

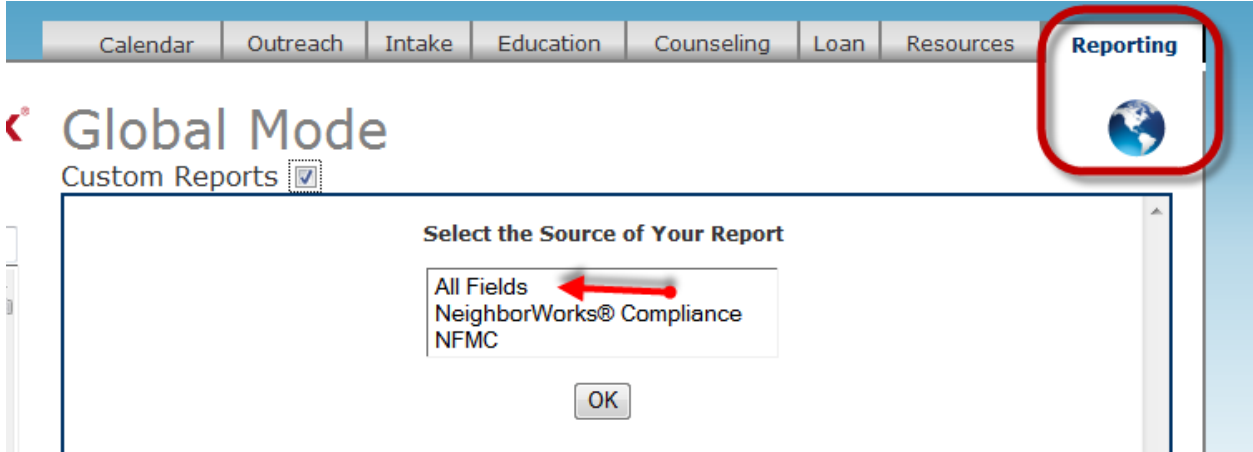
Creating Financial Progress Reports in CounselorMax®

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.

Global Mode



Custom Reports

Select the Source of Your Report

- All Fields
- NeighborWorks® Compliance
- NFMC

OK

This is the most comprehensive source. It includes demographics, closing and loan data, events, and case details. IMPORTANT: This source is huge. Please filter one or more fields.

Saved Reports

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.

Custom Reports

**Please Select the Fields You To Show in Your Report
(Note: Select Them in the Order You Want Them to Appear)**

<input type="checkbox"/> Clients		
<input type="checkbox"/> Cases		
<input type="checkbox"/> Demographics		
<input type="checkbox"/> Co-Applicants		
<input type="checkbox"/> Co-Applicants - Edu		
<input type="checkbox"/> Education		
<input type="checkbox"/> Education Series		
<input type="checkbox"/> Logs - Events - Classes		
<input type="checkbox"/> Logs		
<input type="checkbox"/> Time Spent - Clients		
<input type="checkbox"/> Time Spent - Staff		
<input type="checkbox"/> Workplans	>	
<input type="checkbox"/> Credit	<	
<input type="checkbox"/> Closing Loans/Programs	>>	
<input type="checkbox"/> Closings	<<	
<input type="checkbox"/> Subject Properties		
<input type="checkbox"/> Assets		
<input type="checkbox"/> Liabilities		
<input type="checkbox"/> Dependents		
<input type="checkbox"/> Employment		
<input type="checkbox"/> Other Income		
<input type="checkbox"/> Budgets		
<input type="checkbox"/> Current Residences		
<input type="checkbox"/> COP Diversion		
<input type="checkbox"/> eHLP Usage		
<input type="checkbox"/> Financial Goals		
<input type="checkbox"/> Financial Snapshots		

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:

Please Select the Fields You To Show in Your Report
 (Note: Select Them in the Order You Want Them to Appear)

- Clients
- Cases
- Demographics
- Co-Applicants
- Co-Applicants - Edu
- Education
- Education Series
- Logs - Events - Classes
- Logs
- Time Spent - Clients
- Time Spent - Staff
- Workplans
- Credit
- Closing Loans/Programs
- Closings
- Subject Properties
- Assets
- Liabilities
- Dependents
- Employment
- Other Income
- Budgets
- Current Residences
- COP Diversion
- eHLP Usage
- Financial Goals**

- Credit Score Goal
- Savings Goal
- Gross Monthly Income Goal
- Net Monthly Income Goal
- Current Monthly Debt Obligation Goal
- Total Debt Goal
- Case Financial Goals Date Created
- Total Assets Goal
- Net Worth Goal

Total Debt Goal
Case Financial Goals Date Created

Title:

Portrait Landscape

Column	Label	Sort	Group	Filter	Tabulate
Credit Score Goal	Credit Score Goal	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Savings Goal	Savings Goal	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Gross Monthly Income Goal	Gross Monthly Income Goal	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Net Monthly Income Goal	Net Monthly Income Goal	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Current Monthly Debt Obligation Goal	Current Monthly Debt Obligation Gc	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Total Debt Goal	Total Debt Goal	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Case Financial Goals Date Created	Case Financial Goals Date Created	▼	<input type="checkbox"/>	<input type="checkbox"/>	n/a
Total Assets Goal	Total Assets Goal	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Net Worth Goal	Net Worth Goal	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼

Display Totals/Sub Totals

[Back to Custom Report Start Page](#)

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

Please Select the Fields You To Show in Your Report
 (Note: Select Them in the Order You Want Them to Appear)

- Clients
- Cases
- Demographics
- Co-Applicants
- Co-Applicants - Edu
- Education
- Education Series
- Logs - Events - Classes
- Logs
- Time Spent - Clients
- Time Spent - Staff
- Workplans
- Credit
- Closing Loans/Programs
- Closings
- Subject Properties
- Assets
- Liabilities
- Dependents
- Employment
- Other Income
- Budgets
- Current Residences
- COP Diversion
- eHLP Usage
- Financial Goals
- Financial Snapshots

Credit Score Snapshot
 Savings Snapshot
 Gross Monthly Income Snapshot
 Net Monthly Income Snapshot
 Current Monthly Debt Obligation :
 Total Debt Snapshot
 Case Financial Snapshots Date
 Total Assets Snapshot
 Net Worth Snapshot

Title:

Portrait Landscape

Column	Label	Sort	Group	Filter	Tabulate
Credit Score Snapshot	Credit Score Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Savings Snapshot	Savings Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Gross Monthly Income Snapshot	Gross Monthly Income Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Net Monthly Income Snapshot	Net Monthly Income Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Current Monthly Debt Obligation Snapshot	Current Monthly Debt Obligation Sn	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Total Debt Snapshot	Total Debt Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Case Financial Snapshots Date Created		▼	<input type="checkbox"/>	<input type="checkbox"/>	n/a
Total Assets Snapshot		▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Net Worth Snapshot		▼	<input type="checkbox"/>	<input type="checkbox"/>	▼

Display Totals/Sub Totals

Save Report

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.

Portrait Landscape

Column	Label	Sort	Group	Filter	Tabulate
Credit Score Goal	Credit Score Goal		<input checked="" type="checkbox"/>		
Savings Goal	Savings Goal		<input type="checkbox"/>		
Gross Monthly Income Goal	Gross Monthly Income Goal		<input type="checkbox"/>		
Net Monthly Income Goal	Net Monthly Income Goal		<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> More <input type="checkbox"/> (exclude from rpt)	
Current Monthly Debt Obligation Goal	Current Monthly Debt Obligation Goal		<input type="checkbox"/>		
Total Debt Goal	Total Debt Goal		<input type="checkbox"/>		
Case Financial Goals Date Created	Case Financial Goals Date Created		<input type="checkbox"/>		
Total Assets Goal	Total Assets Goal		<input type="checkbox"/>		
Net Worth Goal	Net Worth Goal		<input type="checkbox"/>		

Remember that fields can be grouped together and filtered to better narrow your search.

Display Totals/Sub Totals
 Save this Report

<< Back
Show Report
Export To Excel

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.

Custom Reports

Title:

Portrait Landscape

Column	Label	Sort	Group	Filter	Tabulate
Last Name	Last Name	▼	<input type="checkbox"/>	<input type="checkbox"/>	n/a
First Name	First Name	▼	<input type="checkbox"/>	<input type="checkbox"/>	n/a
Date Client Created	Date Client Created	▼	<input type="checkbox"/>	<input type="checkbox"/>	n/a
Service Type	Service Type	▼	<input checked="" type="checkbox"/>	<input type="checkbox"/>	n/a
Counselor	Counselor	▼	<input checked="" type="checkbox"/>	<input type="checkbox"/>	n/a
Credit Score Snapshot	Credit Score Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Savings Snapshot	Savings Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Gross Monthly Income Snapshot	Gross Monthly Income Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Net Monthly Income Snapshot	Net Monthly Income Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Current Monthly Debt Obligation Snapshot	Current Monthly Debt Obligation Sn	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Total Debt Snapshot	Total Debt Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Total Assets Snapshot	Total Assets Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼
Net Worth Snapshot	Net Worth Snapshot	▼	<input type="checkbox"/>	<input type="checkbox"/>	▼

Display Totals/Sub Totals Save this Report

Enter Short Description of This Report (Max 500 Chars)

Template to show the status of all clients that counselors have saved Financial Progress Snapshots for.

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.

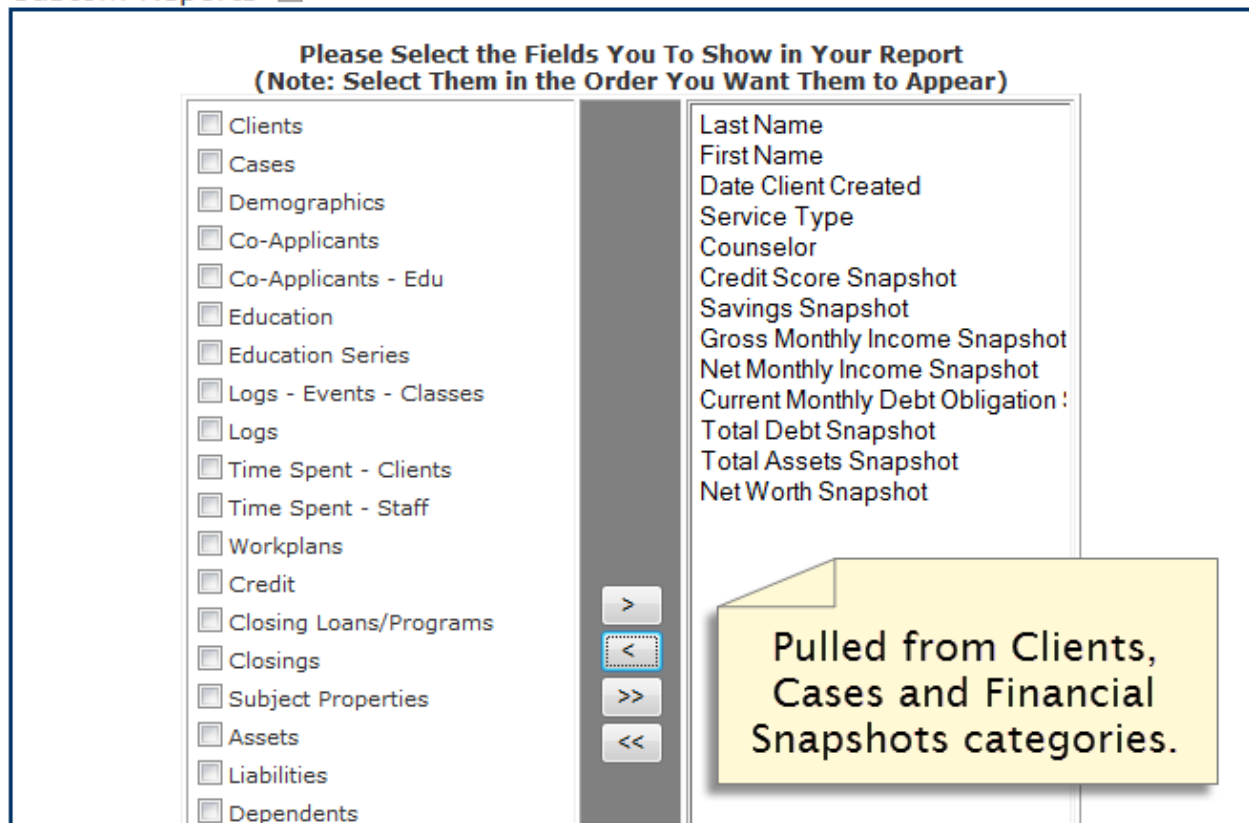
Custom Reports



An Example of a Report for you to use:

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

Custom Reports



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

Custom Reports

Title:

Portrait Landscape

Column	Label	Sort	Group	Filter	Tabulate
Last Name	<input type="text" value="Last Name"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a
First Name	<input type="text" value="First Name"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a
Date Client Created	<input type="text" value="Date Client Created"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a
Service Type	<input type="text" value="Service Type"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	n/a
Counselor	<input type="text" value="Counselor"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	n/a
Credit Score Snapshot	<input type="text" value="Credit Score Snapshot"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>
Savings Snapshot	<input type="text" value="Savings Snapshot"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>
Gross Monthly Income Snapshot	<input type="text" value="Gross Monthly Income Snapshot"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>
Net Monthly Income Snapshot	<input type="text" value="Net Monthly Income Snapshot"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>
Current Monthly Debt Obligation Snapshot	<input type="text" value="Current Monthly Debt Obligation Sn"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>
Total Debt Snapshot	<input type="text" value="Total Debt Snapshot"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>
Total Assets Snapshot	<input type="text" value="Total Assets Snapshot"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>
Net Worth Snapshot	<input type="text" value="Net Worth Snapshot"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>

Display Totals/Sub Totals Save this Report

Enter Short Description of This Report (Max 500 Chars)

Template to show the status of all clients that counselors have saved Financial Progress Snapshots for.

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** San Diego, CA 92108

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:

The screenshot shows an Excel spreadsheet with the following data:

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