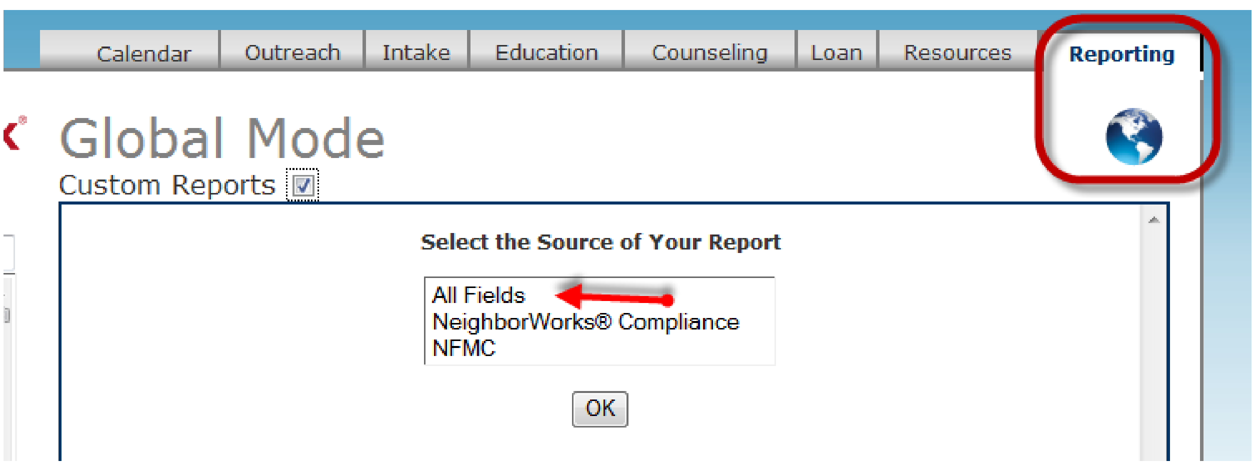
Creating Financial Progress Reports in CounselorMax®

Overview

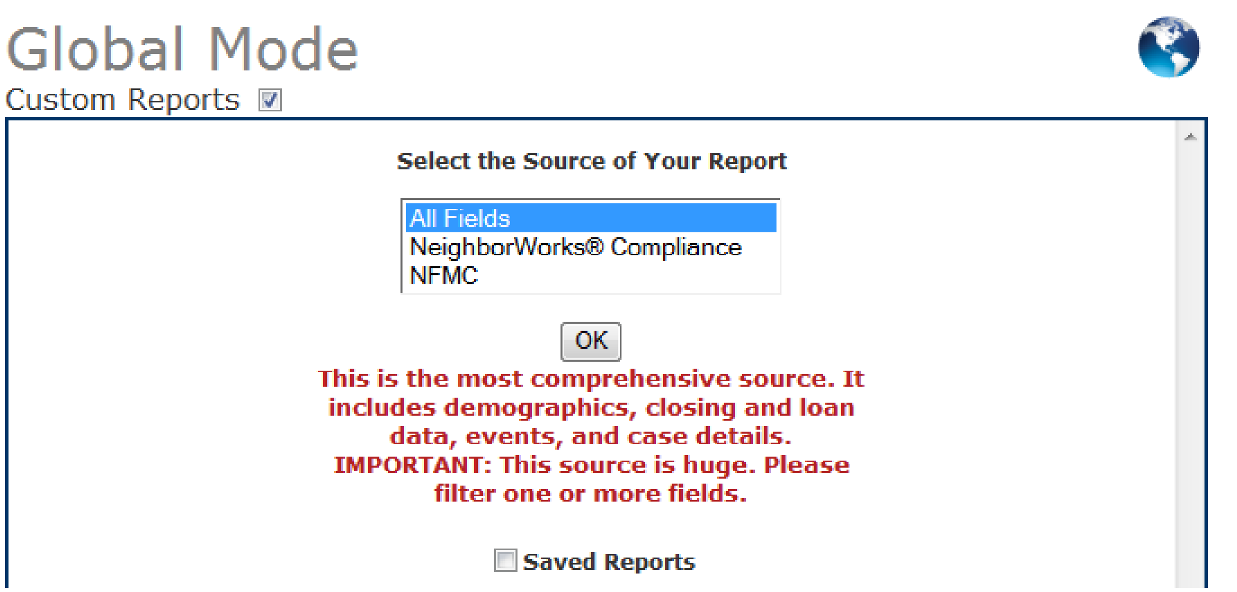
CounselorMax® now has the ability to track a client's financial status changes. The following will be an explanation of data fields available to you by using the Customized Reporting tool. You will also find an Example Template that you might use to create a Customized Report to examine the efficacy of your counseling program.

Let's Begin

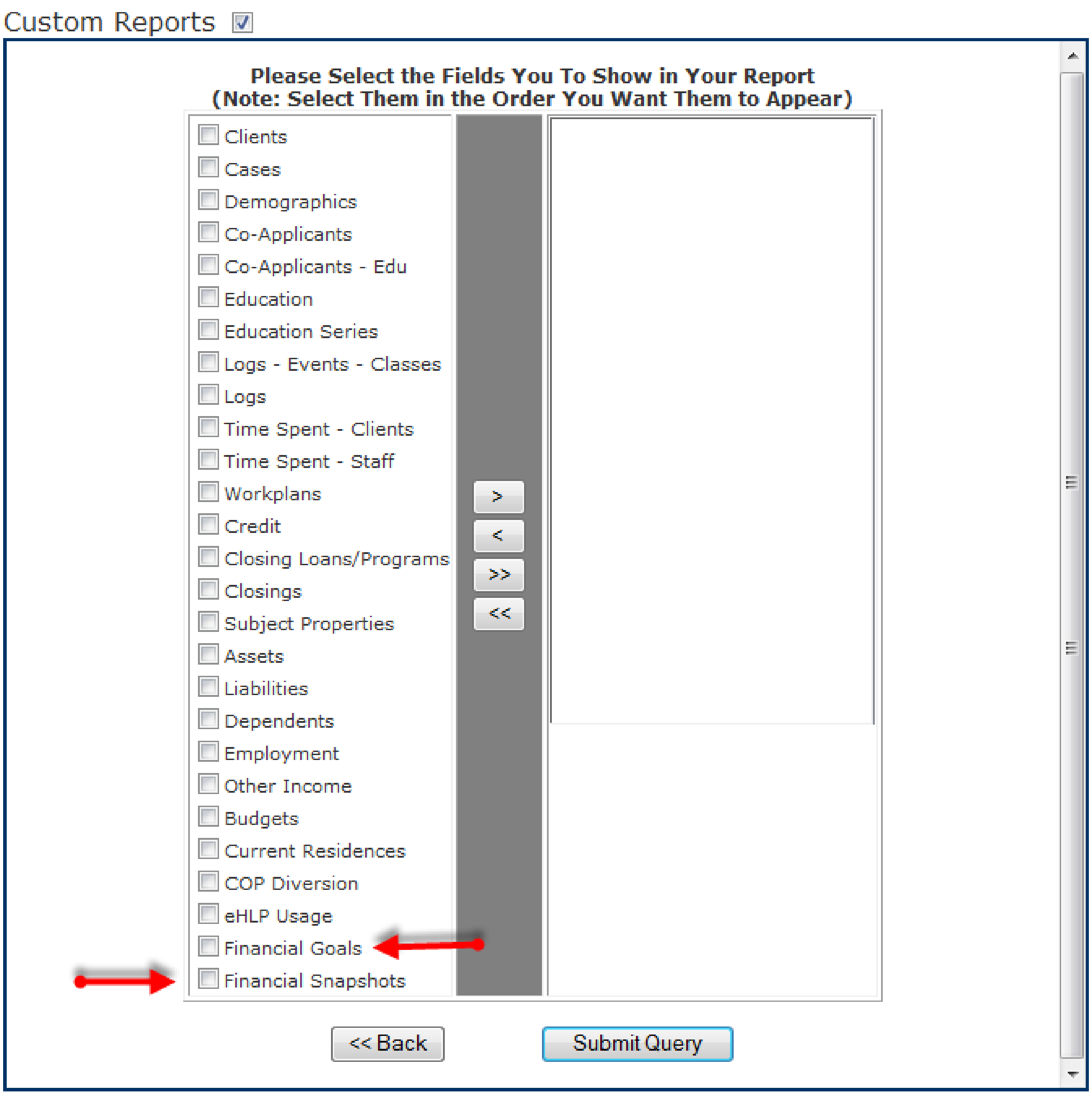
First we navigate to the Reporting tab like we begin with any customized report. Select the All Fields as the Source of Your Report.



You get the notice that you are pulling data from the most comprehensive source and to be sure to use filters when using this large amount of data.

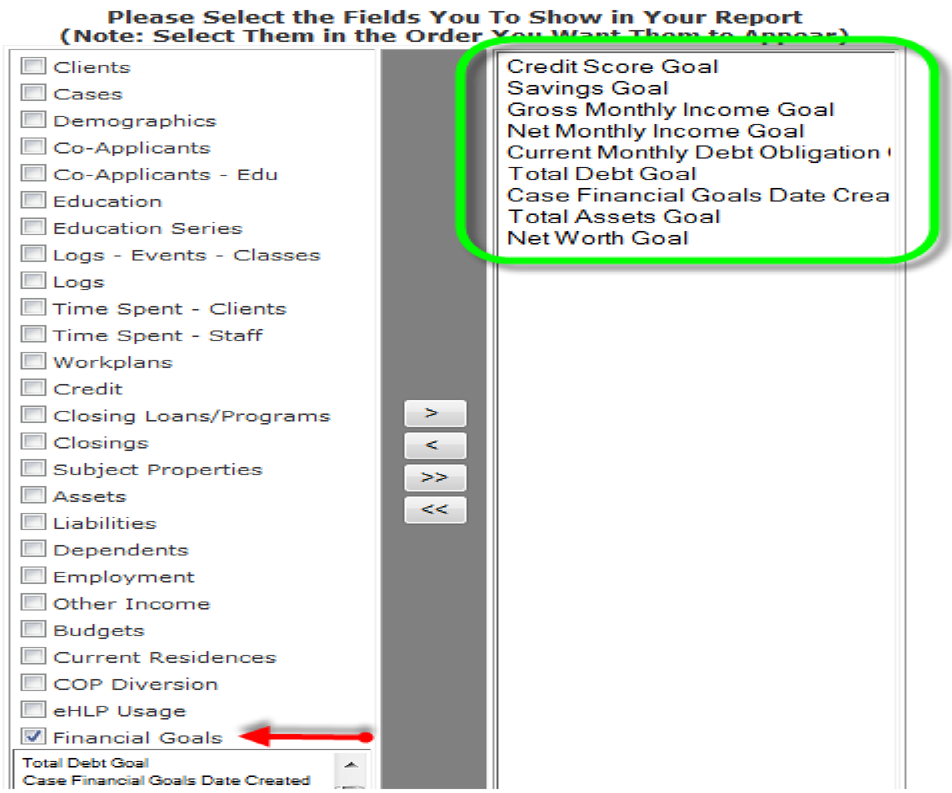


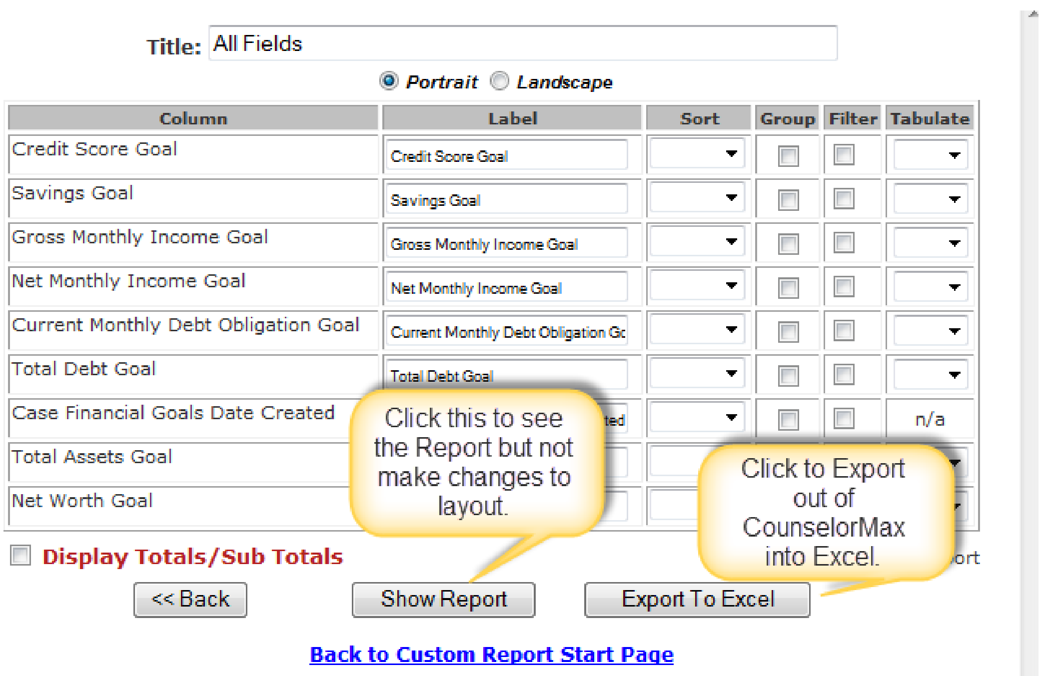
As you open this Source, the data field selection boxes will appear and you are now ready to make a selection from the categories listed. NOTICE that the information for the Financial Progress sections is at the bottom of the screen.



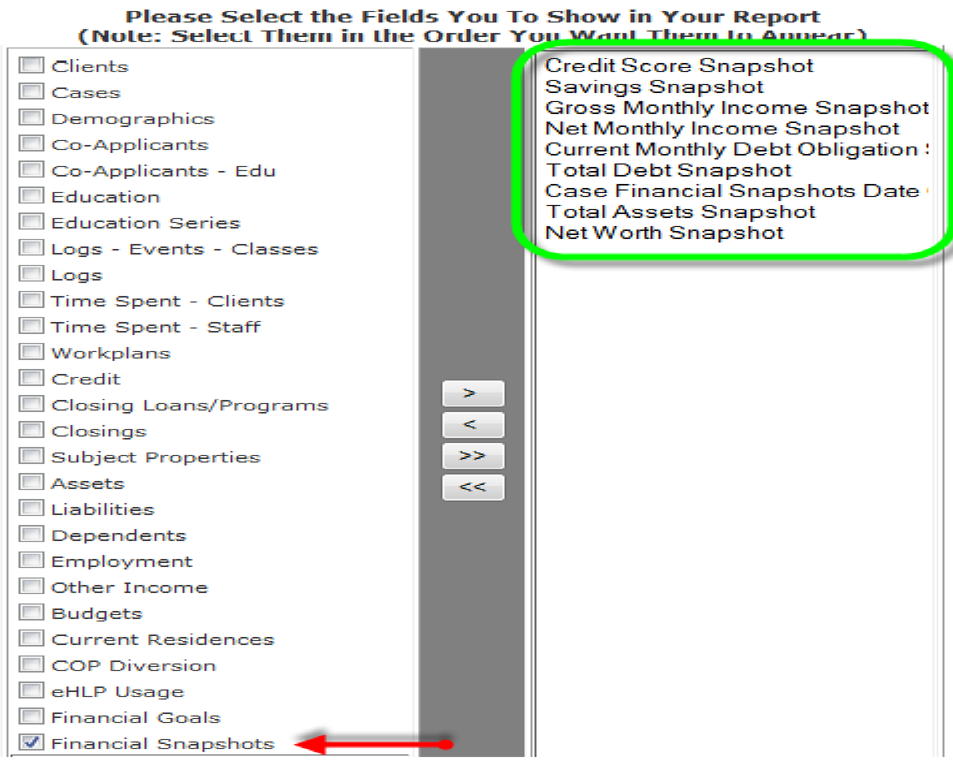
The two sections to report the data you entered into the Financial Progress Profile are Financial Goals and Financial Snapshots. The data fields available in these two categories vary.

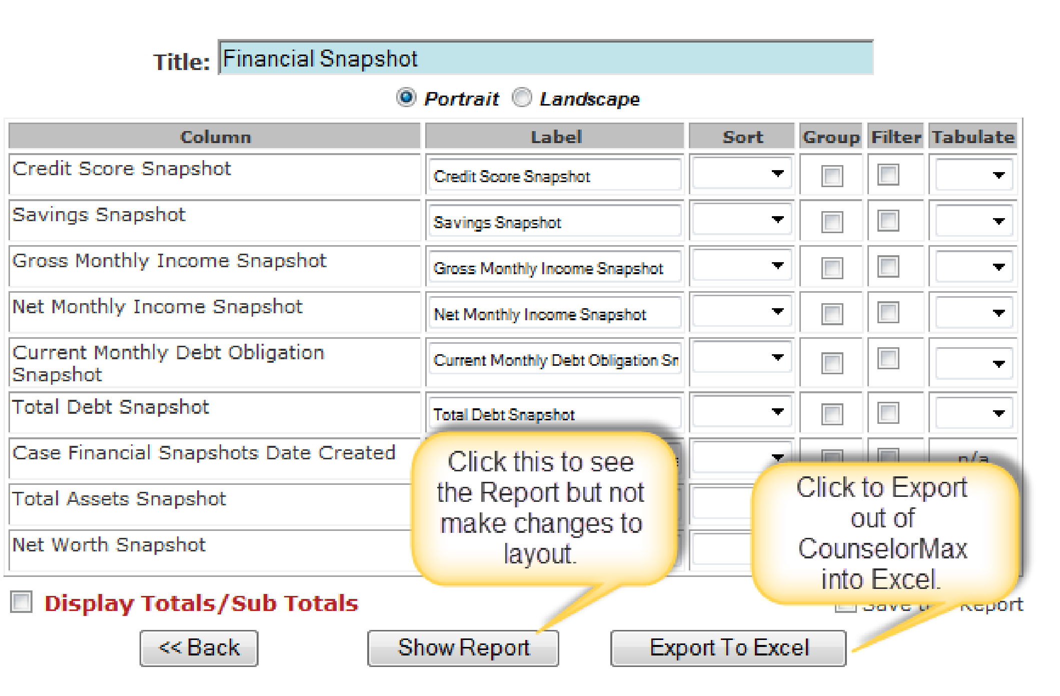
In the Financial Goals section the following data fields are available:



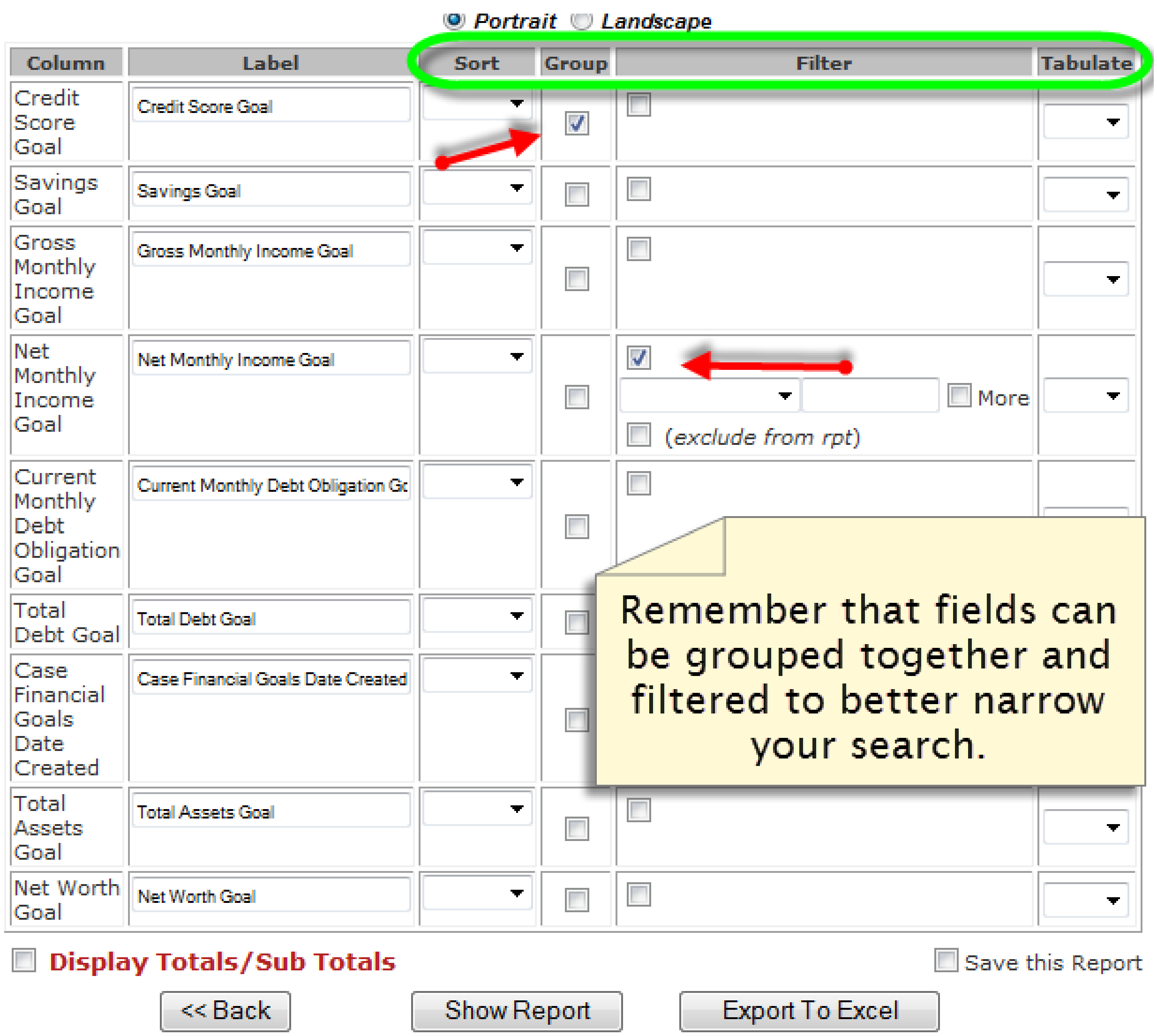


In the Financial Snapshot section the following data fields are available:

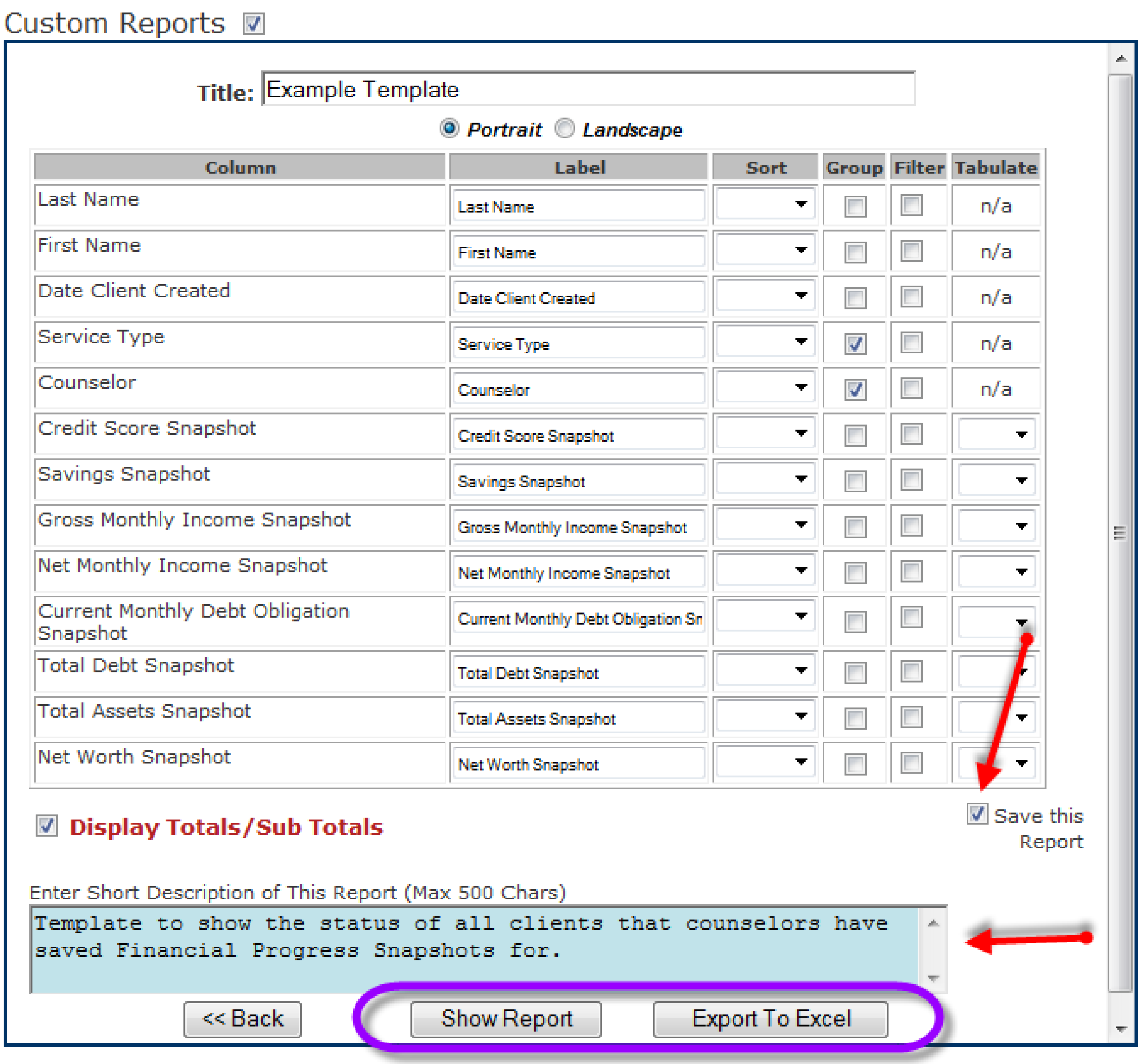




After you have made your selections from either Financial Goals or Financial Snapshots or both, you can then submit the query as usual and you have the ability to group certain fields as well as filter down the reports to narrow the focus of your reports. The filtering option gives you the most flexibility to target specific items depending on your audience and you also have the ability to exclude items that you don't want to appear on your reports.

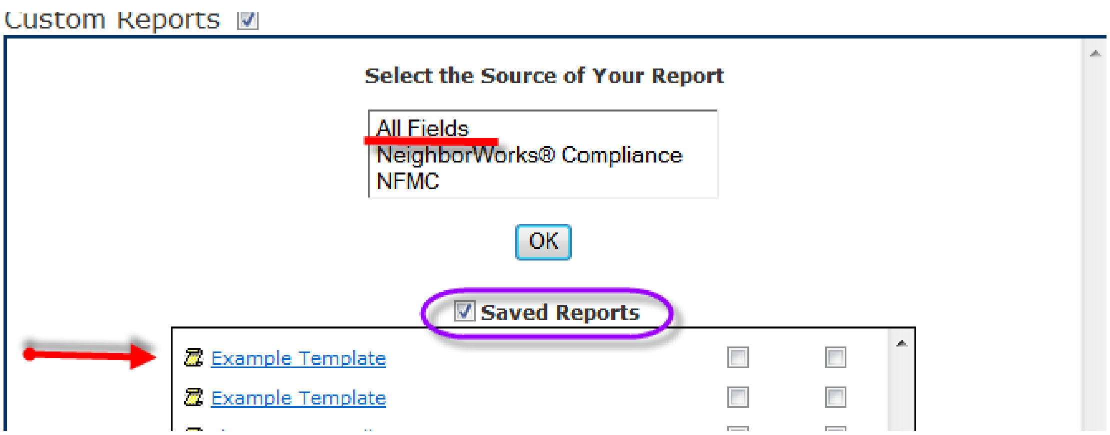


After you have completed the groupings and filters have been put in place for your data, it is a best practice that you save this report. Saving your reports allows you to run this report on multiple instances without having to recreate the report each time it's run.



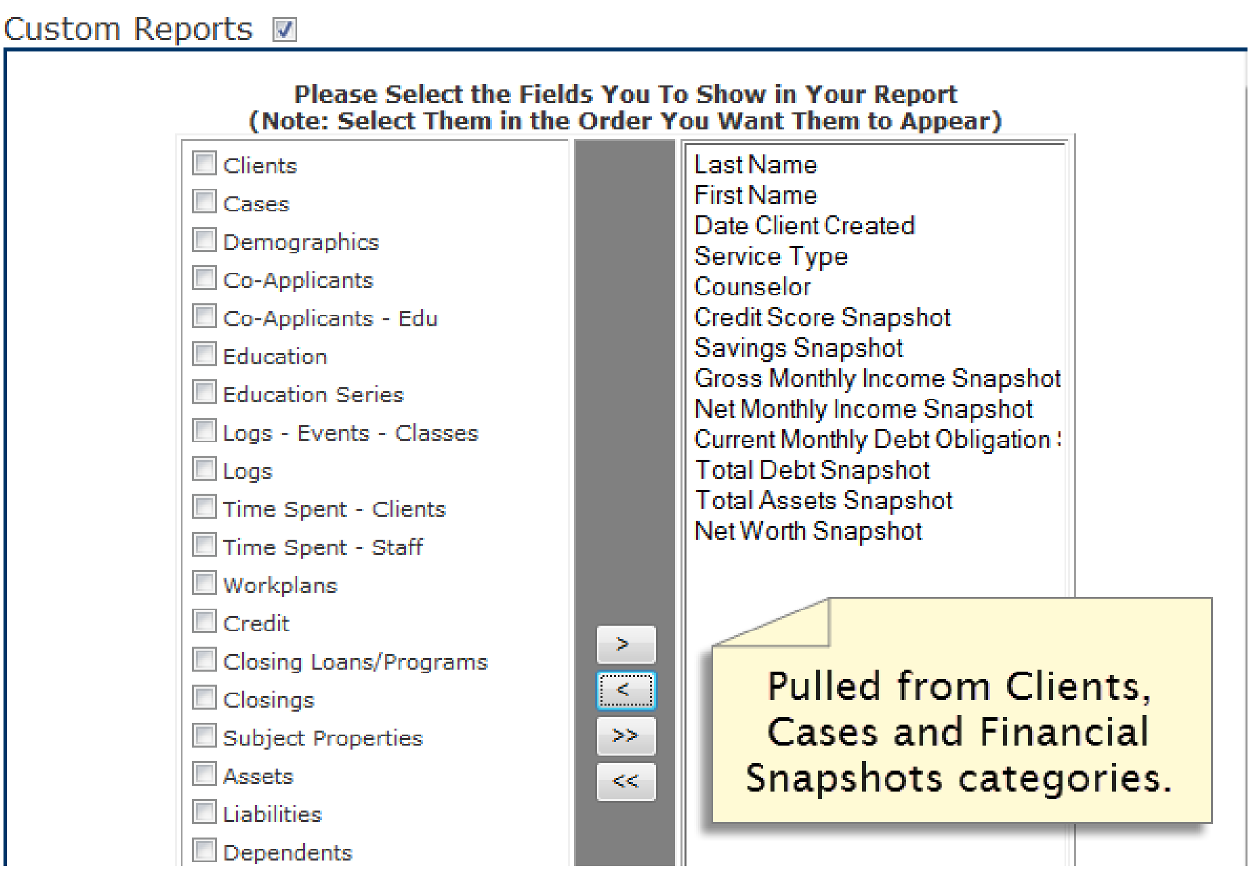
Be sure to click on the Save this Report checkbox and then enter a Short Description of This Report into the box provided so that the next person who pulls the report can ensure that they are pulling the correct one. **NOTE that the report is not saved until you click either the Show Report button or the Export to Excel button.**

Once your report has been saved and run, you will be able to find it in the Saved Reports section of the Customized Reporting for your future use.

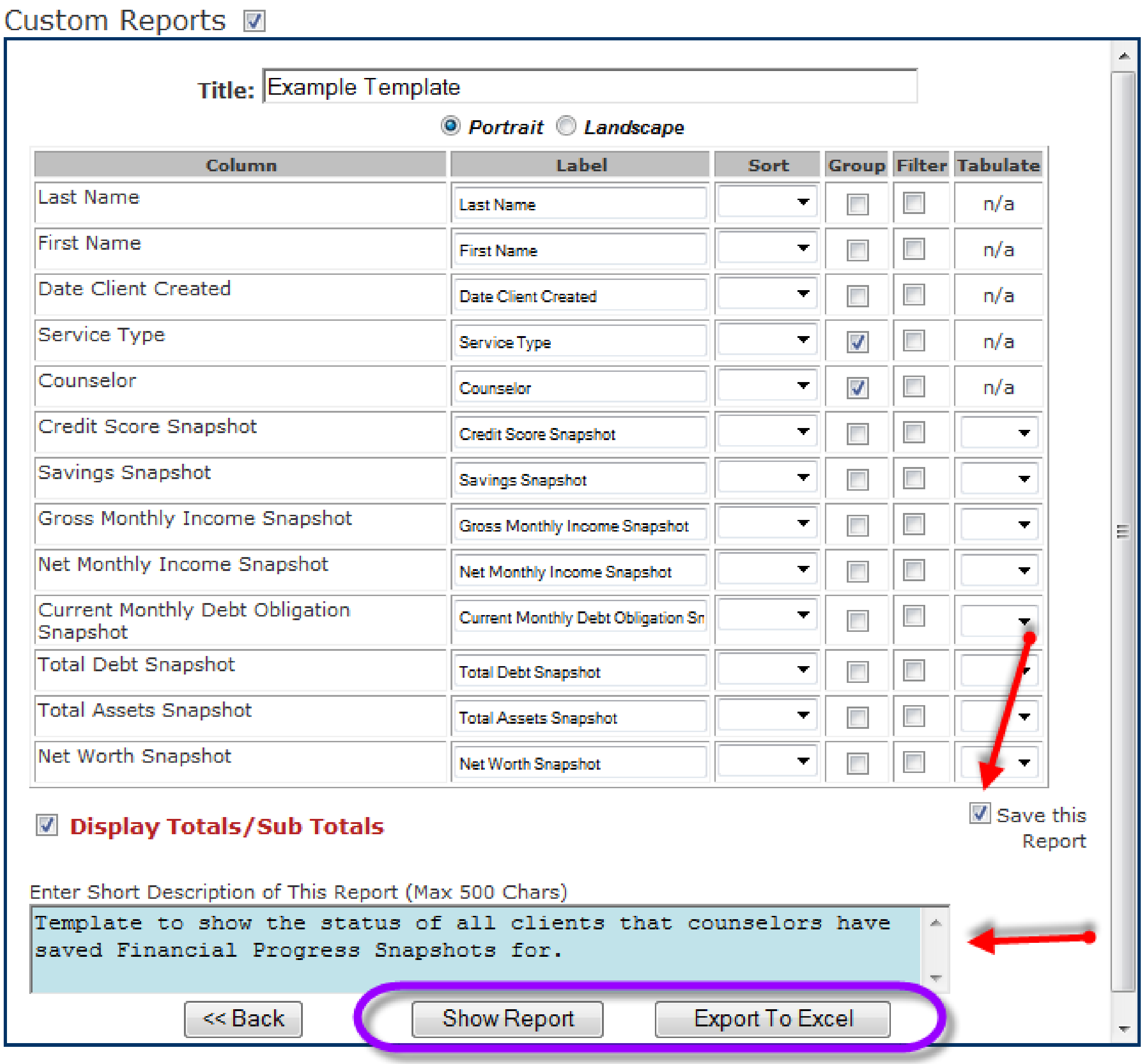


An Example of a Report for you to use:

This report will show the client's you are working with and their Financial Profile



Here save the report by giving it a new Title and begin to filter and group your data.



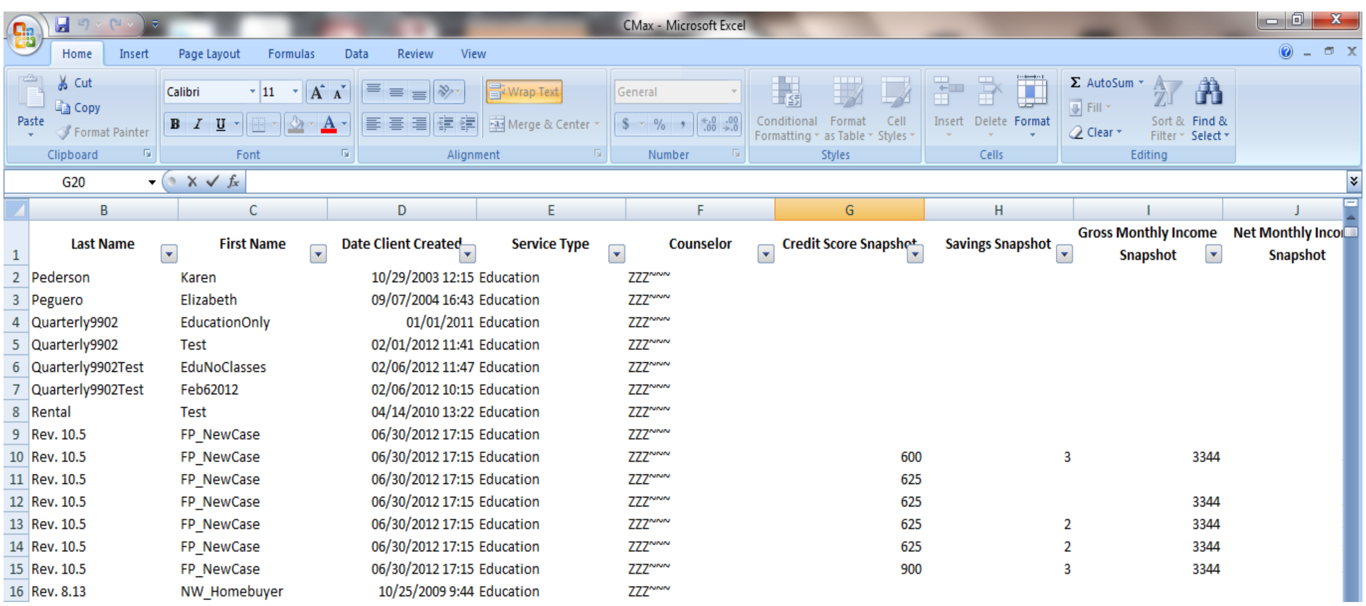
The data selected here will show the clients based on filters selected. The data can be presented in one of two ways or both depending on your audience and any additional requirements for your agency.

Example of selected filtered data using the Show Report button:

8/5/2012 **Example Template**

Last Name	First Name	Date Client Created	Service Type	Counselor	Credit Score Snapshot	Savings Snapshot	Gross Monthly Income Snapshot	Net Monthly Income Snapshot	Current Monthly Debt Obligation Snapshot	Total Debt Snapshot	Total Assets Snapshot	Net Worth Snapshot
Pederson	Karen	10/29/2003	Education	---	---	---	---	---	---	---	---	---
Peguero	Elizabeth	9/7/2004	Education	---	---	---	---	---	---	---	---	---
Quarterly9902	EducationOnly	1/1/2011	Education	---	---	---	---	---	---	---	---	---
Quarterly9902	Test	2/1/2012	Education	---	---	---	---	---	---	---	---	---
Quarterly9902Test	EduNoClasses	2/6/2012	Education	---	---	---	---	---	---	---	---	---
Quarterly9902Test	Feb62012	2/6/2012	Education	---	---	---	---	---	---	---	---	---
Rental	Test	4/14/2010	Education	---	---	---	---	---	---	---	---	---
Rev. 10.5	FP_NewCase	6/30/2012	Education	---	---	---	---	---	---	---	$0.00	$0.00
Rev. 10.5	FP_NewCase	6/30/2012	Education	---	600	$3.00	$3,344.00	$3,344.00	$1,225.00	$3,211.00	$11,114.00	$7,903.00
Rev. 10.5	FP_NewCase	6/30/2012	Education	---	625	---	---	---	---	---	$111.00	$111.00
Rev. 10.5	FP_NewCase	6/30/2012	Education	---	625	---	$3,344.00	$3,344.00	---	---	$1,111.00	$1,111.00
Rev. 10.5	FP_NewCase	6/30/2012	Education	---	625	$2.00	$3,344.00	$3,344.00	---	---	$11,113.00	$11,113.00
Rev. 10.5	FP_NewCase	6/30/2012	Education	---	625	$2.00	$3,344.00	$3,344.00	$100.00	$1,000.00	$11,113.00	$10,113.00
Rev. 10.5	FP_NewCase	6/30/2012	Education	---	900	$3.00	$3,344.00	$3,344.00	$100.00	$1,000.00	$11,114.00	$10,114.00
Rev. 8.13	NW_Homebuyer	10/25/2009	Education	---	---	---	---	---	---	---	---	---

Example of selected filtered data using the Export to Excel button:



	B	C	D	E	F	G	H	I	J
1	Last Name	First Name	Date Client Created	Service Type	Counselor	Credit Score Snapshot	Savings Snapshot	Gross Monthly Income Snapshot	Net Monthly Income Snapshot
2	Pederson	Karen	10/29/2003 12:15	Education	ZZZ~~~				
3	Peguero	Elizabeth	09/07/2004 16:43	Education	ZZZ~~~				
4	Quarterly9902	EducationOnly	01/01/2011	Education	ZZZ~~~				
5	Quarterly9902	Test	02/01/2012 11:41	Education	ZZZ~~~				
6	Quarterly9902Test	EduNoClasses	02/06/2012 11:47	Education	ZZZ~~~				
7	Quarterly9902Test	Feb62012	02/06/2012 10:15	Education	ZZZ~~~				
8	Rental	Test	04/14/2010 13:22	Education	ZZZ~~~				
9	Rev. 10.5	FP_NewCase	06/30/2012 17:15	Education	ZZZ~~~				
10	Rev. 10.5	FP_NewCase	06/30/2012 17:15	Education	ZZZ~~~	600	3	3344	
11	Rev. 10.5	FP_NewCase	06/30/2012 17:15	Education	ZZZ~~~	625			
12	Rev. 10.5	FP_NewCase	06/30/2012 17:15	Education	ZZZ~~~	625		3344	
13	Rev. 10.5	FP_NewCase	06/30/2012 17:15	Education	ZZZ~~~	625	2	3344	
14	Rev. 10.5	FP_NewCase	06/30/2012 17:15	Education	ZZZ~~~	625	2	3344	
15	Rev. 10.5	FP_NewCase	06/30/2012 17:15	Education	ZZZ~~~	900	3	3344	
16	Rev. 8.13	NW_Homebuyer	10/25/2009 9:44	Education	ZZZ~~~				