U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

HUD 9902 Projections in HCS

Audio only available via conference call.

To join:

Call: (866) 233-3841

Participant Access Code: 346678

December 18, 2014

Webinar Logistics:

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- Attendee lines will muted during presentation.

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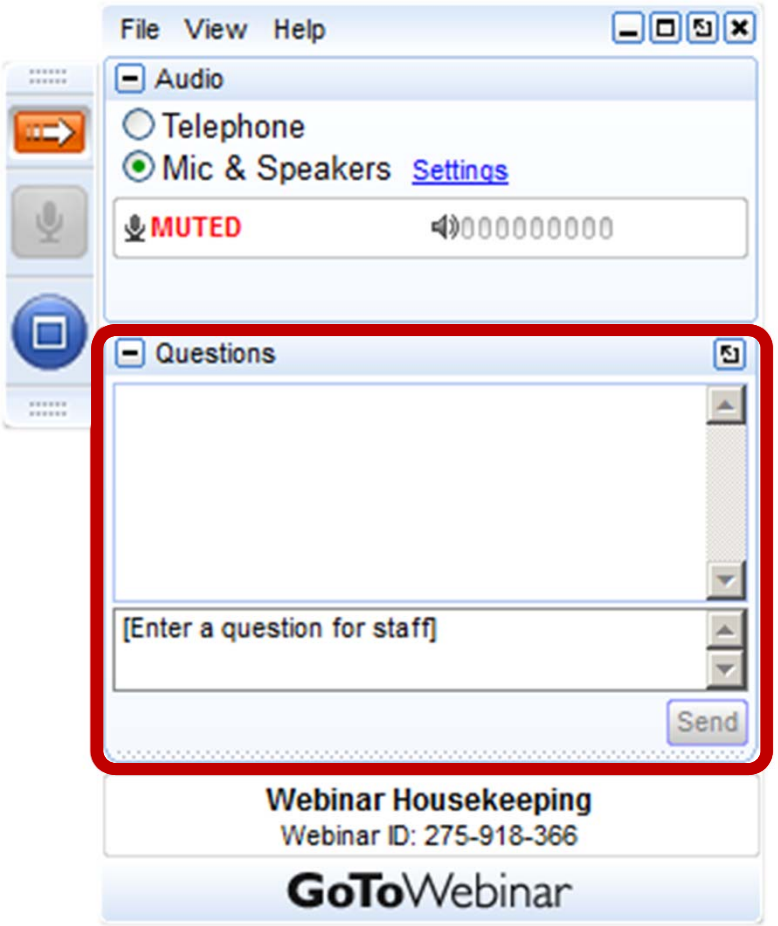

Your Participation

Please submit your text questions and comments using the Questions Panel. We will answer some of them during the webinar.

You can also send questions and comments to housing.counseling@hud.gov

Note: Today's presentation is being recorded and will be provided within 48 hours. The replay information will be sent out via ListServ.

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- Please complete the brief survey at the end of this session.
- Your responses will help OHC better plan and present our webinars.

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- The email will say that it is your Certificate of Training.
- Print out and save that email for your records.

Agenda

- 9902 Projection
- Display of projections on FY 2015 9902 form

- Note: Data seen on presentation screens is sample/test data.

Projections

- Projections identify the number of housing counseling services that the agency estimates they will conduct using their HUD grant award.
- Used to give HUD an idea of what can be expected of the agency and allows for a means of tracking progress through the grant funding period.

Projections

There are two types of projections that can be entered in HCS:

- **Total Negotiated Projection** – represents the total number of housing counseling activities that the agency and HUD has agreed is a reasonable estimate of activities that can be conducted using the agency's HUD grant funding.

Projections

- **9902 Projection –** represents the number of housing counseling activities that the agency anticipates conducting for each line in **section 8 Households Receiving Group Education by Purpose** and **section 9 Households Receiving One-on-One Counseling by Purpose** of the new FY2015 9902 form.
- The total amount entered for the **9902 Projection** must be equal to or greater than the **Total Negotiated Projection.**

Total Negotiated Projection

- The **Total Negotiated Projection** is entered on the agency's grant budget allocation screen by the agency's HUD GTR. It cannot be entered by the agency.
- The **Total Negotiated Projection** must be entered before the agency can submit their 9902 projections to HUD.

Total Negotiated Projection

The next two screens show how the **Total Negotiated Projection** field displays for the HUD user (editable) and for the agency user (read-only).

Total Negotiated Projection

HUD User (editable):

Grant Award Agency's Budget Allocation - NOFA 2014-1 - COMPREHENSIVE COUNSELING

Instructions:

Agency Name: **COUNSELING AGENCY XYZ**	HUD Office: **Headquarters SF-HUD**	Application ID: **0011-029**
Agency Type: **National Intermediary**	Grant Type: **COMPREHENSIVE COUNSELING**	Agency ID: 84538
GTR: **Cheryl,Appline W**	Last update: **11/28/14 09:11**	Fiscal Year: **2014**
Funding Start Date: **10/01/2013**	Funding End Date: **03/31/2015**	
Year 1 Start Date: **10/01/2013**	Year 1 End Date: **09/30/2014**	2014

	Application Projection	Calculated Projection	Total Negotiated Projection
Projected Number of Clients	0	0	4,000

BUDGET		FUNDED		ALLOCATION	
Total Budget:	$ 6,479,792.00	Administrative Funds:	$ 5,000.00	To Be Sub-Allocated:	$ 1,231,245.00
This Year's Funding:	$ 1,236,245.00	Indirect Cost:	$ 0.00	Sub-Allocated:	$ 0.00
Grant Ratio:	19 %	To Be Sub-Allocated:	$ 1,231,245.00	Balance:	$ 1,231,245.00

Allocate Evenly | Allocate By # of Counselors | Allocate By # of Clients

Print | Cancel | Close this window | 9902 Projection

Qtr 1 | Qtr 2 | Qtr 3 | Qtr 4

Status | Sub Agency | Agency | Agency | # of | # of Projected | Sub Allocation | Agency Total

Total Negotiated Projection

Agency User (read-only):

Grant Award Agency's Budget Allocation - NOFA 2014-1 - COMPREHENSIVE COUNSELING

Instructions:

?

Agency Name: **COUNSELING AGENCY XYZ**	HUD Office: **Headquarters SF-HUD**	Application ID: **0011-029**
Agency Type: **National Intermediary**	Grant Type: **COMPREHENSIVE COUNSELING**	Agency ID: 84538
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Year 1 Start Date: **10/01/2013**	Year 1 End Date: **09/30/2014**	2014

	Application Projection	Calculated Projection	Total Negotiated Projection
Projected Number of Clients	0	0	4,000

BUDGET		FUNDED		ALLOCATION	
Total Budget:	$ 6,479,792.00	Administrative Funds:	$ 5,000.00	To Be Sub-Allocated:	$ 1,231,245.00
This Year's Funding:	$ 1,236,245.00	Indirect Cost:	$ 0.00	Sub-Allocated:	$ 0.00
Grant Ratio:	19 %	To Be Sub-Allocated:	$ 1,231,245.00	Balance:	$ 1,231,245.00

Allocate Evenly | Allocate By # of Counselors | Allocate By # of Clients

Print | Cancel | Close this window | 9902 Projection

Qtr 1 | Qtr 2 | Qtr 3 | Qtr 4

Status | Sub-Agency | Agency | Agency | # of | # of Projected | Sub-Allocation | Agency Total

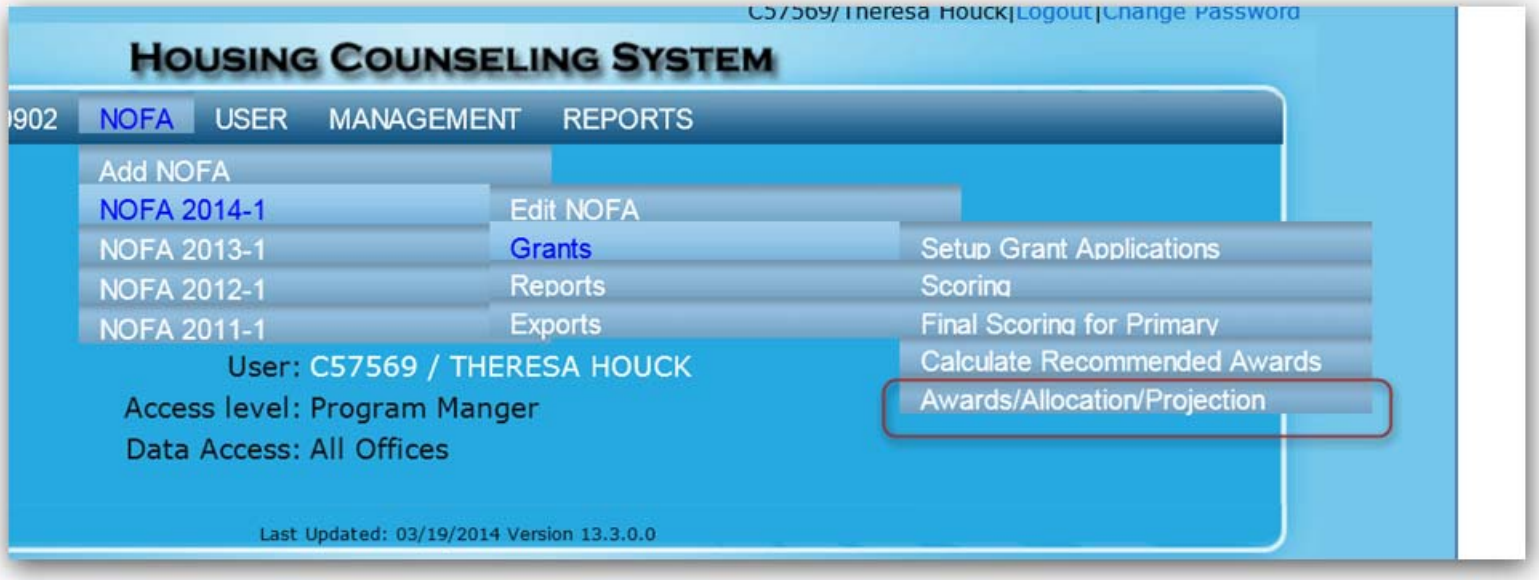
Total Negotiated Projection

To enter the **Total Negotiated Projection,** a HUD user should navigate to the agency's budget allocation screen.

From the **NOFA** menu:

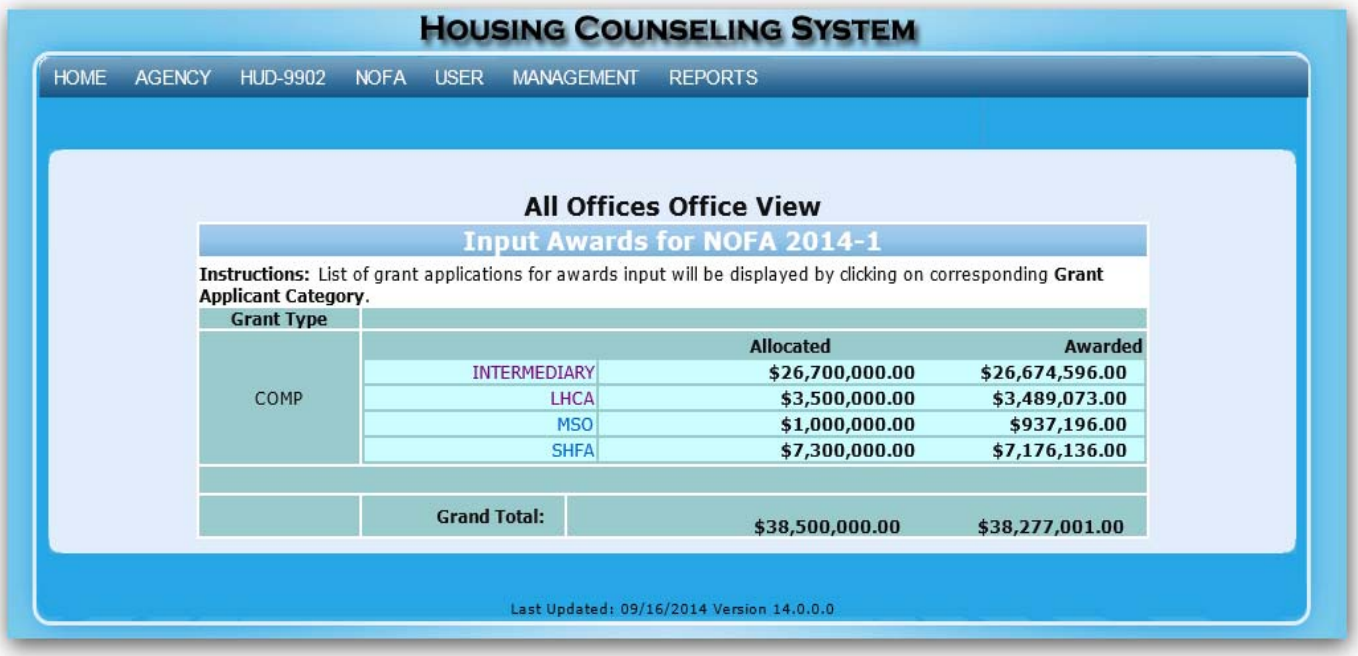
- Hover your mouse over the desired NOFA from the drop-down menu.
- Hover your mouse over the Grants option from the sub-menu.
- Click the Awards/Allocation/Projection link.

Total Negotiated Projection



Total Negotiated Projection

Navigate to the agency whose projections you are reviewing by clicking the link for the agency type.



Grant Type		Allocated	Awarded
COMP	INTERMEDIARY	$26,700,000.00	$26,674,596.00
	LHCA	$3,500,000.00	$3,489,073.00
	MSO	$1,000,000.00	$937,196.00
	SHFA	$7,300,000.00	$7,176,136.00
	Grand Total:	$38,500,000.00	$38,277,001.00

Total Negotiated Projection

Click on the link for the agency's name.

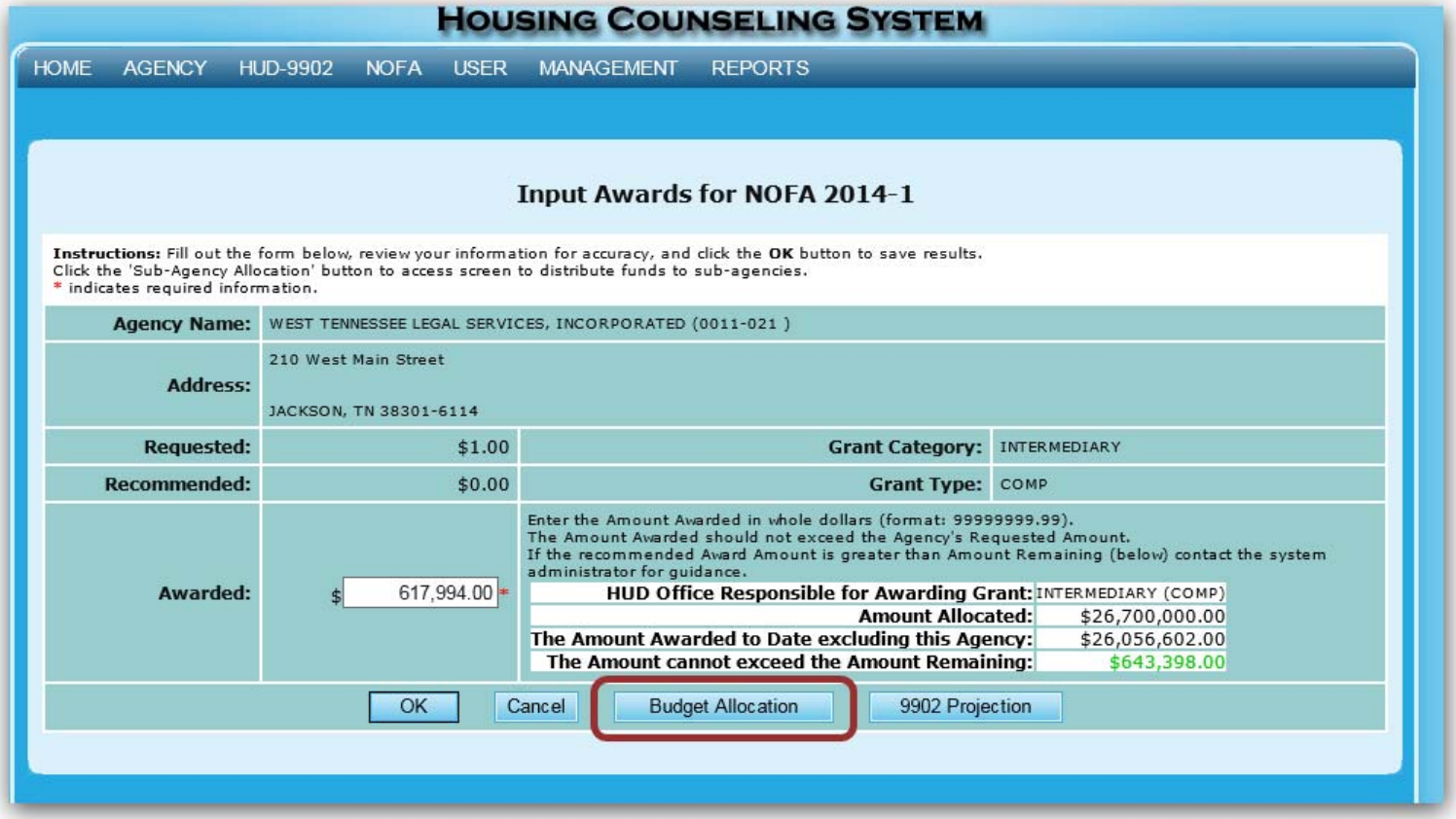
Select a Grant Application to Award for NOFA 2014-1

Instructions: + −

Agency Name	Agency ID	Agency Type	Grant Type	HUD office	City/State	Application ID	Sub-Allocated	Awarded
GARDEN STATE CONSUMER CREDIT COUNSELING, INC. D/B/A/ NOVADEBT	84870	National Intermediary	COMP	HQ SF-HUD	FREEHOLD, NJ	0011-002	N	$339,789.00
NATIONAL COUNCIL OF LA RAZA	80758	National Intermediary	COMP	HQ SF-HUD	WASHINGTON, DC	0011-003	N	$1,160,162.00
HOMEFREE - U S A	80816	National Intermediary	COMP	HQ SF-HUD	RIVERDALE, MD	0011-004	N	$1,254,096.00
GREENPATH, INC.	84871	National Intermediary	COMP	HQ SF-HUD	FARMINGTON HILLS, MI	0011-005	N	$1,549,442.00
HOMEOWNERSHIP PRESERVATION FOUNDATION	84081	National Intermediary	COMP	HQ SF-HUD	MINNEAPOLIS, MN	0011-006	N	$3,000,000.00
NATIONAL URBAN LEAGUE	81639	National Intermediary	COMP	HQ SF-HUD	NEW YORK, NY	0011-007	N	$884,041.00
NUEVA ESPERANZA, INC.	84546	National Intermediary	COMP	HQ SF-HUD	Philadelphia, PA	0011-008	N	$440,236.00
NATIONAL ASSOCIATION OF REAL ESTATE BROKERS-INVESTMENT DIVISION, INC	80759	National Intermediary	COMP	HQ SF-HUD	OAKLAND, CA	0011-009	N	$707,885.00
RURAL COMMUNITY ASSISTANCE CORPORATION	82559	National Intermediary	COMP	HQ SF-HUD	WEST SACRAMENTO, CA	0011-010	N	$502,551.00
NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS	84539	National Intermediary	COMP	HQ SF-HUD	NEW YORK, NY	0011-011	N	$405,528.00
CITIZENS' HOUSING AND PLANNING ASSOCIATION, INC.	81504	National Intermediary	COMP	HQ SF-HUD	BOSTON, MA	0011-012	N	$582,953.00
NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	80751	National Intermediary	COMP	HQ SF-HUD	WASHINGTON, DC	0011-013	N	$1,462,644.00
NATIONAL COMMUNITY REINVESTMENT COALITION, INC.	84434	National Intermediary	COMP	HQ SF-HUD	WASHINGTON, DC	0011-014	N	$1,642,035.00
		National						

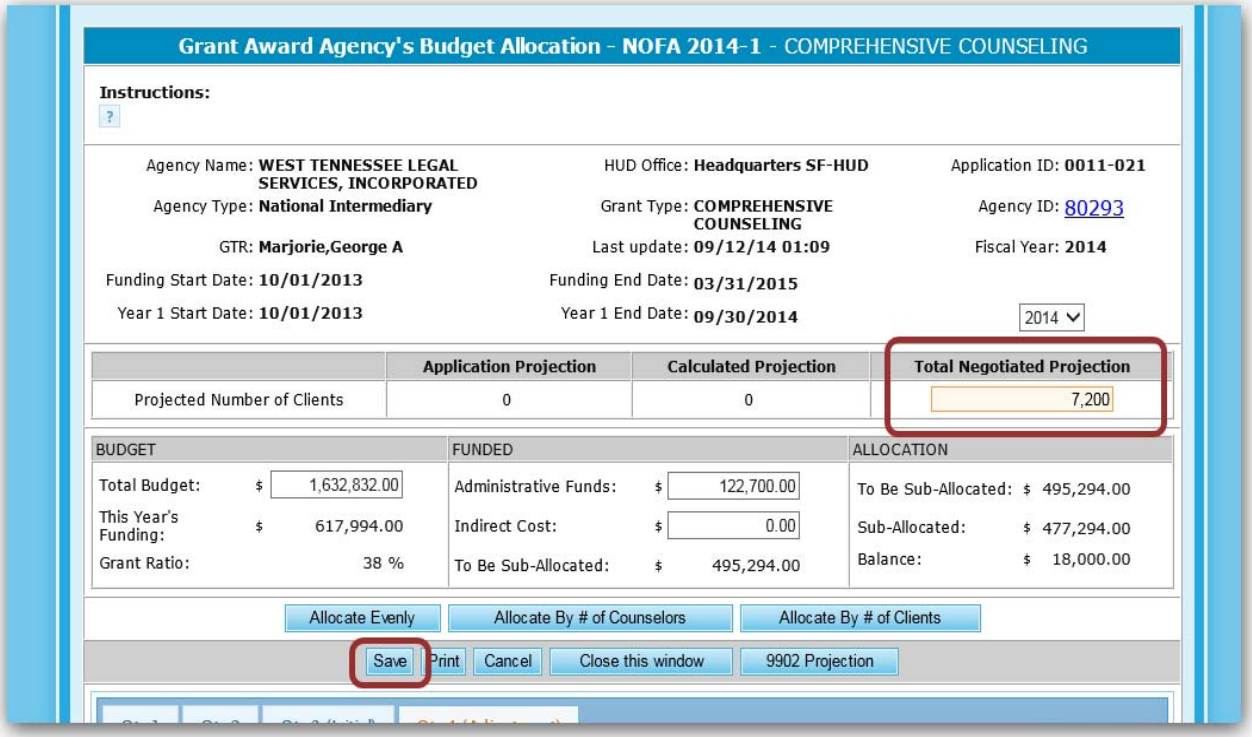
Total Negotiated Projection

Click the **Budget Allocation** button.



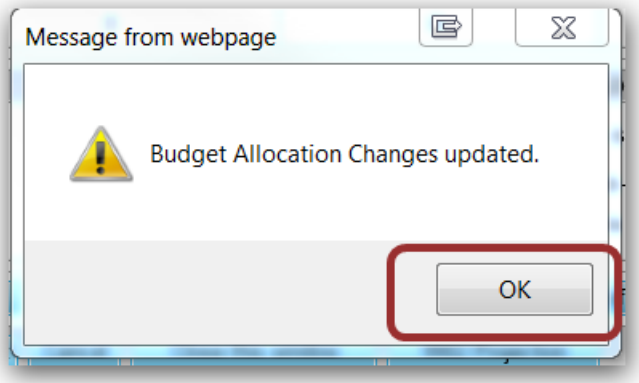
Total Negotiated Projection

Enter the agreed-upon amount in the **Total Negotiated Projection** field, tab or click out of the field, and click the Save button.



Total Negotiated Projection

A message displays indicating that the budget allocation changes have been updated. Click the **OK** button on the message.



9902 Projection

The 9902 projection functionality in HCS allows agencies to enter their 9902 projections directly in HCS for HUD review and approval.

- Only grant awardees will enter projections.
- The projections should represent the anticipated activities for the entire agency organization.
- Agencies that receive a sub-allocation from a parent agency do not enter 9902 projections.

9902 Projection

- Projections are only entered for **section 8 Households Receiving Group Education by Purpose** and **section 9 Households Receiving One-on-One Counseling by Purpose**.
- Projections are entered for each HUD housing counseling grant awarded to an agency.
- If an agency has more than one HUD housing counseling grant funding the same reporting period, projections for each grant are entered separately.

9902 Projection

- Projections are not submitted through CMS. They are entered directly into HCS.
- HUD staff reviews and approves the projections.
- Once approved the projections display on the grant awardees' 9902s for the applicable reporting period.

9902 Projection - Agency User Navigation

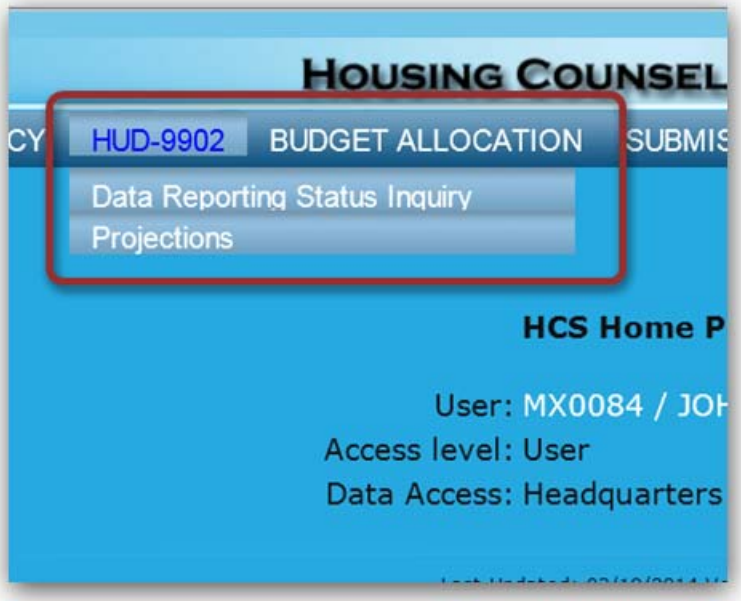
The **HUD-9902** menu item has been updated to allow access to the new 9902 projection screens. To access the 9902 Projection screens, an agency user should:

- Hover your mouse over **HUD-9902** in the main system navigation, two items will display in the drop-down menu:
  - Data Reporting Status Inquiry
  - Projections

9902 Projection - Agency User Navigation

- **Data Reporting Status Inquiry** – takes the user to the HUD-9902 screen for searching and displaying an agency's 9902.
- **Projections** – takes the user to the agency's Grant Menu page. This can also be accessed by clicking the Budget Allocation link in the main navigation.

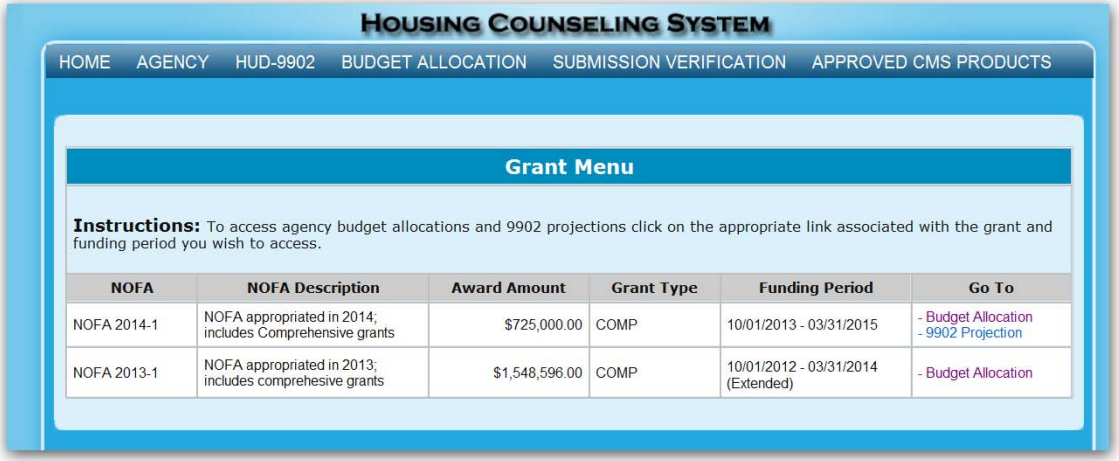
9902 Projection - Agency User Navigation



9902 Projection - Agency User

Grant Menu –

- Lists all of the HUD grants the agency has been awarded.
- Allows the agency to access both the **Budget Allocation** and **9902 Projection** for each grant.

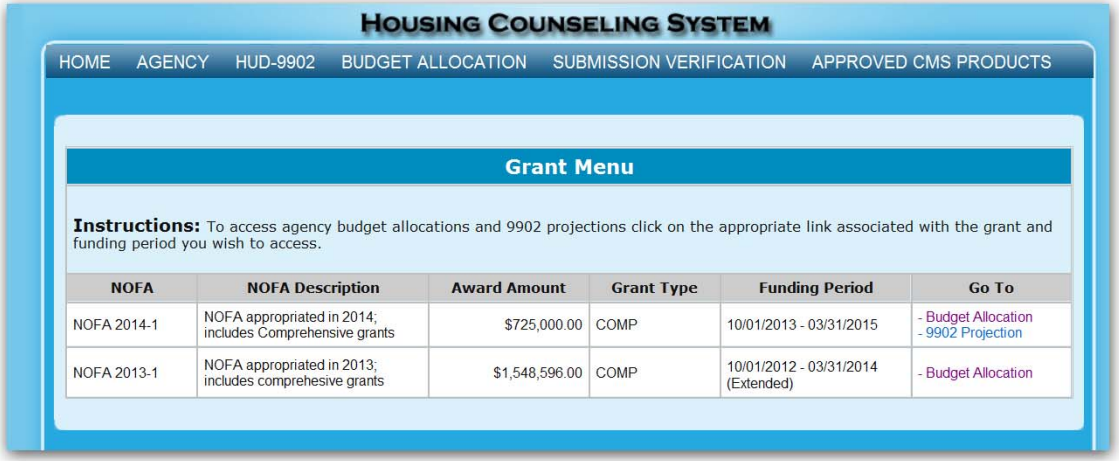


NOFA	NOFA Description	Award Amount	Grant Type	Funding Period	Go To
NOFA 2014-1	NOFA appropriated in 2014; includes Comprehensive grants	$725,000.00	COMP	10/01/2013 - 03/31/2015	- Budget Allocation - 9902 Projection
NOFA 2013-1	NOFA appropriated in 2013; includes comprehesive grants	$1,548,596.00	COMP	10/01/2012 - 03/31/2014 (Extended)	- Budget Allocation

9902 Projection - Agency User

Grant Menu –

- For any grant award that funds FY 2015 and later, a 9902 Projection link will appear under Go To.
- Click the **9902 Projection** link to access the screen for entering and managing the projections for that grant.



9902 Projection Entry Screen

- Displays dashboard information about the agency and associated grant:
  - Agency Name, HCS ID
  - Agency HCS ID
  - Agency Type
  - Agency's HUD Office
  - Grant Type
  - Grant Application ID
  - Funding start and end dates
  - Award Amount
  - Total Negotiated Projection

9902 Projection Entry Screen

9902 Projection NOFA 2014-1 COMPREHENSIVE COUNSELING Grant

Agency Name: HOMEOWNERSHIP PRESERVATION FOUNDATION

Agency ID: 84081

Agency Type: National Intermediary

HUD Office: Headquarters SF-HUD

Grant Type: COMPREHENSIVE COUNSELING

Application ID: 0011-006

Funding Start Date: 10/01/2013
Funding End Date: 03/31/2015

Award Amount: $3,000,000.00
Total Negotiated Projection: 16,373

FY 2014 Projection: 0
FY 2015 Projection: 0
Total Projection: 0

Status: NOT ENTERED
Last Updated:

Submitted to HUD:
By:

HUD Approved:
By:

9902 Projection Entry Screen

- Identifies the **Status** of the projection, the **Total Projection** for each fiscal year of the grant, and the **Total Projection** for the entire grant.
- Provides for entry of projections for **sections 8 & 9** of the 9902 form. Other 9902 sections (3 – 7 and 10) are not included in projections.

9902 Projection Entry Screen

- Allows users to enter comments.
- Once approved by HUD, the fiscal year allocations will display on the agency's 9902s for FY2015 and after.

9902 Projection Entry Screen

9902 Projection NOFA 2014-1 Comprehensive Counseling Grant

Agency Name: MON VALLEY INITIATIVE
Agency ID: 80084
Agency Type: National Intermediary
HUD Office: Headquarters SF-HUD
Grant Type: COMPREHENSIVE COUNSELING
Application ID: 0011-008
Funding Start Date: 10/01/2013
Funding End Date: 03/31/2015
Award Amount: $725,000.00
Total Negotiated Projection: 323
FY 2014 Projection: 0
FY 2015 Projection: 0
Total Projection: 0

Status: NOT ENTERED
Last Updated:
Submitted to HUD:
By:
HUD Approved:
By:

Add Comment:

Note: Projections for the fiscal year 2014 portion of the funding period are optional. Agencies may choose to enter their actual 9902 reported counseling activities for the 2014 fiscal year projections.

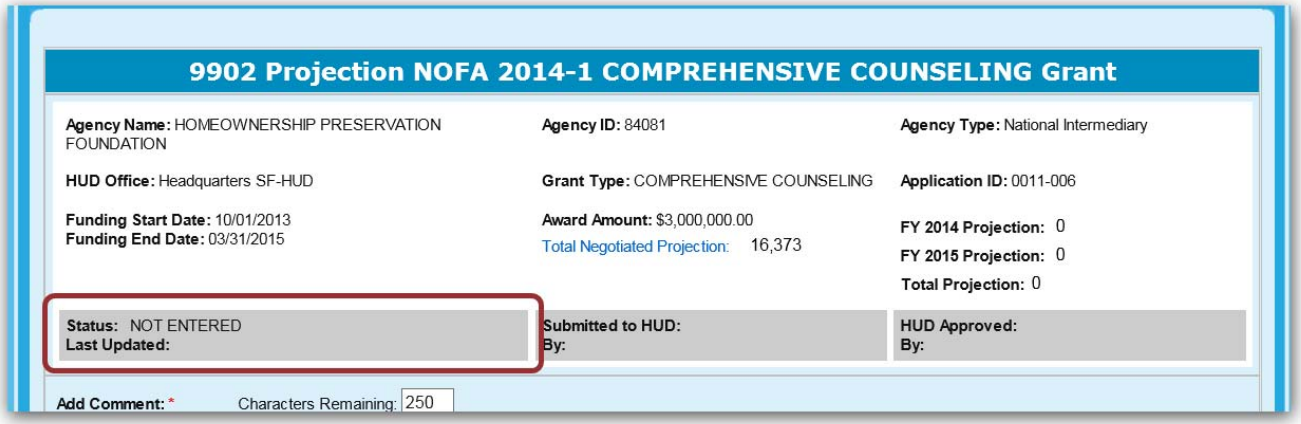
Save As Draft | Submit to HUD

	Fiscal Year 2014 10/01/2013 - 09/30/2014 (optional)	Fiscal Year 2015 10/01/2014 - 03/31/2015	Total
8. Households Receiving Group Education, by Purpose			
a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	0	0	0.00
b. Completed predatory lending, loan scam or other fraud prevention workshop	0	0	0.00
c. Completed fair housing workshop	0	0	0.00
d. Completed homelessness prevention workshop	0	0	0.00
e. Completed rental workshop	0	0	0.00
f. Completed pre-purchase homebuyer education workshop	0	0	0.00
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0	0.00
h. Completed resolving or preventing mortgage delinquency workshop	0	0	0.00
i. Completed other workshop	0	0	0.00
Section 8 Total:	0.00	0.00	0.00
9. Households Receiving One-on-One Counseling, by Purpose			
a. Homeless Assistance	0	0	0.00
b. Rental Topics	0	0	0.00
c. Prepurchase/Homebuying	0	0	0.00
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	0	0	0.00
e. Reverse Mortgage	0	0	0.00
f. Resolving or Preventing Mortgage Delinquency or Default	0	0	0.00
Section 9 Total:	0.00	0.00	0.00
Section 8 & 9 Total:	0.00	0.00	0.00

Save As Draft | Submit to HUD

Projection Status

- The status of the projection displays near the top of the screen under the agency and grant information.
- Initially the status will display as “NOT ENTERED”. It will update as the status changes.



Entering Projections

- Agencies will enter the projected housing counseling activities for:
  - 9902 Section 8: Households Receiving Group Education by Purpose
  - 9902 Section 9: Households Receiving One-on-One Counseling by Purpose.
  - If the funding period spans multiple fiscal years, projections are required for each fiscal year.

2014 Projections

- The 2014 grants have a funding period that includes all of fiscal year 2014 and the first two quarters of 2015.
- The projection screens for the 2014 grants will allow agencies to enter their actual figures for 2014 (optional) and project for 2015.
- This will allow for the total projection figures to be recorded in HCS, and the 2015 projection figures to display on the 9902s.
- Projection figures entered for FY 2014 will not display on the 2014 9902s.
- Future grants that have funding periods that span multiple fiscal years will require projections for each fiscal year of the funding period.

Entering Projections

- Enter the number value for each fiscal year of the grant funding period for each line item in Section 8.
- If the agency does not anticipate conducting that type of housing counseling activity, leave the 0 value that displays by default.
- The screen will display the total values for section 8 and for each line item for the entire funding period.

Entering Projections

Note: Projections for the fiscal year 2014 portion of the funding period are optional. Agencies may choose to enter their actual 9902 reported counseling activities for the 2014 fiscal year projections.

Save As Draft | Submit To HUD

* Comment required

	Fiscal Year 2014: 10/01/2013 - 09/30/2014 (Optional)	Fiscal Year 2015: 10/01/2014 - 03/31/2015	Total
8. Households Receiving Group Education by Purpose			
a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	23	25	48
b. Completed predatory lending, loan scam or other fraud prevention workshop	69	38	107
c. Completed fair housing workshop	0	92	92
d. Completed homelessness prevention workshop	16	0	16
e. Completed rental workshop	69	54	123
f. Completed pre-purchase homebuyer education workshop	88	0	88
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	200	300	500
h. Completed resolving or preventing mortgage delinquency workshop	21	12	33
i. Completed other workshop	37	42	79
Section 8 Total:	523	563	1086
9. Households Receiving One-on-One Counseling by Purpose			
a. Homeless Assistance	0	0	0
b. Rental Topics	0	0	0
c. Prepurchase/Homebuying	0	0	0
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	0	0	0
e. Reverse Mortgage	0	0	0
f. Resolving or Preventing Mortgage Delinquency or Default	0	0	0
Section 9 Total:	0	0	0
Sections 8 & 9 Total:	523	563	1086

Save As Draft | Submit To HUD

Page Errors: 0

* Comment Required if HUD user saves or submits

Entering Projections

- Enter the number value for each fiscal year of the grant funding period for each line item in Section 9.
- If the agency does not anticipate conducting that type of housing counseling activity, leave the 0 value that displays by default.
- The screen will display the total values for section 9 and for each line item for the entire funding period.

Entering Projections

Draft or Submit To HUD buttons to save/submit the data and comment.

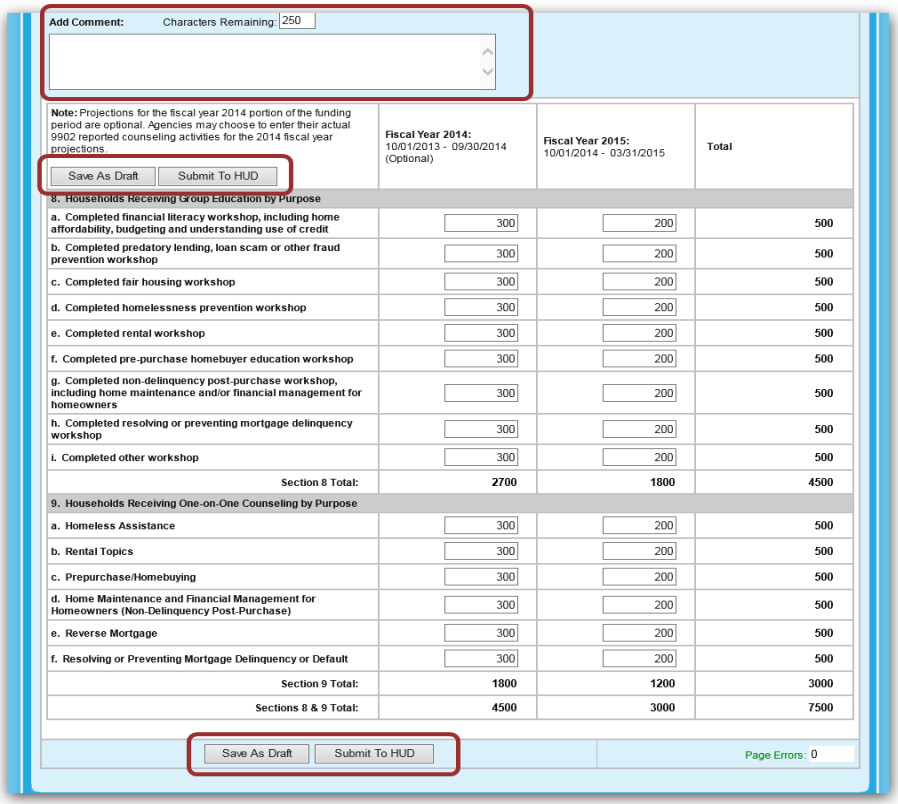
Note: Projections for the fiscal year 2014 portion of the funding period are optional. Agencies may choose to enter their actual 9902 reported counseling activities for the 2014 fiscal year projections. Save As Draft Submit To HUD * Comment required	**Fiscal Year 2014:** 10/01/2013 - 09/30/2014 (Optional)	**Fiscal Year 2015:** 10/01/2014 - 03/31/2015	**Total**
8. Households Receiving Group Education by Purpose			
a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	23	25	48
b. Completed predatory lending, loan scam or other fraud prevention workshop	69	38	107
c. Completed fair housing workshop	0	92	92
d. Completed homelessness prevention workshop	16	0	16
e. Completed rental workshop	69	54	123
f. Completed pre-purchase homebuyer education workshop	88	0	88
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	200	300	500
h. Completed resolving or preventing mortgage delinquency workshop	21	12	33
i. Completed other workshop	37	42	79
Section 8 Total:	523	563	1086
9. Households Receiving One-on-One Counseling by Purpose			
a. Homeless Assistance	28	16	44
b. Rental Topics	50	25	75
c. Prepurchase/Homebuying	0	0	0
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	40	28	68
e. Reverse Mortgage	75	62	137
f. Resolving or Preventing Mortgage Delinquency or Default	60	30	90
Section 9 Total:	253	161	414
Sections 8 & 9 Total:	776	724	1500

Save As Draft Submit To HUD Page Errors: 0

* Comment Required if HUD user saves or submits

Entering Projections

- Enter a comment (optional) and then click either the **Save As Draft** or **Submit To HUD**.



Add Comment: Characters Remaining: 250

Note: Projections for the fiscal year 2014 portion of the funding period are optional. Agencies may choose to enter their actual 9902 reported counseling activities for the 2014 fiscal year projections. Save As Draft Submit To HUD	Fiscal Year 2014: 10/01/2013 - 09/30/2014 (Optional)	Fiscal Year 2015: 10/01/2014 - 03/31/2015	Total
8. Households Receiving Group Education by Purpose			
a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	300	200	500
b. Completed predatory lending, loan scam or other fraud prevention workshop	300	200	500
c. Completed fair housing workshop	300	200	500
d. Completed homelessness prevention workshop	300	200	500
e. Completed rental workshop	300	200	500
f. Completed pre-purchase homebuyer education workshop	300	200	500
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	300	200	500
h. Completed resolving or preventing mortgage delinquency workshop	300	200	500
i. Completed other workshop	300	200	500
Section 8 Total:	2700	1800	4500
9. Households Receiving One-on-One Counseling by Purpose			
a. Homeless Assistance	300	200	500
b. Rental Topics	300	200	500
c. Prepurchase/Homebuying	300	200	500
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	300	200	500
e. Reverse Mortgage	300	200	500
f. Resolving or Preventing Mortgage Delinquency or Default	300	200	500
Section 9 Total:	1800	1200	3000
Sections 8 & 9 Total:	4500	3000	7500

Save As Draft Submit To HUD

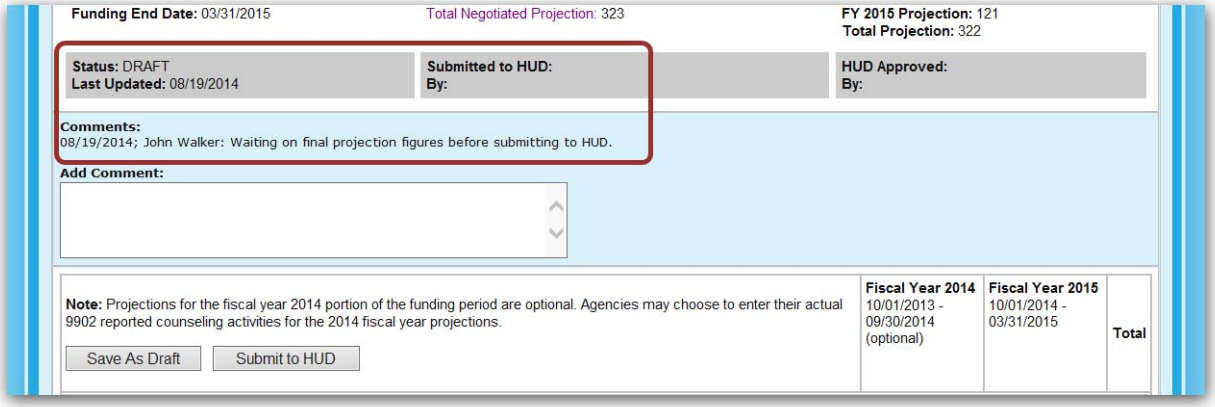
Page Errors: 0

9902 Projection – Save As Draft

Saving as Draft:

- Can be used by the agency to begin entering projections and to save their progress without submitting to HUD.
- Status will display as **Draft**, and the Last Updated Date is updated.
- Any comment that is added is saved and displayed.
- When in draft status agencies can make any changes; no data validation checks are performed.

9902 Projection – Save As Draft

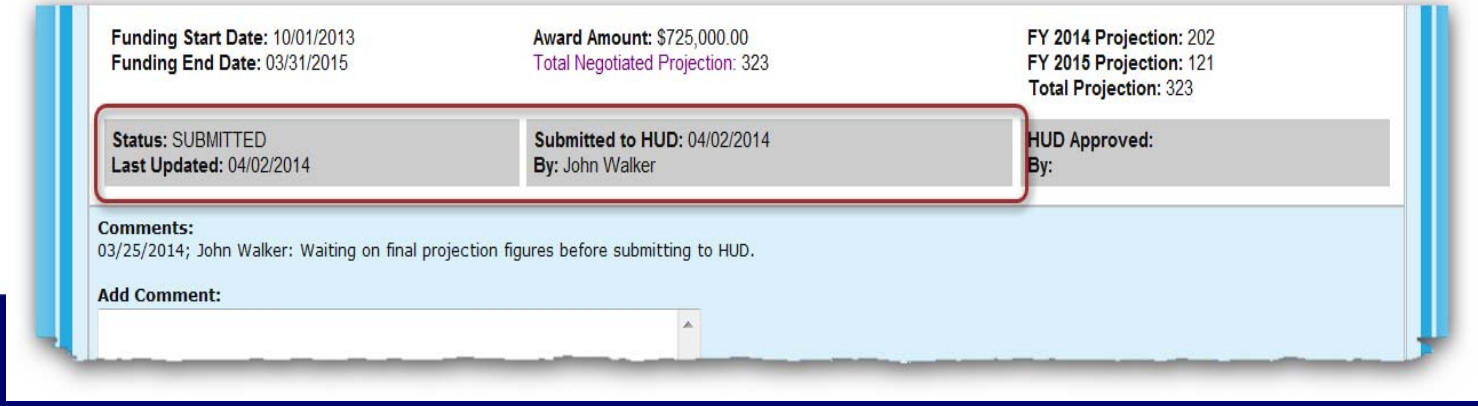


Note: All users (both agency and HUD users) will be able to see all comments entered on a projection. The name of the user that entered the comment is automatically displayed along with the date and comment.

9902 Projection – Submit To HUD

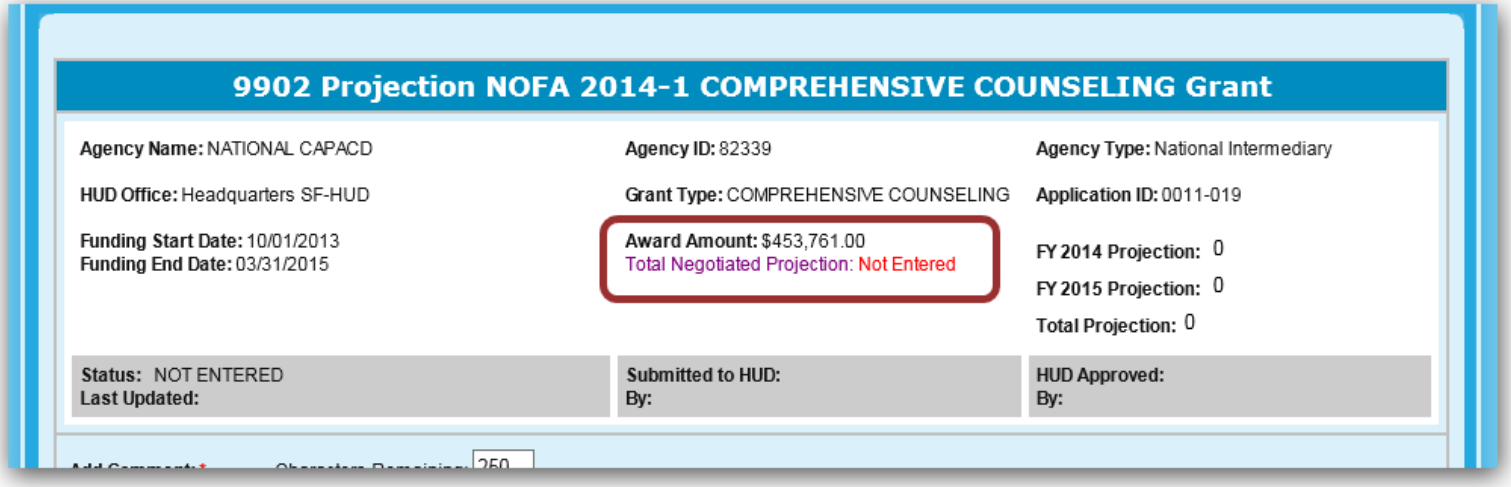
When the projections are ready for HUD's review and approval, the agency should click the **Submit To HUD** button.

- Status changed to **Submitted**.
- **Last Updated** date is updated.
- The **date submitted** is updated.
- The **user that submitted** is updated.



9902 Projection – Submit To HUD

- Remember! The **Total Negotiated Projection** is required before an agency can submit their 9902 Projection.
- The projection screen will indicate if the **Total Negotiated Projection** has not been entered.



9902 Projection NOFA 2014-1 COMPREHENSIVE COUNSELING Grant

Agency Name: NATIONAL CAPACD
Agency ID: 82339
Agency Type: National Intermediary

HUD Office: Headquarters SF-HUD
Grant Type: COMPREHENSIVE COUNSELING
Application ID: 0011-019

Funding Start Date: 10/01/2013
Funding End Date: 03/31/2015

Award Amount: $453,761.00
Total Negotiated Projection: Not Entered

FY 2014 Projection: 0
FY 2015 Projection: 0
Total Projection: 0

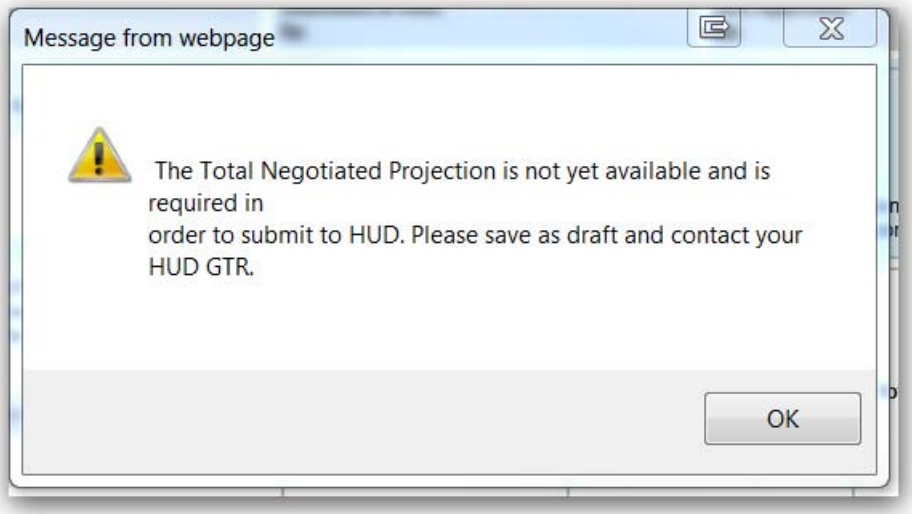
Status: NOT ENTERED
Last Updated:

Submitted to HUD:
By:

HUD Approved:
By:

9902 Projection – Submit To HUD

- If a user attempts to submit the projection when the **Total Negotiated Projection** has not been submitted, a message will display indicating to save the projection as draft and contact your HUD GTR.

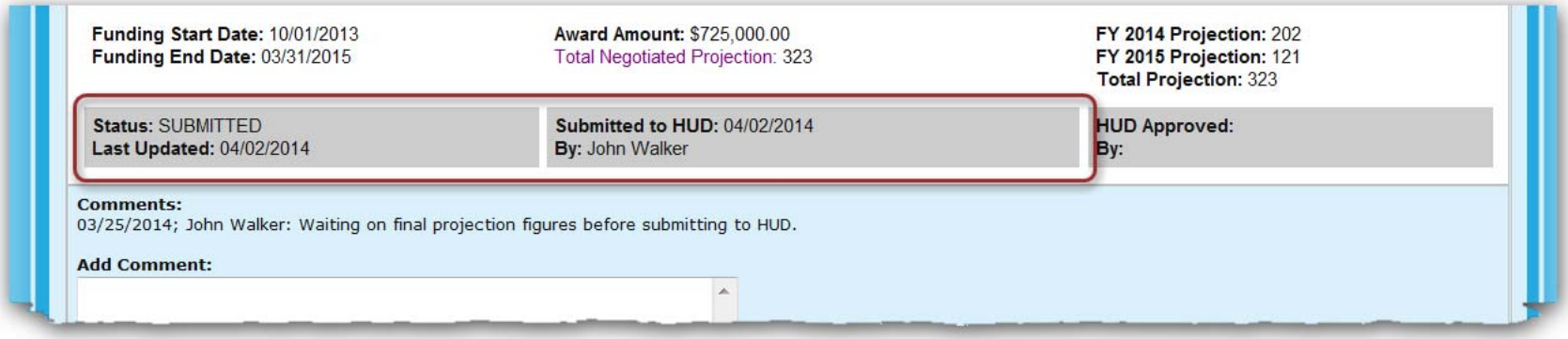


9902 Projection – Submit To HUD

- When the projection is submitted, the system will check that the **Total 9902 Projection** being submitted is not less than the **Total Negotiated Projection**.
- If an agency needs to submit a **Total 9902 Projection** that does not meet the **Total Negotiated Projection**, they will need to contact their HUD GTR to discuss.
- For the initial 2014 Comprehensive Housing Counseling Grants, since the Fiscal Year 2014 projections are optional, the system will not check the **Total 9902 Projection** against the **Total Negotiated Projection**.

9902 Projection – Submit To HUD

The agency should notify their HUD GTR that the projection has been submitted and is ready for approval.



Funding Start Date: 10/01/2013
Funding End Date: 03/31/2015

Award Amount: $725,000.00
Total Negotiated Projection: 323

FY 2014 Projection: 202
FY 2015 Projection: 121
Total Projection: 323

Status: SUBMITTED
Last Updated: 04/02/2014

Submitted to HUD: 04/02/2014
By: John Walker

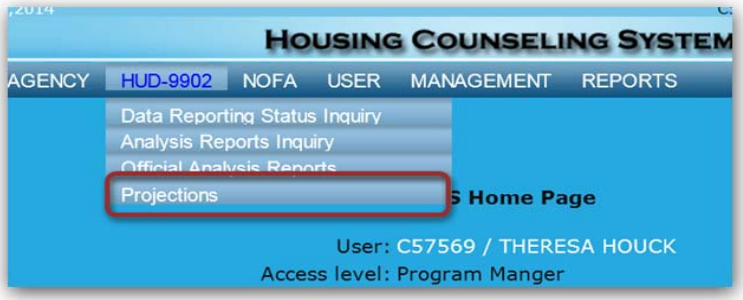
HUD Approved:
By:

Comments:
03/25/2014; John Walker: Waiting on final projection figures before submitting to HUD.

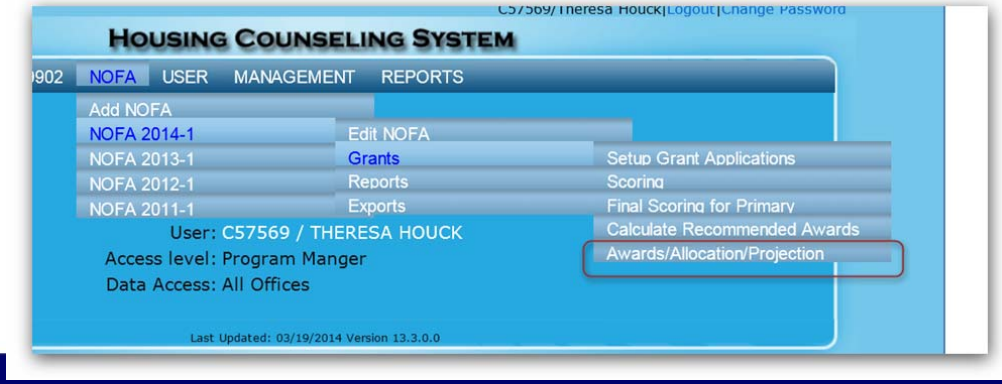
Add Comment:

9902 Projection – HUD User Navigation

- HUD users can access agency 9902 projections two ways:
  - From the **HUD-9902** menu



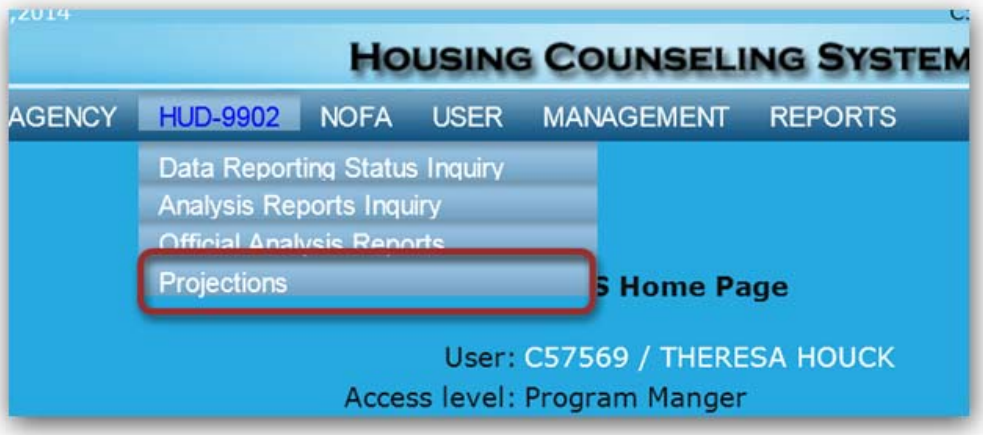
  - From the **NOFA** menu



9902 Projection – HUD-9902 Menu

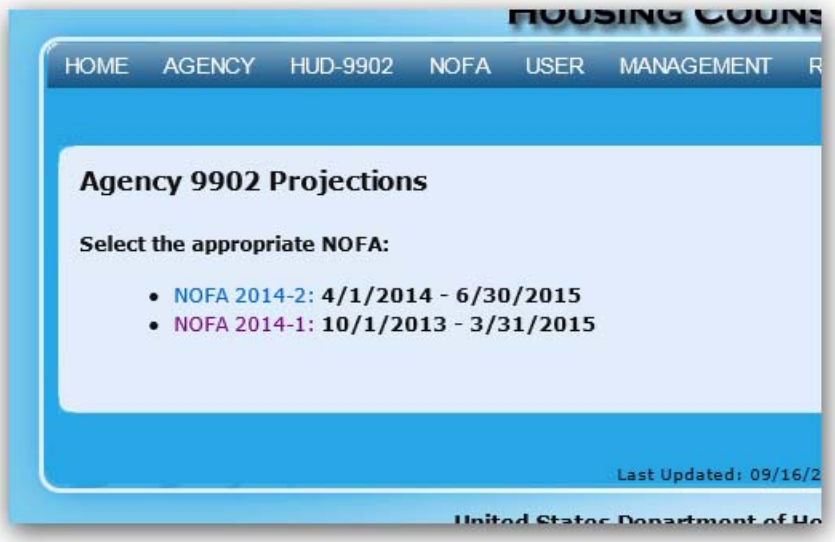
From the **HUD-9902** menu:

- Click **Projections** from the drop-down menu.



9902 Projection – HUD-9902 Menu

- Click the link for the NOFA for the grant projections you are reviewing.



9902 Projection – HUD-9902 Menu

From the **NOFA** menu:

- Hover your mouse over the desired NOFA from the drop-down menu.
- Hover your mouse over the **Grants** option from the sub-menu.
- Click **Awards/Allocation/Projection** link.

9902 Projection – NOFA Menu

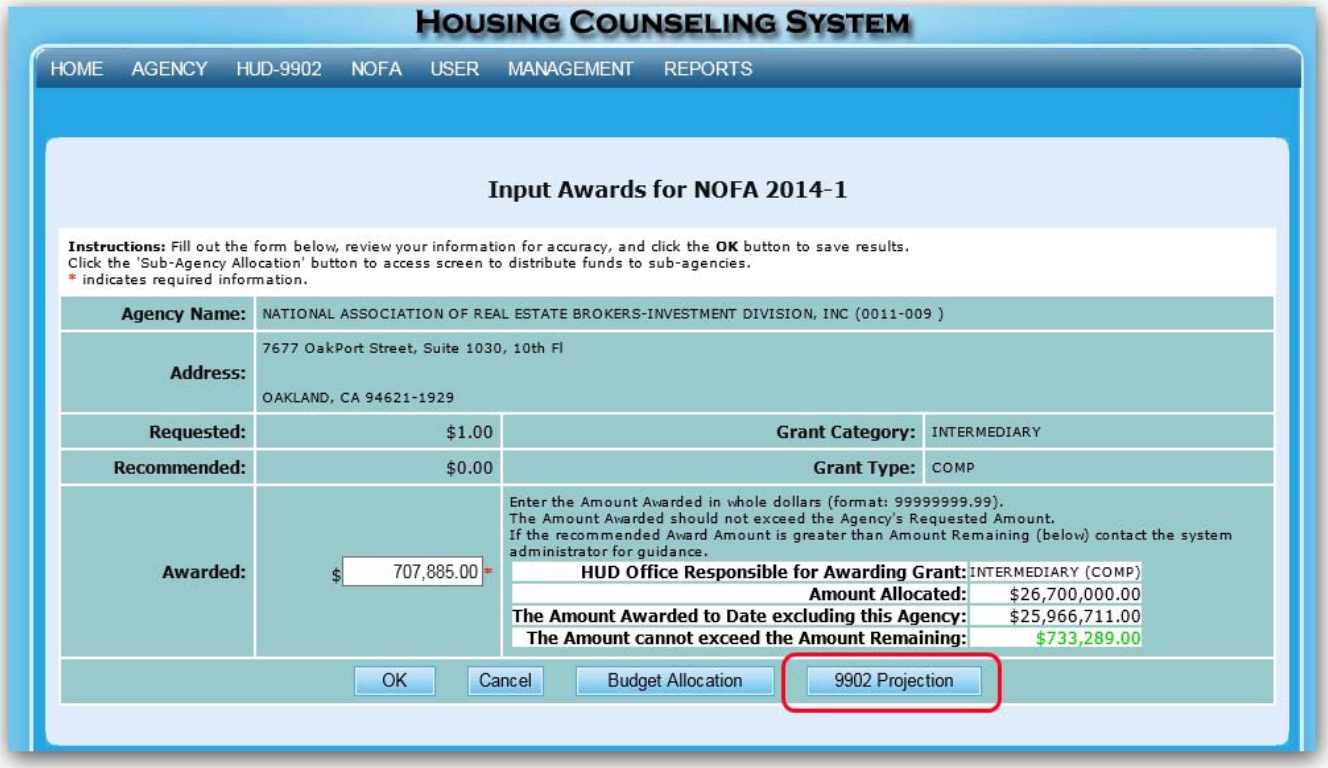
From the **NOFA** menu:

9902 Projection – HUD User Navigation

- Both the **HUD-9902** and **NOFA** menus will take the user to the agency award list for the grant selected.
- Navigate to the agency whose projections you are reviewing by clicking the link for the agency type, and then finding the agency from the list.

9902 Projection – HUD User Navigation

- Click the **9902 Projection** button at the bottom of the Award page.



HUD User Review and Approval

When an agency has submitted their projections, a HUD user must review and approve before the projections will display on the associated 9902 reports. The 9902 Projection screen will allow a HUD user to:

- Save as Draft.
- Submit to HUD
- Approve the 9902 projection
- Enter a comment only

9902 Projection NOFA 2014-1 COMPREHENSIVE COUNSELING Grant

Agency Name: MON VALLEY INITIATIVE
Agency ID: 80084
Agency Type: National Intermediary
HUD Office: Headquarters SF-HUD
Grant Type: COMPREHENSIVE COUNSELING
Application ID: 0011-015
Funding Start Date: 10/01/2013
Funding End Date: 03/31/2015
Award Amount: $633,288.00
Total Negotiated
Projection: 10,485
FY 2014 Projection: 0
FY 2015 Projection: 2409
Total Projection: 2409

Status: SUBMITTED
Last Updated: 12/10/2014
Submitted to HUD: 12/10/2014
By: Theresa Houck
HUD Approved:
By:

Comments:
12/10/2014: Theresa Houck: Entered data for agency after discussing over the phone.

Add Comment: * Characters Remaining: 250

Save Comment Only

If there are unsaved changes to the projections, please use the 'Save as Draft' or 'Submit To HUD' buttons to save/submit the data and comment.

Note: Projections for the fiscal year 2014 portion of the funding period are optional. Agencies may choose to enter their actual 9902 reported counseling activities for the 2014 fiscal year projections.

Save As Draft | Submit To HUD | Approve

* Comment required

	Fiscal Year 2014: 10/01/2013 - 09/30/2014 (Optional)	Fiscal Year 2015: 10/01/2014 - 03/31/2015	Total
8. Households Receiving Group Education by Purpose			
a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	0	364	364
b. Completed predatory lending, loan scam or other fraud prevention workshop	0	956	956
c. Completed fair housing workshop	0	55	55
d. Completed homelessness prevention workshop	0	62	62
e. Completed rental workshop	0	78	78
f. Completed pre-purchase homebuyer education workshop	0	85	85
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0	0
h. Completed resolving or preventing mortgage delinquency workshop	0	0	0
i. Completed other workshop	0	0	0
Section 8 Total:	0	1600	1600
9. Households Receiving One-on-One Counseling by Purpose			
a. Homeless Assistance	0	220	220
b. Rental Topics	0	0	0
c. Prepurchase/Homebuying	0	0	0
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	0	589	589
e. Reverse Mortgage	0	0	0
f. Resolving or Preventing Mortgage Delinquency or Default	0	0	0
Section 9 Total:	0	809	809
Sections 8 & 9 Total:	0	2409	2409

Save As Draft | Submit To HUD | Approve

Page Errors: 0

* Comment Required if HUD user saves or submits

HUD User – Entering Projections

- The **Save As Draft** and **Submit To HUD** buttons are available to HUD users in the event that an agency requires assistance with completing their projections.
- If a HUD user completes either action, the system will require a comment for the HUD user to document why a HUD user revised the projections.

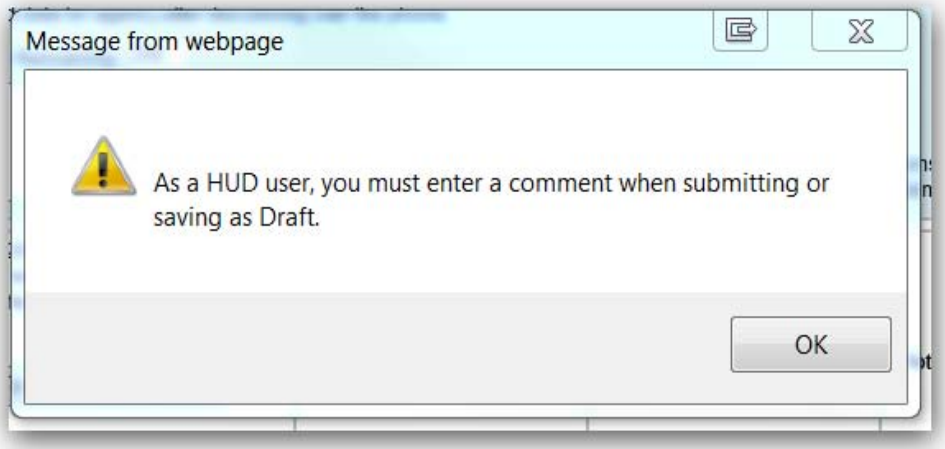
HUD User – Entering Projections

In the rare circumstance that a HUD users revises the projection data for the agency, after entering the projection data for sections 8 and 9:

- Enter a comment in the **Add Comment** box.
- Click either the **Save As Draft** or **Submit To HUD** button. Your comment will be saved along with the projection.

HUD User – Entering Projections

- If you click Save As Draft or Submit To HUD and you have not entered a comment, the following message will display:



HUD User – Entering Projections

- Click the **OK** button to remove the message.
- Enter a comment in the **Add Comment** box and click **Save As Draft** or **Submit To HUD**.
- Do not click the **Save Comment Only** button unless you intend to only enter a comment without saving, submitting, or approving.

HUD User – Approving Projections

Once the projection has been reviewed and is ready for Approval:

- Click the **Approve** button.
- A comment is not required when approving, but if a comment is entered it will be saved when clicking **Approve**.

Approved Projections

Once approved:

Click the **Approve** button.

- **Status** is changed to **Approved**.
- **Date approved** displays.
- **User** that approved displays.
- **Locks** the form so that the projection numbers cannot be changed after approval.

Approved Projections

- Fiscal Year projection figures display on the 9902 form for the direct awardee.
- A HUD user will have the ability to open the 9902 projection for revision after approval.

9902 Projection NOFA 2014-1 COMPREHENSIVE COUNSELING Grant

Agency Name: MON VALLEY INITIATIVE
Agency ID: 80084
Agency Type: National Intermediary

HUD Office: Headquarters SF-HUD
Grant Type: COMPREHENSIVE COUNSELING
Application ID: 0011-015

Funding Start Date: 10/01/2013
Funding End Date: 03/31/2015

Award Amount: $633,288.00
Total Negotiated
Projection: 10,485

FY 2014 Projection: 0
FY 2015 Projection: 2409
Total Projection: 2409

Status: APPROVED
Last Updated: 12/10/2014

Submitted to HUD: 12/10/2014
By: Theresa Houck

HUD Approved: 12/10/2014
By: Theresa Houck

Comments:
12/10/2014: Theresa Houck: Entered data for agency after discussing over the phone.

Add Comment: * Characters Remaining: 250

Note: Projections for the fiscal year 2014 portion of the funding period are optional. Agencies may choose to enter their actual 9902 reported counseling activities for the 2014 fiscal year projections.

Open

* Comment required

	Fiscal Year 2014: 10/01/2013 - 09/30/2014 (Optional)	Fiscal Year 2015: 10/01/2014 - 03/31/2015	Total
8. Households Receiving Group Education by Purpose			
a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	0	364	364
b. Completed predatory lending, loan scam or other fraud prevention workshop	0	956	956
c. Completed fair housing workshop	0	55	55
d. Completed homelessness prevention workshop	0	62	62
e. Completed rental workshop	0	78	78
f. Completed pre-purchase homebuyer education workshop	0	85	85
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0	0
h. Completed resolving or preventing mortgage delinquency workshop	0	0	0
i. Completed other workshop	0	0	0
Section 8 Total	**0**	**1600**	**1600**
9. Households Receiving One-on-One Counseling by Purpose			
a. Homeless Assistance	0	220	220
b. Rental Topics	0	0	0
c. Prepurchase/Homebuying	0	0	0
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	0	589	589
e. Reverse Mortgage	0	0	0
f. Resolving or Preventing Mortgage Delinquency or Default	0	0	0
Section 9 Total	**0**	**809**	**809**
Households Served Sections 8 and 9 Total:	**0**	**2409**	**2409**

Open

Page Errors: 0

* Comment Required if HUD user saves or submits

Opening a Projection

- Once a projection is approved, the fields are locked to read-only mode and cannot be changed.
- If a revision is required, a **HUD user** will need to **Open** the projection.
- If an agency requires revision to an approved projection, they should contact their HUD GTR.

Opening a Projection

To open a projection (completed by a HUD user only):

- Enter a comment in the **Add Comment** box. A comment is required and should identify the reason why the projection was opened.
- Click the **Open** button.

Opening a Projection

Once opened:

- The status of the projection is changed to **DRAFT**. The previous Submitted and Approved details no longer display.
- The Approve and Open buttons do not display for HUD users until the projection has been re-submitted.
- An Agency or HUD user will then be able to edit and Save As Draft or Submit To HUD.

9902 Projections – 9902 Display

- Once approved, the projections will display on the agency's 9902.
- Since the 9902 reports are fiscal year based, just the projection figures applicable to the fiscal year of the 9902 report will display.

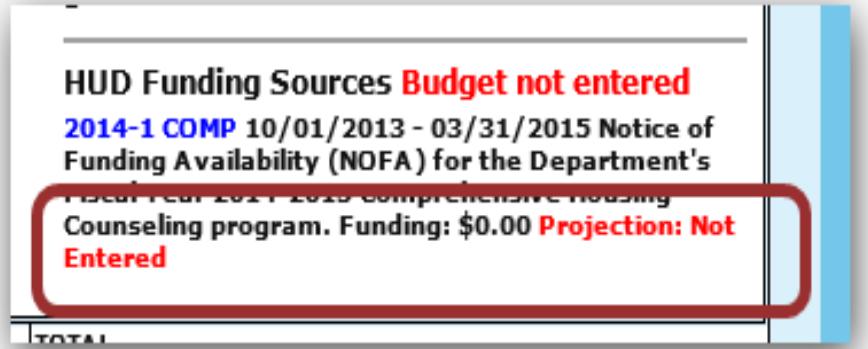
9902 Projections – 9902 Display

The 9902 will also show the current status of the projections next to the grant funding amounts under the **HUD Funding Sources** section. The projection status will indicate one of the following:

- **Projection: Not Entered**
- **Projection: Entered; Not submitted to HUD**
- **Projection: Submitted to HUD; Not Approved**
- **Projection: HUD Approved; [DATE]**

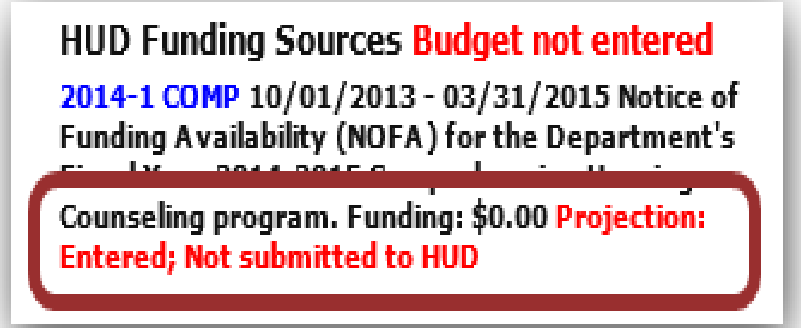
9902 Projections – 9902 Display

Projection: Not Entered - indicates that the agency has not begun to enter their 9902 projections for the grant.



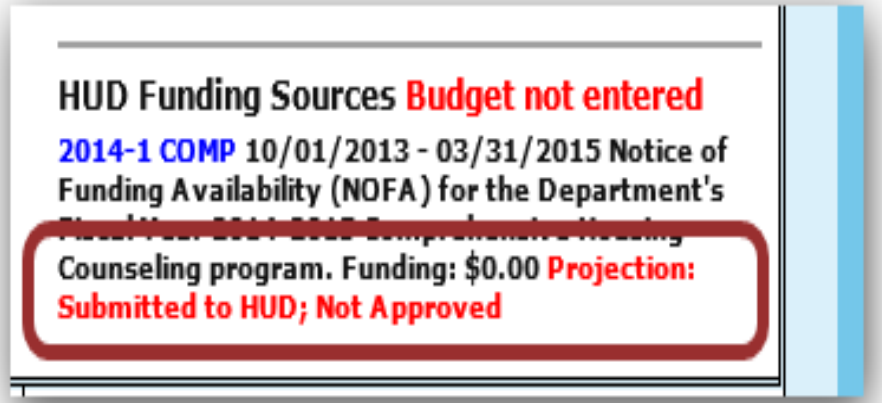
9902 Projections – 9902 Display

Projection: Entered; Not submitted to HUD – indicates that the agency has begun to enter their 9902 projections for the grant but has not yet submitted to HUD. The projection status is **Draft**. Draft projections will not display on the 9902 form.



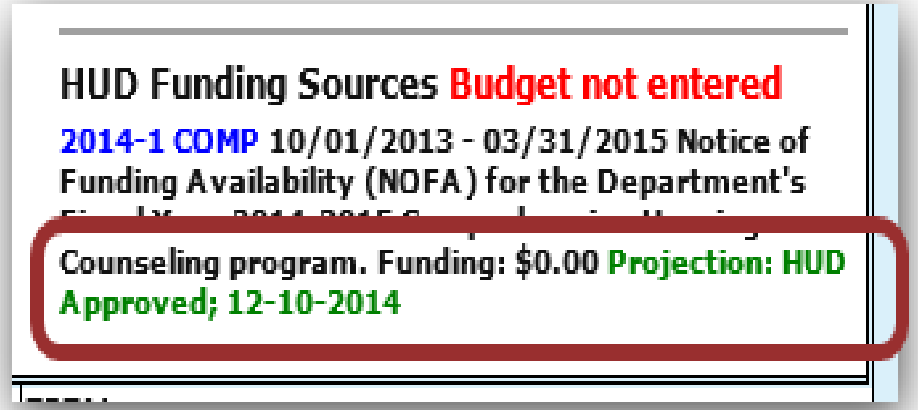
9902 Projections – 9902 Display

Projection: Submitted to HUD; Not Approved – indicates that the agency has submitted their projections for HUD review and approval, but they have not yet been approved. Submitted projections that have not been approved will not display on the 9902 form.



9902 Projections – 9902 Display

Projection: HUD Approved; [DATE] – indicates that the projection has been approved by HUD and provides the date it was approved. Approved projections will display in sections 8 and 9 on the 9902 form.



9902 Projections – 9902 Display

The Projected HUD Housing Counseling Activities column displays the approved projections for sections 8 & 9.

Housing Counseling Agency Activity Report

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

1. Counseling Agency Name

Agency Name
[illegible]
Agency ID: [illegible]
Agency Type: Nonprofit/Intermediary

[illegible]
[illegible]
[illegible]

Reporting 0 of 17 total sub-agencies

2. Reporting Period and Budget

Reporting Period:	Quarter 1
Fiscal Year:	2015
From:	10/01/2014
To:	12/31/2014
Total Budget, all sources:	$0.00
Total HUD Funding, all grants:	$0.00

HUD Funding Sources: Budget not entered

2014 & [illegible] 10/1/2014 - 12/31/2014 Date of Funding Availability (DFA) for the Department's Fiscal Year 2014-2015 Comprehensive Housing Counseling program. Funding $0.00 Projection: [illegible] Approved 11.18.2014

PDF Version | Cancel

	Total # Activities	Of HUD Funded Activities	Calculated HUD Housing Counseling Activities	Projected HUD Housing Counseling Activities
3. Ethnicity of Households (select only one)				
a. Hispanic	0	0	0.00	
b. Not Hispanic	0	0	0.00	
c. Chose not to respond	0	0	0.00	
Section 3 Total	0	0	0.00	
4. Race of Households				
Single Race				
a. American Indian/Alaskan Native	0	0	0.00	
b. Asian	0	0	0.00	
c. Black or African American	0	0	0.00	
d. Native Hawaiian or Other Pacific Islander	0	0	0.00	
e. White	0	0	0.00	
Multi Race				
f. American Indian or Alaska Native and White	0	0	0.00	
g. Asian and White	0	0	0.00	
h. Black or African American and White	0	0	0.00	
i. American Indian or Alaska Native and Black or African American	0	0	0.00	
j. Other multiple race	0	0	0.00	
k. Chose not to respond	0	0	0.00	
Section 4 Total	0	0	0.00	
5. Income Levels				
a. ≤ 30% of Area Median Income (AMI)	0	0	0.00	
b. 31 - 50% of AMI	0	0	0.00	
c. 51 - 79% of AMI	0	0	0.00	
d. 80 - 100% of AMI	0	0	0.00	
e. ≥ 100% AMI	0	0	0.00	
f. Chose not to respond	0	0	0.00	
Section 5 Total	0	0	0.00	
6. Rural Area Status				
a. Household lives in a rural area	0	0	0.00	
b. Household does not live in a rural area	0	0	0.00	
c. Chose not to respond	0	0	0.00	
Section 6 Total	0	0	0.00	
7. Limited English Proficiency Status				
a. Household is Limited English Proficient	0	0	0.00	
b. Household is not Limited English Proficient	0	0	0.00	
c. Chose not to respond	0	0	0.00	
Section 7 Total	0	0	0.00	
8. Households Receiving Group Education by Purpose				
a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	0	0	0.00	364
b. Completed predatory lending, loan scam or other fraud prevention workshop	0	0	0.00	300
c. Completed fair housing workshop	0	0	0.00	91
d. Completed foreclosure prevention workshop	0	0	0.00	67
e. Completed renter workshop	0	0	0.00	77
f. Completed pre-purchase homebuyer education workshop	0	0	0.00	91
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	0	0	0.00	1
h. Completed reverse or prevention mortgage delinquency workshop	0	0	0.00	1
i. Completed other workshop	0	0	0.00	2
Section 8 Total	0	0	0.00	980
9. Households Receiving One-on-One Counseling by Purpose				
a. Homeless Assistance	0	0	0.00	23
b. Rental Topics	0	0	0.00	0
c. Prepurchase/Homebuying	0	0	0.00	0
d. Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	0	0	0.00	100
e. Reverse Mortgage	0	0	0.00	0
f. Resolving or Preventing Mortgage Delinquency or Default	0	0	0.00	0
Section 9 Total	0	0	0.00	123
Households Served (Sections 8 and 9 Total)	0	0	0.00	1103
10. Impact and Scope of One-on-One Counseling Services				
a. Households that received one-on-one counseling that also received group education services	0	0	0.00	
b. Households that received information on fair housing, fair lending and/or accessibility rights	0	0	0.00	
c. Households for which counselor developed a sustainable household budget through the provision of financial management and/or budget services	0	0	0.00	
d. Households that improved their financial capacity (e.g. increased discretionary income, decreased debt load, increased savings, increased credit score) after receiving Housing Counseling Services	0	0	0.00	
e. Households that gained access to resources to help them improve their housing situation (e.g. down payment assistance, rental assistance, utility assistance, etc.) after receiving Housing Counseling Services	0	0	0.00	
f. Households that gained access to non-housing resources (e.g. social service programs, legal services, public benefits such as Social Security or Medicaid, etc.) after receiving Housing Counseling Services	0	0	0.00	
g. Homeless or potentially homeless households that obtained temporary or permanent housing after receiving Housing Counseling Services	0	0	0.00	
h. Households that received rental counseling and avoided eviction after receiving Housing Counseling Services	0	0	0.00	
i. Households that received rental counseling and improved living conditions after receiving Housing Counseling Services	0	0	0.00	
j. Households that received prepurchase/homebuying counseling and purchased housing after receiving Housing Counseling Services	0	0	0.00	
k. Households that received reverse mortgage counseling and obtained a Home Equity Conversion Mortgage (HECM) after receiving Housing Counseling Services	0	0	0.00	
l. Households that received non-delinquency post-purchase counseling that were able to improve home conditions or home affordability after receiving Housing Counseling Services	0	0	0.00	
m. Households that prevented or resolved a mortgage default after receiving Housing Counseling Services	0	0	0.00	
Section 10 Total	0	0	0.00	

Further Assistance

- E-mail: Housing.Counseling@hud.gov