APPENDIX 20

Link to APPENDIX 20 CONTAINS FORM HUD-9923 (Links to 76101x20.pdf)

7610.1 REV-4

Appendix 20 - Instructions

HOUSING COUNSELING ACTIVITY SUMMARY REPORT

Form HUD-9923 - Instructions

Paragraph 4-10 of Housing Counseling Handbook 7610.1 REV-4 dated July, 1995, sets forth the Field Office reporting requirements relating to Form HUD-9923. See paragraph 4-9 of 7610.1 REV-4 regarding revised Form HUD-9902, Housing Counseling Agency Fiscal Year Activity Report, that Field Offices must use to create their Housing Counseling Activity Summary Report on Form HUD-9923. HUD-approved Housing Counseling Agencies must use form HUD-9902 dated 5/95. Earlier versions of HUD-9902 are obsolete and cannot be used to create the summary reports on HUD-9923. The fiscal year covers the period October 1 through September 30.

Form HUD-9923 is a LOTUS spreadsheet sent to the field via CC: MAIL under file name HUD-9923.WK1. For this reason the file was not printed and distributed in the usual manner. To retrieve and use the file you must use LOTUS software. Although you can print the file and make entries manually, if you use LOTUS it will automatically calculate the total entries for columns.

LOTUS file HUD-9923.WK1 is a LARGE file!
You need a hard drive or a high density
diskette for copying the file from CC:MAIL.
Your computer will require several minutes
to copy or retrieve the file. Please be patient.

With the exception of the "Race/Ethnicity" data on Form HUD-9902, the columnar headings in HUD-9923 correspond to the line entries on HUD-9902. The Race/Ethnicity data columns appear as the far-right columns on Form HUD-9923. LOTUS calculates the entries in the "Totals" row at the bottom of each page. The totals are cumulative from one page to the next.

The LOTUS file contains three pages that allow entries for thirty HUD-approved housing counseling agencies--10 per page. This limitation is based upon the fact that the memory capacity of some personal computers now available in the field will not handle a larger file. An office with more than thirty agencies must create additional LOTUS files to handle agencies beyond the initial thirty. This will also require that office to enter the following "Brought Forward" data from their first and subsequent LOTUS files onto the first blank row on the additional LOTUS files before you enter data for the remainder of your agencies.

1. In the counseling agency name column enter the following on line No. 1:
   "Totals brought forward from previous LOTUS file"

2. In columns 1 through "Total Amount Invoiced for All Grants" enter
   "Totals" row entries from the third (final) page of the previous LOTUS
file.
3.Renumber the entries in the "No." column so the entries are numbered
sequentially beginning with "1" on the first page.

The print ranges for each section of the file appear under the header
"Printing the File" on the last page of these instructions.

In the blank spaces in the HEADER (See Print/Options in LOTUS), enter
your Field Office Name and the Fiscal Year covered by the report.

Column   Description/Instruction

No.   The number for each of the HUD-approved housing counseling
agency entries. FIRST, enter data from agencies submitting HUD-9902.
SECOND, enter the name, city and State of the agencies from which you DO
NOT receive a HUD-9902. For these latter agencies, leave the statistical
columns blank.

AgencyFor each of your agencies, enter name, city and State on two
lines. Abbreviate where necessary.

1 - 39These column numbers correspond to the line-entry items on
Form HUD-9902, Housing Counseling Agency Fiscal Year Activity
Report (5/95). "All" corresponds to the "All Counseling
Activities" column on HUD-9902. "Grant" corresponds to the
"HUD Grant Activities" column on HUD-9902. Enter data ONLY in
the second cell from the top of each block. Enter zeros (0)
where an agency reports no activity. See next
description/instruction.

8, 11, 21,   Do NOT enter data in these Total columns. They are "Total"
25, 29, 33,   entries automatically calculated by LOTUS. If an agency
39entered a miscalculation and on HUD-9902, LOTUS will enter the
correct calculation for each of these columns.

*Total   Enter the number of grants. For example, if an agency lists
Number two (2) grants Number in the "HUD Grant No. From Block 3, Form
HUD-1044" column, enter a Grants2 in the "Total Number of
Grants" column. Do NOT enter the HUD-assigned grant number.

*Total Num.   Enter the total of the entries in the "Number of Clients"
of Clients   column on HUD-9902.

*Total Amt.   Enter the total of the entries in the "Amount Invoiced" column
Invoiced for   on HUD-9902.
All Grants

*from the "HUD Grant Activity - Summary Data" box on HUD-9902

Race/Ethnicity   In these five columns, enter the corresponding
data from lines 8a through d on Form HUD-9902. Headers
for these HUD-9923 columns are abbreviated.

See paragraph 4-10 in 7610.1 REV-4 for instructions regarding submitting
your summary report to Headquarters. When you send your LOTUS file to
Headquarters via CC:Mail change the file name so it will identify your
office.

1.If you enter all of your agencies within the 30 entry rows on the
file, here are examples of how to change the file name. Albany will
change the file name "HUD9923.WK1" to "ALBA9923.WK1"; Houston to
"HOUS9923.WK1"; Los Angeles to "LOSA9923.WK1". You MUST retain
".WK1" as part of the file name for LOTUS to recognize it as a
LOTUS file.

2.If you require additional copies of the file to enter more than 30
agencies, here is an example of how to change the files' names.
Philadelphia will change the file names to "1PHI9923.WK1" for its
first file and "2PHI9923.WK1" for its second file and so forth.

PRINTING THE FILE

        For printing purposes, each of the three pages of the file consists of
four LOTUS print ranges. Your office's printing requirements depends upon how
many HUD-approved counseling agencies you enter on the file:

1 to 10 agencies: page 1
11 to 20 agencies: pages 1 and 2
21 to 30 agencies: pages 1 through 3
31 or more agencies: see earlier instructions in the last paragraph
starting as "The LOTUS file ..." on page one of these instructions.

        Print Ranges. Because of the size of the report, you must print it by
section. The print range for each section of the report appears in the column
header boxes of each section and in the table below.

        Use the following LOTUS print ranges to print the sections of the
report. You must use paper size 8 1/2 by 14 inches in the landscape mode with
compressed printing (16.5 or 17 cpi). Each section requires a full page for
printing.

Section	Page 1	Page 2	Page 3
1	A1..AD40	A42..AD81	A83..AD122
2	AB1..BS40	AB42..BS81	AB83..BS122
3	BQ1..DE40	BQ42..DE81	BQ83..DE122
4	DC1..EO40	DC42..EO81	DC83..EO122

        If you need assistance using the LOTUS file, including printing the
file, please consult with your Administrative Officer. If you cannot find
local assistance, please contact the Office of Administration in your State
Office.

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