

**From:** Mayer, Jerrold H  
**Sent:** Friday, January 11, 2013 11:32 AM  
**To:** 'SF-HOUSING-COUNSELING-L@hudlist.hud.gov'  
**Subject:** 9902 Reporting Guidance, & Change in Home Equity Conversion Mortgage (HECM) Housing Counselor Testing Methodology

**To: HUD approved Housing Counseling Agencies**

**Subject: 9902 Reporting Guidance:**

**The deadline for submitting the FY12 quarter 4 9902 report has now passed.** HUD is now in the process of reviewing and validating all FY12 Quarter 4 submissions. If you have not yet submitted your Fourth quarter 9902 report, please do so immediately or call your HUD point of contact. HUD Fiscal Year is October 1st through September 30<sup>th</sup>. Quarterly reporting periods and deadlines are:

- 1<sup>st</sup> Quarter is October 1st through December 31st. 9902 submission is due by January 31st.
- 2<sup>nd</sup> Quarter is January 1st through March 31<sup>st</sup>. 9902 submission is due by April 30<sup>th</sup>.
- 3<sup>rd</sup> Quarter is April 1<sup>st</sup> through June 30<sup>th</sup>. 9902 submission is due by July 31<sup>st</sup>
- 4<sup>th</sup> Quarter is July 1<sup>st</sup> through September 30<sup>th</sup>. 9902 submission is due no later than December 31<sup>st</sup>. Early submissions are recommended, allowing time to address any errors prior to year end.

**Multiple Agencies have reported problems with their 9902 submissions, and the Office of Housing Counseling asks that you please make note of the following:**

- Please ensure that you are selecting **FY12 Quarter 4** as your submission. Multiple agencies have mistakenly tried to submit their 9902 data under FY13 Quarter 4. Future enhancements to the Housing Counseling System will ensure that agencies are only allowed to submit for the current Fiscal Year, but presently agencies are responsible for manually verifying they are submitting for the correct Fiscal Year.
- Agencies must be aware that manually inputting 9902 data into the Housing Counseling System is not the preferred method. HUD recommends submission of 9902 data via a HUD compliant Client Management System. Any data manually entered into the Housing Counseling System will be overwritten if a submission is received via a HUD compliant Client Management System. This includes agency profile information. Agencies should not use a combination of manual entry and automated CMS data submission.
- The 9902 report is cumulative. All counseling activity for Q1, Q2, and Q3 should be included in the Q4 totals. The total numbers reported for sections, 3, 4, and 5 should be equal. The totals reported for sum of section 6 and 7 should be the same as the totals for 3, 4, and 5. HUD is in the process of enhancing HCS to reject 9902 submissions if the totals do not equal. Presently, it is the responsibility of individual Housing Counseling Agencies to ensure the totals are correct and equal before submission. Remember,  $3=4=5=6+7$ .
- Agencies need to manually check to ensure that the data submitted to Housing Counseling System is valid and correctly received. Once a submission has been made, please log into HCS to ensure that the data appears in the system and is correct. There is no limit to the number of times an agency can submit a 9902. If a reporting error is found, simply correct the error in the Client Management System and resubmit to HUD. Agencies should always submit, check the data in HCS, and submit again if necessary.

Please note that if an Agency received an extension of the FY12 grant, counseling activities should be reflected in FY13 Q 1 reporting. Please call your HUD point of contact if you have further questions.

AND

**Change in Home Equity Conversion Mortgage (HECM) Housing Counselor Testing Methodology:**

HUD has changed Home Equity Conversion Mortgage Counselor Testing contractors. The change from NeighborWorks to PAVR Software Solution LLC to oversee and administer the Home Equity Conversion Mortgage examination has provided an opportunity to utilize cost saving advancements in testing methodology. Utilizing technology such as online proctors and webcams will serve to reduce cost not only to HUD, but more importantly, to the individuals taking the test itself. As part of the testing procedures PAVR Software Solutions LLC will provide to individuals, all the necessary equipment to take the exam. It is included in the cost of taking the exam and the test cost will remain the same. Students will have the opportunity to request web camera and/or microphone during scheduling the exam by submitting a request to: [supportteam@netcertification.com](mailto:supportteam@netcertification.com). However there could be additional delays in scheduling the exam due to this. PAVR will provide step by step instructions on installing and utilizing the equipment and method to return it once the test is completed. Agencies and or individuals will need to have internet access and access to a computer that has the minimum capabilities described here: <http://proctoru.com/tech.php>

The new testing methodology will also provide a number of advantages to the agencies and individuals. There is greater flexibility in when the test can be scheduled and allows for taking the exam at the individual's worksite. Other benefits include less time away from worksites, reduction in agencies' expenses for items such as travel reimbursement for individuals taking the test. Scheduling is often much easier with many dates and times available to take the exam. Exams can be scheduled for any available date just 3 days after they register. Students can test their computer readiness prior to the actual exam by going to <http://www.proctoru.com/testitout/>. Here is a link to get more familiar with online proctoring <http://proctoru.com/howitworks.php>

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Bulk subscriptions:

Some housing counselors have asked, "How do I sign up my entire agency staff for housing counseling listserv updates?" It is easy... Just list your staff email addresses like this:

[aaa@xyz.com](mailto:aaa@xyz.com)  
[bbb@xyz.com](mailto:bbb@xyz.com)  
[ccc@xyz.com](mailto:ccc@xyz.com)

You can send in one email address or your entire agency. Email your list to: [jerrold.h.mayer@hud.gov](mailto:jerrold.h.mayer@hud.gov)

If you have a housing counseling industry friend who you want to subscribe to this listserv, there are 3 other ways to sign up: 1. send them this link:

[http://portal.hud.gov/hudportal/HUD?src=/program\\_offices/housing/sfh/hcc/ohc\\_listserv](http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/sfh/hcc/ohc_listserv) they can sign up for the listserv there; or 2: forward them this email; or 3: Visit: <http://www.usa.gov> and subscribe at: <http://apps.gsa.gov/FirstGovCommonSubscriptionService.php> To unsubscribe - go to: <http://portal.hud.gov/portal/page/portal/HUD/subscribe/maillinglist> and click on "Housing Counseling" and follow the unsubscribe instructions on that page.

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HUD Housing Counseling: [www.hud.gov/housingcounseling](http://www.hud.gov/housingcounseling)

Events & Training Calendar:

[http://portal.hud.gov/hudportal/HUD?src=/program\\_offices/housing/sfh/hcc/ohc\\_training](http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/sfh/hcc/ohc_training)

Contracting Opportunities: [http://portal.hud.gov/portal/page/portal/HUD/program\\_offices/cpo](http://portal.hud.gov/portal/page/portal/HUD/program_offices/cpo)

Career Opportunities: <http://www.usajobs.gov>

Grant Opportunities:

[http://portal.hud.gov/portal/page/portal/HUD/program\\_offices/administration/grants/fundsavail](http://portal.hud.gov/portal/page/portal/HUD/program_offices/administration/grants/fundsavail)

Presidentially Declared Disaster Areas:

[http://portal.hud.gov/hudportal/HUD?src=/program\\_offices/housing/sfh/nsc/disaster](http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/sfh/nsc/disaster)

Foreclosure Assistance:

[http://portal.hud.gov/hudportal/HUD?src=/i\\_want\\_to/talk\\_to\\_a\\_housing\\_counselor](http://portal.hud.gov/hudportal/HUD?src=/i_want_to/talk_to_a_housing_counselor)

Making Home Affordable: <http://www.makinghomeaffordable.gov/pages/default.aspx>

This list will often provide training opportunities and event announcements for non-profit and local government HUD Housing Counseling partners. HUD does not endorse the organizations sponsoring linked websites, and we do not endorse the views they express or the products/services they or their community/business partners offer. For more information on HUD's web policies please visit:

<http://www.hud.gov/assist/webpolicies.cfm>

Thank you!!!!