

HUD Form #: (9902), TITLE: Housing Counseling Agency Activity Report

LOCATION	CURRENT TEXT	REVISED TEXT
Footer on each page	Page # of 9	Page # of 11
Footer on each page	ref. Handbook 7610.1. form HUD-9902	Deleted
p. 1, Instructions	Read the instructions and Public Reporting Statement on the back of this form.	Read the Public Reporting Statement on page 4 and instructions on pages 5–11 of this form.
p. 1, Section 2, column “all activities”	All Counseling and Education Activities	All activities meeting HUD’s housing counseling and education requirements
p. 1, Section 2, column “activities attributed to HUD grant”	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds – Actual, to date.	Activities billed to HUD housing counseling grant/subgrant (in part or full) – actual, to date
p. 1, Section 3, header	3. Ethnicity of Households	3. Ethnicity
p. 1, Section 4, header	4. Race of Households	4. Race
p. 1, Section 4, header	Single Race	Deleted
p. 1, Section 4, header	Multi-Race	Deleted
p. 1, Section 4, Single Race, (f) new	N/A	More than one race
p. 1, Section 4, Single Race, (g) new	N/A	Chose not to respond
p. 1, Section 4, Multi-Race (f)	American Indian or Alaska Native and White	Deleted
p. 1, Section 4, Multi-Race (g)	Asian and White	Deleted
p. 1, Section 4, Multi-Race (h)	Black or African American and White	Deleted
p. 1, Section 4, Multi-Race (i)	American Indian or Alaska Native and Black or African American	Deleted
p. 1, Section 4, Multi-Race (j)	Other multiple race	Deleted
p. 1, Section 4, Multi-Race (k)	Chose not to respond	Deleted
p. 2, Section 6, Rural Area	Household lives in a rural area	Lives in a rural area

Status, (a)		
p. 2, Section 6, Rural Area Status (b)	Household does not live in a rural area	Does not live in a rural area
p. 2, Section 7, Limited English Proficiency Status, (a)	Household is Limited English Proficient	Limited English Proficient
p. 2, Section 7, Limited English Proficiency Status, (b)	Household is not Limited English Proficient	Not Limited English Proficient
p. 2, Section 8, header	Households Receiving Group Education, by Purpose	Households Receiving Education Services (Including Online Education), by Purpose
p. 2, Section 8, (i)	Completed other workshop	Deleted
p. 2, Section 8, (i) new	N/A	Completed disaster preparedness assistance workshop
p. 2, Section 8, (j) new	N/A	Completed disaster recovery assistance workshop
p. 2, Section 9, (d)	Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post-Purchase)	Non-Delinquency Post-Purchase
p. 2, Section 9, (f)	Resolving or Preventing Mortgage Delinquency or Default	Resolving or Preventing Forward Mortgage Delinquency or Default
p. 2, Section 9, (g) new	N/A	Resolving or Preventing Reverse Mortgage Delinquency or Default
p. 2, Section 9, (h) new	N/A	Disaster Preparedness Assistance
p. 2, Section 9, (i) new	N/A	Disaster Recovery Assistance
p. 2, Section 10, header	Impact and Scope of One-on-One Counseling Services	Outcome of One-on-One Counseling Services
p. 2 on old form and p. 3 on new form, Section 10, (a)	Households that received one-on-one counseling that also received group education services.	Households that received one-on-one counseling that also received education services.
p. 2 on old form and p. 3 on new form, Section 10, (c)	Households for whom counseling developed a sustainable household budget through the provision of financial management and/or budget services.	Households for whom counseling developed a budget customized to a client's current situation.
p. 2 on old form and p. 3 on new form, Section 10, (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.	Households that improved their financial capacity (e.g. increased discretionary income, decreased debt load, increased savings, increased credit score, etc.) after receiving Housing Counseling Services.
p. 2 on old form and p. 3 on new form,	Households that received rental counseling and avoided eviction after receiving Housing Counseling Services.	Households gained access to disaster to disaster recovery non-housing resources after receiving

Section 10, (h)		Housing Counseling Services (e.g. Red Cross/FEMA relief items, legal services, assistance).
p. 2 on old form and p. 3 on new form, Section 10, (i)	Households that received rental counseling and improved living conditions after receiving Housing Counseling Services.	Households obtained disaster recovery housing resources after receiving Housing Counseling Services (e.g. temporary shelter, homeowner rehab, relocation, etc.).
p. 2 on old form and p. 3 on new form, Section 10, (j)	Households that received prepurchase/homebuying counseling and purchased housing after receiving Housing Counseling Services.	Households for whom counseling developed or updated an emergency preparedness plan.
p. 2 on old form and p. 3 on new form, Section 10, old (h), new (k)	Household that received rental counseling and avoided eviction after receiving Housing Counseling Services.	Same as old form language, moving from (h) to (k).
p. 2 on old form and p. 3 on new form, Section 10, old (i), new (l)	Households that received rental counseling and improved living conditions after receiving Housing Counseling Services.	Same as old form language, moving from (i) to (l).
p. 2 on old form and p. 3 on new form, Section 10, old (j), new (m)	Households that received prepurchase/homebuying counseling and purchased housing after receiving Housing Counseling Services.	Households that received prepurchase/homebuying counseling and purchased housing after receiving Housing Counseling Services.
p. 2 on old form and p. 3 on new form, Section 10, old (k), new (n)	Households that received reverse mortgage counseling and obtained a Home Equity Conversion Mortgage (HECM) after receiving Housing Counseling Services.	Same as old form language, moving from (k) to (n).
p. 2 on old form and p. 3 on new form, Section 10, old (l), new (o)	Households that received non-delinquency post-purchase counseling that were able to improve home conditions or home affordability after receiving Housing Counseling Services.	Same as old form language, moving from (l) to (o).
p. 3, Section 10, old (m), new (p)	Households that prevented or resolved a mortgage default after receiving Housing Counseling Services.	Households that prevented or resolved a forward mortgage default after receiving Housing Counseling Services.
p. 3, Section 10, (q) new	N/A	Households that prevented or resolved a reverse mortgage default after receiving Housing Counseling Services.
p. 3, Section 10, (r) new	N/A	Households that received a forward mortgage modification and remained current in their modified mortgage after receiving

		Housing Counseling Services.
p. 4, Section 10, (s) new	N/A	Households that received a forward mortgage modification and improved their financial capacity after receiving Housing Counseling Services.
p.4, Section 10 Total, new	N/A	Added total line for Section 10 Outcomes
p. 4 (old form) and p. 4 (new form), Section 11, header	HUD Housing Counseling Grant(s) Data	HUD Housing Counseling Grant(s) Data, if applicable
p. 4 (old form) and p. 4 (new form), Section 11	HUD Point of Contact:	Deleted
p. 4 (old form) and p. 4 (new form), Section 12, Authorization	N/A	Submission of this form constitutes a certification by the individual listed that the information provided on the form and in any accompanying documentation is true and accurate. The submission is an acknowledgement that making, preventing, or submitting a false, fictitious, or fraudulent statement, representation, or certification may result in criminal, civil, and/or administrative sanctions, including fines, penalties, and imprisonment.
p. 4 (old form), Section 12	Input Official	Deleted
p. 4 (new form), bottom of the page	N/A	Public reporting burden for this collection of information is estimated to average .375 hours per response. The HUD-9902 form is transmitted 100% electronically. The housing counseling agency can either input data directly into HUD's Housing Counseling System (HCS) or submit through its own Client Management System (CMS) using the Agency Reporting Module connection to HUD's HCS. With universal CMS use, the HUD-9902 populate automatically based on electronic client files. Consequently, the estimated burden hour per response includes logging in and the time necessary to send the

		document electronically (estimated time: 15 minutes). An agency may not conduct or sponsor, and a person is not required to submit an information collection unless that collection displays a valid OMB control number.
p. 9 (old form) to p. 4 (new form)	This information is collected in connection with HUD's Housing Counseling Program and will be used by HUD to measure the performance and effectiveness of HUD's Housing Counseling Program. In addition, the data will help to determine that the grant applicant meets the requirements of the Notice of Fund Availability (NOFA) and to assign points for awarding grant funds on a competitive and equitable basis. The information is required to obtain funding under Section 106 of the Housing and Community Development Act of 1974. The information is considered sensitive and is protected by the Privacy Act which requires the records to be maintained with appropriate administrative, technical and physical safeguards to ensure their security and confidentiality.	This information is collected in connect with HUD's Housing Counseling Program and will be used by HUD to collect performance and outcome data related to HUD's Housing Counseling Program. Additionally, the data collected on form HUD-9902 plays a key role in analyzing performance and capacity during the Office of Housing Counseling's Notice of Funding Availability (NOFA) process. The information is required to obtain funding under Section 106 of the Housing and Community Development Act of 1974. The information is considered sensitive and is protected by the Privacy Act which requires the records to be maintained with appropriate administrative, technical and physical safeguards to ensure their security and confidentiality.
p. 4 (old form) & p. 5 (new form), Instructions, header	Instructions for Form HUD-9902, Housing Counseling Agency Activity Report	Instructions for HUD-9902
p. 4 (old form) & p. 5 (new form), Instructions	HUD-9902 Housing Counseling Agency Activity Reports are CUMULATIVE fiscal year-to-date for each quarterly reporting period.	HUD-9902 Collects CUMULATIVE fiscal year-to-date data for each quarterly reporting period.
p. 4 (old form) & p. 5 (new form), Instructions	This Housing Counseling Agency Activity Report records housing counseling and education activity by agencies participating in HUD's Housing Counseling Program. The form is an online application filed through an agency's Client Management System (CMS) or HUD's Housing Counseling System (HCS). Agencies submitting the form electronically through a CMS must verify the submission in HCS for accuracy. Shaded areas are automatically populated by HCS if the form is submitted through a CMS application or through HCS.	This HUD-9902 records the housing counseling and education activities provided by agencies participating in HUD's Housing Counseling Program. The HUD-9902 shall be completed online through an agency's Client Management System (CMS) or HUD's Housing Counseling System (HCS). Agencies submitting the form electronically through a CMS must review and verify the submission in HCS for

		accuracy. When viewing the HUD-9902 in an agency's CMS, or the HCS system, shaded areas will be automatically populated by those systems upon submission.
p. 4 (old form) & p. 5 (new form), Instructions	Each HUD-approved Local Housing Counseling Agency (LHCA) must submit an electronic form HUD-9902 quarterly, reflecting main-office and branch location activities, if applicable, in the target areas described in its latest housing counseling plan, regardless of whether or not a HUD Housing Counseling Grant was received. Branch offices of LHCA's do not file an independent form HUD-9902.	Each HUD-approved Local Housing Counseling Agency (LHCA) must submit an electronic HUD-9902 quarterly, reflecting main-office and branch location activities, if applicable, in the target areas described in its latest housing counseling plan, regardless of whether or not a HUD Housing Counseling Grant was received. Branch offices of LHCA's do not file an independent HUD-9902.
p. 4 (old form) & p. 5 (new form), Instructions	An individual electronic form HUD-9902 must be submitted quarterly on behalf of each HUD Housing Counseling Program, affiliate and/or branch office, if applicable, of a HUD-approved Intermediary, HUD-approved Multi-state Organization (MSO), or State Housing Finance Agency (SHFA) participating in HUD's Housing Counseling Program.	An individual electronic HUD-9902 must be submitted quarterly on behalf of each HUD Housing Counseling Program subgrantee, affiliate, and/or branch office, if applicable, of a HUD-approved Intermediary, HUD-approved Multi-state Organization (MSO), or State Housing Finance Agency (SHFA) participating in HUD's Housing Counseling Program.
p. 5 (new form), Instructions, new	N/A	How are Sections 3–7 counted? Record the information of one individual, even if there are multiple individuals within a household attending an activity to be recorded. If the individuals identify with different demographic types, encourage the attendees to choose/self-identify the demographic of only one of the individuals to be recorded. The same selected individual's information should be recorded in Sections 3, 4, 6, and 7. For example: A husband and wife attend a pre-purchase homebuying one-on-one counseling session together. If

		<p>the individuals identify with more than one ethnicity and limited English proficiency status types, encourage the attendees to choose/self-identify the ethnicity and limited English proficiency status of one of the individuals that will be recorded in Sections 4 and 7.</p> <p>Section 5, Income Levels, can be recorded by household.</p>
p. 4 (old form), & p. 5 (new form), Instructions, header	Who is counted as a household?	Who is counted as a household in Sections 8 and 9?
p. 4 (old form) & p. 5 (new form), Instructions	In each section, report the number of individual households counseled or educated. For Example: A husband and wife or a brother and sister or three friends who are mortgagors under the same mortgage note or who are tenants under the same lease count as one household.	Report the number of individual households counseled or educated. For example: A husband and wife or a brother and sister or three friends who are mortgagors under the same mortgage note or who are tenants under the same lease count as one household.
p. 4 (old form) & p. 5 (new form), Instructions	Also, multiple individuals or families with the same problem or need that receive counseling together should be counted as an individual household. For example, three renting families who experience the same problem with the same landlord and receive counseling services from your agency together should be counted as one household, and the relevant data recorded in Sections 3-7 and 9.	Multiple individuals or families with the same problem or need that receive counseling together should be counted as an individual household. For example, three renting families who experience the same problem with the same landlord and receive counseling services from your agency together should be counted as one household, and the relevant data recorded in Sections 8 and 9.
p. 4 (new form), Instructions, new	N/A	A household should be counted once for each distinct housing counseling or education service it receives. Households that receive one distinct housing counseling or education service over multiple sessions will still be counted only once.
p. 4 (old form) & p. 6 (new form), Instructions	If a household participates in a workshop and later receives individual counseling, or if a household receives various distinct types of individual counseling or group education, record them in the appropriate row in Sections 8 and 9 , and then again	If a household participates in a workshop and later receives individual counseling, or if a household receives various distinct types of individual

	in Sections 3-7 for each distinct workshop and/or counseling type. For example, a household receiving homebuyer education, pre-purchase counseling and mortgage delinquency prevention counseling during the same year is recorded in Sections 3-7 three times, and Sections 8 or 9 three times.	counseling or group education, record them in the appropriate row in Sections 8 and 9, and record the demographics of only the selected individual from the household in Sections 3-7 for each distinct workshop and/or counseling type. For example, a household receiving homebuyer education, pre-purchase counseling and mortgage delinquency prevention counseling during the same year is recorded in Sections 8 or 9 three times, and the demographics of only the selected individual from the household is recorded in Sections 3-7.
p. 4 (old form), Instructions	Consequently, the total in Section 3 = total in Section 4 = total in Section 5 = total in Section 6 = total in Section 7 = total of Section 8 + 9.	Deleted
p. 4 – 5 (old form) & p. 6 (new form), Instructions	The data totals entered in Section 10 are independent of the totals entered in Sections 3-9. Households can be counted multiple times, or not at all, in Section 10 based on the impact and scope of the counseling services provided.	The data totals entered in Section 10 are independent of the totals entered in Sections 3-9. Households can be counted multiple times in Section 10 based on the impact and scope of the counseling services provided.
p. 5 (old form) & p. 6 (new form), Instructions	Only education and counseling are to be recorded. Marketing and outreach activities, such as fliers mailed or calls made, should not be recorded.	Only education and counseling activities that meet HUD's requirements for housing counseling and education are to be recorded. Marketing and outreach activities, such as fliers mailed or calls made, should not be recorded.
p. 6 (new form), Instructions new	N/A	In accordance with the Housing Counseling Certification requirements stated in 24 CFR 214.103(n)(1), all individuals who provide counseling, including homeownership and rental counseling, must be HUD certified. For housing counseling to meet program requirements, housing counseling performed on or after the final compliance date stated in 24 CFR 214.103(n)(4) must be provided by a HUD-certified housing counselor.
p. 5 (old form) & p. 6 (new form), Instructions	Carryover clients are households that received counseling in a previous reporting year and continue to receive counseling services on the same topic in the current year. Households meeting this criterion	Carryover clients are households that received counseling in a previous fiscal year and continue to receive counseling services on

	are counted again on the current year’s form HUD-9902. Do not count households counseled in a previous reporting year whose result changed, but who received no additional services in the current reporting year.	the same topic in the current fiscal year. Households meeting this criterion are counted again on the current year’s HUD-9902. Do not count households counseled in a previous reporting fiscal year whose result changed, but who have not received additional services in the current fiscal year.
p. 5 (old form) & p. 6 (new form), Instructions	All Counseling and Education Activities Column - Enter all housing counseling and education data for the reporting period, regardless of funding source. The data recorded in this column corresponds to the “Total Annual Housing Counseling Program Budget, All Sources” amount entered in Section 2.	All activities meeting HUD’s housing counseling and education requirements Column - Enter all housing counseling and education data for the reporting period, regardless of the funding source used for that activity. All Services reported on the HUD-9902 should meet HUD’s requirements for housing counseling and education, which can be found in the HUD Housing Counseling Program Handbook, on the HUD Exchange website .
p. 5 (old form) & p. 6-7 (new form), Instructions	Counseling and Education Activities Attributed to HUD Housing Counseling Grants, Actual, to date, Column(s) – Enter all housing counseling and education data for the reporting period that was paid for by HUD Housing Counseling Grants, if applicable. Counseling paid for by HUD Housing Counseling Grants must meet the requirements of the applicable Grant Agreement. Grant activity should be reported in the appropriate column, according to the specific grant under which the activity occurred. In the event that HCS does not contain separate columns for multiple grants during the Period of Performance, grantees must report all activity attributable to all HUD Housing Counseling Grants in a single column. Grantees must, at that time, enter activity attributable to the Grant in the quarter during which it occurred. For example, if grant funds are awarded in the third quarter but activity attributable to the grant occurred in either of the first two quarters, the Form HUD-9902 for those first two quarters must be updated at the time of the third quarter report to accurately reflect the timing of activity under the Grant. Under these circumstances, HUD will not consider retroactive entries of first and second quarter Grant activity data as late.	Activities billed to the HUD housing counseling grant/subgrant (in full or part) – actual, to date, Column – Enter all housing counseling and education data for the reporting period that was paid for by HUD Housing Counseling Grants, if applicable. The number entered in this column represents a sub-set of the “All Activities” column. Counseling paid for by HUD Housing Counseling Grants must meet the requirements of the applicable Grant Agreement. Grant activity should be reported in the appropriate column, according to the specific grant under which the activity occurred. If at the time of a reporting deadline, HCS does not contain separate columns for multiple active grants during the Period of Performance, grantees must report all their activities under the “All Activities” column.
p. 5 (old form) & p. 7 (new form), Instructions	Counseling and Education Activities Attributed to HUD Housing Counseling Grants, Annual Projection, Column(s) – Enter projected housing counseling and education data for the reporting year to be paid for by HUD Housing Counseling Grants, if applicable. Counseling paid for by HUD Housing	Counseling and Education Activities Attributed to HUD Housing Counseling Grants, Annual Projection, Column(s) – Projected data is entered only once annually during HUD

	<p>Counseling Grants must meet the requirements of the applicable Grant Agreement. Grant activity should be reported in the appropriate column, according to the specific grant under which the activity is projected to occur. In the event that HCS does not contain separate columns for multiple grants during the Period of Performance, grantees must report projected activity for all HUD Housing Counseling Grants in a single column. Projected data is entered only once annually unless HUD approval is obtained to revise the annual projections previously recorded.</p>	<p>Housing Counseling Grant execution unless HUD approval is obtained to revise the annual projections previously recorded. Enter projected housing counseling and education data for the reporting year to be paid for by HUD Housing Counseling Grants, if applicable. Counseling paid for by HUD Housing Counseling Grants must meet the requirements of the applicable Grant Agreement. Grant activity should be reported in the appropriate column, according to the specific grant under which the activity is projected to occur. If HCS does not contain separate columns for multiple grants during the Period of Performance, grantees must report projected activity for all HUD Housing Counseling Grants in a single column.</p>
<p>p. 7 (new form), Instructions new,</p>	<p>N/A</p>	<p>How should a grantee report HUD funded activity when the correct grant column is not available in HCS?</p>
<p>p. 7 (new form), Instructions, new</p>	<p>N/A</p>	<p>Grantees must enter activity attributable to the Grant in the quarter during which it occurred. For example, if grant funds are awarded in the third quarter but activity attributable to the grant occurred in either of the first two quarters, the HUD-9902 for those first two quarters should be submitted within the reporting deadline, with the activity reported under “All Activities.” The grantee must then update those previously filed reports once the correct grant reporting column is available in HCS, to accurately reflect the timing of activity under the Grant. HUD will not consider retroactive corrections to previous on-time submissions as late.</p>
<p>p. 5 (old form) & p. 7 (new form), Instructions</p>	<p>Specific Instructions</p>	<p>Section Instructions</p>
<p>p. 5-6 (old form) & p. 7 (new form),</p>	<p>Section 1. Counseling Agency Name & Address – Verify, in HCS, your agency name, contact information, agency type, and parent organization, if</p>	<p>Section 1. Counseling Agency Name and Address – Verify, in HCS, that your agency name,</p>

Instructions	applicable, as it appears on the form. Make any necessary changes through your CMS application, if applicable, or through HUD’s HCS system. Contact your HUD Point of Contact or Government Technical Representative (GTR) regarding “Agency Type” changes.	contact information, agency type, and parent organization, if applicable, is correct as it appears on the form. Make any necessary changes through your CMS application, if applicable, or through HUD’s HCS system. Contact your HUD Point of Contact (POC) regarding “Agency Type” changes.
p. 6 (old form) & p. 7 (new form), Instructions	Section 2. Reporting Period and Budget - This report must reflect the cumulative counseling and education activity of an agency, for a portion of (e.g. quarterly), or for the complete, fiscal year. The start, or “From”, date is automatically populated, set at the beginning of the fiscal year. Verify that the report period is correct. Even if your agency was approved by HUD for less than the full year report period, include households counseled since the beginning of the applicable fiscal year.	Section 2. Reporting Period and Budget - This report must reflect the cumulative counseling and education activity of an agency, for a portion of (e.g. quarterly), or for the complete, fiscal year. The start, or “From”, date is automatically populated, and will be set at the beginning of the fiscal year. Verify that the report period is correct. Even if your agency was approved by HUD for less than the full year report period, include households counseled since the beginning of the applicable fiscal year.
p. 6 (old form) & p. 7-8 (new form), Instructions	Total Annual Housing Counseling Program Budget, All Sources - Enter, through your CMS application, if applicable, or through HUD’s HCS system, the total annual housing counseling budget, all sources. This figure should reflect the total budget, including all HUD grants and other funding sources, for the full fiscal year, for your housing counseling program exclusively. This is the budget that corresponds to the activities recorded in the “All Counseling and Education Activities Column”. It is essential that this figure be accurate, and HUD will request source documentation to verify the total during monitoring reviews. Use HCS to verify that the total annual housing counseling program budget attributed to your agency is correct. If incorrect, or if changes occur throughout the fiscal year, make any necessary revisions through your CMS application, if applicable, or through HUD’s HCS system. A total annual budget amount must be entered whether or not a HUD grant was awarded for the reporting period.	Total Annual Housing Counseling Program Budget, All Sources - A total annual budget amount must be entered whether or not a HUD grant was awarded for the reporting period. Enter, through your CMS application, if applicable, or through HUD’s HCS system, the total annual housing counseling budget, all sources. This figure should reflect the total budget, including all HUD grants and other funding sources, for the full fiscal year, used exclusively for your housing counseling program. It is essential that this figure be accurate, as HUD may request source documentation to verify the total budget during monitoring reviews. Use HCS to verify that the total annual housing counseling program budget attributed to your agency is correct. If incorrect, or if changes occur throughout the fiscal year, make any necessary revisions through your CMS application, if applicable, or through HUD’s

		HCS system.
p. 6 (old form), Instructions	For multi-race and/or multi-ethnic families counted as one household, agencies should encourage them to choose/self-identify the race/ethnicity that will be recorded.	Deleted
p. 6 (old form), p. 8 (new form), Instructions	Counseling agencies are required to discreetly collect, for example through a sign-in sheet or participant survey, and record demographic data for group session participants.	Counseling agencies are required to discreetly collect, for example through a sign-in sheet or participant survey, and record demographic data for education services participants.
p. 8 (new form), Instructions, new	N/A	Record the information of one individual, even if there are multiple individuals within a household attending an activity to be recorded. If the individuals identify with different demographic types, encourage the attendees to choose/self-identify the demographic of only one of the individuals to be recorded in Sections 3, 4, 6, and 7. The same selected individual's information should be recorded in these sections. Section 5, Income Levels, can be recorded by household.
p. 6 (old form), p. 8 (new form), Instructions	Demographic data for households who are unwilling or unable to self-identify should be recorded as 'chose not to respond'.	Demographic data for households who are unwilling or unable to self-identify should be recorded as 'chose not to respond'. The 'chose not to respond' option should be used on a limited basis, under the circumstances described above.
p. 6 (old form), p. 7 (new form), Instructions	Households should self-identify their ethnicity, choosing between 3a and b. The following descriptions serve as a guide for self-identification.	Households should self-identify their ethnicity, choosing from 3a through 3c. The following descriptions serve as a guide for self-identification.
p. 8 (new form), Instructions, new	N/A	Section 3 can only record the ethnicity demographic information of one individual, even if there are multiple individuals within a household attending an activity to be recorded. If the individuals identify with different ethnicity types, encourage the attendees to choose/self-identify the ethnicity, choosing from 3a through 3c, of the individual that will be recorded.
p. 6 (old form),	Record ethnicity data for each individual counseling and group education household receiving a distinct	N/A

Instructions, deleted	service during the reporting period.	
p. 6-7 (old form), p. 8 (new form), Instructions	Record race data for each individual counseling and group education household receiving a distinct service during the reporting period. Households should self-identify their race, choosing between the options available in 4a through 4k. The following descriptions serve as a guide for self-identification. Race categories are mandated by the Office of Management and Budget (OMB).	<p>Section 4 can only record the race demographic information of one individual, even if there are multiple individuals within a household attending an activity to be recorded. If the individuals identify with different race types, encourage the attendees to choose/self-identify the race, choosing from 4a through 4g, of the individual that will be recorded.</p> <p>Race categories are mandated by the Office of Management and Budget (OMB).</p> <p>The following descriptions serve as a guide for self-identification.</p>
p. 7 (old form), p. 9 (new form), Instructions	Record the rural area status of each individual and group education household receiving a distinct service during the reporting period. Rural areas are defined by the U.S. Department of Agriculture at 7 CFR 3550.10. The USDA Income and Property Eligibility website for Single Family Housing programs can serve as a guide for determining rural area status. Go to www.USDA.gov .	<p>Section 6 can only record the rural area status information of one individual, even if there are multiple individuals within a household attending an activity to be recorded. If the individuals identify with different rural area status types, encourage the attendees to choose/self-identify the status, choosing from 6a through 6c, of the individual that will be recorded.</p> <p>Rural areas are defined by the U.S. Department of Agriculture at 7 CFR 3550.10. The USDA Income and Property Eligibility website for Single Family Housing programs can serve as a guide for determining rural area status. For additional information, see www.USDA.gov.</p>
p. 7 (old form), p. 9 (new form), Instructions	Record LEP status of each individual and group education household receiving a distinct service during the reporting period. Individuals who do not speak English as their primary language and who have a limited ability to read, speak, write, or understand English can be limited English proficient, or “LEP.” These individuals may be entitled language assistance with respect to a particular type or service, benefit, or encounter. For additional information, see www.lep.gov	Section 7 can only record the LEP status information of one individual, even if there are multiple individuals within a household attending an activity to be recorded. If the individuals identify with different LEP status types, encourage the attendees to choose/self-identity the status, choosing from 7a through 7c, of

		<p>the individual that will be recorded.</p> <p>Individuals who do not speak English as their primary language and who have a limited ability to read, speak, write, or understand English can be limited English proficient, or “LEP.” These individuals may be entitled language assistance with respect to a particular type or service, benefit, or encounter. For additional information, see www.lep.gov</p>
p. 7 (old form), p. 9 (new form), Instructions	<p>Section 8. Households Receiving Group Education, by Purpose – Record the number of households that attend and complete an educational course or group session. Education differs from counseling in that it is usually conducted in a group setting and is not tailored to the unique circumstance of the individual. Internet education administered by participating Housing Counseling Agencies or accessed by households through the actions of participating Housing Counseling Agencies can be recorded also. Households completing multiple, distinct courses or group sessions should be recorded for each course or group session completed.</p>	<p>Section 8. Households Receiving Education Services (Including Online Education), by Purpose – Record the number of households that attend and complete an educational workshop or online education. Education differs from counseling in that it is usually conducted in a group setting and is not tailored to the unique circumstance of the individual. Online education administered by participating Housing Counseling Agencies or accessed by households through the actions of participating Housing Counseling Agencies can be recorded also. Households completing multiple, distinct courses or group sessions should be recorded for each course or group session completed.</p>
p. 7-8 (old form), p. 9 (new form), Instructions	<p>Section 9. Households Receiving One-on-One Counseling, by Purpose – Counseling goes beyond group education, addresses unique circumstances, is more rigorous, and involves one-on-one and longer-term relationships.</p>	<p>Section 9. Households Receiving One-on-One Counseling by Purpose – Counseling goes beyond education services, addresses unique circumstances, is more rigorous, and involves one-on-one and longer-term relationships.</p>
p. 8 (old form), p. 10 (new form), Instructions	<p>Enter the number of households to whom the agency provided housing counseling during the reporting period, by the purpose of their visit. Count households who entered the agency’s workload the previous reporting period but who carried over into and received counseling on the same topic during the current reporting period.</p>	<p>Enter the number of households to whom the agency provided housing counseling during the reporting period, by the purpose of their visit. Count households who entered the agency’s workload the previous fiscal year but who carried over into and received counseling on the same</p>

		topic during the current fiscal year.
<p>p. 8 (old form), p. 10 (new form), Instructions</p>	<p>Each counseling type can include, but is not limited to, the following topics:</p> <ul style="list-style-type: none"> • Homeless Assistance – information regarding emergency shelter, other emergency services, and transitional housing. • Rental Topics – HUD rental and rent subsidy programs; other federal, state or local assistance; fair housing; housing search assistance; landlord tenant laws; lease terms; rent delinquency. • Prepurchase/Homebuying – advice regarding readiness and preparation, Federal Housing Administration-insured financing, housing selection and mobility, search assistance, fair housing and predatory lending, budgeting and credit, loan product comparison, purchase procedures, and closing costs. • Home Maintenance and Financial Management for Homeowners (Non-Delinquency Post Purchase) – escrow funds, budgeting, refinancing, home equity, home improvement, utility costs, energy efficiency, rights and responsibilities of home owners. • Reverse Mortgage – A reverse mortgage is a mortgage product that pays a homeowner loan proceeds drawn from accumulated home equity and that requires no repayment until a future time. The Federal Housing Administration’s reverse mortgage product is the Home Equity Conversion Mortgage. Please see additional information on HECM in Chapter 4 and Appendix 4 of HUD Handbook 7610.1. • Resolving or Preventing Mortgage Delinquency or Default – default and foreclosure, loss mitigation, budgeting, and credit. 	<p>Each counseling type can include, but is not limited to, the following topics:</p> <ul style="list-style-type: none"> • Homeless Assistance – Information regarding emergency shelter, other emergency services, and transitional housing. • Rental Topics – HUD rental and rent subsidy programs; other federal, state or local assistance; fair housing; housing search assistance; landlord tenant laws; lease terms; rent delinquency. • Pre-purchase/Homebuying – Advice regarding readiness and preparation, Federal Housing Administration-insured financing, housing selection and mobility, search assistance, fair housing and predatory lending, budgeting and credit, loan product comparison, purchase procedures, and closing costs. • Non-Delinquency Post Purchase – Escrow funds, budgeting, refinancing, home equity, home improvement, utility costs, energy efficiency, rights and responsibilities of homeowners. • Reverse Mortgage – A reverse mortgage is a mortgage product that pays a homeowner loan proceeds drawn from accumulated home equity and that requires no repayment until a future time. The Federal

		<p>Housing Administration’s reverse mortgage product is the Home Equity Conversion Mortgage. Please see additional information on HECM in Chapter 4 and Appendix 4 of HUD Handbook 7610.1.</p> <ul style="list-style-type: none"> • Resolving or Preventing Forward Mortgage Delinquency or Default – Default and foreclosure, loss mitigation, budgeting, and credit. • Resolving or Preventing Reverse Mortgage Delinquency or Default – Client/lender workout agreements for taxes and insurance, how to secure housing upon leaving the HECM property, resolution of outstanding debt with borrower estate or facilitating the transfer to the lender. Disaster Preparedness Assistance – Preparing and implementing an emergency preparedness plan. • Disaster Recovery Assistance – Referrals to, and the provision of recovery assistance resources for relocation, re-housing, and/or rebuilding.
<p>p. 8 (old form), p. 10 (new form), Instructions</p>	<p>Section 10. Impact and Scope of Counseling Services - This section is used to report the impact and scope of the housing counseling services reported in Section 9. In Section 10, select as many impacts that apply to the households counseled during the reporting period. The total number of impacts reported in Section 10 does not need to add up to the totals reported in any other sections of this form, and the Section 10 total may be higher or lower than the totals in other sections based on the impact and scope of the counseling services</p>	<p>Section 10. Outcome of One-on-One Counseling Services - This section is used to report the outcome of the housing counseling services reported in Section 9.</p>

	provided.	
p. 8 (old form), p.10 (new form), Instructions new	N/A	In Section 10, select as many outcomes that apply to the households counseled during the reporting period. The total number of outcomes reported in Section 10 does not need to add up to the totals reported in any other sections of this form, and the Section 10 total may be higher than the totals in other sections based on the outcome and scope of the counseling services provided.
p. 8 (old form), p. 10-11 (new form), Instructions	It is not expected or required that there be a reportable impact related to each household reported in Section 9 as receiving housing counseling services. For example, a household may not experience any of the impacts listed in Section 10 or the household may not respond to follow-up attempts to determine if any of the listed impacts are applicable. However, for some households there may be multiple impacts. For example after receiving housing counseling services, a household may have developed a sustainable household budget (10.c), gained access to resources to help improve the household’s housing situation (10.e), and prevented eviction (10.h). In that case, the household should be reported in all three impact categories.	It is not expected or required that there be a reportable outcome related to each household reported in Section 9 as receiving housing counseling services. For example, a household may not experience any of the outcomes listed in Section 10 or the household may not respond to follow-up attempts to determine if any of the listed outcomes are applicable. However, for some households there may be multiple outcomes. For example, after receiving housing counseling services, a household may have developed a household budget (10.c), gained access to resources to help improve the household’s housing situation (10.e), and prevented eviction (10.k). In that case, the household should be reported in all three impact categories.
p. 8-9 (old form), p. 11 (new form), Instructions	Section 11. HUD Housing Counseling Grant Data – If applicable, verify in HCS that all HUD Housing Counseling Program grants, including any supplemental funding, sub-grants, and/or Branch funding amounts received by your agency for the reporting period are accurately listed. For example, funds received for the activities of one or more HECM Network Counselors, if applicable, will be listed separately from a comprehensive counseling grant received directly from HUD. Supplemental funding, such as for HECM Counseling, or discretionary awards, will also be listed separately. Contact your HUD Point of Contact or GTR if you believe that any of the amounts attributed to your agency are incorrect. For sub-grants, contact the relevant parent agency so that they can make any necessary changes, if applicable, using the sub-allocation tool in HCS.	Section 11. HUD Housing Counseling Grant Data – If applicable, verify in HCS that all HUD Housing Counseling Program grants, including any supplemental funding, sub-grants, and/or Branch funding amounts received by your agency for the reporting period are accurately listed. For example, funds received for the activities of one or more HECM Network Counselors, if applicable, will be listed separately from a comprehensive counseling grant received directly from HUD. Supplemental funding, such as for HECM Counseling, or

		discretionary awards, will also be listed separately. Contact your HUD POC if you believe that any of the amounts attributed to your agency are incorrect. For sub-grants, contact the relevant Intermediary, Multi-State Organization, or State Housing Finance Agency so that they can make any necessary changes, if applicable, using the sub-allocation tool in HCS.
p. 9 (old form), p. 11 (new form), Instructions	12. Authorization - Submission of this form constitutes a “signature’ by the individual listed. Enter the requested information regarding the individual inputting the data. Verify in HCS that the correct authorizing official and related information is listed. Make any necessary changes through your CMS application, if applicable, or through HUD’s HCS system.	12. Authorization - Submission of this form constitutes a certification by the Agency Official listed that the information provided on the form and in any accompanying documentation is true and accurate. The submission is an acknowledgement that making, presenting, or submitting a false, fictitious, or fraudulent statement, representation, or certification may result in criminal, civil, and/or administrative sanctions, including fines, penalties, and imprisonment. Enter the requested information regarding the Agency Official who has inputted the HUD-9902 data.
p. 11 (new form), Instructions new	N/A	For additional information on the HUD-9902: Refer to the Housing Counseling 9902 Online Toolkit on the HUD Exchange website . The Toolkit provides information on completing the HUD-9902 report, such as frequently asked questions about the form, more information on each section of the form, and case studies to assist with comprehension on reporting activities.
p. 9 (old form)	Public reporting burden for this collection of information is estimated to average .03 hours per response. With universal CMS use, the HUD-9902 will be populated automatically based on electronic client files. Consequently, the estimated burden hour per response includes only the time necessary to send the document electronically (estimated time: 2 minutes). This agency may not conduct, sponsor, and a person is not required to respond to, an information collection unless that collection displays a valid OMB control number.	Deleted from p.9 of old form, moved to p. 4 (new form), see change listed on page 4 of this chart. p
p. 9 (old	This information is collected in connection with	Deleted from p.9 of old form,

form)	HUD's Housing Counseling Program, and will be used by HUD to measure the performance and effectiveness of HUD's Housing Counseling Program. In addition, the data will help to determine that the grant applicant meets the requirements of the Notice of Fund Availability (NOFA) and to assign points for awarding grant funds on a competitive and equitable basis. The information is required to obtain funding under Section 106 of the Housing and Community Development Act of 1974. The information is considered sensitive and is protected by the Privacy Act which requires the records to be maintained with appropriate administrative, technical and physical safeguards to ensure their security and confidentiality.	moved to p. 4 (new form), see change listed on page 4 of this chart. p
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