



Frequently Asked Questions About the Revised Semi-Annual Performance Report Form

IMPORTANT NOTE: The current Semi-Annual Performance Report form is a “fillable pdf” form. As of 2016, HUD wants Service Coordinators to submit the form in an electronic format – do not complete the form by hand, scan and then email the scanned document. Doing this prevents HUD from capturing the data from the form. Additionally, HUD would like the completed Report forms emailed to either the appropriate Grants Specialist (if Service Coordinator position is funded by the Service Coordinator in Multifamily Housing for the Elderly and Disabled grant program or one-year grant extension) or Asset Manager for the property (for Service Coordinators in Multifamily Housing for the Elderly and Disabled funded by other resources).

Q: Who is required to complete the Semi-Annual Performance Report?

A: *Service coordinators in Multifamily Housing for the Elderly and Disabled (Sect. 202s) including: grant-funded service coordinators; grant extension-funded service coordinators; operations-funded service coordinators; residual receipts-funded service coordinators; excess income-funded service coordinators; and, service coordinators paid via other funding sources who work at Sect. 202 properties.*

IMPORTANT NOTE: As of June 2017, Service Coordinators participating in HUD’s “Standards for Success” (SfS) pilot DO NOT have to complete the Semi-Annual Performance Report. SfS pilot participants’ data will be electronically submitted to HUD at a future date according to the parameters of the pilot

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Q: What are the correct reporting periods for the Semi-Annual Performance Report?

A: *The reporting periods for the Semi-Annual Performance Report were changed in late 2016. The correct reporting periods for the Semi-Annual Report are: January 1 through June 30 and July 1 through December 31. Completed reports are due in to your HUD Field Office 30 days after the end of the reporting period – July 30 and January 30.*

Q: I was recently promoted within our housing organization to the Service Coordinator position. Since I've been with our company for 3 years, do I have to meet the 36-hour or 12-hour training requirements?

A: *Yes. You will have to meet the 36-hour training requirements during your first year as a service coordinator. So, if you were hired as the service coordinator effective March 1, 2017, you will have until February 28, 2018 to complete your 36 hours of training.*

Q: I am a new service coordinator with just one week in this position and the Semi-Annual reporting period ends in two weeks. How do I proceed to fill in report? My numbers will be very low. Should I use the previous service coordinator's information if I can piece it together?

A: *Even though you are a new service coordinator, you are expected to submit a Semi-Annual Report, when due, with just the data and information regarding your activities only. Ideally, HUD would like service coordinators who are leaving the position to complete and submit a Semi-Annual Report for their activities up to their leaving the job but does not mandate this.*

Q: I am one of three service coordinators at our large elderly housing property. Do we all combine our data and information into one report so that there's no duplication on resident counts, health/wellness programs, etc.?

A: *No. Each service coordinator at the property must submit a separate report. HUD realizes that there may be duplication in these instances but is more interested in finding out what each service coordinator has done.*

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Q: I am a service coordinator at two different properties. Previously, I could combine data and information from both properties into one report. Is this still allowable?

A: No. You must submit a separate report for each property where you provide service coordination.

Q: In Section 2 Service Coordinator Information, is the “Number of weekly hrs at project” the hours I work per week and how do I change it? I was transferred from another property and the Semi-Annual reads 15 hrs and I am working 40 per week.

A: You are to put the number of hours that HUD funds (be they grant, grant extension, operations, residual receipts or excess income funds) are paying the service coordinator to work. HUD is interested in what you do during the amount of hours they fund.

Q: I work at a 100-unit property where half the units are HUD subsidized and the other half are tax credit units. I provide service coordination to all of the residents. How do I document the work I do with the tax credit residents?

A: You would count the tax credit unit residents as “neighborhood residents” on the Semi-Annual Report form.

Q: What if your property is subsidized by HUD but has been given tax-credit monies for renovations, do I, as the service coordinator, still need to complete and submit the Semi-Annual Report?

A: Yes.

Q: Regarding my hire date - I have been employed as a ROSS service coordinator for 3 years and then recently transferred to Multifamily housing. What date do I enter as my hire date? The date I started as a ROSS SC or the date I started in multifamily?

A: The date you started as a Service Coordinator in Multifamily Housing for the Elderly/Disabled.

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Q: As a ROSS service coordinator, I have attended training as required for service coordinators in multifamily housing; will I be able to count those hours towards my training requirement for multifamily?

A: **Yes.**

Q: I am hired to work 20 hours a week. However, to complete my job I always end up working anywhere from 28 to 35 a week. My employer calls the extra hours 'volunteer time". How do I document these hours appropriately?

A: ***Technically speaking, HUD only wants to know what you do during the hours that HUD pays your salary. However, you should document all of your activities and you could indicate in "Section 14: Additional Information," that you routinely work more than the 20 hours/week to complete your regular service coordinator duties.***

Q: Are service coordinators in Elderly housing supposed to be providing service coordination with neighborhood residents?

A: ***Service coordinators in Multifamily Housing for the Elderly and Disabled (Sect. 202s) are allowed by law to provide services to elderly and non-elderly disabled residents of the immediate neighborhood of the property where they work. There is no requirement to do so however, if the caseload at your property allows, you may want to offer your service coordination services to these neighborhood residents.***

Q: Do you capture the number of people who attended a program you organized under section 6 or is this section only for one-on-one referrals? For example if I had a blood pressure clinic and 15 people attended do I mark 15 people under healthcare services under section 6 or do I only report that 15 under section 10 for wellness programs?

A: ***Your blood pressure clinic would be documented as an Educational/Preventive Health-Wellness program in Section 10 of the form.***

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Q: Do we add all the training from when we first got employed to add 36 hours for our first year?

A: *The 36-hour training requirement is for service coordinators in their first year as a service coordinator in Multifamily Housing for the Elderly and Disabled. Your “year” starts on your hire date and you have 12 months to complete 36 hours of HUD-required training in specific areas relative to aging, federal programs, communication, etc. The specific requirements can be found in HUD’s Management Agent Handbook Chapter 8: Service Coordination (http://portal.hud.gov/hudportal/documents/huddoc?id=DOC_25241.pdf).*

Q: Regarding Section 5a and Residents Age Ranges, in previous versions of the Semi-Annual report, service coordinators documented the percentage of residents in each age category. Has this changed with the revised form?

A: *Yes. Service coordinators are now to be providing the actual number of residents in each age range category.*

Q: In Section 5b regarding residents’ Functional Status, who are “All Others”?

A: *These are the residents with no needs in Activities of Daily Living (ADLs). The revised Semi-Annual form wants service coordinators to list the number of residents at the property who are “Frail Elders” – those with needs in 3 or more ADLs; “At-Risk Elders” – those with needs in one or two ADLs; the number of non-elderly residents with disabilities; and, “All Others” – those residents without needs in any ADLs. By completing the number of residents in each ADL category in the first column of Section 5b, the form will automatically calculate the percentage of the total number of residents at the property each category represents (second column). Service Coordinators are to input the number of residents within each category that you assisted during the reporting period (third column).*

Q: How would you include low-income non-disabled or non-elderly people on the report?

A: *If you are working at a Multifamily Housing for the Elderly and Disabled property, you should only be working with low-income elderly and/or low-income non-elderly people with disabilities who either reside at the property or*

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live in the immediate neighborhood around your property. You should not be providing extensive service coordination for non-elderly, non-disabled people. However, service coordinators have provided information and assistance to non-elderly and non-disabled family members of residents and documented these activities in Section 6: Types of Service Coordination Performed under the “Family Support” category.

Q: Would you count helping a resident’s family member as a neighborhood resident or under family contacts for that particular resident?

A: You would document this assistance in Section 6 under “Family Support.”

Q: If I assist someone with obtaining Farmers Market Vouchers would that be under Entitlements or Meals in Section 6?

A: This would be documented under “Benefits/Entitlements/Insurance. Per the “Glossary of Service Types” that is linked to the Semi-Annual Report form, “Assistance in applying for any government entitlement, veteran’s benefit or social services ‘safety net’ programs (federal, state, local) and/or any other public benefit program.”

Q: Do you get a confidentiality agreement and other Intake documents on a resident of the immediate neighborhood that you assist and, if so, where is that information kept?

A: You would start a file, like you would with your property’s residents, and keep it in your locked file cabinet. Some Service Coordinators who maintain manual, hard-copy files have indicated that they use a different color file folder or file label to differentiate between the property’s residents and neighborhood residents.

Q: Under Section 6, if the service coordinator provides advocacy for a resident in April and it took three (3) contacts to resolve, the resident is counted as one individual with three (3) contacts. If the same resident has another issue where you, as the service coordinator, provide advocacy in August with two (2) more contacts, is the resident counted again or have they already been counted 4 months ago?

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A: *The resident is counted only once in each category in the “# Individuals” column with the total number of contacts in that Service/Activity recorded in the “# Contacts” column. In your example, you would count 1 resident and 5 contacts.*

Q: Sometimes, I am asked by the Property Manager to help a non-resident fill out an application to be a resident. How would I document this activity?

A: *You would document first in Section 5c as a “Neighbors Served” and then in Section 6 under “Benefits/Entitlements.”*

Q: Would I document as “Monitoring Services” when I see a resident every day?

A: *It would depend on why you are seeing that resident daily. According to the Glossary of Service Types, “Monitoring Services” include “Follow-up on service outcomes or verification of services that have been received with the resident and/or service providers, to determine whether the services are meeting needs and when new or additional resources might be needed.” If you are seeing the resident daily because they tend to hang out in the common areas of the property with no particular purpose or issue to be addressed or assistance provided, this would not be considered “Monitoring Services.”*

Q: Could you give some examples of what the paperwork would be that is not related to the residents?

A: *Per the “Instructions for Completing Form HUD-92456 General”: “Paperwork not related to a resident. Includes any reports written for management staff, supervisors, or peers. Also relevant is paperwork related to registering for training, arranging travel, or purchasing supplies or equipment.”*

Q: If a resident moves to a nursing home or assisted living facility and then I learn that the resident has died, I would document this resident’s reason for leaving as “Moved to a higher level of care,” correct?

A: **Correct.**

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Q: If a resident is in a rehab facility on a temporary basis but is still considered to be a tenant at the property and they die while at the rehab facility, I would document this resident's reason for leaving in the "number of residents who died," correct?

A: **Correct**

Q: In previous versions of the Semi-Annual Report form and service coordinator grant NOFAs, there appears to be a discrepancy with regard to ADLs and what is now considered an ADL on the revised Semi-Annual Report form. The previous form had eating, bathing, grooming, dressing and home management activities as ADLs. The current Semi Report form lists eating, dressing, bathing, grooming and *transferring* as ADLs. Since service coordinators are making "frail" and "at-risk" determinations based on their residents' ADL needs, should service coordinators continue to use Home Management for the Semi-Annual even though it's not listed?

A: **Yes. According to HUD HQ staff, home management is still an allowable ADL category.**

Q: At a property that was developed by mixed financing, how should the service coordinator be reporting on the residents that they served? The property has market rate units, low-income housing tax credit units and Sect. 202 units.

A: **The service coordinator should count the Section 202 units' residents as "residents of the project" and the market rate and tax credit units as "neighborhood residents." For example, a mixed finance property has a total of 120 units. There are 45 units that are Sect. 202 with the remaining 75 units being tax credit and market rate units. Under this scenario, the service coordinator bases his/her report on the 45 units, not the 120 units. The remaining 75 mixed-finance units' residents would be considered as "neighborhood residents."****

***Recognizing that some service coordinators may be using documentation/case management systems that do not have the ability to separate the residents based on how their unit is funded, HUD HQ staff with oversight of the entire Service Coordinators in Housing for the Elderly/Disabled grant program has indicated that if their system cannot be modified or manipulated to differentiate between "residents of the project" and "neighborhood residents," the service coordinator can submit the report for all the residents and include a note to the HUD Field Office staff that this is the case – typically in*

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Section 14 Additional Information – making them aware of the issue with project residents and neighborhood residents.

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Q: In Section 8 Time Allocation of Monthly Tasks, are there required percentages that service coordinators are expected to be meeting?

A: **No. There is no requisite percentage of time that HUD is expecting service coordinators to meet in each category. This is an approximation of your typical time and not a documentation of every minute of your workday or work month. HUD understands that a service coordinator's tasks and activities change on a daily basis and HUD cannot expect service coordinators to achieve a specific percentage. There is no goal or magic percentage to be met. HUD is interested in capturing what amount of time service coordinators spend in specific activities. This is an informational section and not designed to penalize or reprimand service coordinators. HUD just wants an approximation of your monthly time spent in these areas.**

Q: Where or how would I document my writing and distributing to the residents the property-wide newsletter?

A: **Per HUD HQ staff, you would document these activities in Section 8 as "Direct contact with project and neighborhood residents."**

Q: I routinely meet with our Quality Assurance (QA) Administrator to discuss unique resident situations and for guidance on the most appropriate ways to address resident issues. How would I document this time?

A: **You would document your meetings with your QA Administrator as "Meetings with property management staff" if your QA Administrator is part of your housing organization. However, if your QA Administrator is a contractor (e.g., from the Area Agency on Aging, another national housing organization, etc.) that provides QA services, your meetings can be documented under "Other." According to HUD HQ staff, the purpose of this item is to ensure that service coordinators are not doing routine property management tasks.**

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