730 --> 1:21:14.560
Roman, Gabriela
But if you're also seeing exceptional work, make sure that you acknowledge the work of our counselors.

1:21:14.750 --> 1:21:17.400
Roman, Gabriela
They move, you know, they do an awesome job.

1:21:17.410 --> 1:21:20.110
Roman, Gabriela
Less sure that they are acknowledged.

1:21:20.440 --> 1:21:28.0
Roman, Gabriela
And as I mentioned you, you can use the data analysis to improve the quality of your work.

1:21:28.740 --> 1:21:37.230
Roman, Gabriela
You know, I don't know how many of you were and housing counseling when, you know, we started to see the beginning of foreclosure counseling.

1:21:37.240 --> 1:21:41.410
Roman, Gabriela
I know I saw in my 99 oh, twos of a jump.

1:21:41.420 --> 1:21:45.90
Roman, Gabriela
An extreme jump like maybe tenfold in a foreclosure.

1:21:45.300 --> 1:21:46.850
Roman, Gabriela
Counseling clients.

1:21:46.860 --> 1:21:47.190
Roman, Gabriela
Right.

1:21:47.260 --> 1:21:50.170
Roman, Gabriela
And and you know that was like, OK, what's going on?

1:21:50.180 --> 1:21:52.910
Roman, Gabriela
And unfortunately it was the start of something big.

1:21:52.920 --> 1:22:7.590
Roman, Gabriela
But you know something like you know that numbers that jump out, you can use them to analyze your work and see if you need to make any adjustments if or or if you need to respond to your local needs.

1:22:7.880 --> 1:22:8.420
Roman, Gabriela
Next slide.

1:22:11.270 --> 1:22:20.160
Roman, Gabriela
So when you submit your 9902 on HCS, we have what I call the data quality checks.

1:22:20.330 --> 1:22:37.160
Roman, Gabriela
These are in the system itself, and if there's, if you look at the picture, if there is a are any data alerts, it will where that red arrow is will be data quality alerts which will display.

1:22:37.170 --> 1:22:44.700
Roman, Gabriela
It will display a list of all your errors and what you have to do is you have to review them.

1:22:44.710 --> 1:22:49.310
Roman, Gabriela
So click the review data quality alert buttons to display the alerts.

1:22:49.670 --> 1:22:50.210
Roman, Gabriela
Next slide.

1:22:52.600 --> 1:23:2.570
Roman, Gabriela
So when you have the data quality alerts, you can here, but they will come up and each one.

1:23:2.620 --> 1:23:6.190
Roman, Gabriela
Please review and then there will be three options that you have.

1:23:6.200 --> 1:23:9.70
Roman, Gabriela
You can ignore the alert for the moment.

1:23:9.620 --> 1:23:17.650
Roman, Gabriela
You can update the 9902 to remove the alert where you go back and you said Ohh there's yeah that that I was missing that that's an error.

1:23:17.980 --> 1:23:22.490
Roman, Gabriela
Let me fix that, but then you can also accept alert.

1:23:22.530 --> 1:23:36.490
Roman, Gabriela
You know some and I'll talk about a scenario where later on where, you know, maybe the alert is umm, you can accept alert because that was ballad reporting on your counseling activity.

1:23:36.500 --> 1:23:48.190
Roman, Gabriela
So you can do one of those three things and in the presentation we will have a link on more information on instructions on how to address the alerts.

1:23:48.850 --> 1:23:55.10
Roman, Gabriela
Umm to uh to improve your reporting, next slide.

1:24:4.820 --> 1:24:5.520
Roman, Gabriela
Next slide please.

1:24:12.930 --> 1:24:14.20
Oaks, Tracie R
Yeah, bear with us, folks.

1:24:14.30 --> 1:24:22.130
Oaks, Tracie R
We might be having a a technical my issue with what with moving the the the slides forward one second.

1:24:24.570 --> 1:24:25.890
Roman, Gabriela
Oh so.

1:24:28.290 --> 1:24:30.600
Roman, Gabriela
Actually, I think that's the last.

1:24:30.820 --> 1:24:31.280
Roman, Gabriela
No.

1:24:31.290 --> 1:24:31.720
Roman, Gabriela
Is it?

1:24:31.770 --> 1:24:33.40
Roman, Gabriela
No, no.

1:24:33.50 --> 1:24:35.140
Roman, Gabriela
I have one more slide in the data quality checks.

1:24:41.260 --> 1:24:42.200
Oaks, Tracie R
Bear with us, folks.

1:24:42.210 --> 1:24:44.730
Oaks, Tracie R
UH-1 once we'll we'll be back up one second.

1:24:58.460 --> 1:24:59.200
Roman, Gabriela
Next slide please.

1:25:1.490 --> 1:25:8.420
Yanetta, Benjamin T
It looks like I might need to take over for the slides if you'll bear with US1 moment, I'm going to share my screen.

1:25:8.430 --> 1:25:14.840
Yanetta, Benjamin T
So Rebecca, who's been behind the scenes moving slides, might be having some technical difficulties.

1:25:14.850 --> 1:25:19.720
Yanetta, Benjamin T
I'm sure everybody's having some weather issues, so there might be a technical hiccup due to that.

1:25:20.770 --> 1:25:21.280
Roman, Gabriela
Yes.

1:25:21.290 --> 1:25:21.620
Roman, Gabriela
OK.

1:25:21.710 --> 1:25:23.390
Roman, Gabriela
We'll be on slide 41.

1:25:31.720 --> 1:25:32.970
Roman, Gabriela
Thank you very much.

1:25:33.480 --> 1:25:43.30
Roman, Gabriela
I'm so I'm going on with data quality checks and I was like I was on A roll so anyway, so here are some of the common.

1:25:44.180 --> 1:25:55.700
Roman, Gabriela
HCS quality data check so these are not umm, these are kind of a standard data quality checks that are generated by the system when you report.

1:25:55.810 --> 1:26:3.750
Roman, Gabriela
So one is 0 outcomes entered in section 12:50 on one counseling services.

1:26:3.760 --> 1:26:5.610
Roman, Gabriela
That means you didn't report any outcomes.

1:26:7.70 --> 1:26:10.300
Roman, Gabriela
Maybe you don't have outcomes yet, but maybe you do.

1:26:10.350 --> 1:26:16.20
Roman, Gabriela
You should check, I mean I would only you know it would only be acceptable in the first quarter to have zero.

1:26:16.30 --> 1:26:20.280
Roman, Gabriela
If you have a small amount of clients, you should have some kind of outcomes.

1:26:21.90 --> 1:26:24.780
Roman, Gabriela
The other uh, quality data?

1:26:25.10 --> 1:26:27.870
Roman, Gabriela
Check the notices.

1:26:27.880 --> 1:26:35.640
Roman, Gabriela
Could be total outcome centered in section 10 is the same as section 941 and ones I'm.

1:26:35.690 --> 1:26:43.310
Roman, Gabriela
It also indicates that you're not reporting multiple outcomes may or may not apply, so please verify.

1:26:44.240 --> 1:26:44.790
Roman, Gabriela
Umm.

1:26:45.180 --> 1:26:55.110
Roman, Gabriela
Also total number entered for 10C developer sustainable budget is less than 9 totals for one on one counseling.

1:26:55.220 --> 1:27:7.420
Roman, Gabriela
So, oh, this one is a little tricky because you know, we are supposed to conduct a financial analysis, which may include a budget, right?

1:27:7.430 --> 1:27:9.740
Roman, Gabriela
A budget is a tool, but it's not.

1:27:10.210 --> 1:27:26.180
Roman, Gabriela
You know, there could be other forms of financial analysis, but and there are some exceptions where a budget may not be feasible and some of those exceptions were a budget might not be feasible.

1:27:26.390 --> 1:27:30.410
Roman, Gabriela
Include you know when you're working with a homeless client, right?

1:27:31.0 --> 1:27:31.750
Roman, Gabriela
It's it's.

1:27:31.760 --> 1:27:40.980
Roman, Gabriela
Are you gonna be able to do a budget about their, you know, their housing costs and other other costs for house, for homeless clients?

1:27:40.990 --> 1:27:48.310
Roman, Gabriela
No, they, you know, they would have cereal budget more likely and you know mine.

1:27:48.540 --> 1:27:49.940
Roman, Gabriela
You know, they're expenses. You know.

1:27:50.620 --> 1:27:52.510
Roman, Gabriela
Umm, you know might be different.

1:27:52.520 --> 1:28:2.910
Roman, Gabriela
So in that case, you know you wouldn't be able to develop a a budget for the homeless person, but you might enter in in a notes.

1:28:2.920 --> 1:28:4.690
Roman, Gabriela
Hey, this person is homeless.

1:28:4.780 --> 1:28:10.170
Roman, Gabriela
They do not have a budget, you know they have minimal expenses or they don't.

1:28:10.180 --> 1:28:12.470
Roman, Gabriela
You know, they don't have funds for expenses.

1:28:12.620 --> 1:28:15.290
Roman, Gabriela
You know, please write it on a notes and that's acceptable.

1:28:15.820 --> 1:28:27.740
Roman, Gabriela
Another instance where you might not be able to develop a budget is when a person is, you know, just came, you know, like came out of disaster.

1:28:27.750 --> 1:28:35.740
Roman, Gabriela
Like in Illinois, we've had, you know, like one day of, you know, recently we had 11 minor hurricanes.

1:28:35.750 --> 1:28:38.70
Roman, Gabriela
But you know, we've had a see any tornadoes.

1:28:38.350 --> 1:28:40.820
Roman, Gabriela
We've had hurricanes elsewhere.

1:28:40.870 --> 1:28:50.840
Roman, Gabriela
We had wildfires, so in cases where, you know, in cases such as disaster recovery, you might not be able to develop a budget, you know.

1:28:50.950 --> 1:29:0.230
Roman, Gabriela
So in that case, right in the explanation, you know it's not feasible to write about a budget because of this situation and explain it.

1:29:0.240 --> 1:29:1.860
Roman, Gabriela
And that would suffice.

1:29:1.870 --> 1:29:9.610
Roman, Gabriela
So I'm in general umm you should be able to connect the financial analysis, but there are exceptions.

1:29:9.620 --> 1:29:12.490
Roman, Gabriela
And please, your counselor notes.

1:29:12.500 --> 1:29:15.100
Roman, Gabriela
Please write down what those exceptions are.

1:29:15.110 --> 1:29:34.710
Roman, Gabriela
We we listed to which is homeless and disaster, so also another data quality check that comes out Tenny households gain access to resources to improve their housing situation.

1:29:36.370 --> 1:29:40.630
Roman, Gabriela
Umm, you know, please make sure that, uh, that they.

1:29:42.630 --> 1:29:53.260
Roman, Gabriela
That uh, that you're verifying and if you are providing resources indicate so as well and then another quality data quality.

1:29:53.270 --> 1:29:58.680
Roman, Gabriela
Check the housing counseling agency did not include the yearly budget.

1:29:59.30 --> 1:30:1.460
Roman, Gabriela
That the yearly budget was not entered.

1:30:1.470 --> 1:30:4.980
Roman, Gabriela
It's very important that you update all your information.

1:30:4.990 --> 1:30:8.870
Roman, Gabriela
As I mentioned, contact information and the budget next.

1:30:12.880 --> 1:30:13.370
Roman, Gabriela
Umm.

1:30:13.420 --> 1:30:22.630
Roman, Gabriela
So I believe now Ben is gonna have a poll where he will talk about, umm, resources.

1:30:22.640 --> 1:30:24.150
Roman, Gabriela
Ben, do you have your poll ready?

1:30:25.360 --> 1:30:29.610
Yanetta, Benjamin T
Actually, because I took over his presenting the slides, I'm not able to access the polls.

1:30:29.740 --> 1:30:33.270
Yanetta, Benjamin T
Rob, are you capable of launching the third polling question?

1:30:36.470 --> 1:30:37.540
Weber, Robert J
Let me take a look.

1:30:42.550 --> 1:30:44.360
Yanetta, Benjamin T
Thank you everyone for bearing with us as well.

1:30:44.660 --> 1:30:52.670
Yanetta, Benjamin T
It's a newer system that we're using for these webinars and there's a little bit of growing pains, so I, but I appreciate everybody's a time and being with us today.

1:30:54.90 --> 1:31:5.540
Yanetta, Benjamin T
Robert should be under the IT might be a hidden option for polls at the top, and there should be 2 that are in there that are closed that I already showed.

1:31:7.410 --> 1:31:10.710
Weber, Robert J
Yeah, I opened that and I see the two that are closed.

1:31:10.720 --> 1:31:13.280
Weber, Robert J
I'm not seeing any others in there.

1:31:13.290 --> 1:31:15.560
Yanetta, Benjamin T
Is there a scroll bar that's kind of hidden?

1:31:15.570 --> 1:31:17.630
Yanetta, Benjamin T
Cause I was having some trouble also earlier.

1:31:27.0 --> 1:31:27.370
Oaks, Tracie R
And then.

1:31:27.290 --> 1:31:27.470
Roman, Gabriela
Well.

1:31:19.230 --> 1:31:29.480
Yanetta, Benjamin T
Scrolling down to the third one, or it might be it's only on my account because I'm the one that created it and since it hasn't been launched so I apologize to our presenters.

1:31:29.730 --> 1:31:36.900
Yanetta, Benjamin T
We tried to make this work perfectly for them, but a little hiccup caused the problem and we're not going to be able to to launch that third polling question.

1:31:36.910 --> 1:31:38.230
Yanetta, Benjamin T
I really do think it's for that.

1:31:36.940 --> 1:31:40.850
Roman, Gabriela
Sure, but we can continue with our presentation.

1:31:40.860 --> 1:31:48.830
Roman, Gabriela
But basically, I think we were gonna ask you what resources you you would like for us to provide.

1:31:48.840 --> 1:31:52.150
Roman, Gabriela
So if you put anything in the chat, we will take a look at it.

1:31:53.810 --> 1:31:55.700
Roman, Gabriela
So I'm just gonna continue.

1:31:55.790 --> 1:31:56.600
Roman, Gabriela
Next slide please.

1:31:59.130 --> 1:32:6.260
Roman, Gabriela
So some of the resources I would say your best resource resource is your hot point of contact.

1:32:6.330 --> 1:32:10.80
Roman, Gabriela
So when you're submitting your 99 or tools, they can.

1:32:10.250 --> 1:32:16.720
Roman, Gabriela
If you need your H, your HCS password reset, they can help you in.

1:32:17.70 --> 1:32:26.850
Roman, Gabriela
If you are funded by her, they can help you review, submit, compare your 99 or two objections.

1:32:28.230 --> 1:32:35.800
Roman, Gabriela
If you have to, you know, modify your 99 or two submissions, that can help you with that.

1:32:36.190 --> 1:32:42.660
Roman, Gabriela
They can provide instructions union putting the 9902 data manually.

1:32:42.770 --> 1:32:56.760
Roman, Gabriela
If you cannot submit, but we wanna stress that manual submission is something that should be used very lightly, I preferred mode of submission is the client management systems.

1:32:57.320 --> 1:33:5.510
Roman, Gabriela
You should, you know it is a requirement that all housing counseling agencies have a functional housing count.

1:33:6.240 --> 1:33:11.960
Roman, Gabriela
Yeah, CMS that will, umm, report to HCS.

1:33:12.10 --> 1:33:23.240
Roman, Gabriela
So as I mentioned, manually should be some utilized very, very lightly and we would like to get those numbers down to almost zero.

1:33:23.250 --> 1:33:30.970
Roman, Gabriela
But I you know not possible but ohh looks like we have the the pole.

1:33:31.310 --> 1:33:32.550
Roman, Gabriela
You know, the poll says.

1:33:32.560 --> 1:33:35.370
Roman, Gabriela
What additional training would you like?

1:33:35.440 --> 1:33:38.400
Roman, Gabriela
Or is he to provide on the 9902?

1:33:39.170 --> 1:33:50.400
Roman, Gabriela
So if select the following first one is grantee reporting, the next one is 9902 reporting and HUD housing counseling system.

1:33:50.850 --> 1:33:57.720
Roman, Gabriela
The third one is CMS system specific training and the 4th one is case studies training.

1:33:57.870 --> 1:34:3.570
Roman, Gabriela
So if you see the poll, please submit an answer.

1:34:21.650 --> 1:34:22.200
Weber, Robert J
OK.

1:34:22.210 --> 1:34:34.780
Weber, Robert J
I just closed the pole and looks like 12% responded grantee reporting 23% reported 9902 reporting and HUD housing counseling system 36%.

1:34:34.850 --> 1:34:42.280
Weber, Robert J
The highest one said CMS system specific training and also at 29% case study training.

1:34:44.80 --> 1:34:44.530
Roman, Gabriela
OK.

1:34:44.540 --> 1:34:48.30
Roman, Gabriela
Thank you very much for the poll and thank you for all of you too.

1:34:48.40 --> 1:35:4.900
Roman, Gabriela
Participated and if you were not able to submit via the poll, please feel free to add it and the chat because I haven't seen that people wanted to pick more than one answer, which is perfectly fine.

1:35:5.150 --> 1:35:6.800
Roman, Gabriela
Please add it to the chat.

1:35:7.130 --> 1:35:10.470
Roman, Gabriela
We will take all your answers into consideration.

1:35:12.340 --> 1:35:17.100
Roman, Gabriela
So your park going back to your wonderful park and.

1:35:19.290 --> 1:35:26.920
Roman, Gabriela
That your pocket can't confirm that the 9902 was actually submitted uh to HUD.

1:35:27.370 --> 1:35:30.40
Roman, Gabriela
Sometimes agencies do not.

1:35:30.930 --> 1:35:37.120
Roman, Gabriela
You know, we've had instances where agencies have said they submitted it and and they looked like they submitted it from their end.

1:35:37.130 --> 1:35:40.540
Roman, Gabriela
But it actually didn't come true through.

1:35:40.550 --> 1:35:44.900
Roman, Gabriela
So make sure that you you can contact your park and say, hey, I submitted it.

1:35:44.910 --> 1:35:45.820
Roman, Gabriela
Did you guys get it?

1:35:46.110 --> 1:35:47.700
Roman, Gabriela
And that's perfectly fine.

1:35:47.930 --> 1:35:57.340
Roman, Gabriela
And then finally, your pot can assist with training and resources and many topics, not just the 99 or two next slide.

1:36:0.490 --> 1:36:7.170
Roman, Gabriela
Also some other troubleshooting regarding to, you know, people have a question.

1:36:7.180 --> 1:36:8.740
Roman, Gabriela
Should I call my CMS?

1:36:8.750 --> 1:36:12.460
Roman, Gabriela
Should I call my ACS for CMS issues?

1:36:12.470 --> 1:36:15.320
Roman, Gabriela
Please contact your vendor directly.

1:36:15.530 --> 1:36:48.730
Roman, Gabriela
We have a list of compliance CMS vendors as as well and for HTFS issues which are technical issues, please contact the HUD National Help Desk now and and and choose option nine and to ensure that the ticket is routed to the appropriate person which is housing HCS on group and for general ACS questions you may feel free to contact your POC.

1:36:48.740 --> 1:36:50.950
Roman, Gabriela
As I said, they are a wonderful resource.

1:36:51.130 --> 1:36:51.680
Roman, Gabriela
Next slide.

1:36:55.590 --> 1:36:58.490
Roman, Gabriela
And for HCS password resets.

1:36:59.830 --> 1:37:7.420
Roman, Gabriela
So basically, email housing counseling at dot Gov you know, request a password reset with your name.

1:37:7.500 --> 1:37:12.200
Roman, Gabriela
Your ACS ID number, your housing housing agency.

1:37:12.570 --> 1:37:15.380
Roman, Gabriela
ID number and your agency's name.

1:37:15.730 --> 1:37:23.810
Roman, Gabriela
And if you wanna email, you can email housing.counseling@her.gov next slide.

1:37:26.180 --> 1:37:32.950
Roman, Gabriela
So next I'm going to go over some of the resources that we have available online.

1:37:33.540 --> 1:37:47.250
Roman, Gabriela
We have a great websites that has all the HUD resources, including the housing counseling 9902 online toolkit which which has different sections.

1:37:47.760 --> 1:37:48.570
Roman, Gabriela
Next slide please.

1:37:51.710 --> 1:38:5.140
Roman, Gabriela
So one of the sections is the general overview of the 9902, which has some of the information that we went over, such as what is the reporting periods.

1:38:5.410 --> 1:38:15.80
Roman, Gabriela
You will also find a different topics such as what is HUD 9902 reporting, who files the 9902, how do I report?

1:38:15.500 --> 1:38:22.440
Roman, Gabriela
How do I make sure my reporting is accurate and also other HUD 9902 additional resources?

1:38:22.830 --> 1:38:23.410
Roman, Gabriela
Next slide?

1:38:25.170 --> 1:38:41.160
Roman, Gabriela
Umm, there's also a section that covers completing the 9902 and it there's actually a bunch of subsections that you could scroll and you could search each section of the 9902.

1:38:41.170 --> 1:38:45.320
Roman, Gabriela
I know somebody asked if we were to go through each section.

1:38:45.530 --> 1:38:57.150
Roman, Gabriela
Unfortunately, time did not permit us to go through each section, but online you can go through each section of the 9902 and there will be additional information on each section.

1:38:57.580 --> 1:39:5.250
Roman, Gabriela
And there's also frequently asked questions, and there are case studies for section 10.

1:39:5.680 --> 1:39:6.260
Roman, Gabriela
Next slide.

1:39:8.980 --> 1:39:15.990
Roman, Gabriela
So one of the things that I like is that the housing counseling toolkit is downloadable.

1:39:16.0 --> 1:39:23.210
Roman, Gabriela
If you wanna download the full toolkit you table contents, it's quite large.

1:39:23.220 --> 1:39:38.880
Roman, Gabriela
It's 44 pages, but you can actually download the entire toolkit I and I've been through, you know, outreach events where some of the agencies are are going through the different HUD resources, you know.

1:39:38.890 --> 1:39:56.820
Roman, Gabriela
Meanwhile, they're they're waiting around and it's it's a great resource on the toolkit, actually replaces the desktop guide, which was available or few year few years back, but it was very helpful.

1:39:56.830 --> 1:40:13.780
Roman, Gabriela
But the two kid is actually much more comprehensive, so if you want just something that have on your desk, if you're the kind of person that prints out your HUD handbook, then the toolkit, please go to the website and print it out.

1:40:14.100 --> 1:40:14.620
Roman, Gabriela
Next slide.

1:40:17.0 --> 1:40:20.900
Roman, Gabriela
So we also have information about client management systems.

1:40:20.910 --> 1:40:23.790
Roman, Gabriela
That's a very big topic.

1:40:24.160 --> 1:40:24.620
Roman, Gabriela
Some of the.

1:40:25.510 --> 1:40:25.960
Roman, Gabriela
Umm.

1:40:26.570 --> 1:40:48.130
Roman, Gabriela
Items that we cover is an overview, TMS benefits reporting requirements, choosing, TMS making, CMS harder compliance, UMM, agency reporting, modules developing meeting notes in announcements, and we also have information of Technical Support and help desk which I previously covered.

1:40:48.560 --> 1:40:49.40
Roman, Gabriela
Next slide.

1:40:51.810 --> 1:41:0.410
Roman, Gabriela
So one of the important tools that Terry mentioned is the 9092 data displays we are reporting.

1:41:2.280 --> 1:41:12.870
Roman, Gabriela
Uh, publicly, what are what the good work that all of you as housing counseling agencies are doing for our program?

1:41:13.0 --> 1:41:16.190
Roman, Gabriela
So we report quarterly.

1:41:16.200 --> 1:41:24.580
Roman, Gabriela
Right now the information is up to date till the fourth quarter of the 2023.

1:41:24.810 --> 1:41:27.340
Roman, Gabriela
Umm reports.

1:41:27.430 --> 1:41:39.740
Roman, Gabriela
So the last year, so that information is in the website in a 9902 data displays and I'm gonna share a few screens about what this looks like.

1:41:40.190 --> 1:41:50.80
Roman, Gabriela
Generally it's 1/4 behind because of course you have to submit we we do a quality control process and then you know we get the snapshot ready.

1:41:50.90 --> 1:42:0.320
Roman, Gabriela
But, umm, it's a fair it's gonna be fairly up to the they going forward because Congress really is looking at a reporting next.

1:42:2.910 --> 1:42:18.430
Roman, Gabriela
So this is kind of some of the screens that that we have in, in the data displays besides scopes of services where we can break out between workshops and one and one counselings.

1:42:18.650 --> 1:42:25.340
Roman, Gabriela
We also have umm hustle, served by states by race, ethnicity, income level, outcome of services.

1:42:26.250 --> 1:42:27.940
Roman, Gabriela
So next slide please.

1:42:29.430 --> 1:42:29.780
Roman, Gabriela
Umm.

1:42:29.830 --> 1:42:38.800
Roman, Gabriela
And one of the things that people really like is, is that we can see how, umm, the number of clients served by each state.

1:42:39.650 --> 1:42:48.950
Roman, Gabriela
Umm so navigation is required and you know here you see the the continental United States.

1:42:48.960 --> 1:42:53.230
Roman, Gabriela
But we also have Alaska, Hawaii and Puerto Rico data.

1:42:53.500 --> 1:42:54.0
Roman, Gabriela
Next slide.

1:42:56.10 --> 1:43:4.910
Roman, Gabriela
So this concludes my section and uh, we're gonna see how we are on time.

1:43:4.920 --> 1:43:6.310
Roman, Gabriela
Uh, the next section?

1:43:7.60 --> 1:43:19.890
Roman, Gabriela
Umm, it's Tracy and I really wanted to go over some of the frequently asked questions, so we will try to see how many of the frequently asked questions we can get through.

1:43:20.800 --> 1:43:27.690
Roman, Gabriela
But you will get everything on in your slides if you haven't already received it, so.

1:43:30.730 --> 1:43:35.940
Roman, Gabriela
And by the way, if if you have a question, please put it in the chat.

1:43:35.950 --> 1:43:36.840
Roman, Gabriela
We we can't.

1:43:39.40 --> 1:43:43.130
Roman, Gabriela
A new people we have over 570 participants.

1:43:43.140 --> 1:43:52.260
Roman, Gabriela
And last time I checked so we had a we we have a really big group, but if you have a question please put it on the chat next slide.

1:43:55.350 --> 1:44:0.380
Roman, Gabriela
So, Tracy, Are you ready for the frequently asked questions?

1:44:1.460 --> 1:44:2.340
Oaks, Tracie R
Yeah, absolutely.

1:44:2.350 --> 1:44:3.730
Oaks, Tracie R
And thank you, Gabriella.

1:44:4.60 --> 1:44:9.490
Oaks, Tracie R
We we've done our best here today to answer the questions that were put into the chat.

1:44:9.500 --> 1:44:18.250
Oaks, Tracie R
I think we've responded to probably a little over 90% of those questions and I wanna remind folks again, Ben mentioned this at the beginning of the presentation.

1:44:18.700 --> 1:44:25.330
Oaks, Tracie R
If you don't have your, it's it's a little bit challenging for us to pinpoint who is asking the question once the.

1:44:26.230 --> 1:44:45.870
Oaks, Tracie R
Umm presentation has ended, so if you do have a question and you did not see a response in the chat, please umm please send an email to thehousing.counselingedhud.gov mailbox and make sure in the subject line you do reference dish training and we will do our best to respond to that question.

1:44:46.540 --> 1:44:51.430
Oaks, Tracie R
Also, Robert mentioned earlier today, I do see a couple of folks with their hands up.

1:44:51.440 --> 1:45:2.680
Oaks, Tracie R
Unfortunately, we are unable to unmute the MIC to allow folks to ask live questions through the training again due to the large volume of participants of the training.

1:45:3.550 --> 1:45:5.270
Oaks, Tracie R
But I will try to.

1:45:5.370 --> 1:45:12.920
Oaks, Tracie R
We'll go through a couple of the questions more frequently that we do receive with respect to 9902 training, we do have them on the slide.

1:45:12.930 --> 1:45:15.520
Oaks, Tracie R
We have a few minutes left in the presentation.

1:45:15.530 --> 1:45:21.340
Oaks, Tracie R
So and we'll go through those right now as time permits.

1:45:21.420 --> 1:45:21.790
Oaks, Tracie R
OK.

1:45:21.800 --> 1:45:41.90
Oaks, Tracie R
So the first question on the screen is that we do receive a lot is how do you report your 9902 demographic information for a household when there's more than one person and essentially the section three of the form only allows you to record the ethnicity demographic information for one individual.

1:45:41.180 --> 1:45:49.340
Oaks, Tracie R
OK, so even if there are multiple individuals within that household attending that session, umm what?

1:45:49.350 --> 1:46:2.760
Oaks, Tracie R
We ask counselors to do is to identify or we ask the the participant to self identify the ethnicity based on the individual that is participating in the intake.

1:46:2.770 --> 1:46:8.580
Oaks, Tracie R
Part of that of that counseling session and for that to be recorded on the form.

1:46:8.590 --> 1:46:20.400
Oaks, Tracie R
So again, we do ask folks to self identify and to choose one, umm, 1 demographic to report on the 9902 for that household.

1:46:21.520 --> 1:46:25.260
Oaks, Tracie R
Let's take a look at another question that we do receive quite frequently.

1:46:26.400 --> 1:46:26.820
Oaks, Tracie R
Umm.

1:46:27.240 --> 1:46:35.500
Oaks, Tracie R
If your client comes in for multiple distinct types of counseling and reporting period, how do you report that demographic information?

1:46:35.510 --> 1:46:51.760
Oaks, Tracie R
And again, this is talking about the how you reported on Section 3 through 7 and and the response to that is and you should absolutely count each distinct type of housing, counseling or education service that that client receives.

1:46:51.770 --> 1:47:12.570
Oaks, Tracie R
So if they as as mentioned in the case study earlier today, earlier during the presentation, if a household participates in a workshop and then later receives A1 on one counseling within that same fiscal year, then that household should be recorded on the 9902 in Section 8 and section 9.

1:47:12.580 --> 1:47:21.820
Oaks, Tracie R
So again, when you're filling out or completing your demographic information, it should also be reported appropriately in those sections as well.

1:47:21.830 --> 1:47:45.190
Oaks, Tracie R
So again, if those counseling types are distinct, you want to make sure that you are reporting them separately on your 9902 so that you do get credit for not only having that that consumer participate in a group education course, but also later coming in for more individualized one on one counseling as well.

1:47:49.520 --> 1:47:52.20
Oaks, Tracie R
And I see where with me one second.

1:47:53.670 --> 1:47:53.900
Oaks, Tracie R
OK.

1:47:53.910 --> 1:47:57.0
Oaks, Tracie R
And I'm just taking a look at the chat, OK?

1:48:0.20 --> 1:48:15.950
Oaks, Tracie R
Another question that we received quite frequently is does the group education course or workshop require its own file in the response to that is, yes, the group education course does require a file.

1:48:15.960 --> 1:48:19.450
Oaks, Tracie R
It does not require an individual file for each participant.

1:48:19.460 --> 1:48:26.0
Oaks, Tracie R
However, we've spelled out here what is required in a group education file.

1:48:26.600 --> 1:48:32.780
Oaks, Tracie R
One question we did receive today, which I think is important to point out, is respect to the how do you collect the demographic information?

1:48:33.650 --> 1:48:38.150
Oaks, Tracie R
And it's required to collect demographic information during the group education session.

1:48:38.160 --> 1:48:43.420
Oaks, Tracie R
And that answer is yes, you must collect the demographic information for all the education participants.

1:48:43.430 --> 1:48:47.340
Oaks, Tracie R
And what we recommend is that you are develop a form.

1:48:47.690 --> 1:48:54.860
Oaks, Tracie R
It could be an anonymous form, but there is a form that needs to be completed at the start of the class for those participants.

1:48:54.870 --> 1:49:9.720
Oaks, Tracie R
So you wanna make sure that you all have a form in place that allows you to collect that demographic information, but you do not need to create an individual client file for each participant of Ruby education.

1:49:9.730 --> 1:49:20.600
Oaks, Tracie R
You know, if a participant in your group education course comes in from one on one counseling and they do not have a file at that time is when you will create the client file for that individual.

1:49:20.610 --> 1:49:32.600
Oaks, Tracie R
Or if someone attends a group education course and they are A1 on one client, then you want to notate in that file also that that one on one client did complete a repetition pre purchase course as well.

1:49:32.610 --> 1:49:37.210
Oaks, Tracie R
And of course, make sure that you're 9902 reporting reflects that.

1:49:37.220 --> 1:49:44.390
Oaks, Tracie R
That client did come in not only received with education, but also received one on one counseling as well.

1:49:50.110 --> 1:49:50.490
Oaks, Tracie R
Let's see.

1:49:50.500 --> 1:49:51.950
Oaks, Tracie R
Let's see where we are on time.

1:49:54.210 --> 1:49:58.900
Oaks, Tracie R
Yeah, this question is similar to the one that I just responded to.

1:49:58.950 --> 1:50:14.120
Oaks, Tracie R
Do you need to create individual files for group education and the answer something is no, you do not need to create individual files, but again, emphasizing that if that client comes in for individual one on one counseling, you wanna make sure that you do create.

1:50:14.130 --> 1:50:14.900
Oaks, Tracie R
That's at that point.

1:50:14.910 --> 1:50:17.700
Oaks, Tracie R
It's when you would create the one on one counseling file for that client.

1:50:21.710 --> 1:50:22.740
Oaks, Tracie R
Let's look at it another one.

1:50:26.530 --> 1:50:28.540
Oaks, Tracie R
Uh, we do receive this question a lot.

1:50:28.950 --> 1:50:34.60
Oaks, Tracie R
This question specifically is talking about and focusing in on fair housing.

1:50:34.650 --> 1:50:45.100
Oaks, Tracie R
How do you report that on your 9902 report and the way that that's reported is is that you want to identify the predominant type of counseling?

1:50:45.110 --> 1:50:51.40
Oaks, Tracie R
So if that client is coming in, let's say for rental counseling, then that would be the type of that would be the counseling that's.

1:50:52.920 --> 1:50:56.830
Oaks, Tracie R
That's that is included on your 9902 report for a Section 9.

1:50:56.840 --> 1:50:57.90
Oaks, Tracie R
Right.

1:50:57.100 --> 1:51:1.750
Oaks, Tracie R
And then during that rental counseling session you presented them with fair housing information.

1:51:1.760 --> 1:51:8.650
Oaks, Tracie R
So you would appropriately report that in your on your 9902 report as well in your section 10 outcome.

1:51:8.660 --> 1:51:21.160
Oaks, Tracie R
So again, you just wanna make sure that you are identifying the type of counseling that was provided in section 9 and then appropriately report the outcomes as part of that one on one counseling session.

1:51:30.490 --> 1:51:42.760
Oaks, Tracie R
Again, this is a very similar to one of the frequently asked questions that we looked at and just expanded on regarding an A client that's coming in for multiple or more than one type of counseling.

1:51:42.770 --> 1:51:52.550
Oaks, Tracie R
So again, again, making sure that you're getting credit for not only that client participating in a workshop, but also receiving the one on one counseling.

1:51:52.590 --> 1:51:59.610
Oaks, Tracie R
Because remember, what if when the client participates in what in reducation, they should also be offered someone on one counseling as well?

1:52:0.470 --> 1:52:0.710
Oaks, Tracie R
No.

1:52:0.970 --> 1:52:3.300
Oaks, Tracie R
So make sure that you're just reporting that appropriately.

1:52:5.730 --> 1:52:9.0
Oaks, Tracie R
And we'll take a couple more before we wrap up.

1:52:11.690 --> 1:52:15.240
Oaks, Tracie R
And so how should you report a carryover clients?

1:52:15.250 --> 1:52:18.260
Oaks, Tracie R
This is a question that we receive quite a bit.

1:52:18.830 --> 1:52:30.540
Oaks, Tracie R
So carry over clients or those households that receive counseling and a previous reporting year and continue to receive counseling on the same topic in the current in a in in a current year.

1:52:30.600 --> 1:52:35.150
Oaks, Tracie R
So we're talking about one federal fiscal year and a second a different federal fiscal year.

1:52:35.820 --> 1:52:43.190
Oaks, Tracie R
So households that do meet that requirement, you can be counted again in the next fiscal year.

1:52:43.450 --> 1:52:55.0
Oaks, Tracie R
But again, noting that emphasizing that you do not count those clients who receive no additional services in that in the current fiscal year, so again we received a lot of questions around carryover clients.

1:52:55.10 --> 1:53:7.650
Oaks, Tracie R
We could probably do an entire training on carryover clients, but if that client is receiving services the same on that same topic, they can be carried forward into the next reporting error when you're 9902 reporting.

1:53:10.0 --> 1:53:10.490
Roman, Gabriela
Crazy.

1:53:10.500 --> 1:53:10.810
Roman, Gabriela
Umm.

1:53:10.820 --> 1:53:13.110
Roman, Gabriela
We're umm down to the five minute mark.

1:53:13.730 --> 1:53:14.70
Oaks, Tracie R
OK.

1:53:13.120 --> 1:53:15.221
Roman, Gabriela
Umm, it should we go to?

1:53:15.860 --> 1:53:16.370
Roman, Gabriela
Umm.

1:53:17.120 --> 1:53:24.910
Roman, Gabriela
People answering the chat, is there anything that, umm, that they saw that we should emphasize?

1:53:26.90 --> 1:53:26.400
Oaks, Tracie R
Yeah.

1:53:26.410 --> 1:53:27.520
Oaks, Tracie R
Let me take a look at the chat.

1:53:30.900 --> 1:53:32.480
Oaks, Tracie R
Let's see the lot.

1:53:32.490 --> 1:53:33.310
Oaks, Tracie R
A lot of questions.

1:53:33.320 --> 1:53:45.340
Oaks, Tracie R
It's a little challenging for us to see which ones were responded to uh in real in real time, and we have a lot of folks asking about CMS questions and I see the response.

1:53:45.350 --> 1:53:49.0
Oaks, Tracie R
So it's is appropriate you wanted to 1st reach out to your CMS vendor.

1:53:49.10 --> 1:53:57.410
Oaks, Tracie R
If you're having some technical challenges with your CMS, uh, if that would be the first, you know, your first contact.

1:53:58.610 --> 1:53:59.770
Oaks, Tracie R
Umm, we did receive.

1:53:59.780 --> 1:54:1.280
Oaks, Tracie R
I did see a question a couple of times.

1:54:1.290 --> 1:54:4.480
Oaks, Tracie R
Folks asked how do I identify who my pocket is?

1:54:4.970 --> 1:54:17.690
Oaks, Tracie R
Your pocket is listed in the in ACS under the HUD affiliate tab, so once you log into ACS again, a lot of good information in there, including who your point of contact here is in the Office of Housing Council.

1:54:19.590 --> 1:54:21.760
Oaks, Tracie R
Some folks are asking about the webinar.

1:54:21.990 --> 1:54:24.960
Oaks, Tracie R
Again, it will be published in about a week on the HUD exchange.

1:54:24.970 --> 1:54:31.250
Oaks, Tracie R
If you did not receive the training, make sure that you are registered on the list.

1:54:31.260 --> 1:54:42.320
Oaks, Tracie R
Serve to because we do send out notifications to agencies quite frequently and when trainings are coming up with no fees, are published and a lot of updates to things within our program.

1:54:42.330 --> 1:54:45.620
Oaks, Tracie R
So you want to make sure that you are on that mailing list.

1:54:45.910 --> 1:54:52.660
Oaks, Tracie R
Also, for most of our trainings, in order to receive the materials ahead of the training, you need to be registered for that training.

1:54:52.850 --> 1:55:0.970
Oaks, Tracie R
OK, so if someone just forwarded you the invite, but he didn't register, chances are you may not receive the PowerPoint presentation prior to the start of the training.

1:55:0.980 --> 1:55:14.920
Oaks, Tracie R
But again it it it is very you wanna make sure that you are registered for the list serve so that you do receive the most current and up to date press releases and notifications for for our office.

1:55:16.890 --> 1:55:33.480
Oaks, Tracie R
We did receive a several questions folks asking about outcomes for their education at currently and we only section 10 is only for counseling, but it's only for one on one counseling to report those outcomes, but we'll take that feedback.

1:55:33.490 --> 1:55:44.190
Oaks, Tracie R
But that's that's currently the way that the form is set up is that the one on one counseling section 10, is only to report outcomes of 1 on one council.

1:55:48.920 --> 1:55:51.100
Oaks, Tracie R
Which is scrolling through to see some of the more.

1:55:52.490 --> 1:56:0.290
Oaks, Tracie R
Some of the questions that were Melissa, anything else standing out or or or Connie, you know you guys have been working hard to answer these questions.

1:56:9.990 --> 1:56:10.270
Oaks, Tracie R
Sure.

1:56:2.300 --> 1:56:10.570
Noe, Melissa S
Yes, Tracy, could you speak some about how to report online educational services on the 90?

1:56:11.460 --> 1:56:11.910
Oaks, Tracie R
Yeah.

1:56:11.920 --> 1:56:18.90
Oaks, Tracie R
Online education is reported as as group education and we do receive that question a lot.

1:56:18.100 --> 1:56:28.330
Oaks, Tracie R
So when you're reporting your online education again, you wanna take you wanna take a look at Section 8 on the 9902 form Section 3 through 7 for your demographic info.

1:56:29.210 --> 1:56:30.460
Oaks, Tracie R
Hang on, I 9902.

1:56:31.580 --> 1:56:48.380
Roman, Gabriela
I think one of the challenges we see on on the online education is that agencies may not be collecting all the data, so make sure you develop a mechanism to collect the data that you will need for your 9902 reporting.

1:56:51.590 --> 1:56:54.340
Oaks, Tracie R
Currently well, it looks like we have one minute left.

1:56:55.230 --> 1:56:56.500
Oaks, Tracie R
Umm yes.

1:56:55.330 --> 1:56:56.720
Yanetta, Benjamin T
I'm curious.

1:56:56.850 --> 1:57:4.890
Yanetta, Benjamin T
Just as a reminder to the audience, I know that we did have a lot of questions come in and if we weren't able to get to your question, I I we apologize for that.

1:57:5.410 --> 1:57:12.280
Yanetta, Benjamin T
But because of the way these new webinars set up, we're not gonna be able to issue responses to you by email.

1:57:12.290 --> 1:57:13.620
Yanetta, Benjamin T
Based on what your question.

1:57:13.810 --> 1:57:26.330
Yanetta, Benjamin T
So if you you take the time to send an email to housing.counseling@hud.gov with your specific question, we will get a response to you that way and our turn around time on responses to that email address very fast.

1:57:26.340 --> 1:57:33.50
Yanetta, Benjamin T
So just I wanted to reiterate that that's your best way of getting a a response to a question that did not get answered during the course of this.

1:57:35.420 --> 1:57:37.70
Oaks, Tracie R
Absolutely, absolutely.

1:57:38.450 --> 1:57:43.0
Oaks, Tracie R
And with that, uh, I want to thank everyone who attended today's webinar.

1:57:43.110 --> 1:57:45.800
Oaks, Tracie R
Folks are asking will there will be more webinars?

1:57:45.810 --> 1:57:51.580
Oaks, Tracie R
Absolutely, 9902 reporting could probably be a three or four part series, as many of you know.

1:57:51.590 --> 1:57:55.920
Oaks, Tracie R
So we'll do our best to take your feedback into consideration for future training.

1:57:55.930 --> 1:57:57.620
Oaks, Tracie R
So again, please lot sign up for the list.

1:57:57.630 --> 1:57:59.770
Oaks, Tracie R
Serve more trainings to come.

1:57:59.780 --> 1:58:0.320
Oaks, Tracie R
Thank you.

1:58:0.630 --> 1:58:1.920
Oaks, Tracie R
Thank you for attending today.

1:58:3.720 --> 1:58:4.350
Roman, Gabriela
Thanks everyone.