

# CounselorMax User Guide



## CounselorMax<sup>®</sup> Client Management and Tracking Application

# USER GUIDE

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# CounselorMax User Guide

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## Chapter 1 – About CounselorMax

### 1.1 What is CounselorMax?

CounselorMax<sup>®</sup> (CounselorMax) is first and foremost a client management system (CMS). It allows counselors and agency administrators to manage a client's various requests for service as a complete end-to-end client lifecycle assistance process. If you are a HUD funded housing counseling agency, you should know that CounselorMax is designed to meet all HUD housing counseling requirements.

In CounselorMax, a **client** is the person you are working with until you conclude your work with that person. A client profile can be created under the **Intake** tab, **Contact** sub-tab (see Chapter 3 for clarification on tabs and sub-tabs).

A **case** represents the specific work – e.g., rehab, foreclosure prevention, first time home buyer – relating to the client. A counselor opens a case under **Case Data** sub-tab after creating the client profile via the Intake tab. At this point, a counselor can perform all the education, counseling and loan activities associated with the case. Note that each client can have multiple cases associated with them over the years with an agency, *but cannot have more than one case open at any one time.*

The advantage of CounselorMax is the use of both its tools and resources to manage the client's case on a *daily basis* and its full-service counseling support tool to help your client. Ideally, CounselorMax should not be used at the end of the reporting period to enter data into the system to meet monthly or quarterly reporting requirements. Daily use of CounselorMax helps you organize your work and ensures better data integrity when reporting occurs.

### 1.2 Why use CounselorMax as a client management system?

CounselorMax is a very good system of choice because it's an easy-to-use, web-based application which allows for a simple intake process. In addition, you can schedule and track educational classes, create outreach campaigns that can be tailored to fit a specific need and easily create standard and custom reports.

Working with this application makes the counselor's job much easier because CounselorMax can be accessed from virtually any location by simply logging on to the Internet.

All of an agency's client data is in one place with contact information and service history accessible to all of the agency's staff. Since the system is web based, it allows for easy resolution of technical and administrative issues.

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Your life as a counselor is made easier through the following features:

**Conduct intake electronically.** Electronic intake is much easier than a manual process because you can enter prospect data and, within seconds, the database automatically initiates new 'active' client files. This allows for fast assignments or re-assignments and speeds up the overall intake process.

**Schedule and track educational classes easily.** You can enroll and manage attendance; view classes and seating availability; and send follow-up correspondence. Once the campaign or class has been attended or completed by your client, you can generate a certificate of completion through CounselorMax® which may be a requirement to receive down payment or other monetary assistance.

**Create outreach campaigns.** CounselorMax gives agencies the opportunity to leverage a variety of outreach features, including functions to create client flyers and client letters in English and Spanish. This feature also allows you to assign a group of clients to a specific class, generate mass mailings and record client responses.

**Create accurate standard and customized reports.** Agencies can generate standard reports (including the HUD 9902) and design custom reports through CounselorMax. Agencies can report outcomes to respond to the different reporting requirements of funders. This allows agencies to show results of their specific programs and services which in turn may create funding opportunities. The system also has controls in place to ensure that agencies collect the data needed to easily produce accurate reports.

**Effectiveness:** By automating client intake and financial analysis, CounselorMax use will standardize and improve the quality of housing counseling provided by HCAs. This makes it easier for another counselor to handle your client if you are out of office.

**Record Keeping Efficiency:** Record keeping will be greatly simplified for counseling agencies by the automated intake and file creation possible through CounselorMax use. *You create and update client files through CounselorMax as counseling occurs.*

**Simplified Reporting:** CounselorMax electronic files automate reporting, minimizing the time burden associated with data collection and submission, and improving the quality of the data submitted. Electronic files make possible the submission of required data fields at the touch of a button. This is important for you and your fellow counselors to continue receiving grants and funding.

**Impact of Counseling:** Client level data also allows funders to track and document the long-term impact of counseling on households. This data will help justify program appropriations.

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CounselorMax supports the following specific National Industry Standards for minimum Housing Counseling Activities:

1. Perform intake.
2. Conduct accurate needs assessment.
3. Document household income and expenses.
4. Determine household debt level.
5. Review credit reports.
6. Identify credit challenges.
7. Determine and document household savings.
8. Develop a household budget.
9. Analyze budget and recommend modification.
10. Conduct various calculations including affordability based on income & debt.
11. Develop a written action plan.
12. Provide client follow up.
13. Make referrals for additional services needed by client.
14. Provide client information on delinquency/foreclosure services or referral information for these services.

## **1.3 What are examples of how CounselorMax can be effective with my clients?**

- Easy set up of new active client files.
- Fully customizable budget worksheets, educational tools, and outreach materials.
- The ability to create, enroll, track and manage all education activities at the agency and client level.
- Fully interactive calendar for meetings, calls, events, outreach and other activities.
- Multi-lingual (English & Spanish) outreach materials and mailings that can be created and/or customized.
- The ability to create standard (including HUD 9902, NFMC and NeighborWorks America specific) and custom reports using accurate data.
- Guidance & Planning System (“GPS”) – This supplemental tool acts as an overlay on CounselorMax that provide counselors with additional details and functionalities.

These easy work steps ensure organizations are compliant with the industry standards.

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## 1.4 Highlights of the Guide

- Counselors can use the guide both as a “how to” guide and as a reference guide to answer those questions that come up in the course of performing a function.
- The content is set up to walk you through the Classic CounselorMax interface when working with your client. Chapter 12 describes the Guidance & Planning System module that you may be required to use for your counseling activities.
- The chapters represent common process flow. However, keep in mind, that there is no required order and you can jump around from tab to tab, as your workload requires. The features are as flexible as you need them to be and how and when you use the features is ultimately up to you.
- Each chapter describes the CounselorMax functions in business context, explains the whys and the how to guide you in meeting your counseling work needs.

**NOTE:** CounselorMax has a detailed “click-by-click” On-line Help also.

## 1.5 What do I need to run CounselorMax?

- As long as you have Internet Explorer (“IE”) 6 or greater, you can use CounselorMax
- CounselorMax security settings will only work on IE; thus, other browsers cannot support the application.
- CounselorMax is not supported on Apple Operating Systems (i.e. Mac)

## 1.6 Security

### Data

All client and financial data is securely encrypted. The data is stored at a central secured location and all sensitive information entered is encrypted. CounselorMax has a range of setup options to meet the needs of your agency. This guide assumes that someone from your agency has attended the administrative training to do the setup and that all required licenses have been obtained.

### Login

Although CounselorMax can store your login password, NeighborWorks strongly recommends that you do not use this feature in order to reduce the potential for fraud by unauthorized users. Although others may know your Login, only you know your password. Please remember to secure your password. If you believe your password has been compromised; change your password immediately. The change password function is located on the login screen.

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## Licenses

CounselorMax is designed to track progress of each counselor doing their work through the control of one license for each counselor. CounselorMax is not designed to have multiple counselors use a single license. If licenses and Login have not been obtained, then you will need to work with your CounselorMax administrator and have them contact NeighborWorks Help Desk at 866-720-1807 before you can begin using the system.

**NOTE:** A CounselorMax License comes with 5 user seats. 1 license equals 5 users. Additional users need to obtain additional licenses.

## Server

The CounselorMax database is hosted in Virginia by Dynaxys Application ([www.dynaxys.com](http://www.dynaxys.com)). This is a professional Web hosting site with 30 years experience with numerous government organizations, private and non-profit clients. They host other applications for NeighborWorks and many other clients including HUD, FDIC and PriceWaterhouseCoopers, to name a few.

The Dynaxys technicians and DBAs are responsible for maintaining and monitoring the server and the application. In addition, NeighborWorks works with software vendor for ongoing development of the application. They have sophisticated monitoring systems in place to ensure uptime and to preempt problems. NeighborWorks routinely receives performance monitoring reports and emails from them if any unexpected spike in usage or performance is detected.

Dynaxys uses industry leading firewalls in a redundant/failover configuration. The firewalls are configured using default deny and least privilege policies.

## 1.7 What if I need additional Help?

The following are the resources available to counselors:

- Resources tab in CounselorMax
- On-line help on the main page of CounselorMax



[Help](#)

- Support Desk
  - You can contact the Support Desk during business hours between 8:00am and 5:00pm EST Monday through Friday. Please provide your name, number, organization, and issue for assistance.
  - The Support Desk email is [CounselorMaxSupport@nw.org](mailto:CounselorMaxSupport@nw.org) and phone number 866-720-1807 Option 1.
  - Support Requests response time is very quick and does not extend beyond 24 hours. Note that the office is closed on all Federal Holidays.

For additional information or guidance, click on the link displayed below:

[www.counselormax.com](http://www.counselormax.com)



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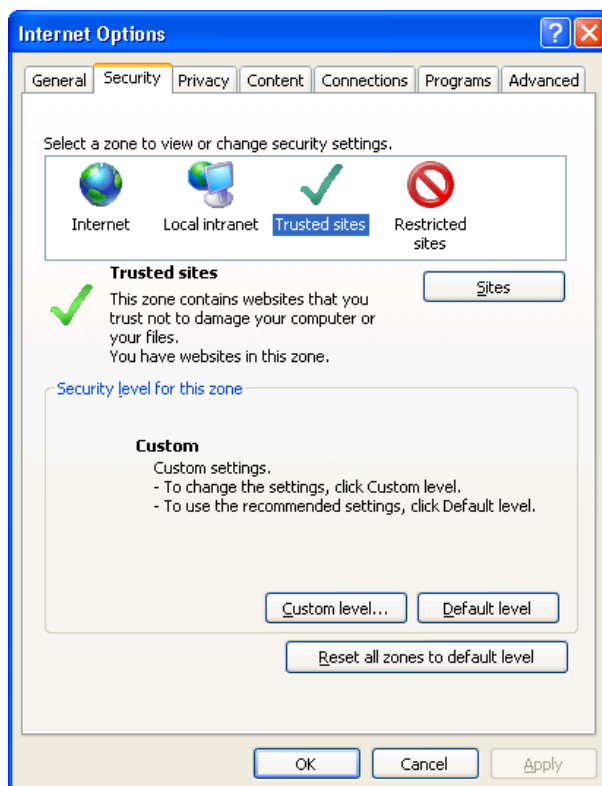
## Chapter 2 – Getting Started with CounselorMax®

### 2.1 Brower Setting for CounselorMax

As noted in Chapter 1, you need IE 6 or greater to use CounselorMax. Below is the browser settings instruction for the most commonly used IE 8.

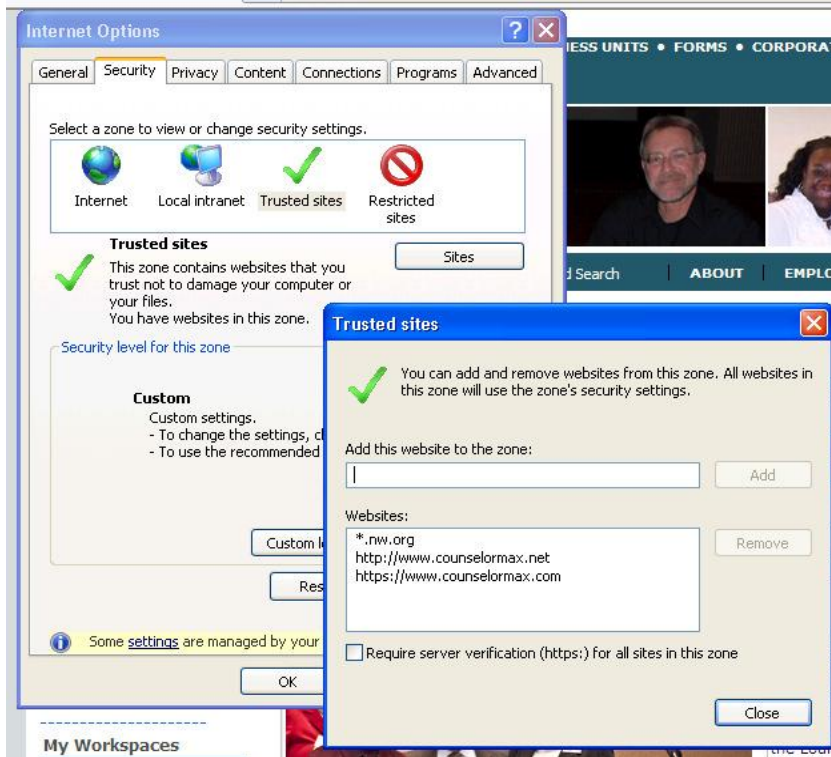
#### Internet Explorer 8 Browser Settings = Important

- #1 Compatibility View  
Tools> Compatibility View Settings> Add <http://www.counselormax.net>> OK
- #2 On the browser Menu > Tools > Internet Options 2 steps: Security Tab & Privacy Tab
- Security Tab
  - Select the SECURITY Tab
  - Click “Trusted Sites Logo
  - Click the “Sites Button”
  - Add CounselorMax.net and
  - UN-check box called ‘Require server verification’



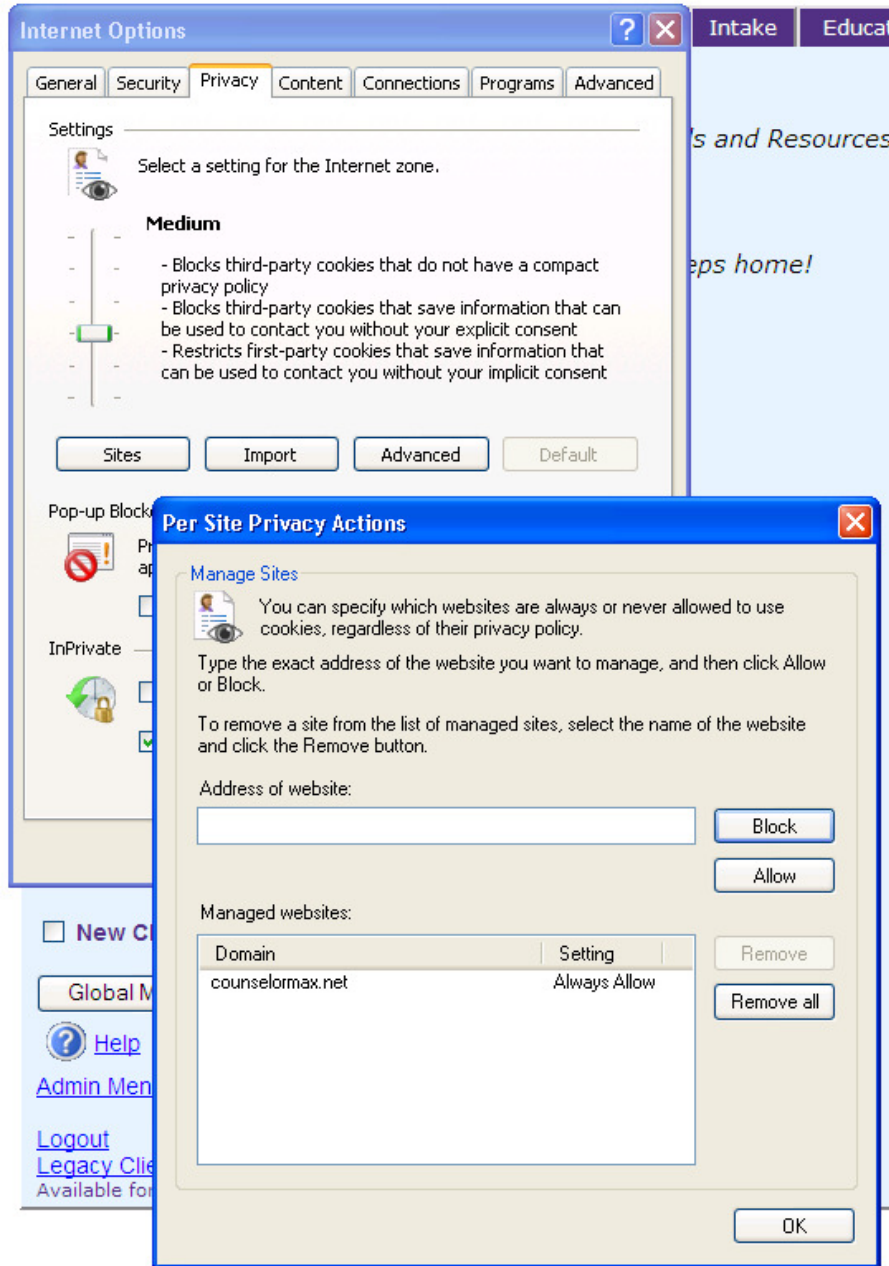
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- Privacy Tab
  - **On the browser Menu > Tools > Internet Options**
  - Select the Privacy Tab
  - Click on Sites button



- Add CounselorMax.net
- Select Allow
- OK

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## 2.2 Logging into CounselorMax

### Login

Once you have your Login and temporary password information, type in the following URL: <https://www.counselormax.net> on your browser to get access to the CounselorMax login page.

**Tip:** Since this is a browser-based application, any supported browser listed in chapter 1 can be used from any location.



**NOTE:** Although CounselorMax can store your login password, NeighborWorks strongly recommends that you do not use this feature in order to reduce the potential for fraud by unauthorized users.

If you forget your login or password, you can click on the **Lost Password** link on the bottom of the screen above and you will be prompted with the following page:

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## Logging out of CounselorMax

Before you log out of CounselorMax, complete and save your work. Note that **after 30 minutes of inactivity**, CounselorMax will log you out automatically. You must return to the login screen and log back in.

## **2.3 Navigating through CounselorMax**

This section covers some general overview of the CounselorMax application. Chapters 4 through 13 will cover each of the main work service paths in CounselorMax.

### Conventions used

Screen shots are an important part of the guide and are included as you walk through the steps described in the guide. These will help you to not only visualize where you are in the system but also focus on the particular screen that supports the functions being described. Sometimes the entire screen is displayed as shown here or just those parts of the screen that the narrative is describing.

CounselorMax has three major navigation areas on the home page:

1. Work Tabs – across the top of the screen on CounselorMax shown below, the major work service paths are: Client, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting.

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2. Left Side Navigation – along the left side displays all the clients for the agency. Clients can be filtered by status of their cases, etc.
3. Main Work Space – used to for data entering, processing, searching and manipulation. Remember to always save each page as you go along.

The screenshot shows the CounselorMax web application interface. At the top, there is a navigation bar with tabs: Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. Below this is the 'Global Mode' header. The main content area is divided into a left sidebar and a main work space. The left sidebar contains a 'Quick Client Search' list with names like 'Armstrong23, Stan', 'ARMSTRONG1, STAN', etc., and a 'Identify Clients' section with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended'. There is also a 'New Client' checkbox and a 'Global Mode' button. The main work space features a form for 'Add New Prospect' with fields for First Name, Last Name, Middle Name, Name Suffix, Street Address, City, State, Zip Code, Home Phone, Work Phone, Other Phone, Preferred Language, Sponsor, Purpose, and Email. There is also a 'Do Not Contact' checkbox and a 'Save' button. Annotations with red boxes and arrows point to the 'Global Mode' header, the left sidebar, and the main work space form.

**Work Tabs** represent the main work areas

**Left Side Navigation** provides the Quick Client Search and on-line Help

**Main Work Space** to enter & retrieve data, both in Client & Global Mode

There are two basic modes in CounselorMax, **Global Mode** and **Client Mode**. Additional functions are available under **Admin Menu** for users with administrative access privileges and **Legacy Clients** for organizations entering existing clients in CounselorMax from different systems. Below are the general descriptions of the three modes:

**Global Mode** - The Global Mode button, on the bottom left corner of home page above, allows you to move between client mode and global mode. On the Counseling tab, you can assign one or more clients to a counselor using two criteria: service path and/or assigned counselors. In Global Mode, you are performing tasks or functions on an agency level. The Global Mode button allows you to switch between client mode and global mode.

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**Client Mode** - In Client Mode, you can perform all client level functions including scheduling meetings, follow-ups, classes, counseling sessions, budgeting, loan level details and case resolution.

**NOTE:** In **Client Mode** only, the **Guided Counseling** checkbox will appear in the Menu Bar on the bottom left side of the screen. This **Guidance & Planning System (“GPS”)** will be a linear interface for entering and updating case data for the selected client. When you click on the GPS checkbox, CounselorMax will take you to the Work Plan generated previously for the client being counseled (see **Chapter 12** for more details).

The screenshot displays the CounselorMax web application interface. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main content area shows client information for 'Joe Homebuyer' (123 Main St., Washington, DC 20005, (202) 555-2266 (hm)), contact details (Joe@nw.org), and case information (Home Purchase, In-Process, AMI % = 115). A 'Reminders' table is visible, currently empty. On the left side, there is a 'Quick Client Search' box and a 'Co-Applicant Search' section. Below these, there is an 'Identify Clients' section with radio buttons for All, In-Process, Closed, Prospect, and Suspended. The 'Guided Counseling (GPS)' checkbox is highlighted with a red box and an arrow pointing to it. Other options include 'New Client', 'Global Mode', 'Help', 'Admin Menu', 'Logout', and 'Legacy Clients'. The bottom left corner indicates 'Available for 196 Days'.

**Admin Menu** - The administration menu, shown as **Admin Menu** link on the bottom left corner of home page, is strictly utilized by CounselorMax users with Admin privileges for setting up and customizing CounselorMax with agency specific information for the agency’s entire office. See Chapter 13 for details on Admin Menu functionalities.

**Legacy Clients** link shown on the bottom left corner of the screen below Logout link is visible only if this feature is available to your organization. CounselorMax does permit backdating client creation, case creation and HUD9902 resolution dates which may be required if the counselors want to enter the historical data from a different system in

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CounselorMax. Below is the screen that pops up when the counselor clicks the Legacy Clients link.



## Legacy Clients and Cases

NOTE: This is intended for legacy data - it will only be available for the next 196 Days.

[Legacy Clients](#)

[Legacy Cases](#)

This screen shows two links: **Legacy Clients** and **Legacy Cases**. Legacy client information is required to be captured first using the Legacy Clients screen before Legacy Case can be completed. After the initial entry of historical client and client case information into CounselorMax, counselors can use CounselorMax for any on-going events and activities for these clients.

## Overview of Identify Clients

See below the **Identify Clients** section that appears on the left side of the main screen in CounselorMax:

The screenshot shows the CounselorMax web application interface. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header area displays "Student S51" with a globe icon. Below this, there is a "Reminders" table with columns for Subject, Action, Details, Days, Edit, Delete, and Done. The table contains three rows of reminders. On the left side, there is a sidebar with several sections: "Quick Client Search" with a list of names, "Co-Applicant Search", and "Identify Clients" which is highlighted with a red box. The "Identify Clients" section has radio buttons for "All", "In-Process", "Closed", "Prospect", and "Suspended". Below this are links for "New Client", "Global Mode", "Help", "Admin Menu", "Logout", and "Legacy Clients". At the bottom of the sidebar, it says "Available for 196 Days." The main content area also includes a "Select Another Calendar" dropdown, a date selector for "June 2010", and a calendar grid showing dates from 1 to 30.

These sections always appear on the left side regardless of the tab you are in.



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A client can be in different stages in counseling and are denoted by 5 statuses used in CounselorMax. Each checkbox allows you to filter the clients:

1. **All** – all clients
2. **In process** – a client is being actively managed in the CounselorMax system
3. **Closed** – this is no longer an active case. A new case can be opened for a client regardless of the history previous (closed) cases
4. **Prospect** - anyone that does not have an Intake in the system can be a prospect which allows for Outreach and Education services
5. **Suspended** – not closed but suspended for potential future re-activation. Should you inadvertently open a 2<sup>nd</sup> case without resolving (closing) the current case, you will be prompted to suspend the current case so you may proceed with the new, second case.

**NOTE:** There can be no more than one “in process” case per client.

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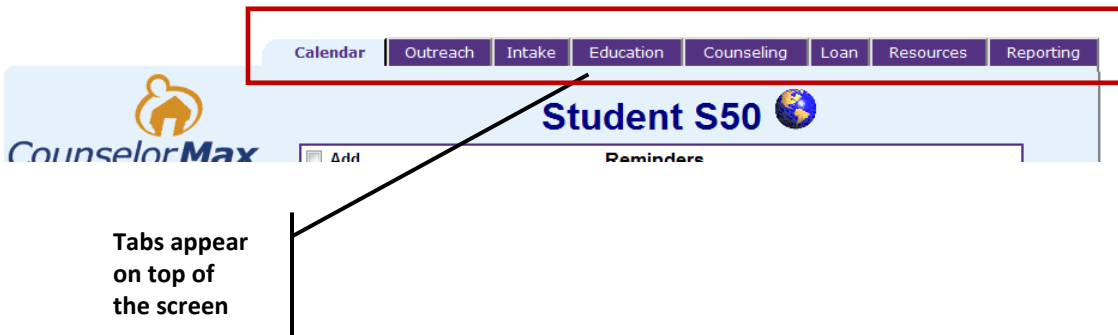
## Chapter 3 – Overview of Major Functions

### 3.1 Modes, Tabs & Functions

As discussed in Chapter 2, CounselorMax has two primary modes, **Global Mode** and **Client Mode**, used for its various functions and counseling activities. In addition, the **Admin Menu** is available only for person(s) designated as a CounselorMax administrator.

**Note:** Both **Global** and **Client** mode functionality can be accessed throughout all tabs within the system with some exceptions noted below. The tabs within CounselorMax are **Calendar, Outreach, Intake, Education, Counseling, Loan, Resources and Reporting.**

You can jump around from tab to tab.



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## 3.2 An Overview of the Work Tabs (main work service paths)

### Calendar Tab (Details in Chapter 4)

The **Calendar** tab allows the user to track all scheduling needs. You can follow up on meetings, classes, phone calls, reminders.

In the **Global Mode** you can set calendar events for yourself and other office staff.

Subject	Action	Details	Days	Edit	Delete	Done
Appt	Appt Letter	appointment to review credit: office on 4/16/2010 9:00:00 AM (Stan Armstrong51B)	-66	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	Phone	Intake - review privacy policy / sign authorization (Marsha Jackson51B)	-62	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	Phone	Intake - collect subject property info (Marsha Jackson51B)	-62	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	Phone	Budget Creation - monthly update (Marsha Jackson51B)	-62	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- The **reminder** function allows you to set up various tasks and display a certain number of days in which to accomplish those tasks. You also have the capability to edit or delete reminders.
- The **event** function allows you to set up various types of “Events” to the calendar for a specific date and time.
- The **view staff** function allows you to view staff member schedules in order to schedule an event during an open time for all members.

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In the **Client Mode**, you can perform the following functions:

The screenshot displays the CounselorMax interface with a navigation bar at the top containing: Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main content area is divided into several sections:

- Client Information:** Joe Homebuyer, 123 Main St., Washington, DC 20005, (202) 555-2266 (hm). Contact: Joe@nw.org, English. Home Purchase, In-Process (AMI % = 115). Counselor: n/a.
- Client ID:** Client #: 13847, Case #: 10265(6/19/2010).
- HUD NUMBER:** Requires an 'Open Case' and 'Appointment' in Calendar That Has Already Passed.
- Quick Client Search:** A search box with a dropdown menu showing results: Foreclosure, Frank; Homebuyer, Jane; Homebuyer, Joe (highlighted).
- Co-Applicant Search:** A link for searching co-applicants.
- Identify Clients:** Radio buttons for All, In-Process, Closed, Prospect, and Suspended.
- Reminders:** A section with a checked 'Reminders' checkbox and an 'Add' button. Below it is a table with columns: Subject, Action, Details, Days, Edit, Delete, Done. The table currently shows 'No Reminders Exist'.
- Client Schedule:** Client Schedule:  (show)
- Client History:** Client History:  (show)
- Client Log:** Client Log:  (show)

- **Client Schedule** allows you to make changes to client schedules
- **Client History** allows you to track the classes a client is scheduled to attend.
- **Client log** allows you to keep track of conversations with clients during the normal process of housing counseling. Using the log is recommended because it allows you to track actual time spent with the client and is done after events take place rather than the calendar which would require constant updating if used as the primary means of client activity tracking.

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## Outreach Tab (Details in Chapter 5)

In **Global Mode**, the **Outreach** tab allows you to create a new prospect (client), distribute outreach materials, create mailing labels and distribute outreach materials to potential clients.

The screen below shows the Add New Prospect section of the Outreach tab where the counselor may create a new client by completing the required fields.

The screenshot shows the CounselorMax Global Mode interface. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header includes the CounselorMax logo and the text 'Global Mode' with a globe icon. Below the header, there are several options: 'Distribute Outreach Material:  (show)', 'Mailing Labels (show)  (show)'. The 'Add New Prospect' section is highlighted with a red border and contains the following fields:

- \* = Required**
- First Name \* (text input)
- Last Name \* (text input)
- Middle Name (text input)
- Name Suffix (dropdown menu)
- Street Address \* (text input)
- City \* (text input)
- State \* (dropdown menu, currently showing "-- Choose One --")
- Zip Code \* (text input)
- Home Phone ( ) ( ) - ( ) ( ) (text input)
- Work Phone ( ) ( ) - ( ) ( ) (text input)
- Other Phone ( ) ( ) - ( ) ( ) (text input)
- Preferred Language (dropdown menu, currently showing "English")
- Sponsor (dropdown menu, currently showing "None")
- E-Mail (text input)
- Purpose (dropdown menu, currently showing "None")
- Do Not Contact
- Save (button)

On the left side of the form, there is a 'Quick Client Search' box containing the text 'Foreclosure, Frank' and 'Homebuyer, Joe'. Below this is a 'Co-Applicant Search' link and an 'Identify Clients' section with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended'. At the bottom left, there is a 'New Client' checkbox and a 'Global Mode' button.

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In **Client Mode**, the **Outreach** tab allows you to view the client information created under the **Global Mode**. This screen allows you to edit and save client information or delete the client by clicking on the **Save Changes** or **Delete** button at the bottom of the screen depicted below.

The screenshot shows the CounselorMax interface with the 'Outreach' tab selected. The client name is 'Joe Homebuyer'. The 'Distribute Outreach Material' checkbox is unchecked. The 'Contact Information' section is expanded, showing a form with the following fields:

- First Name \***: Joe
- Last Name \***: Homebuyer
- Middle Name**: (empty)
- Name Suffix**: (dropdown menu)
- Street Address \***: 123 Main St
- City \***: Washington
- State \***: DC
- Zip Code \***: 20005
- Home Phone**: (202) 555 - 2266
- Work Phone**: (202) 212 - 5555
- Other Phone**: ( ) - ( )
- Preferred Language**: English
- Sponsor**: Citibank
- E-Mail**: Joe@nw.org
- Purpose**: None
- Do Not Contact**

Buttons for 'Save Changes' and 'Delete' are located at the bottom of the form. On the left side, there are search and identification options, including 'Quick Client Search', 'Co-Applicant Search', and 'Identify Clients' with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended'. There are also checkboxes for 'Guided Counseling (GPS)', 'New Client', and 'Global Mode'.

This tab also shows outreach materials have been distributed, displays client outreach efforts and tracks the history of custom letters that have been created and sent. For example, the Distribute Outreach Material section, shown below, stores multiple marketing materials so you can distribute them to potential clients.

The screenshot shows the 'Distribute Outreach Material' section of the CounselorMax interface. A table lists the distributed materials:

Sponsor	Program Title	Purpose	Method	Start	Distribute
Bank of America	Foreclosure Workshop <a href="#">English</a>	Homebuyer Education	Flyer	11/17/2008 12:02:00 PM	<input type="checkbox"/>
Banco Popular	Home Buyer Education Fast Track 8 Hours <a href="#">English</a>	Post Purchase	Flyer	1/20/2010 4:02:00 PM	<input type="checkbox"/>
WGSB	Saving for Homeownership <a href="#">English</a>	IDA	Flyer	1/27/2010 10:06:00 AM	<input type="checkbox"/>
County Funding	Foreclosure Prevention Event	Foreclosure prevention	Flyer	1/27/2010 10:06:00 AM	No Flyer!

Below the table, there are checkboxes for 'Display Client's Outreach Exposure' and 'Custom Letter History', and a 'Contact Information' link.

# CounselorMax User Guide

The **Display Client's Outreach Exposure** section shows what outreach programs the client has been exposed to while the Custom Letter History section displays any custom letters that the client has received from the agency. See Chapter 5 for detailed discussions on these functionalities under the **Outreach** tab.

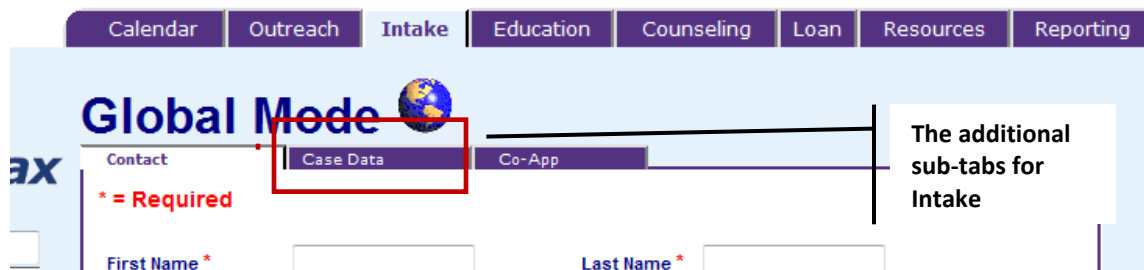
**NOTE:** The marketing materials can be in multiple languages to more effectively market to your client (see the Distribute Outreach Material screen above under each Program Title). CounselorMax has English and Spanish as default languages. *However additional languages can be added in the Admin Menu to reflect the demographics of the populations your agency serves. CounselorMax cannot translate languages.*

## **Intake Tab (Details in Chapter 6)**

As introduced in Chapter 1, the Intake tab is used to on-board a client into the agency's programs and services. This approach allows for one standard that is used for all clients.

The Intake tab contains **sub-tabs**. As the term implies, these sub-tabs, **Contact, Case Data and Co-App** are different screens contained within the **Intake** Work tab.

The **Intake** tab defaults to the **Global Mode** screen but all the functionalities reside in **Client Mode**. The screen contains the Contact sub-tab identical to the Contact screen in the Outreach tab. However, the Intake screen shows two additional tabs: Case Data and Co-Apps.



Counselors can add new clients by completing the Contact tab (and Co-App tab if there is a co-applicant). In the same session, the counselors can start a case for the client by completing the Case Data tab.

# CounselorMax User Guide

In the **Client Mode**, the “Intake” tab allows counselors to create a case for the existing client under Case Data tab.

The screenshot shows the CounselorMax Intake form for a client named Joe Homebuyer. The interface includes a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header displays the client's name and a folder icon. Below the header, there are two tabs: Contact and Case Data. The Contact tab is active, showing a form with the following fields: First Name (Joe), Last Name (Homebuyer), Middle Name, Name Suffix, Street Address (123 Main St), City (Washington), State (DC), Zip Code (20005), Home Phone (202) 555-2266, Work Phone (202) 212-5555, Other Phone, Preferred Language (English), Sponsor (Citibank), Email (Joe@nw.org), Purpose (None), and a checkbox for Do Not Contact. There are Save Changes and Delete buttons at the bottom of the form. On the left side, there is a Quick Client Search box with a list of clients (Foreclosure, Frank; Homebuyer, Joe) and a Co-Applicant Search section. Below that is an Identify Clients section with radio buttons for All, In-Process, Closed, Prospect, and Suspended, and checkboxes for Guided Counseling (GPS), New Client, and Global Mode.

The Case Data tab contains Service Required, Demographics and Financial Info sections with required data to open the case.

The screenshot shows the CounselorMax Intake form for a client named Joe Homebuyer, with the Case Data tab active. The form is divided into several sections: Service Required, Demographics, and Financial Info. The Service Required section includes fields for Service Type (Home Purchase), HUD Activity (checked), Case Term (Long Term (180+ days)), Total Co-Apps (0), and Referral Source (Church). The Demographics section includes fields for Race (Black/African American & Hispanic), Number in Household (1), Gender (Male), Head of Household? (checked), Ethnicity, Age, Birthdate (1/1/1980), Disabled?, Disabled Dependent?, Education, and Marital status. The Financial Info section includes fields for Home Purchase, HUD Activity, Case Term, Total Co-Apps, and Referral Source. There are Save Changes and Delete buttons at the bottom of the form. On the left side, there is a Quick Client Search box with a list of clients (Foreclosure, Frank; Homebuyer, Joe) and a Co-Applicant Search section. Below that is an Identify Clients section with radio buttons for All, In-Process, Closed, Prospect, and Suspended, and checkboxes for Guided Counseling (GPS), New Client, and Global Mode. There are also links for Help, Admin Menu, Logout, and Legacy Clients.

Refer to Chapter 6 for a more in-depth discussion on this topic.



# CounselorMax User Guide

## Education Tab (Details in Chapter 7)

The education tab shows the classes that have been created in the system by the administrator. It lists the classes by title, day, date, location, number of seats available and the language it will be delivered in.

In **Global Mode**, the counselors can view all the available classes and series of classes.

**Global Mode**

Classes:  (show)

Classes: \_\_\_\_\_ Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_ Search by Date

Filter Based on Service Types

Title	Day	Date	Location	Seats	Lang	Roster	Notify	Enroll	Attn
<b>HBE 23-04/01/2010 (entire series)</b>									
HBE	Fri	6/18/2010 (9:00AM-5:00PM)	PHOENIX19	<a href="#">Seats</a>	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Financial Literacy 21-Financial Literacy May (entire series)</b>									
	Sat	6/5/2010 (12:00AM-1:00AM)	Board Room	<a href="#">Seats</a>	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Financial Literacy20-Financial Fitness May (entire series)</b>									
Budgeting	Thur	6/10/2010 (6:00PM-7:00PM)	ATLC Building	<a href="#">Seats</a>	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>HBE19-HBE19 (entire series)</b>									
CREDIT	Thur	6/10/2010 (6:00PM-8:00PM)	HomeOwnership Center	<a href="#">Seats</a>	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LOANS	Fri	6/25/2010 (6:00PM-8:00PM)	HomeOwnership Center	<a href="#">Seats</a>	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Fiancial Literacy10-june-july2010 (entire series)</b>									
checking 101	Tue	6/8/2010 (8:00AM-1:00PM)	Gleneida Housing Complex	<a href="#">Seats</a>	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Financial Literacy 11-June 2010 (entire series)</b>									
Checking 101	Mon	6/7/2010 (8:00AM-1:00PM)	Gleneida Housing Complex	<a href="#">Seats</a>	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Global Mode

# CounselorMax User Guide

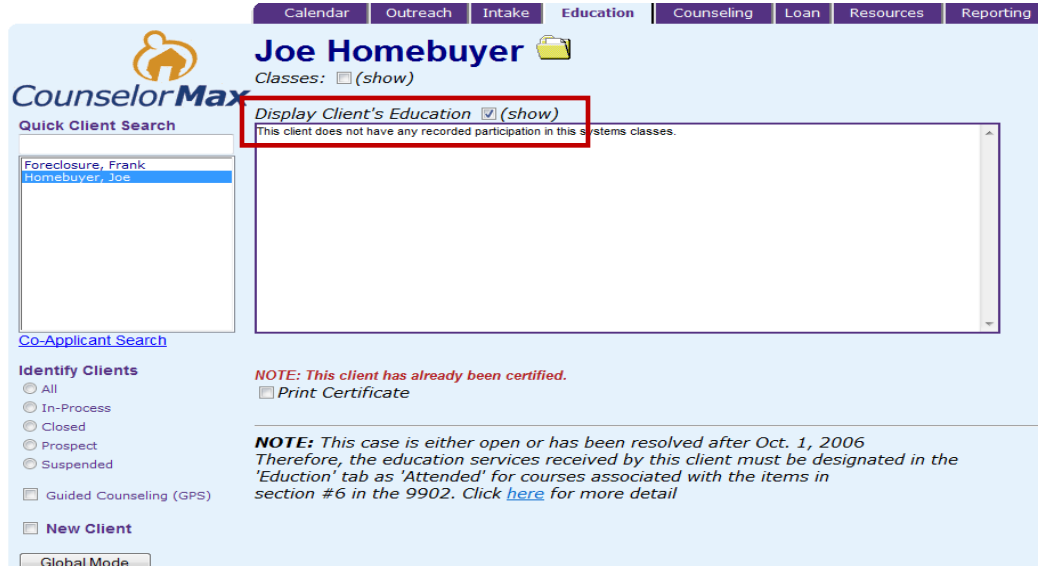
The counselors can notify clients to enroll in an education session and track the enrolled and attended statuses. On the screen above, click on **Filter Based on Service Types** checkbox to view education sessions on a specific service type.

The screenshot shows the CounselorMax Global Mode interface. At the top, there are navigation tabs: Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header includes the CounselorMax logo and the text "Global Mode". Below the header, there is a "Classes: (show)" dropdown menu. A red box highlights the filter options, which include radio buttons for "All", "Home", "Education", "Mortgage", "Rental", "Seeking", "Homeowner", "Short", "Pre", "Roof", "Rehab", and "sen". Below these are checkboxes for "Classes Purchase", "Default/Early", "Counseling Shelter or Home", "Services", "Sale", "Purchase Repair", and "sen".

Class Name	Date	Day	Time	Location	Seats	Language	Filter	Enroll	Attend
<b>HBE 23-04/01/2010 (entire series)</b>									
HBE	Fri	6/18/2010	(9:00AM-5:00PM)	PHOENIX19	Seats	English	Z		
<b>Financial Literacy 21-Financial Literacy May (entire series)</b>									
	Sat	6/5/2010	(12:00AM-1:00AM)	Board Room	Seats	English	Z		
<b>Financial Literacy20-Financial Fitness May (entire series)</b>									
Budgeting	Thur	6/10/2010	(6:00PM-7:00PM)	ATLC Building	Seats	English	Z		
<b>HBE19-HBE19 (entire series)</b>									
CREDIT	Thur	6/10/2010	(6:00PM-8:00PM)	HomeOwnership Center	Seats	English	Z		
LOANS	Fri	6/25/2010	(6:00PM-8:00PM)	HomeOwnership Center	Seats	English	Z		
<b>Financial Literacy10-june-july2010 (entire series)</b>									
checking 101	Tue	6/8/2010	(8:00AM-1:00PM)	Gleneida Housing Complex	Seats	English	Z		
<b>Financial Literacy 11-June 2010 (entire series)</b>									
Checking 101	Mon	6/7/2010	(8:00AM-1:00PM)	Gleneida Housing Complex	Seats	English	Z		

# CounselorMax User Guide

In **Client Mode**, the Education tab displays three checkboxes: **Classes**, **Display Client's Education** and **Record & Print Certificates**. The Education tab defaults to Display Client's Education checkbox which allows counselors to view the education history or resolve an issue relating to education for a client.



This checkbox allows the tracking of individuals who have attended specific classes for future reporting purposes. Counselors can also notify, enroll, and mark attendance status on a class or series of classes for a specific client by clicking on the Classes checkbox.



# CounselorMax User Guide

Finally, the counselors can record and print certificates for completion of a class or series under Record & Print Certificates checkbox.

The screenshot shows the CounselorMax interface with the following elements:

- Navigation tabs: Calendar, Outreach, Intake, Education (selected), Counseling, Loan, Resources, Reporting.
- Client name: Joe Homebuyer (with a folder icon).
- Buttons: Classes:  (show), Display Client's Education  (show).
- Search section: Quick Client Search (with a dropdown menu showing "Foreclosure, Frank" and "Homebuyer, Joe" selected), Co-Applicant Search.
- Identify Clients section: Radio buttons for All, In-Process, and Closed.
- Red box highlights:  Print Certificate.
- Note: **NOTE:** This client has already been certified.
- Bottom note: **NOTE:** This case is either open or has been resolved after Oct. 1, 2006. Therefore, the education services received by this client must be designated in the 'Education' tab as 'Attended' for courses associated with the items in section #6 in the 9902. Click [here](#) for more detail.

# CounselorMax User Guide

## Counseling Tab (Details in Chapter 8)

In **Global Mode**, counselors or Admin can assign or reassign counselors for one or more clients.

The screenshot displays the CounselorMax Global Mode interface. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header includes the CounselorMax logo and the text "Global Mode" with a globe icon. Below the header, the main content area is titled "Subset Clients By Selecting One or Both of the Following". This area contains two dropdown menus: "Service Path" (set to "All Service Paths") and "Assigned Counselors" (set to "All Counselors"). Below these is a list of clients: "Foreclosure, Frank Homebuyer, Joe". To the right of this list is a "New Counselor" dropdown menu set to "Select a New Counselor". A button labeled "Assign To Counselor" is positioned below the client list. On the left side of the interface, there is a "Quick Client Search" section with a search box containing the same client names, and a "Co-Applicant Search" section. Below these are "Identify Clients" radio buttons for "All", "In-Process", "Closed", "Prospect", and "Suspended", and a "New Client" checkbox.

Above, you see two filters you can use to select clients to be assigned to a counselor:

- 1) **Service Path** - clients may be assigned to a counselor using the **Service Path** filter on the upper left pull-down selection (defaults to All Service Paths).
- 2) **Assigned Counselor** - individual clients may be reassigned to a new counselor (from the existing counselor assignment) using the Assigned Counselor filter on the upper right pull-down selection (defaults to All Counselors).

With or without the filters described above, counselors can assign one or more clients to another counselor by selecting the client(s) under “**Press the ‘Ctrl’ button to select more than one client**” list and assigning a counselor under the **New Counselors** drop-down list.

**NOTE:** The current version of CounselorMax does not have restricted access for this function so any counselor can make counselor reassignments for other counselors. Also, this version does not have electronic notification function for sending counselors new client assignment information.

# CounselorMax User Guide

In **Client Mode**, counselors can perform the following tasks: prepare client log, case profile, and budget; use tools, do prequalification, and prepare work plans.



The **Counseling** tab is also used to capture client data, profile information, and budget info to pre-qualify clients for specific programs and develop a work plan that will lead to case resolution.

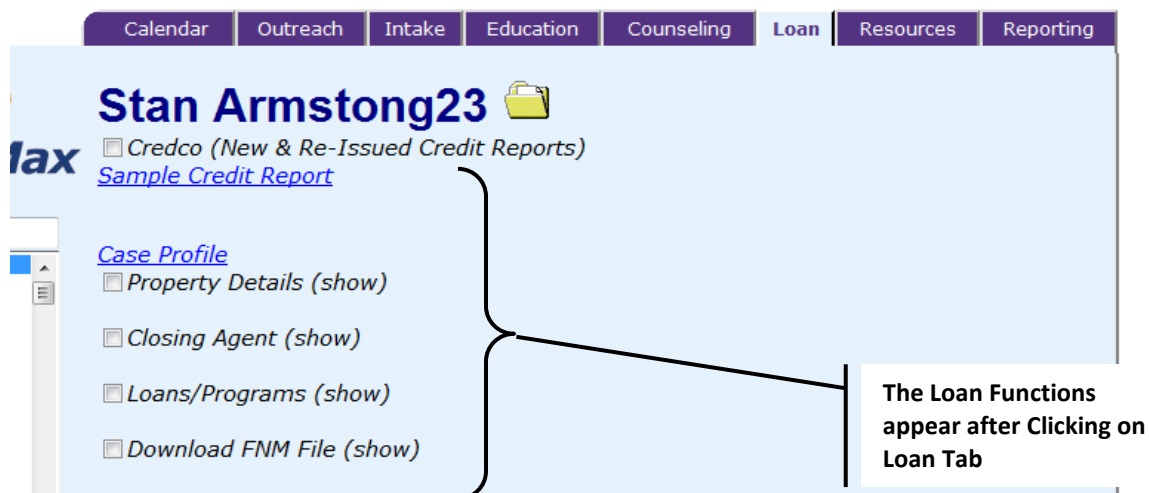
**NOTE:** GPS functions will be covered separately in detail in Chapter 12 (*Guidance & Planning System (GPS) checkbox* ).

# CounselorMax User Guide

## Loan Tab (Details in Chapter 9)

The loan tab captures all pertinent data necessary to successfully close a mortgage loan.

In **Client Mode**, the Loan function will not be available until you create an active case by completing the **Case Data** page under the **Intake** tab or **Reactivates** a closed case for the selected client. Once your client has an active case, you can order and view credit reports, view case profile and closing information, fill out the loan program information and property information and finally download an .FNM file (see Chapter 9 for details on FNM file).



**NOTE:** The Loan tab has no functionality in **Global Mode**.

## Resources Tab (Details in Chapter 10)

A number of resources are available both online and by phone including:

- Frequently asked questions (FAQs)
- User Guide
- Job Aids
- Other resources

These are examples of the resources available. You should visit the Resources tab periodically for updated information.

**NOTE:** The Resource tab has no functionality in **Client Mode**.

# CounselorMax User Guide

## Reporting Tab (Details in Chapter 11)

In **Global Mode**, the reporting tab is used to create custom reports and select standard reports such as the **HUD 9902** report (both quarterly and year to date), **CARS** report, **NFMC** report and **NW Compliance** report.

The screenshot shows the CounselorMax Reporting Tab interface in Global Mode. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header includes the CounselorMax logo and the text "Global Mode" with a globe icon. Below the header, there are several sections: "Quick Client Search" with a search box containing "Foreclosure, Frank Homebuyer, Joe"; "Select Standard reports:" with a checked checkbox for "HUD-9902 & NFMC"; "Select One:" with radio buttons for "HUD 9902", "YTD 9902", "Quarterly 9902", "NFMC Report", and "NW Compliance Report"; "Identify Clients" with radio buttons for "All", "In-Process", "Closed", "Prospect", and "Suspended"; "Letters, Reminders, & Logs" with a checked checkbox; "Down Load Clients & Cases"; "List of Deleted Clients"; "New Client" with a checked checkbox; and "Global Mode" with a checked checkbox.

You also have the functionality to view, edit or delete reports. You can also print letters, view reminders and client logs. The view for the **Reporting** tab may vary organization to organization.

**NOTE:** The Reporting tab has no functionality in **Client Mode**.

## Guidance and Planning System “GPS” (Details in Chapter 12)

**Guidance & Planning System (“GPS”)** is a supplemental tool that acts as an overlay on Classic CounselorMax that provides counselors with additional details and functionalities. The basic premise is that it puts all of the necessary steps or “tasks” required to serve a client within easy reach. It creates a “task” for each step in the service path and creates a link to the data entry form(s) for each task right on the work plan. This way you don’t need to remember all of the sometimes complex steps to resolving a client or how to navigate to a specific data entry form...



## CounselorMax User Guide

GPS for Mortgage Default module (“**GPS**”) is accessible in Classic CounselorMax and is available to everyone. In addition to GPS, the full GPS module (“**Full GPS**”) offers additional services: New Home Buyer Service, Rehab Service and Other Client Services. The Full GPS is only available to NeighborWorks agencies or any other agencies that opted to install GPS.

# CounselorMax User Guide

## Chapter 4 – Calendar

The **Calendar** tab is the first screen that you should see when logging into CounselorMax. The Calendar tab defaults to the **Global Mode** with the counselor's name and the globe icon at the top of the screen.

### 4.1 Global Mode

In Global Mode, there are two main sections of the Calendar: Reminders section on top and the current month's calendar on the bottom. See below:

These are your reminders & shows days past

Calendar | Outreach | Intake | Education | Counseling | Loan | Resources | Reporting

Student One

**Reminders**

Subject	Action	Details	Days	Edit	Delete	Done
Appt	Meeting	Initial meeting with client (Client Demo)	-1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	Phone	Intake - review privacy policy / sign authorization (Jeff Gordon1)	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	Phone	Intake - collect subject property info (Jeff Gordon1)	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	Phone	Budget Creation - monthly worksheet (Jeff Gordon1)	-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Quick Client Search

Counselor, Joe  
Doe, Jane  
Doe, Sharon  
Homeowner, Joe  
Nowhere, Missy  
Squarepants, Sponge Bob  
Demo, Client

Co-Applicant Search

Identify Clients

All  
 In-Process  
 Closed  
 Prospect  
 Suspended

New Client

Global Mode

Help  
Admin Menu  
Logout  
Legacy Clients  
Available for 381 Days

Select Another Calendar  
One, Student

Entire Calendar For:  
Student One

December 2009

• = Appt • = Call \* = Clean  
• = Mtg • = Training

Sun	Mon	Tue	Wed	Thr	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

You can look at your own or others. Defaults to Today's Date

# CounselorMax User Guide

## 4.1.1 Reminders

This section lists a running tally of all events, past, present and future that have either not been completed and or are marked as 'Done' with the appropriate number of minutes spent with the client entered. In addition, the counselor can view, add, edit or delete any reminders of client-related activities from that screen.

**NOTE:** Because you will be using CounselorMax to support multiple clients at any one given time, you may find the **Reminders** a useful tool to remind yourself and/or your colleagues to do a task or a reminder to complete an activity.

## 4.1.2 Calendar

The bottom section displays the current month's calendar of all of the counselor's events - **Appointments, Meetings, Calls, Training, Classes** and **Workshop** with his/her clients.

The screenshot displays the CounselorMax interface for Student S51. The top navigation bar includes tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header shows the student's name 'Student S51' with a globe icon. Below this, there are two main sections: 'Reminders' and 'Calendar'.

**Reminders Section:**

Subject	Action	Details	Days	Edit	Delete	Done
Appt	Appt Letter	appointment to review credit: office on 4/16/2010 9:00:00 AM (Stan Armstrong51B) <a href="#">Print Reminder Letter</a>	-65	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	Phone	Intake - review privacy policy / sign authorization (Marsha Jackson51B)	-61	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	Phone	Intake - collect subject property info (Marsha Jackson51B)	-61	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan	Phone	Budget Creation - monthly worksheet (Marsha Jackson51B)	-64	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Calendar Section:**

Select Another Calendar: S51, Student

Entire Calendar For: Student S51

Calendar for June 2010:

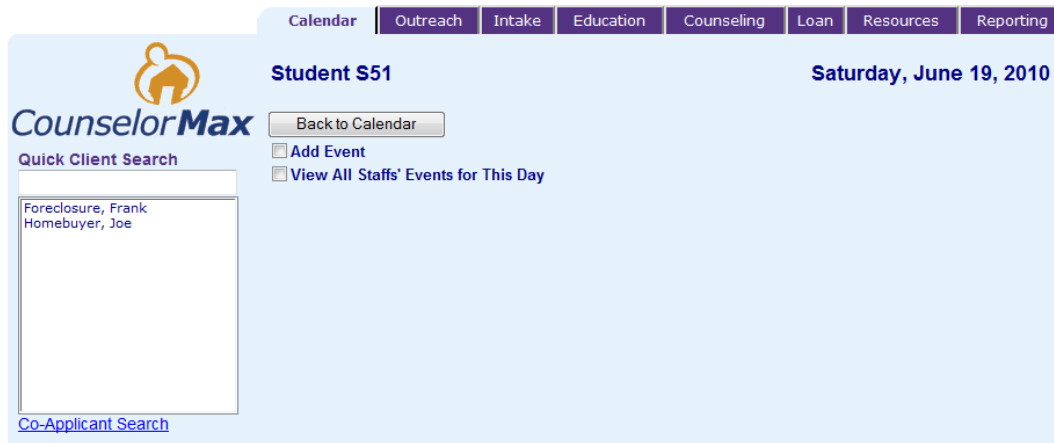
Sun	Mon	Tue	Wed	Thr	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Legend: Appt (blue dot), Call (purple dot), Class (yellow dot), Mtg (red dot), Training (pink dot), Workshop (green dot)

Additional interface elements include a 'Quick Client Search' box with results for 'Foreclosure, Frank' and 'Homebuyer, Joe', a 'Co-Applicant Search' link, 'Identify Clients' radio buttons (All, In-Process, Closed, Prospect, Suspended), a 'New Client' checkbox, and a 'Global Mode' button.

# CounselorMax User Guide

In order to view the detailed events, the counselor can click on a specific date and the calendar will display the counselor's events as shown below:



On the above screen, counselors can add new event by checking **Add Event** checkbox, view all staffs' events by checking **View All Staffs' Events for This Day** checkbox or click on the **Back to Calendar** button to return to current month's calendar view.

## 4.2 Client Mode

Once the counselor selects a client, the Calendar tab will enter the **Client Mode**.

As shown below, the **Calendar** tab shows the client's name, current address, client number and client case number. It is important to verify that this information is current and accurate before proceeding with additional tasks.

# CounselorMax User Guide

The screenshot displays the CounselorMax interface with a navigation bar at the top containing: Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main content area is divided into several sections:

- Client Information:** Joe Homebuyer, 123 Main St., Washington, DC 20005, (202) 555-2266 (hm). Client #: 13847, Case #: 10250(6/15/2010). HUD NUMBER: Requires an 'Open Case' and 'Appointment' in Calendar That Has Already Passed.
- Quick Client Search:** A search box with results for "Foreclosure, Frank" and "Homebuyer, Joe".
- Client Details:** Joe@nw.org, English, Home Purchase, In-Process (AMI% = 115), Counselor: n/a.
- Reminders:** A section with a checked "Reminders" checkbox and a table with columns: Add, Subject, Action, Details, Days, Edit, Delete, Done. The table content is "No Reminders Exist".
- Identify Clients:** Radio buttons for All, In-Process, Closed, Prospect, Suspended, and a checkbox for Guided Counseling (GPS).
- Client Schedule, History, and Log:** Each with a "show" button.

This screen above also displays the client's language, service path and counselor assignment information.

**NOTE:** In Client Mode, you have access to all client level functions on the calendar tab.

## 4.2.1 Reminders

When the counselor selects a client as shown on the screen above, the **Client Mode** screen is displayed as shown above with the **Reminders** checkbox already checked. Any reminders specific to the client appears. You can also **add, edit, delete and complete** any reminders as needed.

**NOTE:** All your clients' reminders appear in the **Global Mode** whereas all reminders specific to one client appear in the **Client Mode**.

# CounselorMax User Guide

## 4.2.2 Client Schedule

When the **Client Schedule** checkbox is selected, all of the client's scheduled events for the current calendar month appear as shown on the screen below.

Calendar | Outreach | Intake | Education | Counseling | Loan | Resources | Reporting

**CounselorMax**

Quick Client Search

Foreclosure, Frank  
Homebuyer, Joe

Co-Applicant Search

Identify Clients

All  
 In-Process  
 Closed  
 Prospect  
 Suspended

Guided Counseling (GPS)

New Client

Global Mode

**Joe Homebuyer**  
123 Main St.  
Washington, DC 20005  
(202) 555-2266 (hm)

Joe@nw.org  
English  
Home Purchase  
In-Process (AMI % = 115)      *Counselor: n/a*

Client #: 13847  
Case #: 10250(6/15/2010)

HUD NUMBER:  
Requires an 'Open Case' and 'Appointment'  
in Calendar That Has Already Passed

Mailing Label  
Reminders

Client Schedule:  (show)

June 2010

• = Appt   • = Call   • = Class  
• = Mtg   • = Training   • = Workshop

Sun	Mon	Tue	Wed	Thr	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Click on any date and the next screen appears

The color coded event labels with corresponding color coded dots are shown on the top right corner of the calendar. These dots are also shown on the specific event dates on the calendar.

# CounselorMax User Guide

To view the details of any client event, simply click on the date with the specific event scheduled. For example, if you click on the date checkbox for **June 18, 2010** as shown above, a window will appear with event type, description and other information as shown below:

The screenshot shows the CounselorMax interface for client 'Joe Homebuyer' on 'Friday, June 18, 2010'. A table lists events for that date. The first event is highlighted with a red box:

Type	Staff	Description	Location	Start	End	Cancel	Edit
Class	T00	one on one training w/ Joe Homebuyer	office	6/18/2010 9:00 AM	6/18/2010 5:00 PM	<input type="checkbox"/>	<input type="checkbox"/>

Below the table, there are two checkboxes:  Add Event and  View All Staffs' Events for This Day. A text box labeled 'Information for the date clicked' is positioned to the right of the table.

The counselor can utilize this screen to cancel or edit the event by clicking on the **Cancel** or **Edit** checkbox, add a specific event for this client by clicking the **Add Event** or **View All Staffs' Events for This Day** checkbox.

For example, if you want to add an event for your client, click on **Add Event** checkbox within the specific date you clicked and the screen displays event fields under Add Event as follows:

The screenshot shows the 'Add Event' form in the CounselorMax interface. The form is titled 'Add Event' and is highlighted with a red box. It contains the following fields:

Type	Staff	Description	Location	Start (Date/Time)	End (Date/Time)
Appt	jp T00 T10			6/18/2010 00 AM	6/18/2010 00 AM

There is an 'OK' button below the form. The 'View All Staffs' Events for This Day' checkbox is also visible below the form.

Add the details on the new event and click **“OK”** to save.

# CounselorMax User Guide

## 4.2.3 Client History

When the **Client History** checkbox is selected, the screen displays all of the historical and scheduled events as well as the activities for the selected client.

The screenshot shows the CounselorMax interface with the 'Client History' section highlighted. The client information for Joe Homebuyer is displayed, including contact details and HUD number. The 'Client History' table lists various events such as 'Case Created', 'Work Plan', and 'Case Resolved' with their respective dates.

Event	Description	Date
File Created	New Client	5/26/2010
Case Created	Home Purchase	5/27/2010
Work Plan	Started	5/27/2010
Case Resolved	Fulfilled	6/9/2010
Case Created	Home Purchase	6/15/2010
Log: Class	one on one training	6/18/2010
Work Plan	Last Completed	12/1/2010

## 4.2.4 Client Log

The **Client Log** is used to record all activities and the amount of time spent with each client. The summary is a record typed by the counselor detailing the interaction with the client.

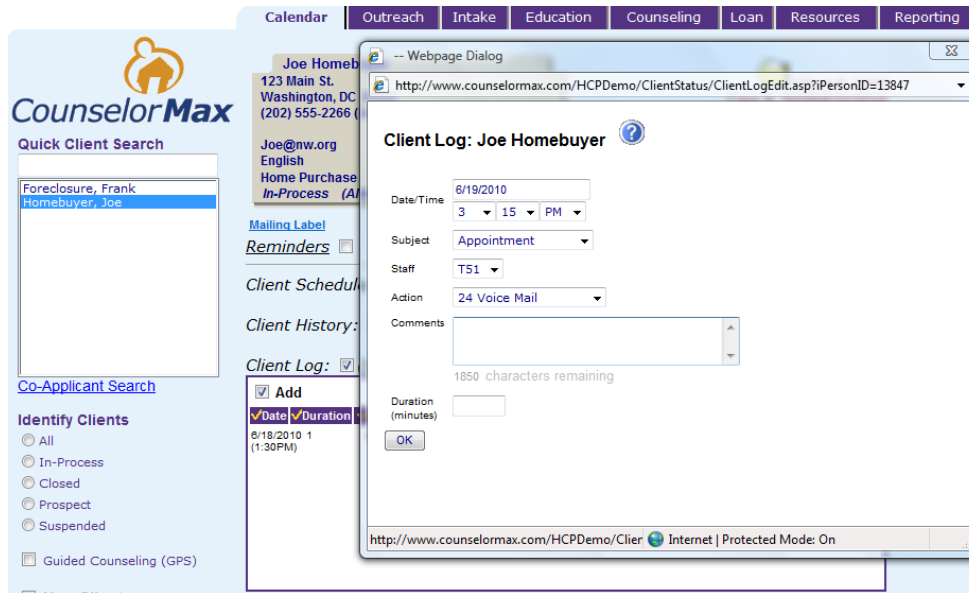
The screenshot shows the CounselorMax interface with the 'Client Log' section highlighted. The client information for Joe Homebuyer is displayed. The 'Client Log' table shows a log entry for an appointment on 6/18/2010 at 1:30 PM.

Date	Duration	Subject	Staff	Summary
6/18/2010	1 (1:30PM)	Appointment	00	jhsdklj, lkajsdf, lkhas, dlkjl, alskjdf, laskdfsjkdf, kjjsdf



# CounselorMax User Guide

For example, the screen above shows the activities of a client under the **Client Log** checkbox. If you want to add a new activity under Client Log, click on the **Add** checkbox within the **Client Log** checkbox and you should see the following screen:



Enter the client activity information in the above pop up screen and then click “**OK**” button to save.

**NOTE:** Using the client log consistently and entering data timely and accurately result in more accurate reporting.

# CounselorMax User Guide

## Chapter 5 – Outreach

The **Outreach** tab allows the counselors to create new prospects and to manage and distribute marketing materials to potential clients.

### 5.1 Global Mode

When you click on the Outreach tab, the following screen appears in Global Mode:

The screenshot shows the CounselorMax Global Mode interface. At the top, a navigation bar includes tabs for Calendar, Outreach (highlighted), Intake, Education, Counseling, Loan, Resources, and Reporting. Below the navigation bar, the page title is "Global Mode" with a globe icon and the text "Distribute Outreach Material:  (show)". On the left side, there is a "Quick Client Search" box with a list of names: Albizu-Campos, Pedro; Counselor, Joe; Demo, Client; Doe, Jane; Doe, John; Doe, Sharon; Friedrich, Nietzsche; homebuyer, john; Homeowner, Joe; Jean-Paul, Sartre; Martin, Ross; Scott, Michael; Thompson, Creed. Below this is a "Co-Applicant Search" section. Further down is an "Identify Clients" section with radio buttons for All, In-Process, Closed, Prospect, and Suspended. At the bottom left, there are links for "New Client", "Global Mode", "Help", "Admin Menu", "Logout", and "Legacy Clients". The main content area features a "Mailing Labels (show)

**Add New Prospect  (show)**

**\* = Required**

First Name \*  Last Name \*   
Middle Name  Name Suffix   
Street Address \*   
City \*  State \* -- Choose One --  
Zip Code \*  Home Phone ( ) -   
Work Phone ( ) -  Other Phone ( ) -   
Preferred Language English  Sponsor None   
Email  Purpose None   
 Do Not Contact

#### 5.1.1 Add New Prospect

This screen defaults to the **Add New Prospect** view. Counselors can enter new prospects (i.e., potential clients) into the system whether they are referrals or new prospects for Intake.

The Add New Prospect checkbox is the foundation of the client data input process. This screen captures all client contact information like name, address, phone numbers, preferred language of communication, sponsor information, email address and purpose. All the required fields need be completed. The information will not be saved unless the counselor clicks on the **Save** button.

# CounselorMax User Guide

Calendar Outreach Intake Education Counseling Loan Resources Reporting

**Global Mode** Distribute Outreach Material: (Low)

Quick Client Search

Foreclosure, Frank  
Homebuyer, Joe

Mailing Labels (show)

**Add New Prospect (Low)**

\*=Required

First Name \*  Last Name \*

Middle Name  Name Suffix

Street Address \*

City \*  State \* -- Choose One --

Zip Code \*  Home Phone (    )

Work Phone (    ) Other Phone (    )

Preferred Language English  Sponsor None

Email  Purpose None

Do Not Contact

Save

Identify Clients

All

In-Process

Closed

Prospect

Suspended

New Client

Global Mode

Help

These two fields are drop-down fields with selections available only after your Admin creates them

4

**TIP:** Don't forget to invoke the online Help to determine on field-by-field and values required in the fields

**NOTE:** The **New Client** checkbox on the bottom left side of the screen can be clicked at any time and on any tab and CounselorMax should open up the Add New Prospect box in Global Mode under the **Outreach** tab.

# CounselorMax User Guide

## 5.1.2 Distribute Outreach Material

When you click on the **Distribute Outreach Material** checkbox, the screen displays all the marketing materials that have been created by your Admin and are available for distribution to potential clients. Also, the marketing materials may be available in languages other than English provided your Admin has set them up.

The screenshot shows the CounselorMax interface with a navigation bar at the top containing 'Calendar', 'Outreach', 'Intake', 'Education', 'Counseling', 'Loan', 'Resources', and 'Reports'. Below the navigation bar, the 'Global Mode' section is active, featuring a globe icon and a checkbox labeled 'Distribute Outreach Material: (show)'. Below this, a table lists marketing materials with columns for Sponsor, Program Title, Purpose, Method, Start, and Distribute. The 'Distribute' column contains checkboxes for each row. Below the table, there is a checkbox labeled 'Mailing Labels (show)'. The 'Distribute' column header and the checkboxes for the first three rows are highlighted with red boxes.

Sponsor	Program Title	Purpose	Method	Start	Distribute
Bank of America	Foreclosure Workshop <a href="#">English</a>	Homebuyer Education	Flyer	11/17/2008 12:02:00 PM	<input type="checkbox"/>
Banco Popular	Home Buyer Education Fast Track 8 Hours <a href="#">English</a>	Post Purchase	Flyer	1/20/2010 4:02:00 PM	<input type="checkbox"/>
WGSB	Saving for Homeownership <a href="#">English</a>	IDA	Flyer	1/27/2010 10:06:00 AM	<input type="checkbox"/>
County Funding	Foreclosure Prevention Event	Foreclosure prevention	Flyer	1/27/2010 10:06:00 AM	No Flyer

As seen above, counselors have the ability to distribute 'Existing Fliers' after viewing the existing marketing materials by clicking on the checkbox under 'Distribute' with the corresponding program.

# CounselorMax User Guide

## 5.1.3 Mailing Labels

Counselors can click on the **Mailing Labels** checkbox to create mailing labels for clients to use for mailing out the marketing materials. This checkbox allows counselors to send outreach material by client status (fulfilled, in-process, prospect and suspended) by outreach sponsor, and by date of last activity.

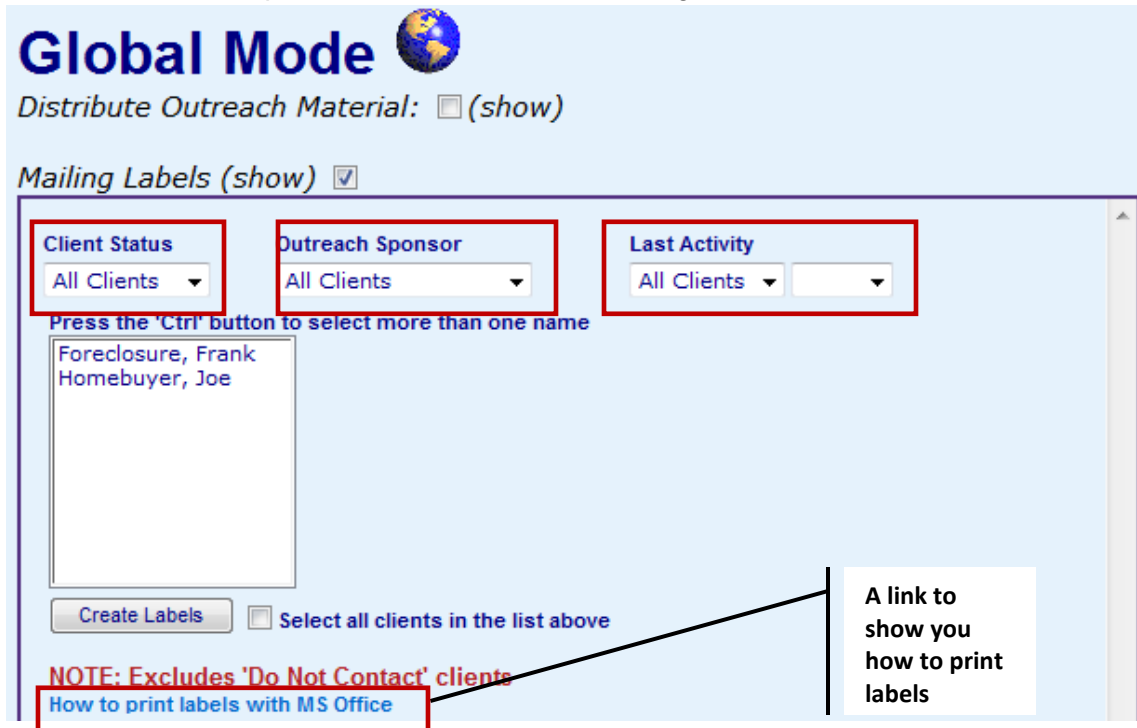
The screenshot shows the CounselorMax interface with the 'Outreach' tab selected. The 'Mailing Labels (show)' checkbox is checked. The 'Client Status', 'Outreach Sponsor', and 'Last Activity' filters are all set to 'All Clients'. The client list shows 'Foreclosure, Frank Homebuyer, Joe' selected. The 'Create Labels' button is visible, along with a note: 'NOTE: Excludes 'Do Not Contact' clients'.

Under the **Mailing Labels** checkbox, three different pull-down menu bars can be used to filter client's names as shown above:

- **Client Status** – use this filter to view clients that are either fulfilled, in process, prospects, or suspended.
- **Outreach Sponsor** – use this filter to view only those clients with a specific Outreach Sponsor.
- **Date of Last Activity** – use this filter to further reduce the list of clients based on the month and year of last activity.

# CounselorMax User Guide

See below a close up of the screen under the Mailing Labels checkbox:



Whether the counselors use the client name filters or not, they can select a single client or multiple clients on the client list to send out fliers corresponding to the outreach efforts.

# CounselorMax User Guide

## 5.2 Client Mode

To cross over from Global Mode to the **Client Mode** on the **Outreach** tab, counselors can select any of the clients listed on the left side under **Quick Client Search**. This will take you to the **Client Mode** with the default screen as seen below:

The screenshot displays the CounselorMax interface in Client Mode. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header shows the CounselorMax logo and the client name 'Joe Homebuyer' with a folder icon. Below the header, there are several options: 'Distribute Outreach Material:  (show)', 'Display Client's Outreach Exposure  (show)', and 'Custom Letter History:  (show)'. On the left side, there is a 'Quick Client Search' box containing a list of clients: 'Foreclosure, Frank' and 'Homebuyer, Joe'. Below this is a 'Co-Applicant Search' link and an 'Identify Clients' section with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended', along with checkboxes for 'Guided Counseling (GPS)' and 'New Client'. The main content area is titled 'Contact Information  (show)'. It contains a form with the following fields: 'First Name \*' (Joe), 'Last Name \*' (Homebuyer), 'Middle Name' (empty), 'Name Suffix' (dropdown), 'Street Address \*' (123 Main St), 'City \*' (Washington), 'State \*' (DC), 'Zip Code \*' (20005), 'Home Phone' ((202) 555 - 2266), 'Work Phone' ((202) 212 - 5555), 'Other Phone' (( ) - ), 'Preferred Language' (English), 'Sponsor' (Citibank), 'Email' (Joe@nw.org), and 'Purpose' (None). There is also a 'Do Not Contact' checkbox. At the bottom of the form are 'Save Changes' and 'Delete' buttons.

### 5.2.1 Contact Information

The main **Outreach** screen in **Client Mode** opens up the **Contact Information** checkbox as shown above. This section allows counselors to edit the client contact information and save by clicking the **Save Changes** button.

# CounselorMax User Guide

## 5.2.2 Display Outreach Material

This section is exactly the same in **Client Mode** as in Global Mode. An exception is that when you click on the **Distribute** checkbox in Client Mode, the outreach material can be distributed to the specific client you have selected.

The screenshot shows the CounselorMax interface for 'Joe Homebuyer'. The 'Outreach' tab is selected. A table titled 'Distribute Outreach Material:  (show)' displays the following data:

Sponsor	Program Title	Purpose	Method	Start	Distribute
Bank of America	Foreclosure Workshop <a href="#">English</a>	Homebuyer Education	Flyer	11/17/2008 12:02:00 PM	<input type="checkbox"/>
Banco Popular	Home Buyer Education Fast Track 8 Hours <a href="#">English</a>	Post Purchase	Flyer	1/20/2010 4:02:00 PM	<input type="checkbox"/>
WGSB	Saving for Homeownership <a href="#">English</a>	IDA	Flyer	1/27/2010 10:06:00 AM	<input type="checkbox"/>
County Funding	Foreclosure Prevention Event	Foreclosure prevention	Flyer	1/27/2010 10:06:00 AM	No Flyer!

Below the table, there are three checkboxes: 'Display Client's Outreach Exposure  (show)', 'Custom Letter History:  (show)', and 'Contact Information  (show)'. On the left, there is a 'Quick Client Search' box with 'Foreclosure, Frank' and 'Homebuyer, Joe' listed, and a 'Co-Applicant Search' link.

## 5.2.3 Display Client's Outreach Exposure

The **Display Client's Outreach Exposure** checkbox displays the outreach material the selected client has had exposure to and shows the date the material was printed for that particular client.

The screenshot shows the CounselorMax interface for 'Joe Homebuyer'. The 'Outreach' tab is selected. The 'Display Client's Outreach Exposure' checkbox is checked, and the text '(show)' is visible. Below this, a message box states: 'This client does not have any recorded exposure to any outreach programs in this system'. The 'Custom Letter History' and 'Contact Information' checkboxes are unchecked. On the left, the 'Quick Client Search' box shows 'Foreclosure, Frank' and 'Homebuyer, Joe', and there are radio buttons for 'All' and 'In-Process' under 'Identify Clients'.



# CounselorMax User Guide

## 5.2.4 Customer Letter History

This section lists the letters the counselors sent to the client, the person who sent the letter and the date of the letters were distributed.

The screenshot displays the CounselorMax web application interface. At the top, a navigation bar contains tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header area features the CounselorMax logo and the client's name, Joe Homebuyer, with a folder icon. Below the header, there are several interactive elements: a 'Quick Client Search' box with a dropdown menu showing 'Foreclosure, Frank' and 'Homebuyer, Joe'; a 'Co-Applicant Search' link; an 'Identify Clients' section with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended'; and a 'Contact Information' link with a '(show)' button. The central content area is titled 'Custom Letter History' and contains a large, empty rectangular box with the text 'This client does not have a history of custom letters'. The interface is clean and professional, with a light blue background and clear navigation options.

# CounselorMax User Guide

## Chapter 6 – Intake

Once a prospect has responded to any outreach effort, counselors may gather additional information on this person. If no information has been collected previously, you can click on the **Intake** tab and the screen displays the **Contact** screen identical to the screen in the Outreach tab's **Add New Prospect** checkbox. However, in addition to the Contact screen (“sub-tab”), the Intake tab contains two additional sub-tabs, **Case Data** and **Co-App** tabs. See below:

The screenshot displays the CounselorMax web application interface. At the top, a navigation bar includes tabs for Calendar, Outreach, Intake (highlighted with a red box), Education, Counseling, Loan, Resources, and Reporting. Below this, the main header shows 'Global Mode' with a globe icon. The left sidebar contains the 'CounselorMax' logo, a 'Quick Client Search' dropdown menu with a list of names (e.g., Armstrong23, Stan), and a 'Co-Applicant Search' link. Below the search is the 'Identify Clients' section with radio buttons for All, In-Process, Closed, Prospect, and Suspended. There is also a 'New Client' checkbox and a 'Global Mode' button. At the bottom of the sidebar are links for Help, Admin Menu, Logout, and Legacy Clients (Available for 227 Days).

The main content area is titled 'Global Mode' and features three sub-tabs: Contact (selected), Case Data, and Co-App. The 'Contact' sub-tab contains a form with the following fields and options:

- \* = Required**
- First Name \* (text input)
- Last Name \* (text input)
- Middle Name (text input)
- Name Suffix (dropdown menu)
- Street Address \* (text input)
- City \* (text input)
- State \* (dropdown menu, currently showing "-- Choose One --")
- Zip Code \* (text input)
- Home Phone (text input with parentheses and dashes)
- Work Phone (text input with parentheses and dashes)
- Other Phone (text input with parentheses and dashes)
- Preferred Language (dropdown menu, currently showing "English")
- Sponsor (dropdown menu, currently showing "None")
- Email (text input)
- Purpose (dropdown menu, currently showing "None")
- Do Not Contact
- Save (button)

# CounselorMax User Guide

## 6.1 Global Mode

The **Global Mode** is the default view under the **Intake** tab. However, there are no functions in the Global Mode under Intake.

## 6.2 Client Mode

While in **Client Mode** you will be able to:

- Add or edit client contact information under the **Contact** sub-tab
- Add or edit client case data under the **Case Data** sub-tab
- Add or edit co-applicant information under **Co-App** sub-tab

The screenshot displays the CounselorMax interface for a client named Stan Armstrong23. The top navigation bar includes tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header shows the client's name and a folder icon. Below the header, there are three sub-tabs: Contact, Case Data, and Co-App. The Co-App sub-tab is highlighted with a red box. A red asterisk indicates required fields. The form contains the following fields and values:

Field	Value
First Name *	Stan
Last Name *	Armstrong23
Middle Name	
Name Suffix	
Street Address *	124 North 2nd Street
City *	Phoenix
State *	AZ
Zip Code *	85004
Home Phone	(802) 553 - 1234
Work Phone	(802) 553 - 6541
Other Phone	( ) - -
Preferred Language	English
Sponsor	None
Email	
Purpose	Homeownership

Additional form elements include a "Do Not Contact" checkbox, "Save Changes" and "Delete" buttons, and a "Print Intake" link. On the left side, there is a "Client Search" list and a "Identify Clients" section with options: All, In-Process, Closed, Prospect, and Suspended. At the bottom left, it says "Guided Counseling (GPS)". An arrow points from the text "Note the Co-applicant" to the "Purpose" dropdown menu.

# CounselorMax User Guide

When you click on the **Case Data** sub-tab the following popup screen appears:

The screenshot shows the CounselorMax interface for a client named Joe Homebuyer. The 'Case Data' tab is selected, and a red box highlights the 'Service Required: Service Type' field, which is marked with a red asterisk. A callout box points to this field with the text 'The red "\*\*" indicates required entry'. Other fields with red asterisks include 'Total Co-Apps', 'Referral Source', 'Race', 'Number in Household', 'Gender', 'Birthdate', 'Household Income', 'County', and 'Current Residence'. The form also includes sections for 'Additional Fields', 'Demographics', and 'Ethnicity'. The left sidebar contains navigation options like 'Quick Client Search', 'Co-Applicant Search', and 'Identify Clients'. The top navigation bar includes 'Calendar', 'Outreach', 'Intake', 'Education', 'Counseling', 'Loan', 'Resources', and 'Reporting'.

The **required fields** (indicated with a **red \***) within the **Case Data** tab are Service Type, Total Co-apps, Referral Source, Race, Number in Household, Gender, Birth Date, Household Income, County (i.e. MSA) and Current Residence.

The following fields contain drop-down menus as follows:

- **Service Type** – Education, Home Purchase, Homeowner Services, Mortgage Default/Early Delinquency, Rental Counseling Homeless Services.
- **Case Term** – Long Term, Mid Term Short Term (Case Term can be updated and monitored throughout the process at any point prior to Case Resolution)
- **Referral Source** – Lender, Mailer, HUD Website etc.
- **Race** – Example: White Non-Hispanic, Black non-Hispanic. This field is required for HUD 9902 reporting and is an official category for HUD reporting on both race and ethnicity.
- **Number in Household** – 1 thru 8+
- **Ethnicity** – Refers to heritage and culture. This field is for information purposes only and is not required for HUD 9902 reporting.

## CounselorMax User Guide

- **Education** – Ranging from none to GED to P.H D.
- **Marital Status** – Divorced, Female Head of Household, Male Head of Household, Married, Single, Widowed.
- **County of Residence (this is really the MSA)** – Used to determine census tract and possible grant or other funding possibilities.
- **Current Residence** – Lease, Own or Rent, Empowerment Zone, Enterprise Zone.

**NOTE:** You will notice two different colors in the drop-down options. The options in black are standard in CounselorMax and used for HUD reporting and tracking. The options in **red** are those which have been added by your agency Admin and are not used for HUD reporting and tracking.

# CounselorMax User Guide

## Chapter 7 – Education

On the **Education** tab, you can enroll individuals who respond to outreach efforts that were sent via the Outreach tab. You can also view all available classes and series of classes and sort them based on “**Service Type.**” The individuals attending specific classes are tracked for future reporting purposes.

When you click on the Education tab, the default screen is in **Global Mode**. In both **Global** and **Client Mode** you can view classes by title, day, date, location, number of seats available and language.

You can view the roster for a class, course or series, notify clients of an upcoming class, enroll a client in a class, course or series and list the attendance of clients in a class, course or series.

**NOTE:** All class and class series are set up by your CounselorMax administrator.

### 7.1 Global Mode

In **Global Mode**, there is only one selection checkbox – Classes. You will see class series functionalities and can click on ‘**Notify**’, ‘**Enroll**’, or ‘**Mark attended**’ a client for all classes within a series at one time or for a single class *within* that series.

The screenshot shows the CounselorMax Global Mode Education tab. The interface includes a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main content area displays a list of classes and series. A red box highlights the 'Notify', 'Enroll', and 'Mark attended' columns for a specific class. An arrow points to the 'Notify' button for the 'Counseling Services' class.

Title	Day	Date	Location	Seats	Lang	Roster	Notify	Enroll	Attnd
<b>Client Orientation-December Orientation (entire series)</b>									
New Client Process	Sat	12/5/2009 (10:00AM-10:00AM)	New Orleans, LA	Seats	English	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Counseling Services	Tue	12/15/2009 (10:00AM-11:00AM)	New Orleans, LA	Seats	English	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Everyday Cooking-December 2009 (entire series)</b>									
Appetizers	Sun	12/20/2009 (5:00PM-7:00PM)	Asian Resource Center	Seats	Vietnamese	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entrees	Mon	12/21/2009 (5:00PM-7:00PM)	Asian Resource Center	Seats	Vietnamese	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dessert	Tue	12/22/2009 (5:00PM-7:00PM)	Asian Resource Center	Seats	Vietnamese	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Finance Fitness-December 2009 (entire series)</b>									
Budget Management	Wed	12/9/2009 (12:00PM-4:00PM)	Main Office	Seats	English	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit Repair	Mon	12/14/2009 (12:00PM-12:00PM)	Main Office	Seats	English	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Get Your Money Right-Semi Annually (Part 1) (entire series)</b>									
Credit	Mon	12/7/2009 (9:00AM-12:00PM)	Navy Pier	Seats	English	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Budgeting	Sun	2/7/2010 (9:00AM-12:00PM)	Gaylord Resort	Seats	English	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consumer Pitfalls	Sun	3/7/2010 (9:00AM-12:00PM)	Main Office	Seats	English	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**NOTE:** The Global Mode allows you to notify and enroll multiple clients while the Client Mode allows you to notify or enroll one client you have selected.

# CounselorMax User Guide

## 7.1.1 Roster Icon

To review an existing class or series of classes to check the status of who has already enrolled, click on the **Roster** icon next to the appropriate class. This will retrieve the list of individuals who have been enrolled.

The screenshot displays the CounselorMax Global Mode interface. At the top, there are navigation tabs: Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header includes the CounselorMax logo and the text "Global Mode". Below the header, there are search and filter options: "Classes: (show)", "Start Date:", "End Date:", and "Search by Date".

On the left side, there is a "Quick Client Search" section with a list of client names: Counselor, Joe; Demo, Client; Doe, Jane; Doe, Sharon; and Homeowner, Joe. Below this is a "Co-Applicant Search" section and an "Identify Clients" section with radio buttons for "All", "In-Process", "Closed", "Prospect", and "Suspended". There is also a "New Client" button and a "Global Mode" button.

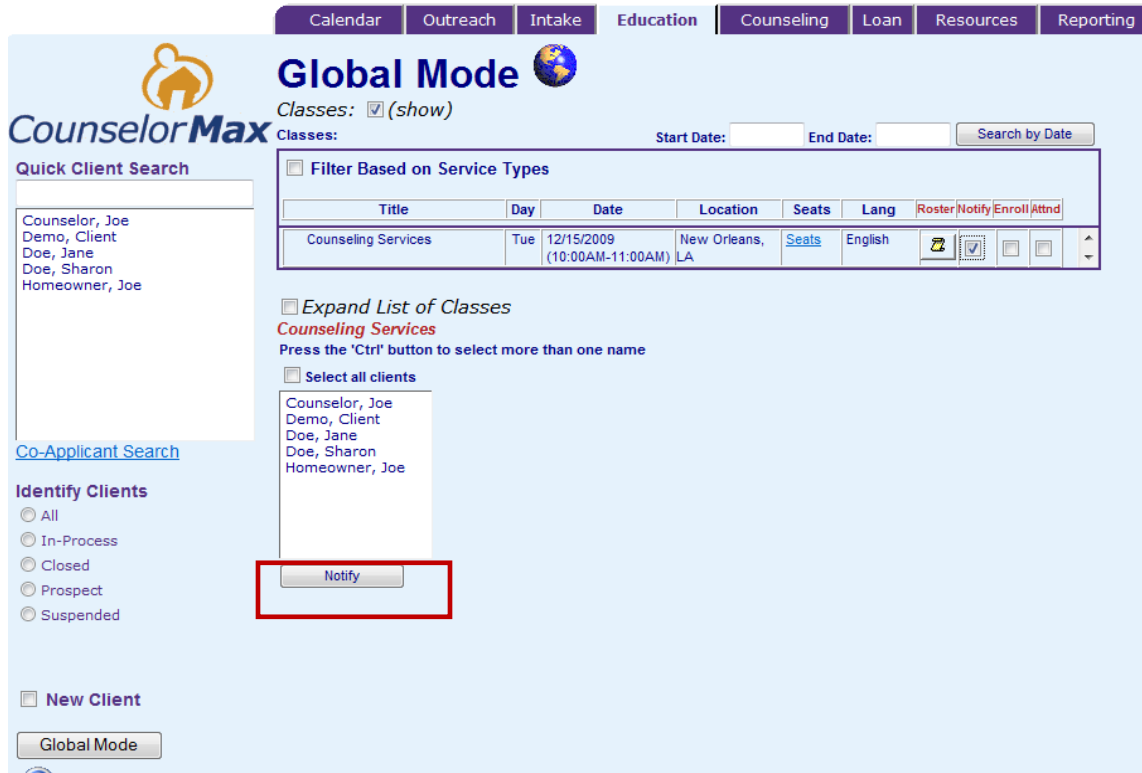
The main content area is a table titled "Filter Based on Service Types". The table has the following columns: Title, Day, Date, Location, Seats, Lang, Roster, Notify, Enroll, and Attend. A red box highlights the Roster, Notify, Enroll, and Attend columns. The table contains several rows of class information, including "Client Orientation-December Orientation", "Everyday Cooking-December 2009", "Finance Fitness-December 2009", and "Get Your Money Right-Semi Annually (Part 1)".

Title	Day	Date	Location	Seats	Lang	Roster	Notify	Enroll	Attend
<b>Client Orientation-December Orientation (entire series)</b>									
New Client Process	Sat	12/5/2009 (10:00AM-10:00AM)	New Orleans, LA	Seats	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Counseling Services	Tue	12/15/2009 (10:00AM-11:00AM)	New Orleans, LA	Seats	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Everyday Cooking-December 2009 (entire series)</b>									
Appetizers	Sun	12/20/2009 (5:00PM-7:00PM)	Asian Resource Center	Seats	Vietnamese		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entrees	Mon	12/21/2009 (5:00PM-7:00PM)	Asian Resource Center	Seats	Vietnamese		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dessert	Tue	12/22/2009 (5:00PM-7:00PM)	Asian Resource Center	Seats	Vietnamese		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Finance Fitness-December 2009 (entire series)</b>									
Budget Management	Wed	12/9/2009 (12:00PM-4:00PM)	Main Office	Seats	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit Repair	Mon	12/14/2009 (12:00PM-12:00PM)	Main Office	Seats	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Get Your Money Right-Semi Annually (Part 1) (entire series)</b>									
Credit	Mon	12/7/2009 (9:00AM-12:00PM)	Navy Pier	Seats	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Budgeting	Sun	2/7/2010 (9:00AM-12:00PM)	Gaylord Resort	Seats	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consumer Pitfalls	Sun	3/7/2010 (9:00AM-12:00PM)	Main Office	Seats	English		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# CounselorMax User Guide

## 7.1.2 Notify

The **Notify** checkbox allows you to print and mail the flier to your clients. Once you click on the Notify checkbox next to the corresponding class or series you would like your client to take, the following screen appears:



You can either select all the clients by clicking the “**Select all Clients**” checkbox above the names of all the clients or **select names individually** by holding down the “Ctrl” key and clicking on specific client(s). Once selected and displayed, click on the ‘**Notify**’ Button to preview the fliers prior to printing. If the flier is acceptable, then click the File menu on your browser (upper left) and then print.

**NOTE:** The **Notify** Button in red circle above is just a marketing function. In order to actually send out notifications, your Admin should have created a notification letter template already in the system.



# CounselorMax User Guide

## 7.1.3 Enroll

Once the counselor has decided on the class or series of classes, the counselor can use the “**Enroll**” function to enroll multiple clients into a series of classes or just an individual class.

Click on the **Enroll** checkbox next to the corresponding class you are interested in. Counselors can either **select all the clients** by clicking the “Select all Clients” checkbox above the names of all the clients or counselors can **select names individually** by holding down the “Ctrl” key and clicking on client’s names. Once client names have been displayed, click on the **Enroll** button.

An enrollment reminder letter is automatically generated.

The screenshot displays the CounselorMax Global Mode interface. At the top, there are navigation tabs: Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header includes the CounselorMax logo and the text "Global Mode". Below this, there are search filters for "Classes" and "Start Date/End Date".

The central part of the interface features a table with the following columns: Title, Day, Date, Location, Seats, Lang, and a set of action buttons (Roster, Notify, Enroll, Attn). The table contains one row for "Appetizers" on "Sun" at "12/20/2009 (5:00PM-7:00PM)" at the "Asian Resource Center". The "Enroll" button in this row is highlighted with a red box.

Below the table, there are sections for "Expand List of Classes" (showing "Appetizers") and "Select all clients" (showing a list of client names: Counselor, Joe; Demo, Client; Doe, Jane; Doe, Sharon; Homeowner, Joe). The "Enroll" button at the bottom of this section is also highlighted with a red box.

On the left side, there are sections for "Quick Client Search" (listing client names), "Co-Applicant Search", and "Identify Clients" (with radio buttons for All, In-Process, Closed, Prospect, and Suspended).

# CounselorMax User Guide

## 7.1.4 Attn

This checkbox allows you to record attendance for a group of clients. Once you have a list of all the people who have attended a specific class, go to the **Education** tab and click on the “**Attended**” checkbox corresponding with the appropriate class or series of classes. This provides the counselor a new screen that shows all the people that were enrolled for the class. Click the checkbox under “**Attended**” by the names of those who attended.

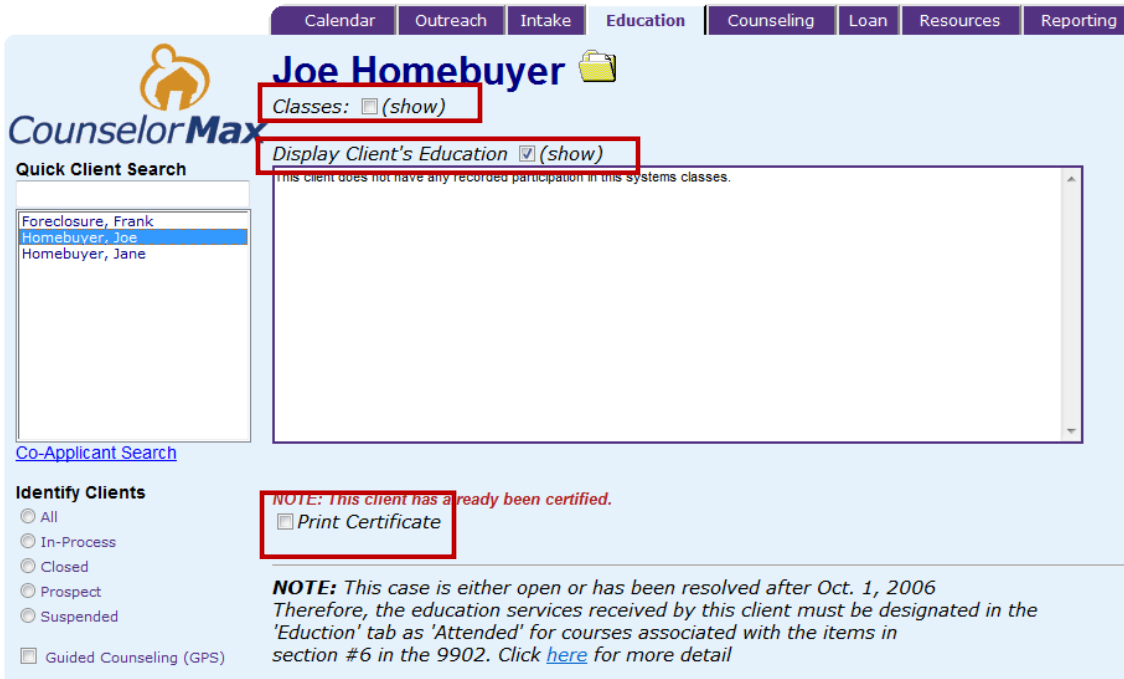
Click “**OK**” to save.

The screenshot shows the CounselorMax interface in Global Mode, with the Education tab selected. The top navigation bar includes Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header displays the CounselorMax logo and 'Global Mode' with a globe icon. Below the header, there are search filters for 'Classes' (with a 'show' link), 'Start Date', 'End Date', and a 'Search by Date' button. A 'Filter Based on Service Types' section is visible. A table lists classes with columns for Title, Day, Date, Location, Seats, Lang, Roster, Notify, Enroll, and Attn. The 'Attn' column for the 'Client Orientation-December Orientation' class is highlighted with a red box and contains a checked checkbox. Below the table, there is an 'Expand List of Classes' checkbox and an 'Important!' message: 'Please Check the "Attended" Checkbox Below:'. A table below this message shows client attendance records with columns for Name (Client/Co-Applicant), Attended, Makeup, Cancel, and Completed Series. The 'Attended' column for three 'Homeowner, Joe' entries is highlighted with a red box and contains unchecked checkboxes. At the bottom left, there is an 'OK' button highlighted with a red box. Other interface elements include a 'Quick Client Search' list, a 'Co-Applicant Search' link, 'Identify Clients' radio buttons (All, In-Process, Closed, Prospect, Suspended), a 'New Client' checkbox, a 'Global Mode' button, and links for 'Help' and 'Admin Menu'.

# CounselorMax User Guide

## 7.2 Client Mode

The **Education** tab defaults to the screen corresponding to the **Display Client's Education** checkbox in the **Client Mode**. There are two additional checkboxes available in Client Mode: **Classes** and **Print Certificate**. See the default screen below:



In **Client Mode**, you can notify, enroll, and mark attended for a specific client to a class or series of classes. You can also view their Education history or even resolve their Education case. The last checkbox on Education tab under Client Mode allows counselors to print attendance certificate for the client.

### 7.2.1 Classes

Similar to the **Global Mode**, **Classes** in **Client Mode** displays a list of classes. However, as mentioned previously, you are limited to utilizing **Notify**, **Enroll** and **Attn** functions for one selected client in Client Mode.

# CounselorMax User Guide

## 7.2.1.1 Notify

By clicking on the **Notify** checkbox, you can send notification of a class to the client. See below a step by step example:

1. Select the desired client from the **Quick Client Search** on Left Side Navigation by clicking on the name.

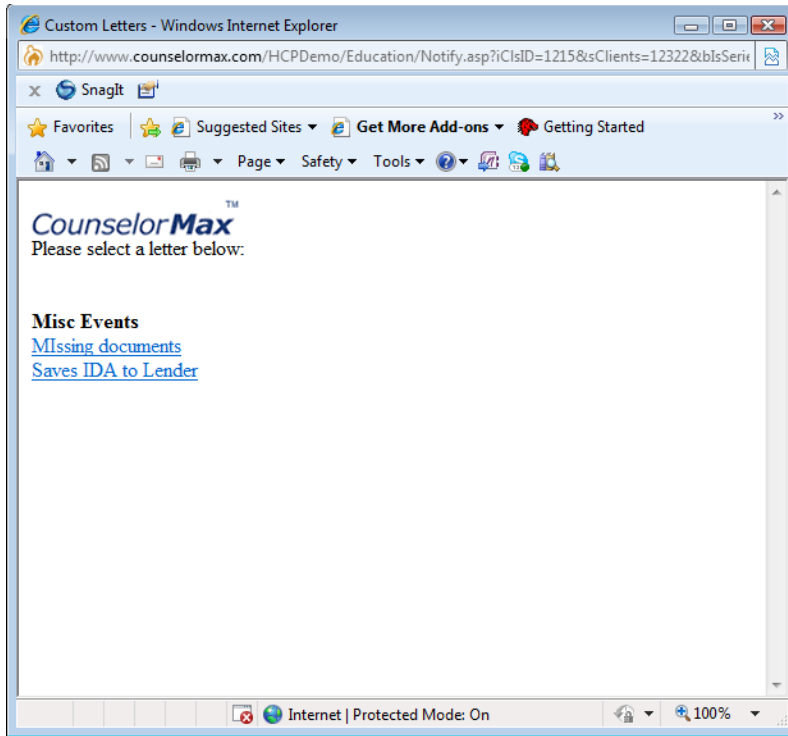
The screenshot shows the CounselorMax interface with a navigation bar at the top containing 'Calendar', 'Outreach', 'Intake', 'Education', 'Counseling', 'Loan', 'Resources', and 'Reporting'. The main header area includes the 'Client Demo' title and a 'Classes:  (show)' checkbox, which is highlighted with a red box. Below this is a 'Quick Client Search' sidebar with a list of client names: 'Counselor, Joe', 'Demo, Client', 'Doe, Jane', 'Doe, Sharon', and 'Homeowner, Joe'. The 'Demo, Client' is selected. The main content area displays a table of classes with columns for 'Title', 'Day', 'Date', 'Location', 'Seats', 'Lang', 'Notify', 'Enroll', and 'Attd'. The 'Notify' column contains checkboxes, with the checkbox for the 'Counseling Services' class highlighted by a red box. Below the table are sections for 'Filter Based on Service Types' and 'Identify Clients' with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended', and checkboxes for 'Guided Counseling (GPS)' and 'New Client'. A 'Global Mode' button and 'Help' and 'Admin Menu' links are also visible.

Title	Day	Date	Location	Seats	Lang	Notify	Enroll	Attd
<b>Client Orientation-December Orientation (entire series)</b>								
Counseling Services	Tue	12/15/2009 (10:00AM-11:00AM)	New Orleans, LA	Seats	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Everyday Cooking-December 2009 (entire series)</b>								
Appetizers	Sun	12/20/2009 (5:00PM-7:00PM)	Asian Resource Center	Seats	Vietnamese	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entrees	Mon	12/21/2009 (5:00PM-7:00PM)	Asian Resource Center	Seats	Vietnamese	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dessert	Tue	12/22/2009 (5:00PM-7:00PM)	Asian Resource Center	Seats	Vietnamese	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Finance Fitness-December 2009 (entire series)</b>								
Budget Management	Wed	12/9/2009 (12:00PM-4:00PM)	Main Office	Seats	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit Repair	Mon	12/14/2009 (12:00PM-12:00PM)	Main Office	Seats	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Get Your Money Right-Semi Annually (Part 1) (entire series)</b>								
Credit	Mon	12/7/2009 (9:00AM-12:00PM)	Navy Pier	Seats	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Budgeting	Sun	2/7/2010 (9:00AM-12:00PM)	Gaylord Resort	Seats	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consumer Pitfalls	Sun	3/7/2010 (9:00AM-12:00PM)	Main Office	Seats	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

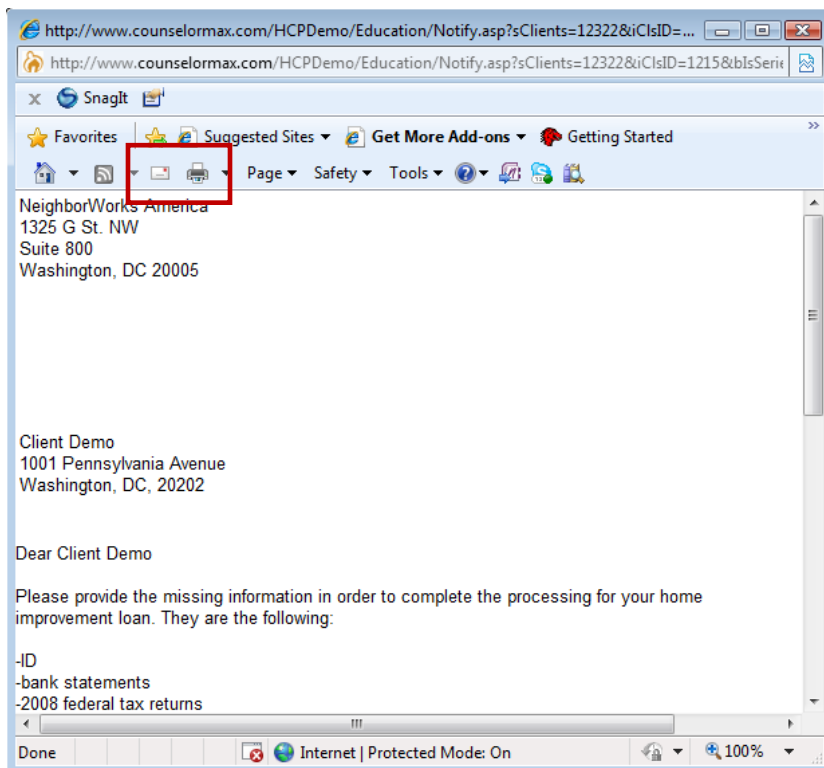
2. Click on the checkbox next to **Classes** located at the top left of the screen. Click the checkbox under "**Notify**" column next to the appropriate class or series of classes.

# CounselorMax User Guide

3. Select the letter you want to preview prior to printing.



4. Click the **Print** icon or **E-mail** icon to notify your client.

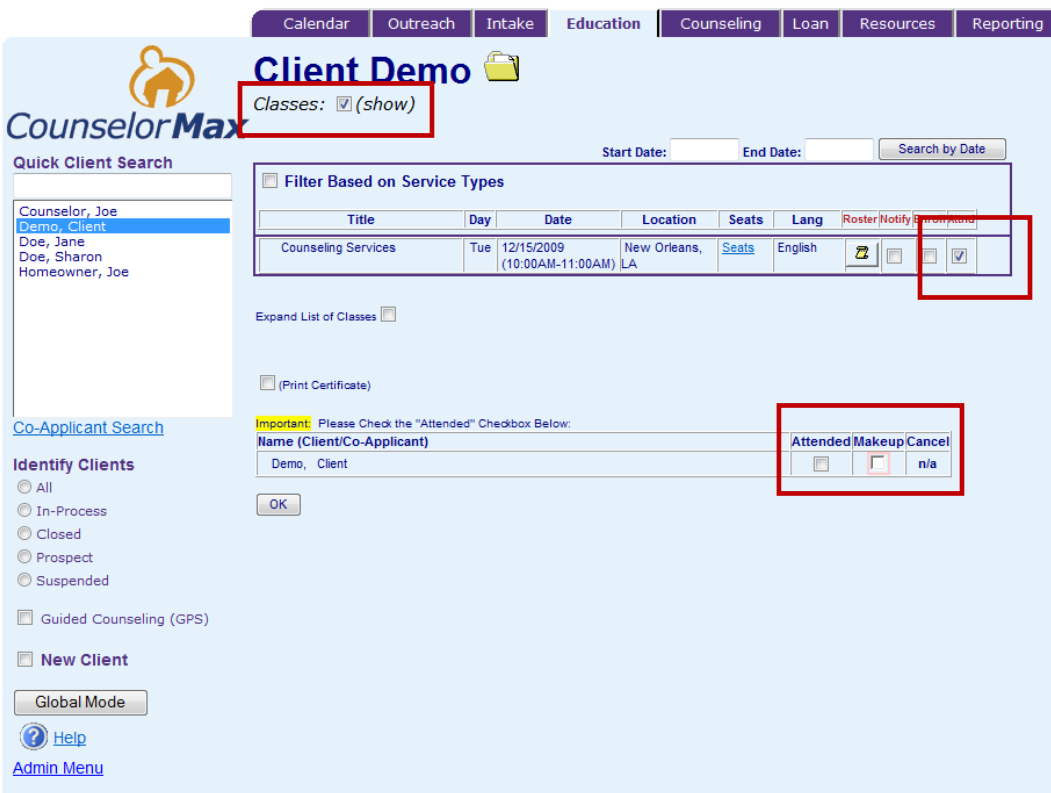


# CounselorMax User Guide

## 7.2.1.2 Enroll

To assign a specific client to a specific class or series of classes, ensure that correct client file has been selected before proceeding. Once certain, click on the “**Enroll**” radio button corresponding to the appropriate class (refer to the screenshot in Section 7.2.1.1., Step 1). The preview window will pop up with the flier for mailing regarding the class. If the flier is acceptable, then click the File button on your browser and then print.

## 7.2.1.3 Attnd



To record the attendance of a specific client in a **specific class or series of classes**, be sure that the correct client has been selected before proceeding. Then click on the **Attnd** checkbox corresponding to the appropriate class. This triggers another screen to pop up with the clients name and their co-applicant (if applicable). Click the checkbox under **Attnd** next to each individual who attended the class or series of classes. Click “**OK**” to save.

**NOTE:** You should click **Attnd** checkbox only after your client has actually attended the class.

# CounselorMax User Guide

## 7.2.2 Display Client's Education

Within the **Client Mode** on the **Education** tab, you are able to see all of your Client's Education classes and series of classes that the client has been notified of, enrolled in or have attended.

The screenshot shows the CounselorMax interface with the 'Education' tab selected. The main content area displays a table of education classes for a client named 'Demo, Client'. The table has columns for Course Title, Course Date, Status, Date, and Cancel. Below the table, there is a 'Record & Print Certificate' checkbox and a note about the case status.

Course Title	Course Date	Status	Date	Cancel
Understanding your credit	12/10/2009 6:00 PM	Enrolled	12/16/2009 8:20 PM	<input type="checkbox"/>
Insurance & Lending Process	12/17/2009 6:00 PM	Enrolled	12/16/2009 8:20 PM	<input type="checkbox"/>
Counseling Services	12/15/2009 10:00 AM	Notification	12/21/2009 3:17 PM	N/A
Counseling Services	12/15/2009 10:00 AM	Enrolled	12/21/2009 3:21 PM	<input type="checkbox"/>
Finding a Home & Home Inspection	12/24/2009 6:00 PM	Enrolled	12/16/2009 8:20 PM	<input type="checkbox"/>

Record & Print Certificate

**NOTE:** This case is either open or has been resolved after Oct. 1, 2006 Therefore, the education services received by this client must be designated in the 'Education' tab as 'Attended' for courses associated with the items in section #6 in the 9902. Click [here](#) for more detail

**NOTE:** Only the latest status is displayed.

# CounselorMax User Guide

## 7.2.3 Record & Print Certificate

After your client attends the class and you record the attendance, you can click on the **Record & Print Certificate** checkbox to print the client's class completion certificate as shown below:

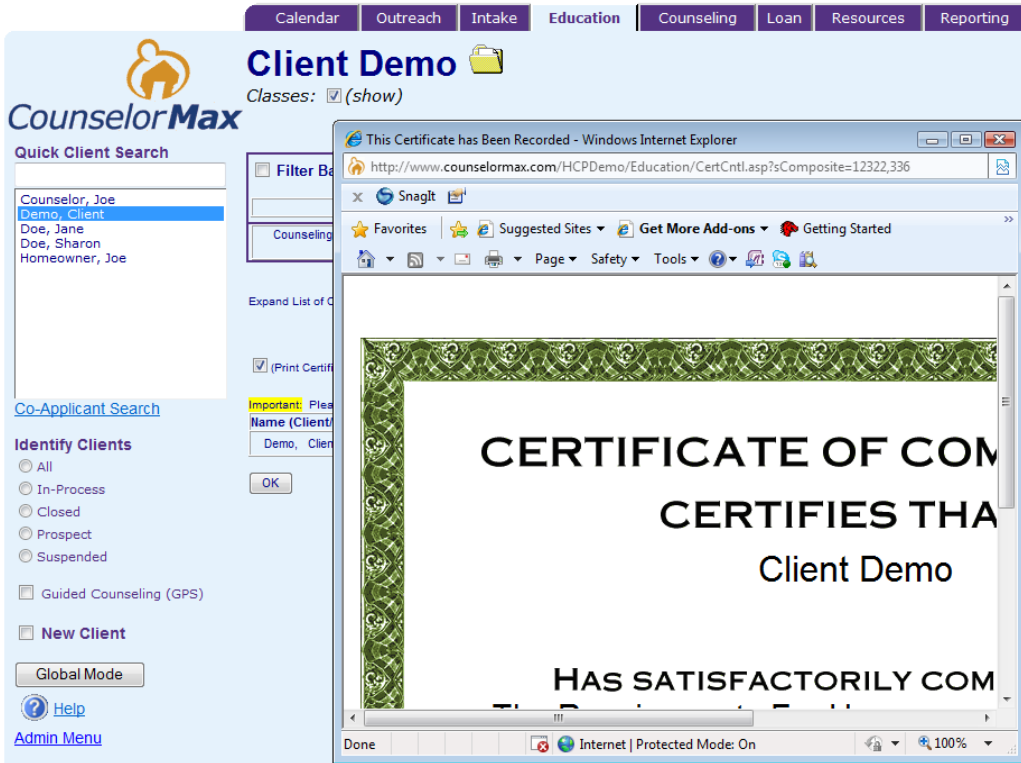
The screenshot shows the CounselorMax interface for a client named 'Demo Client'. The 'Education' tab is selected, displaying a table of courses. A checkbox labeled 'Record & Print Certificate' is highlighted with a red box. Below the table, a note states: 'NOTE: This case is either open or has been resolved after Oct. 1, 2006. Therefore, the education services received by this client must be designated in the 'Education' tab as 'Attended' for courses associated with the items in section #6 in the 9902. Click here for more detail'.

Course Title	Course Date	Status	Date	Cancel
Understanding your credit	12/10/2009 6:00 PM	Enrolled	12/16/2009 8:20 PM	<input type="checkbox"/>
Insurance & Lending Process	12/17/2009 6:00 PM	Enrolled	12/16/2009 8:20 PM	<input type="checkbox"/>
Counseling Services	12/15/2009 10:00 AM	Notification	12/21/2009 3:17 PM	N/A
Counseling Services	12/15/2009 10:00 AM	Enrolled	12/21/2009 3:21 PM	<input type="checkbox"/>
Finding a Home & Home Inspection	12/24/2009 6:00 PM	Enrolled	12/16/2009 8:20 PM	<input type="checkbox"/>

You will be asked a series of questions and the system will display the certificate. You may print this for your client. However, this function is a value-added feature in the system and the use of this function is not required.



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**NOTE:** Only when a client completes a course, a certificate of completion can be printed. CERTIFICATES CAN ONLY BE PRINTED INDIVIDUALLY.

## Single Class

On the **Education** tab, click on the **Print Certificate** checkbox and fill in the date when prompted. **This date appears on the front of the certificate.** Dates entered here will **not** be archived for future printing.

## Series Classes

The next step is to check the appropriate checkbox if the client completed all the series' classes. Make sure the **Attnd** checkbox for the entire series is checked while in **Client Mode**.

Next enter the text about the class or course that was completed. Be sure to enter relevant text in the prompt checkbox as the certificate will not read properly with a blank in this field.

**NOTE:** A Certificate on Series Classes is available.

# CounselorMax User Guide

## Chapter 8: Counseling

The **Counseling** tab is the primary area in CounselorMax where you perform the majority of tasks to ultimately lead your client's case to a complete case resolution state.

**NOTE:** Case resolution can be achieved only in one additional place, GPS.

### 8.1 Global Mode

In **Global Mode** on the **Counseling** tab, you can filter clients by Service Path and/or Assigned Counselors. Then, you can assign one or more clients to a new counselor for their counseling activities.

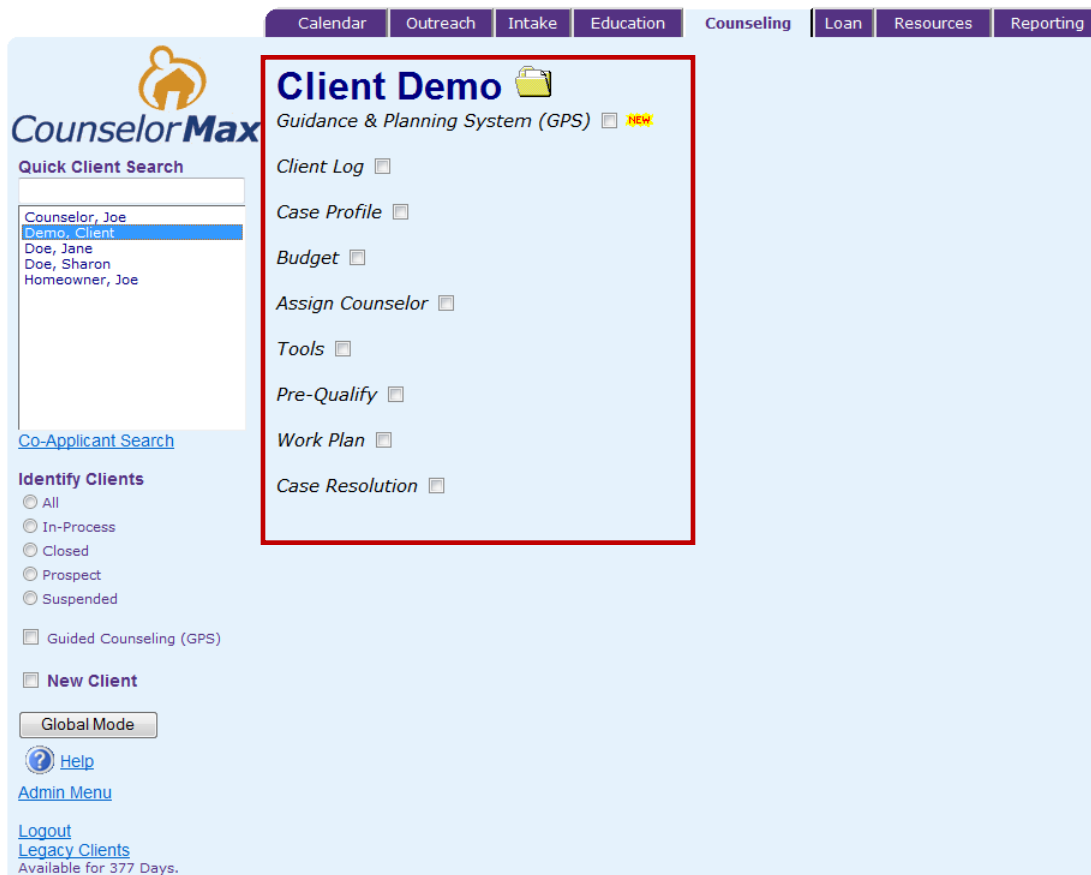
The screenshot displays the CounselorMax web application interface. At the top, a navigation bar includes tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The 'Counseling' tab is active and highlighted with a red box. Below the navigation bar, the 'Global Mode' section is titled with a globe icon. The main content area is titled 'Subset Clients By Selecting One or Both of the Following'. It features two dropdown menus: 'Service Path' (set to 'All Service Paths') and 'Assigned Counselors' (set to 'All Counselors'), both highlighted with a red box. Below these, there is a section for selecting a 'New Counselor' with a list of client names (Counselor, Joe; Demo, Client; Doe, Jane; Doe, Sharon; Homeowner, Joe) and a 'Select a New Counselor' dropdown. A button labeled 'Assign To Counselor' is positioned at the bottom of the main content area. On the left side, there is a sidebar with a 'Quick Client Search' field, a list of client names, and various search and filter options like 'Co-Applicant Search', 'Identify Clients', and 'New Client'.

# CounselorMax User Guide

## 8.2 Client Mode

In **Client Mode**, there are multiple functions you can select by clicking the appropriate checkbox.

**NOTE:** Only one button can be clicked to make a selection. Clicking another button causes a new selection (pop-up) to occur, overlaying the previous selection.



### 8.2.1 Guidance & Planning System (GPS) – Mortgage Default

The GPS functions relating to the **Mortgage Default GPS (GPS)** is covered in this section as this service type is also available in Classic CounselorMax.

**NOTE:** Chapter 12 provides a full coverage of services under GPS (**Full GPS**).

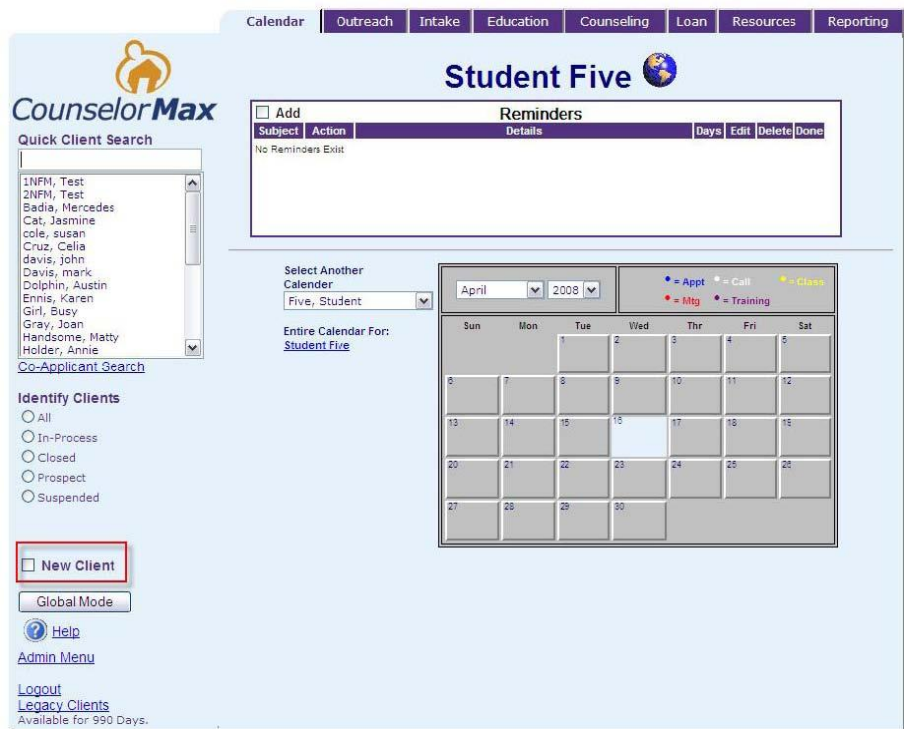
The Mortgage Default (MD) service allows you to collect all of the necessary data to work with a customer facing foreclosure and to document all the necessary steps required to resolve the case, or at least conclude the case. The outcome will not always be positive but CounselorMax can help you organize the counseling process and ensure

# CounselorMax User Guide

that you collect all of the necessary data in a logical, sequential and thorough manner. In the process, the MD service also collects all of the necessary data to report the case fully to HUD (in the 9902 report) and to the National Foreclosure Mitigation Counseling (NFMC) grant program.

## 8.2.1.1 Creating a Mortgage Default Client

You can create a new Mortgage Default client as you would any client in CounselorMax. Once you are successfully logged into the system, select the **New Client** checkbox from the **Calendar** tab:



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This will open the screen under the **Add new Prospect** checkbox on the **Outreach** tab. Fill in all the required fields and click the **Save** button:

The screenshot shows the CounselorMax interface with the 'Outreach' tab selected. The 'Add New Prospect' form is open, displaying various input fields. The 'First Name' field contains 'Test' and the 'Last Name' field contains 'Client'. The 'Street Address' is '1 Main Street', 'City' is 'Boston', and 'State' is 'MASSACHUSETTS'. The 'Zip Code' is '02116'. The 'Home Phone' is '(777) 777-7777'. The 'Work Phone' is '(888) 888-8888'. The 'Preferred Language' is 'English' and the 'Sponsor' is 'None'. The 'Purpose' is 'None'. There is a 'Save' button at the bottom of the form. The left sidebar contains search and navigation options.

You will receive a confirmation pop-up and will now be able to complete an Intake for the client. Click on the **Intake** tab and the **Case Data** sub-tab appears as shown below:

The screenshot shows the CounselorMax interface with the 'Intake' tab selected and the 'Case Data' sub-tab active. The form is titled 'Test Client' and contains several sections: 'Service Required' with dropdown menus for 'Service Type', 'HUD Activity', and 'Case Term'; 'Referral Source' with a dropdown menu; 'Demographics' with dropdowns for 'Race', 'Number in Household', and 'Current Residence', and radio buttons for 'Gender' and a checkbox for 'Head of Household?'; and 'Financial Info' with a text field for 'Household Annual Income' and dropdowns for 'County' and 'Current Residence'. There is a 'Save' button at the bottom of the form. The left sidebar contains search and navigation options.

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From the **Service Type** drop-down list, select the **Mortgage Default/Early Delinquency** option. This selection is important as it enables you to provide the MD service for the client.

If you receive NFMC funds directly or through an intermediary, make sure you obtain the customer's authorization to release information to third parties and that you check off the **Authorization to Release Information** checkbox on the screen above. This is required for reporting to NFMC.

In addition, make sure you click on all **Additional Fields** checkboxes to capture all of the required demographic data for HUD and the NFMC report.

When you have entered all required data click "**Save**".

This prompts the following pop-up screen. Click "**OK**".



If applicable, fill out all co-app information in the **Co-App** tabs for all the co-apps associated with the client.

**NOTE:** You can enter up to 8 co-applicants.

You have now created a Mortgage Default case for your client in Classic CounselorMax.

At this point, a GPS pop-up screen appears as follows:

### Please Select a Work Plan Template for Mortgage Default/Early Delinquency

- Foreclosure Mitigation (NFMC compliant)
- New Home Owner

OK

# CounselorMax User Guide

Select Foreclosure Mitigation (NFMC compliant) and you should see the following MD work plan:

## Foreclosure Mitigation (NFMC compliant)

Save Work Plan

Include	Action	Rationale	Days to Complete
yes	Intake - collect case info	Level 1	
yes	Identify Grantor	Level 1	
yes	Designate Level	Status	
yes	Intake - review privacy policy / sign authorization	Level 1	5
yes	Counseling Mode (Level 1)	Level 1	
yes	Intake - collect subject property info	Level 1	12
yes	Budget - Creation - pull / review credit	Level 1	20
yes	Budget Creation - enter liabilities	Level 1	20
yes	Budget Creation - enter income	Level 1	20
yes	Budget Creation - enter liens and payments	Level 1	20
yes	Budget Creation - monthly worksheet	Level 1	10
yes	Counseling Mode (Level 2 & 3)	Level 2	
yes	Budget Validation - review financial information	Level 2	10
yes	Steps to Solution - choose workout method	Level 2	20
yes	Steps to Solution - contact lien holder (offer)	Level 2	20
yes	Steps to Solution - select activity type	Level 2	
yes	Steps to Solution - complete finance page	Level 2	20
yes	Complete - enter case resolution	Status	

Click on the **Save Work Plan** button at the top of the page to save the work plan.

**NOTE:** The work plan that is auto generated for Mortgage Default customers has been carefully developed. It includes all of the items required to fully resolve a foreclosure client case and to report to NFMC.

As soon as you save the work plan, you should see the GPS menu screen that lists all tasks associated with that work plan template. This GPS menu screen allows you to enter all required data and fully resolve the case from one easy to use location:

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit	Cancel
Intake - collect case info	Level 1	Intake		Pending	60	[E]	[X]
Identify Grantor	Level 1	Grantor		Pending	0	[E]	[X]
Intake - review privacy policy / sign authorization	Level 1	Authorization		Pending	60	[E]	[X]
Intake - collect subject property info	Level 1	Property		Pending	90	[E]	[X]
Budget - Creation - pull / review credit	Level 1	Credit Report		Pending	300	[E]	[X]
Budget Creation - enter liabilities	Level 1	Liabilities		Pending		[E]	[X]
Budget Creation - enter income	Level 1	Income		Pending	300	[E]	[X]
Budget Creation - enter liens and payments	Level 1	Liens		Pending	300	[E]	[X]
Budget Creation - monthly worksheet	Level 1	Budget		Pending	120	[E]	[X]
Budget Validation - review financial information	Level 2	Budget		Pending	120	[E]	[X]
Steps to Solution - choose workout method	Level 2	Liens		Pending	300	[E]	[X]
Steps to Solution - contact lien holder (offer)	Level 2	Liens		Pending	300	[E]	[X]
Steps to Solution - complete finance page	Level 2	Finance		Pending	300	[E]	[X]
Designate Level 3	Level 1			Pending		[E]	[X]
Complete - enter case resolution	Closeout & Resolution	Resolution		Pending		[E]	[X]

# CounselorMax User Guide

## 8.2.1.2 Mortgage Default (MD) Service Work Plan

Each service type in CounselorMax has its own unique standard work plan template with corresponding tasks. The MD service has the following tasks as displayed above and in the following list:

1. Intake
2. Identify Grantor
3. Intake – review privacy policy /sign authorization
4. Budget creation – pull/review credit
5. Budget creation – enter liabilities
6. Budget creation – enter income
7. Budget creation – enter liens and payments
8. Budget creation – monthly worksheets
9. Budget validation – review financial information
10. Steps to solution – chose workout method
11. Steps to solution – contact lien holder (offer)
12. Steps to solution – complete finance page
13. Designate Level 3 (optional)
14. Complete – enter case resolution

Each of these tasks is covered in detail later in the document.

## 8.2.1.3 Collecting Counseling and Education Data

To claim a customer as a legitimate Mortgage Default client, you must provide at least one individual counseling session. You may also provide multiple additional counseling sessions and education sessions. Recording these activities should be familiar since are similar to the Classic CounselorMax functions. You can track MD related counseling and education as you would any other counseling and education. Below is a review of how to track this data.

### Education Data

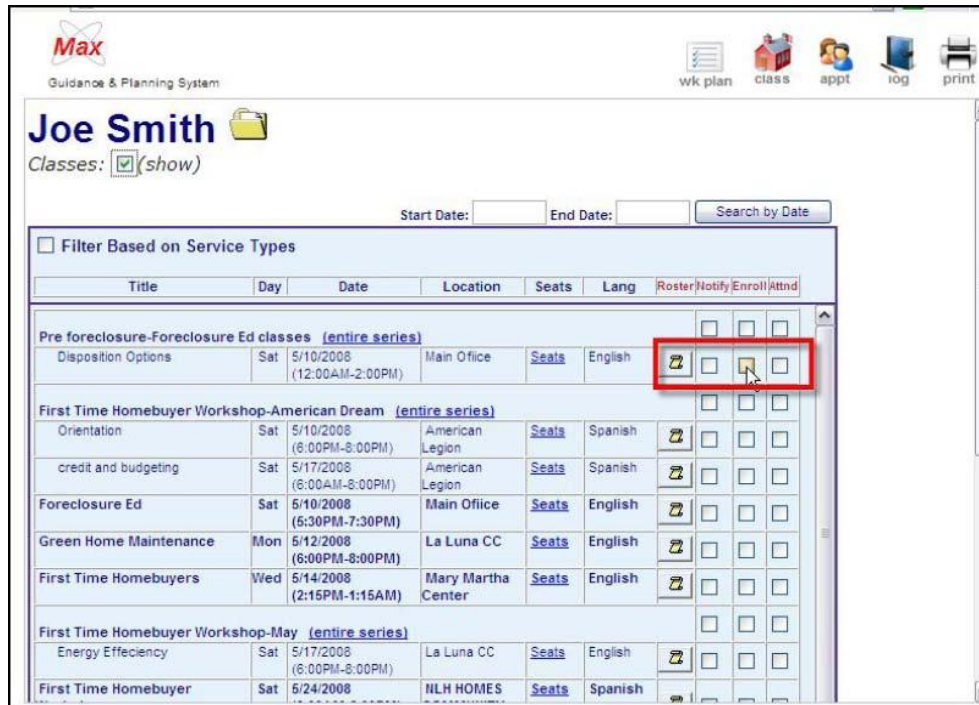
Although foreclosure related education is not a required activity for an MD client, often the client will attend one or more MD related education sessions. To track this information you click on the **Class** icon within the GPS menu screen:





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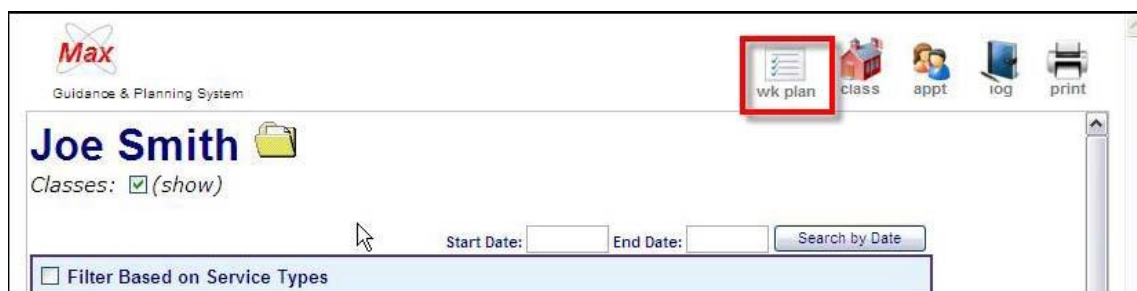
This will open the available class form similar to Classic CounselorMax:



In the example class list pictured above, you can see one **Pre-foreclosure - Foreclosure Ed class** titled “**Disposition Options**”. Click on any one of the relevant checkboxes to notify, enroll or mark the customer as having attended the class.

If the customer attends additional classes, track their participation in the same manner.

Once you’ve completed entering education data, return to the main GPS work plan screen by clicking on the **Wk Plan** icon at the top of the GPS form:



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## Collecting Counseling Data

You must have at least one documented Mortgage Default related counseling session in CounselorMax to count the client as a Mortgage Default client. You can record counseling information using the GPS. If you are already in the GPS form you can enter a new counseling record by clicking on the **Appt** icon.

If you are returning to a client's record from within the main forms in CounselorMax, you can return to the GPS form to record counseling information by clicking on the Counseling tab. Notice that you now have a new "Guidance & Planning System (GPS)" option:

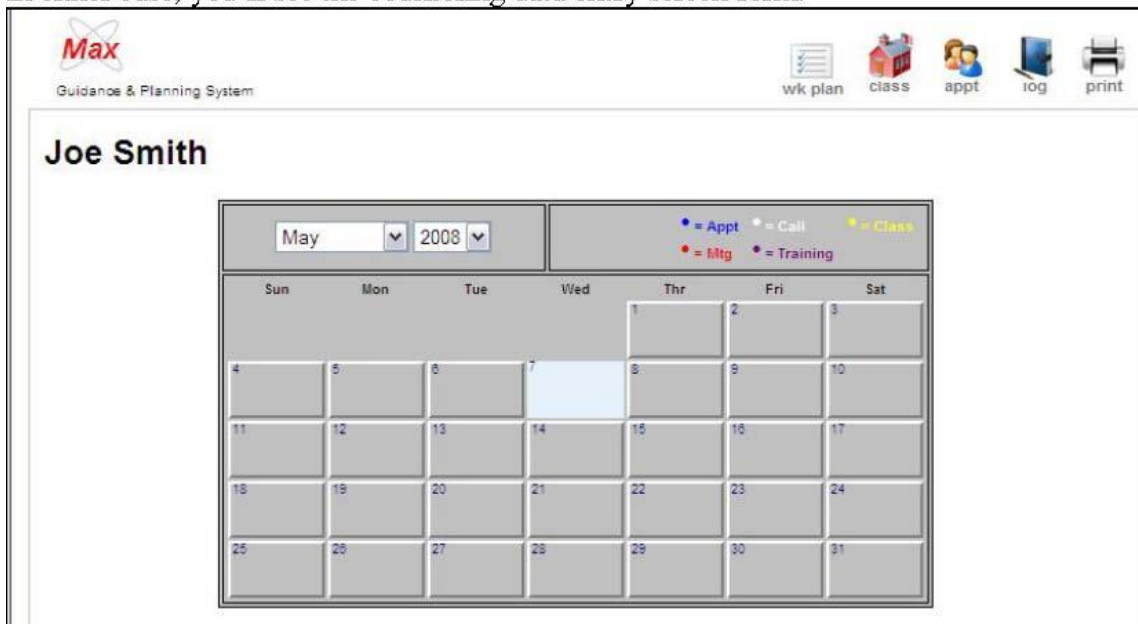


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Click on the **Guidance & Planning System (GPS)** checkbox on the screen above to enter the GPS work plan for the MD service and then click on the **Appt** (appointment) icon:



In either case, you'll see the counseling data entry screen form:



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To add a new appointment, click on the date you wish to schedule. This will open an appointment detail form. Enter all the necessary data. See below a sample appointment with the following data:

**Type:** Select Appt from drop-down list

**Staff:** Leave the default selection (CounselorMax defaults to your user initials)

**Description:** One-on-one MD counseling session

**Location:** Main office

**Start (Date/Time):** 5/15/2008

**End (Date/Time):** 5/15/2008

The screenshot shows the CounselorMax interface for adding an appointment. At the top, it says "Max Guidance & Planning System" and "Joe Smith Thursday, May 15, 2008". There are navigation icons for "wk plan", "class", "appt", "log", and "print". A "Back to Calendar" button is present. A checked "Add Event" checkbox is shown. The form fields are: Type (Appt), Staff (BH, CA, DN), Description (One-on-one FM counseling session), Location (Main office), Start (Date/Time) (5/15/2008 4:00 PM), and End (Date/Time) (5/15/2008 5:00 PM). An "OK" button is highlighted with a mouse cursor. At the bottom, there is a checkbox for "View All Staffs' Events for This Day".

Once you click “OK”, CounselorMax will prompt you to send a reminder letter. You can do this or return to the work plan to enter additional information:

The screenshot shows a confirmation dialog box. It says "Your Event was Saved Successfully!". Below that, it asks "Would you like to [print a reminder letter](#) to the client now?". There is a "print a reminder letter" link. Below that, it says "If not [return to the calendar](#) and a reminder will be automatically created so you can print this letter later." There are navigation icons for "wk plan", "class", "appt", "log", and "print".

**NOTE:** For NFMC grantees, CounselorMax checks to determine that at least one appointment exists in the system before it counts an MD client in the NFMC report. In addition, the client must have completed one or both Level 1 and Level 2 requirements.

## 8.2.1.4 Updating and Completing Work Plan Tasks

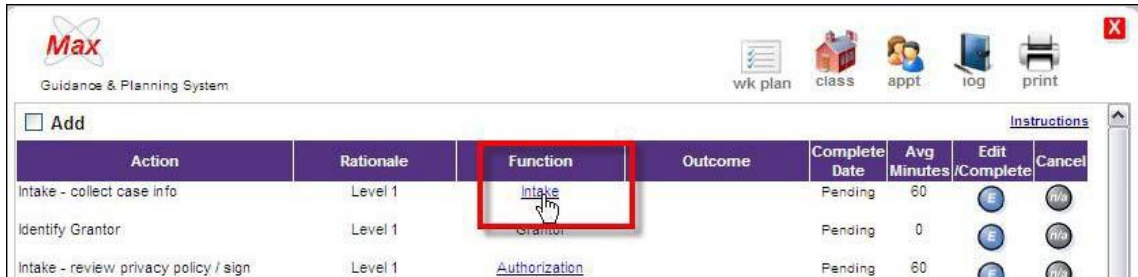
Using the GPS you can collect all of the required MD service data for a client. Although the tasks in the MD auto generated work plan follow a logical and sequential service path, it's certainly possible to enter the data in any order you wish. You do not need to complete each task in sequence to complete data entry for an MD client. However, for illustration purposes the tasks are performed sequentially.

# CounselorMax User Guide

## Intake – Collect Case Info

By completing the case information in Classic CounselorMax, you have already collected most of the contact, demographic and background information for the client. However, there are some additional items under **Intake Function** that relate to MD clients and are entered by completing the **Intake – Collect Case Info** task under **Action**, the first task on our MD auto-generated work plan.

To access the task, simply click on the **Intake** link in the work plan under **Function**:



Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit/Complete	Cancel
Intake - collect case info	Level 1	<a href="#">Intake</a>		Pending	60		
Identify Grantor:	Level 1	<a href="#">Grantor</a>		Pending	0		
Intake - review privacy policy / sign	Level 1	<a href="#">Authorization</a>		Pending	60		

This opens the MD Intake task data entry form:



**Client Information**

Required Fields Must Be Filled-In

First Name: John Middle: Last: Smith  
Address: 12 Main Street  
City: Boston State: MA Zip: 02110

Household Occupants \*  
---Select One---

Default Reason \*  
---Select One---

SAVE

There are two buttons:

**Client Info** (the default selection) - the current data entry screen and **Subject Prop** – the subject property detail data entry screen.

To begin, select the appropriate options from the **Household Occupants** and **Default Reason** drop-down lists and click on the **Save** button.

**NOTE:** The Default Reason drop-down list provides the primary reasons the client is facing a potential foreclosure.

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Client Info    Subject Prop    Client Information

Required Fields Must Be Filled-in

First Name: John    Middle:    Last: Smith  
 Address: 12 Main Street  
 City: Boston    State: MA    Zip: 02110

Household Occupants\*  
 Married with children

Default Reason\*  
 ---Select One---  
 ---Select One---  
 Business Venture Failed  
 Death of a family member  
 Divorce/Separation  
 Increase in Expense  
 Increase in loan payment  
 Loss of income  
 Medical Issues  
 Other  
 Poor budget management skills  
 Reduction in income

SAVE

You should see a **Saved Successfully!** Pop-up screen.

Click on the **Wk plan** icon at the top of the screen to return to the work plan menu screen.

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wk plan    class    appt    log    print

Add    Instructions

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes / Complete	Edit	Cancel
Intake - collect case info	Level 1	<a href="#">Intake</a>		Pending	00		
Identify Grants	Level 1	<a href="#">Grants</a>		Pending	0		
Intake - review university policy / sign authorization	Level 1	<a href="#">Authorization</a>		Pending	80		
Intake - collect subject property info	Level 1	<a href="#">Property</a>		Pending	00		
Budget Creation - pull / review credit	Level 1	<a href="#">Credit Report</a>		Pending	300		
Budget Creation - enter liabilities	Level 1	<a href="#">Liabilities</a>		Pending			
Budget Creation - enter income	Level 1	<a href="#">Income</a>		Pending	300		
Budget Creation - enter lease / rent payments	Level 1	<a href="#">Lease</a>		Pending	300		
Budget Creation - monthly workshoop	Level 1	<a href="#">Budget</a>		Pending	120		
Budget Validation - review financial information	Level 2	<a href="#">Budget</a>		Pending	120		
Steps to Solution - choose workout method	Level 2	<a href="#">Lease</a>		Pending	300		
Steps to Solution - contact lien holder (if any)	Level 2	<a href="#">Lease</a>		Pending	300		
Steps to Solution - select activity type	Level 2	<a href="#">Activity Type</a>		Pending			
Steps to Solution - complete finance doc	Level 2	<a href="#">Finance</a>		Pending	300		
Complete - enter case resolution	Caseual & Resolution	<a href="#">Resolution</a>		Pending			

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Start with the first action under the **Action** heading and click on its corresponding link under the **Function** heading. Complete all required fields marked with an asterisk and add additional information when/if available.

When completed, click on the blue button marked “E” under the **Edit/Complete** column. Enter the date of completion and appropriate Outcome.

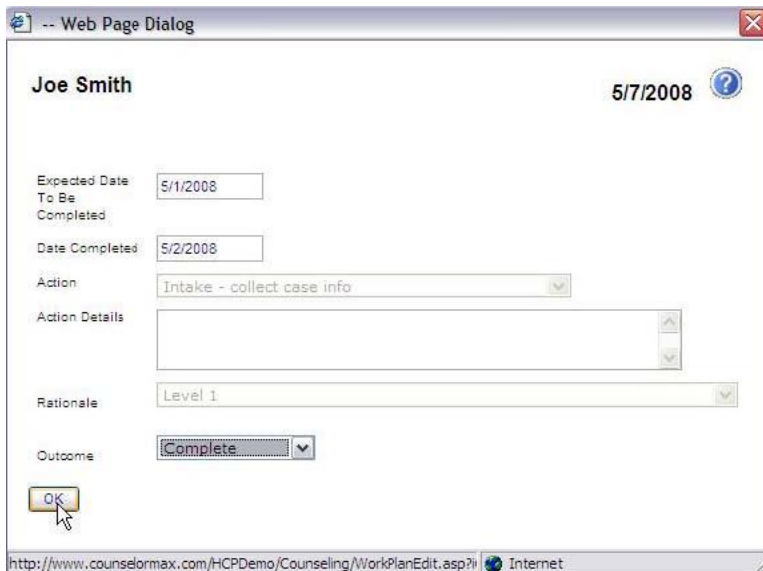
Complete all remaining Functions, corresponding Edit/Complete buttons and resolve when completed.

**NOTE:** Functions can be completed in any order.



Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit/Complete	Cancel
Intake - collect case info	Level 1	<a href="#">Intake</a>		Pending	60		
Identify Grantor	Level 1	Grantor		Pending	0		
Intake - review privacy policy / sign	Level 1	<a href="#">Authorization</a>		Pending	60		

This opens the task's **Resolution** form where you can finalize the task. Enter all data and click “OK”. If you leave the **Date Completed** field blank, the system automatically enters the current date for you. You can change this manually or enter it directly if you want a different date.



Joe Smith 5/7/2008

Expected Date To Be Completed: 5/1/2008

Date Completed: 5/2/2008

Action: Intake - collect case info

Action Details:

Rationale: Level 1


Outcome: Complete

OK

http://www.counselormax.com/HCPDemo/Counseling/WorkPlanEdit.asp?i Internet

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This should return you to the work plan. Note that the “Outcome” column for the “Intake” task is now marked **“Complete”**. You can also see a date in the **Completed Date** column:

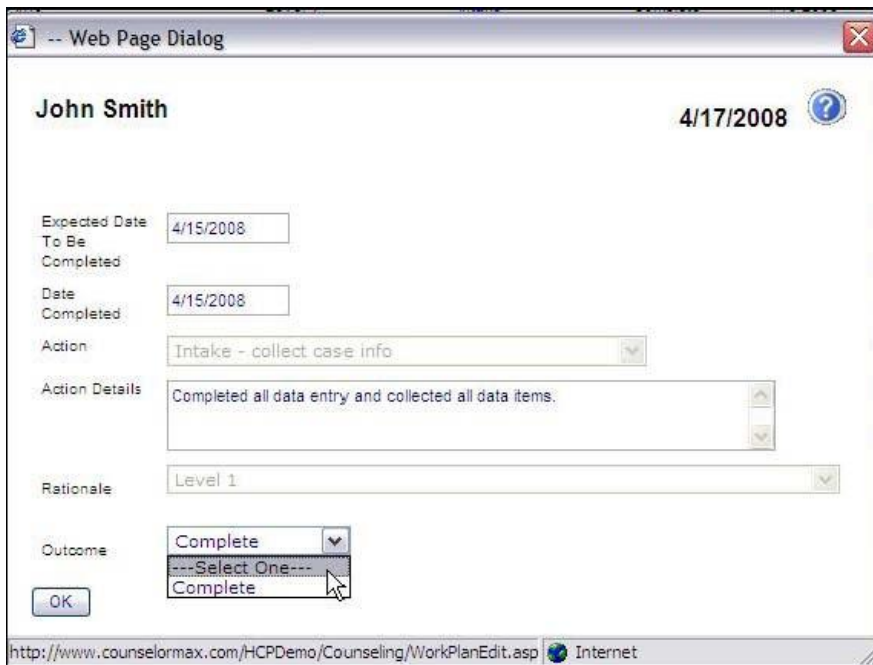


Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake - collect case info	Level 1	<a href="#">Intake</a>	Complete	5/2/2008	60		
Identify Grantor	Level 1	Grantor	Pending		0		
Intake - review privacy policy / sign	Level 1	<a href="#">Authorization</a>	Pending		60		

All other tasks work exactly in the same manner.

## Undoing a Completed Task

You can undo a completed task, if necessary, by clicking the edit button associated with the Action item (“E” in the Edit/Completed column). Change the **Outcome** field back to null (“**---Select One---**”) and then click **“OK”**.



John Smith 4/17/2008

Expected Date To Be: 4/15/2008  
Date Completed: 4/15/2008  
Action: Intake - collect case info  
Action Details: Completed all data entry and collected all data items.  
Rationale: Level 1  
Outcome: Complete (dropdown menu open showing: Complete, ---Select One---, Complete)  
OK

http://www.counselormax.com/HCPDemo/Counseling/WorkPlanEdit.asp Internet

This will return you to the work plan and you will see that the “Outcome” column for the work plan has changed from **“Complete”** to blank.



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## Identify Grantor

The next task in the MD work plan is “**Identify Grantor**”. When you are working with a MD client, you are most often funding the service through a specific funder or grantor (e.g., HUD or one of the eligible NFMC grantors). Currently, CounselorMax contains a list of all NFMC granted organizations. In order to tag the client to report them to a specific grantor, select the correct grantor in this step. Since many of you have multiple grantors for your MD services, it is important to make sure each client gets associated with the correct funding source.

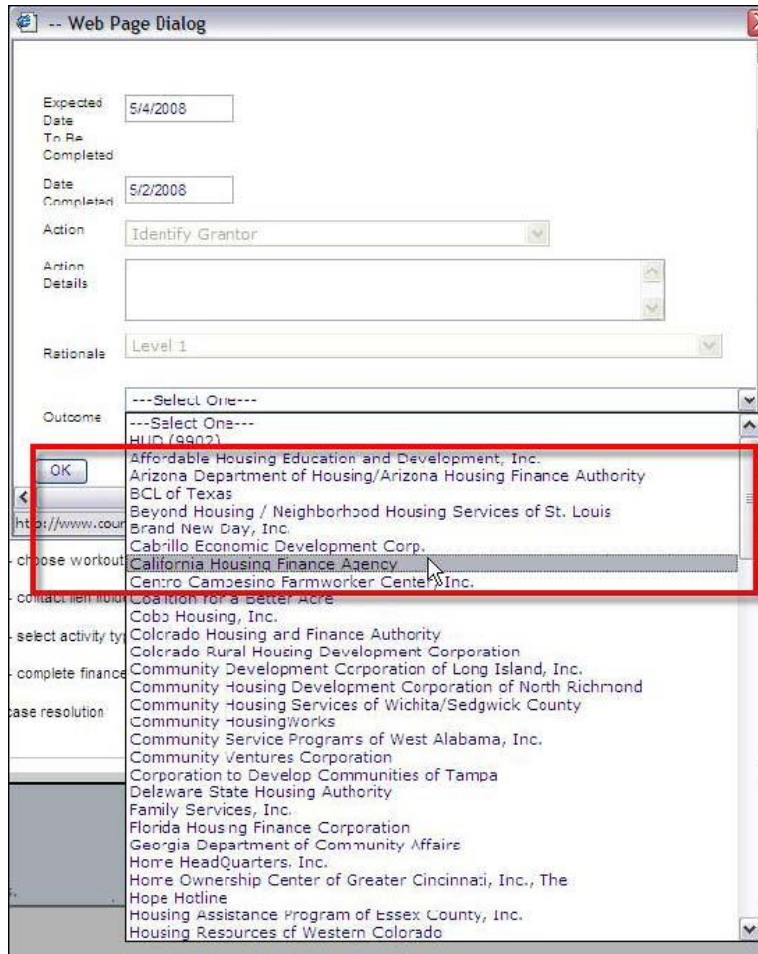
Click on the “**E**” button under the **Edit/Complete** column, in the **Identify Grantor** task row:

The screenshot shows the CounselorMax software interface. At the top left is the 'Max' logo and 'Guidance & Planning System'. On the top right are icons for 'wk plan', 'class', 'appt', 'rog', and 'print'. Below these is a table with the following columns: Action, Rationale, Function, Outcome, Complete Date, Avg Minutes, Edit/Complete, and Cancel. The 'Identify Grantor' row is highlighted, and the 'E' button in the 'Edit/Complete' column is circled in red.

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit/Complete	Cancel
Intake - collect case info	Level 1	<a href="#">Intake</a>	Complete	5/2/2008	60		
Identify Grantor	Level 1	Grantor	Pending		0		
Intake - review privacy policy / sign authorization	Level 1	<a href="#">Authorization</a>	Pending		60		
Intake - collect subject property info	Level 1	<a href="#">Property</a>	Pending		90		

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This opens the grantor selection form. Enter **Expected Date** and **Completed Date**, select the grantor funding this client's services, and click **"OK"**:



This brings you back to the work plan and the task is marked with the grantor selected. This is indication that the task has been completed. If necessary you can return to the form using the **"E"** button under the **Edit/Complete** column to change it:

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit / Complete	Cancel
Intake - collect case info	Level 1	<a href="#">Intake</a>	Complete	5/2/2008	60		
Identify Grantor	Level 1	Grantor	California Housing Finance Agency	5/2/2008	0		
Intake - review privacy policy / sign authorization	Level 1	<a href="#">Authorization</a>		Pending	60		
Intake - collect subject property info	Level 1	<a href="#">Property</a>		Pending	90		

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## Intake – Review Privacy Policy / Sign Authorization

The next step in the standard MD work plan is to collect and document the authorization form to release information. CounselorMax includes a standard authorization form that you can use for this purpose. However, if you receive an NFMC grant, you may want to download and replace this version with the NFMC specific authorization form.

**NOTE:** The Admin at your organization can download and replace the NFMC specific authorization form.

Click on the **Authorization** task name from the work plan form to access the authorization task form:



The screenshot shows a web browser window with the CounselorMax logo and navigation icons (wk plan, class, appt, log, print). The main content area contains the following text: "Please print a copy of the release form (see link below), make sure that your client reads it carefully, have you client sign the form, check the box below, and press the 'OK' button." Below this is a red-bordered box titled "Authorization to Release Information" containing a checked checkbox, a link "Click Here to Print Form", and a note "(note: to change this go to 'Admin/Misc/Release Form')". An "OK" button is located at the bottom of the box.

Click the **Authorized to Release Information** checkbox if the client has authorized you to release information to third parties. It's important that you print the form, have the client sign it, and save the signed copy. Click on the **Click Here** link to print the form. Click on the **OK** button and then click on the **Wk plan** icon to close the form and return to the work plan.

As with all work plan tasks, you now need to finalize the task by clicking on the **Edit/Complete** button and filling out the task completion form:



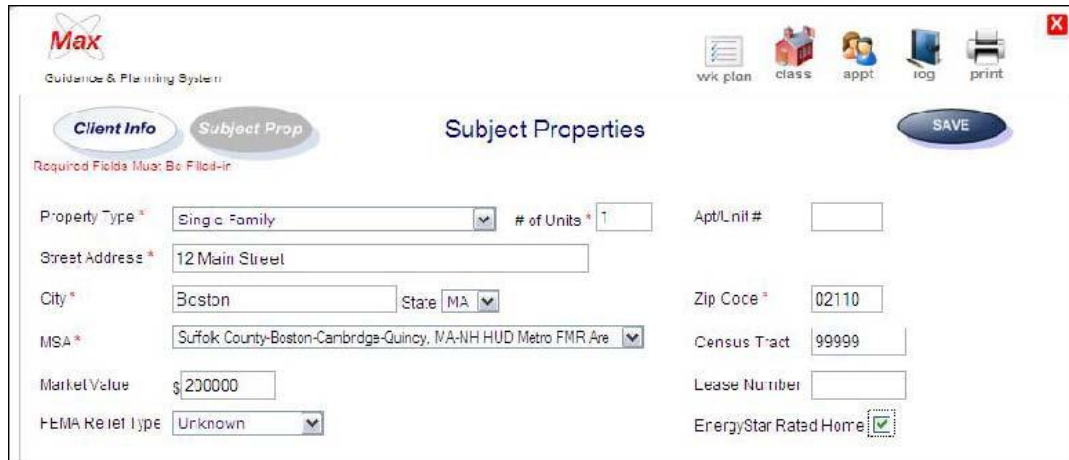
The screenshot shows a "Web Page Dialog" window for a task titled "John Smith" dated "4/17/2008". The form includes the following fields: "Expected Date To Be Completed" (4/22/2008), "Date Completed" (4/22/2008), "Action" (Intake - review privacy policy / sign authorization), "Action Details" (Client signed and saved to hard file.), "Rationale" (Level 1), and "Outcome" (Signed). An "OK" button is at the bottom left. The browser address bar shows "http://www.counselormax.com/HCPDemo/Counseling/WorkPlanEdit.asp".

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Click “OK” and you will return to the work plan with an updated status for the **Authorization** task. Note the Outcome field now shows “Signed”.

## Intake - Collection Subject Property Information

The NFMC grant requires additional subject property information above what is normally collected in CounselorMax. The **Property** form of the work plan allows you to collect this information. Click on the **Property** task to open the form:



The screenshot shows the CounselorMax interface for the 'Subject Properties' form. At the top, there is a navigation bar with icons for 'wk plan', 'class', 'appt', 'log', and 'print'. Below this, there are tabs for 'Client Info' and 'Subject Prop.', with 'Subject Prop.' selected. The form title is 'Subject Properties' and there is a 'SAVE' button. A note indicates 'Required Fields Must Be Filled-In'. The form contains several fields: 'Property Type' (Single Family), '# of Units' (1), 'Apt/Lnit #' (empty), 'Street Address' (12 Main Street), 'City' (Boston), 'State' (MA), 'Zip Code' (02110), 'MSA' (Suffolk County-Boston-Cambridge-Quincy, MA-NH HUD Metro FMR Are), 'Census Tract' (99999), 'Market Value' (\$200000), 'Lease Number' (empty), 'FEMA Relet Type' (Unknown), and 'EnergyStar Rated Home' (checked).

**Note:** While not all fields are required (required fields are marked with a red asterisk), you should enter all of the data you can. Once you are done entering data click “Save”. You should see a **Saved successfully!** message.

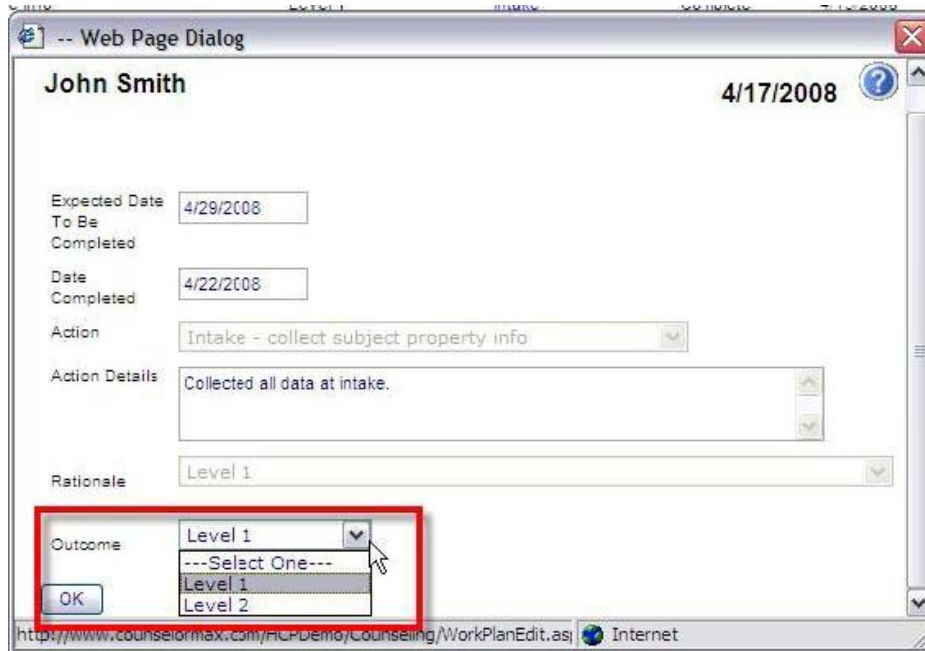
Click on the **Wk plan** icon to return to the work plan.

Finalizing this work plan item is the same process as with any task, click on the “E” edit button and fill out the task completion form. In this case, the task is associated with one of the NFMC counseling level tasks, specifically the **Completed an Intake** level 1 task. You can see the drop-down list to track that you’ve accomplished this task. It is critical that you complete this step since this is how CounselorMax knows that you’ve achieved the required tasks to include a client in your NFMC report. The system tracks if you’ve completed all the tasks associated with a “Level 1” outcome:

- Completed Intake
- Collected an Authorization Form
- Developed a Budget
- Developed an Action Plan

IF all four are marked as “Completed”, then the client and all their associated data is included in the report, otherwise they are left out. So, make sure you select “Level 1” from the **Outcome** drop-down list, enter “Date Completed” and click “OK” to save.

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## Budget Creation – Pull/Review Credit

The MD module allows you to pull a client's credit report and auto-populate the liabilities and credit score automatically.

If you are setup to pull credit reports from CounselorMax, enter your login name and password and click "OK".



This opens up the Get Credit Report form for the customer. Fill in all the required data and click on the **Get Credit report** button. This connects you to First American Credco, the credit report provider, and completes the data transfer (refer to Chapter 13 for the Admin function on Credco).

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The screenshot shows the 'Get Credit Report' form in the CounselorMax system. At the top left is the 'Max' logo and 'Guidance & Planning System'. On the top right are icons for 'wk plan', 'class', 'appt', 'log', and 'print'. The form includes a 'Get Credit Report' button, a 'Joint' checkbox, and a 'Client Paid In-Full?' section with radio buttons for 'No' and 'yes'. The main form area contains fields for 'First Name' (John), 'Last Name' (Smith), 'Middle Name', 'Name Suffix', and 'SSN' (with a note: 'NOTE: The SSN you enter will be saved in this person's 'Case Data' located in the 'Intake' tab'). Below these are 'Street Address' (12 Main Street), 'City' (Boston), 'State' (MA), and 'Zip Code' (02110). At the bottom, there are three checked checkboxes: 'Trans Union', 'Equifax', and 'Experian'.

If you are not set up in CounselorMax to collect credit data automatically you can still complete this step manually. Simply collect the credit report by your standard means and once you have done so you can finalize the **Credit Report** task as you do with any task. Click on the **Edit** button, fill out the task finalization form and click **“OK”**:

The screenshot shows a 'Web Page Dialog' window titled 'John Smith' with a date of '4/17/2008'. The form contains the following fields: 'Expected Date To Be' (5/7/2008), 'Date Completed' (4/22/2008), 'Action' (Budget - Creation - pull / review credit), 'Action Details' (Successfully pulled report.), 'Rationale' (Level 1), and 'Outcome' (Complete). An 'OK' button is at the bottom left. The URL at the bottom of the dialog is 'http://www.counselormax.com/HCPDemo/Counseling/WorkPlanEdit.asp'.

## Budget Creation - Enter Liabilities

If you pulled a credit report from CounselorMax automatically, all of the client's liabilities will be auto-populated for you. You can still access them to edit and fine tune the data. If you did not pull the credit report automatically, you can still enter liabilities manually. In either case, you can click on the **Liabilities** task within the work plan to view liabilities.

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Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit / Complete	Cancel
Intake - collect case info	Level 1	<a href="#">Intake</a>	Complete	5/2/2008	60		
Identify Grantor	Level 1	Grantor	California Housing Finance Agency	5/2/2008	0		
Intake - review privacy policy / sign authorization	Level 1	<a href="#">Authorization</a>	Signed	5/8/2008	60		
Intake - collect subject property info	Level 1	<a href="#">Property</a>	Complete	5/8/2008	90		
Budget - Creation - pull / review credit	Level 1	<a href="#">Credit Report</a>	Complete	5/7/2008	300		
Budget Creation - enter liabilities	Level 1	<a href="#">Liabilities</a>	Pending				
Budget Creation - enter income	Level 1	<a href="#">Income</a>	Pending		300		

This opens up the **Liabilities** form. If no liabilities exist in the system, you should see a form that allows you to enter data for the client's first liability. Complete all required data fields and click **"Save"**. This saves your liability and takes you to the liability summary form:

**Liabilities**

Required Fields Must Be Filled in

Liability Type\*:  Account Number:

Min Mnth Pymnt\*:  Account Balance:

Account Name\*:  Street:

City:  State:

Zip Code:

Don't Use in Computations:

Victim of Predatory Lending:

Paid Off At Case Resolution:

**SAVE**

If you click on the **Paid off at Case Resolution** checkbox at the bottom of the form, the liability is added to the finance summary page since this is required when applying for loans, grants or work out scenarios.

**Liabilities**

Required Fields Must Be Filled in

Liability Type\*:  Account Number:

Min Mnth Pymnt\*:  Account Balance:

Account Name\*:  Street:

City:

State:

Zip Code:

Don't Use in Computations:

Victim of Predatory Lending:

**Paid Off At Case Resolution**:

[Back to List of Liabilities](#)

**SAVE**

# CounselorMax User Guide

If you pulled a credit report through CounselorMax and the client's credit information included some existing liabilities, or you've already entered liabilities manually, you will see the **Liability** summary form, from which you can access specific liabilities to review or edit, delete existing liabilities, or add new ones:



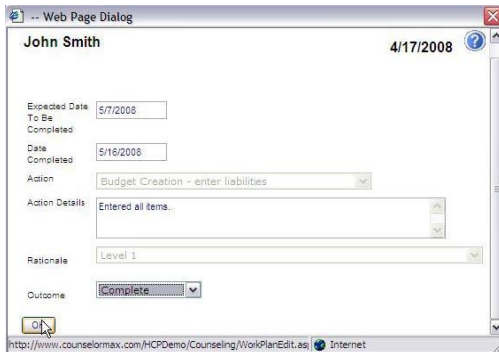
The screenshot shows the CounselorMax interface for the 'Liabilities' section. At the top left is the 'Max' logo and 'Guidance & Planning System'. On the top right are navigation icons for 'wk plan', 'class', 'appt', 'log', and 'print'. The main heading is 'Liabilities' with an 'Add New' button. Below is a table with columns: Name, Type, Applicant / Co-App, Min Pymnt, Balance, Edit, and Delete. The table contains one entry for a Visa credit card with a balance of \$1,000.00 and a minimum payment of \$30.00. A 'Total' row shows a combined balance of \$1,000.00 and a minimum payment of \$30.00. Edit and Delete buttons are shown as blue and red circles with 'E' and 'D' respectively.

Name	Type	Applicant / Co-App	Min Pymnt	Balance	Edit	Delete
Visa	Credit Card	Smith, John	\$30.00	\$1,000.00	E	D
Total:			\$30.00	\$1,000.00		

The process is simple and entails clicking on the appropriate button “E” for edit, “D” for delete, or “Add New” to add a new liability.

Make sure you enter all relevant liabilities for the customer, including all existing mortgages.

After you have documented all of the liabilities, make sure you click on the **Edit** button and select “**Complete**” for the **Liabilities** task.



The screenshot shows a web browser window titled 'Web Page Dialog' displaying the 'Edit' form for a task. The client name is 'John Smith' and the date is '4/17/2008'. The form includes fields for 'Expected Date To Be Completed' (5/7/2008), 'Date Completed' (5/16/2008), 'Action' (Budget Creation - enter liabilities), 'Action Details' (Entered all items...), 'Rationale' (Level 1), and 'Outcome' (Complete). The URL at the bottom is 'http://www.counselormax.com/HCPDemo/Counseling/WorkPlanEdit.as'. The browser shows an Internet Explorer icon.



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The task will be marked as **Complete** when you return to the work plan:

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake - collect case info	Level 1	<a href="#">Intake</a>	Complete	5/2/2008	60		
Identify Grantor	Level 1	Grantor	California Housing Finance Agency	5/2/2008	0		
Intake - review privacy policy / sign authorization	Level 1	<a href="#">Authorization</a>	Signed	5/8/2008	60		
Intake - collect subject property info	Level 1	<a href="#">Property</a>	Complete	5/8/2008	90		
Budget - Creation - pull / review credit	Level 1	<a href="#">Credit Report</a>	Complete	5/7/2008	300		
Budget Creation - enter liabilities	Level 1	<a href="#">Liabilities</a>	<b>Complete</b>	5/7/2008			

## Budget Creation – Enter Income

The next task in the process is to enter income data. Click on the **Income** task. If you have not entered income before, a new **Income** form will open. Complete all required items and click the **Save** button.

**Income**

Required Fields Must Be Filled-in

[Other Income](#)

Add

Employer*	<input type="text" value="Walmart"/>	Date Start (mm/dd/yyyy)*	<input type="text" value="01/01/2008"/>
Date End (mm/dd/yyyy)	<input type="text"/>	Years In Profession	<input type="text" value="1"/>
Self Employed	<input type="checkbox"/>	Title*	<input type="text"/>
Bus Type*	<input type="text" value="Retail"/>	Phone	<input type="text" value="(777) 7777777"/>
Mnthly Gross Income*	<input type="text" value="\$3000"/>	Mnthly Net Income*	<input type="text" value="\$2000"/>
Address	<input type="text" value="1 Main Street"/>	City	<input type="text" value="Medford"/>
State	<input type="text" value="MA"/>	Zip Code	<input type="text" value="02111"/>
Farm Worker	<input type="checkbox"/>		

**SAVE**

Upon saving the first source of income the **Income Summary** form will display, listing all existing income sources. If at least one income exists, clicking on the **Income** task will open the Income summary form, and you can edit, delete, or add new income exactly as you did with liabilities.

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Income does not have to be employment income. It can be any kind of income the customer has; for example, disability benefits, dividends, alimony payments, etc. Add these in the income sources also. To access the **Other Income** form, click on the **Add New** button to view the standard **Income** form, and then click on the **Other Income** link:

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Income

Required Fields Must Be Filled-in

Other Income

Employer\*  Date Start (mm/dd/yyyy)\*

Date End  Years In Profession

SAVE

This displays the **Other Income** form:

Max  
Guidance & Planning System

Other Income

Required Fields Must Be Filled-in

Income Type\* Alimony Monthly Income\* 400

SAVE

Fill out all required fields and save. This will return you to the income summary form:

Max  
Guidance & Planning System

Income

Add New

Company	Applicant / Co-App	Monthly Gross	Monthly Net	Edit	Delete
Dividend Income	Smith, John	\$200.00	\$200.00		
Walmart	Smith, John	\$3,000.00	\$2,000.00		
Total:		\$3,200.00	\$2,200.00		

As always, return to the work plan form. When you've entered all sources of income, complete the task by clicking on the "E" button under the **Edit** column and enter a completion date, an outcome of completed and save it. The task will be marked as complete in the work plan GPS.

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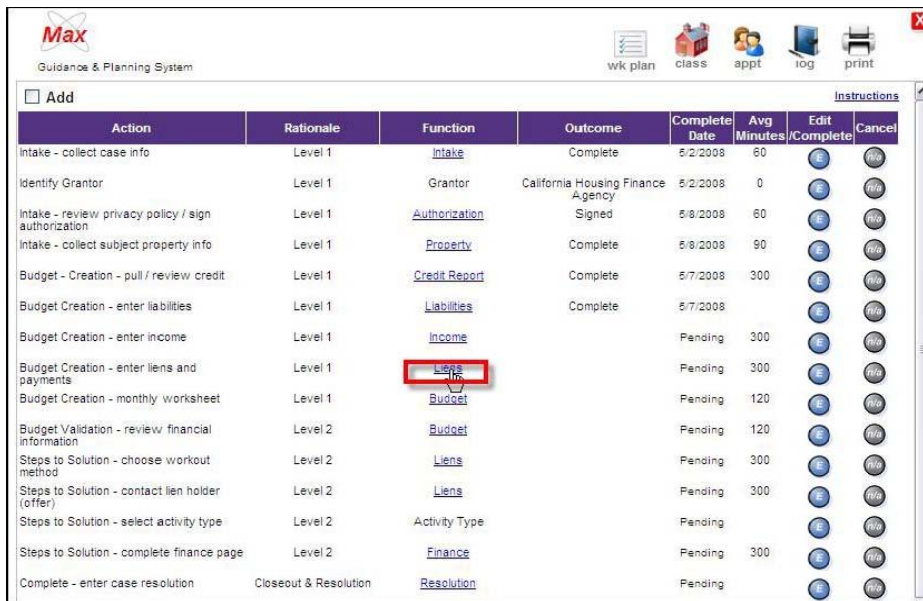
## 8.2.1.5 Entering Workout Data

Documenting lien and lien resolution/conclusion information (that is, documenting a work plan for the customer) is at the center of the MD module. In CounselorMax, this step is broken down into three discrete tasks: **Budget Creation - Enter Liens and Payments**, **Budget Creation – Monthly Worksheet** and **Budget Validation –review financial information**. These tasks are all entered through the **Liens and Payments** form.

### Budget Creation - Enter Liens and Payments

The first lien task is “**Budget Creation –enter Liens and Payments**”. Since the client is a Mortgage Default client, the completion of this section is an important step that must be carefully documented. Thus, the form is more detailed than other budget forms.

Click on the **Lien** task from the work plan form to access the Lien form. If this is your first lien, a new lien detail form will open. If you’ve already entered liens, the lien summary form will open. In this example, the client has no pre-entered liens for the client.



Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit/Complete	Cancel
Intake - collect case info	Level 1	<a href="#">Intake</a>	Complete	5/2/2008	60		
Identify Grantor	Level 1	Grantor	California Housing Finance Agency	5/2/2008	0		
Intake - review privacy policy / sign authorization	Level 1	<a href="#">Authorization</a>	Signed	5/8/2008	60		
Intake - collect subject property info	Level 1	<a href="#">Property</a>	Complete	5/8/2008	90		
Budget - Creation - pull / review credit	Level 1	<a href="#">Credit Report</a>	Complete	5/7/2008	300		
Budget Creation - enter liabilities	Level 1	<a href="#">Liabilities</a>	Complete	5/7/2008			
Budget Creation - enter income	Level 1	<a href="#">Income</a>	Pending		300		
Budget Creation - enter liens and payments	Level 1	<a href="#">Liens and Payments</a>	Pending		300		
Budget Creation - monthly worksheet	Level 1	<a href="#">Budget</a>	Pending		120		
Budget Validation - review financial information	Level 2	<a href="#">Budget</a>	Pending		120		
Steps to Solution - choose workout method	Level 2	<a href="#">Liens</a>	Pending		300		
Steps to Solution - contact lien holder (offer)	Level 2	<a href="#">Liens</a>	Pending		300		
Steps to Solution - select activity type	Level 2	Activity Type	Pending				
Steps to Solution - complete finance page	Level 2	<a href="#">Finance</a>	Pending		300		
Complete - enter case resolution	Closeout & Resolution	<a href="#">Resolution</a>	Pending				

The Liens and Payments form has three parts. The first two parts are the **Lien Holder Information** section and the **Lien Characteristics** section and those are the two pieces you need to enter when completing the **Budget Creation Enter Liens and Payments** Task.

The **Lien Holder Information** section contains contact information for the lien holder (Bank, loan servicer, Mortgage Company, etc.). To complete this section, collect the lien holder information from the client and fill in the contact fields. Required fields are marked with the familiar red asterisk and must be filled out. In addition to basic contact information, this section also includes two required fields with drop-down lists, **Lien Holder Type** and **Payment Status** at contact. Choose the correct options for each.

# CounselorMax User Guide

Complete one **Lien Holder Information** section for each existing lien on the client's property:

**Liens and Payments**

Required Fields Must Be Filled-in:

Subject: 12 Main Street, Boston, MA 02110 [Printer friendly version](#)

**Lien Holder Information**

Lien Holder Name *	Lender Inc.	Contact Name	Harry Smith	FDIC #	
Address 1	1 Spring Street	Phone	777-777-7777		
Address 2	Suite 3	Contact Fax	8888888888		
City	Bostcn	Contact Email	hsmith@lendersinc.com		
State	MA	Zip	02116	Pmt Status (at contact) *	61 - 90 days
Lien Holder Type *	Mtg Lender				

**Lien Characteristics**

Payment Type *	---Select One---	Income Doc Type	---Select One---	Lien Position *	--
Current Servicer		Servicer Loan #		Term Type *	--

The second section of the **Liens and Payments** form is the **Lien Characteristics** section where the characteristics of the lien currently and at origination are populated:

**Lien Characteristics**

Payment Type *	Mtg - Hybrid rate reset	Income Doc Type	NINA (no income no asset verification)	Lien Position *	1
Current Servicer	Lender Inc.	Servicer Loan #	9999999	Term Type *	30
Original Lien Holder	Lender Inc.	Original Loan #	9999999	Start Rate	6
Pmt Prior to Rate	1400	Mtg Insurance Type	Private Mortgage Insurance	Interest Only	<input checked="" type="checkbox"/>

**Monthly Payments & Loan Balance / Past Due Amounts**

Although not all of the data fields are required for every lien, you are required to collect all data points in this section for some liens, such as mortgage liens.

You've now entered all of the required data for the **Budget Creation – enter liens and payments** task. You can now finalize this task by returning to the **Work Plan** form, clicking on the **“E”** button of the **Budget Creation – enter liens and payments** task row and entering a **completion date** and **Completed** status for the task.

# CounselorMax User Guide

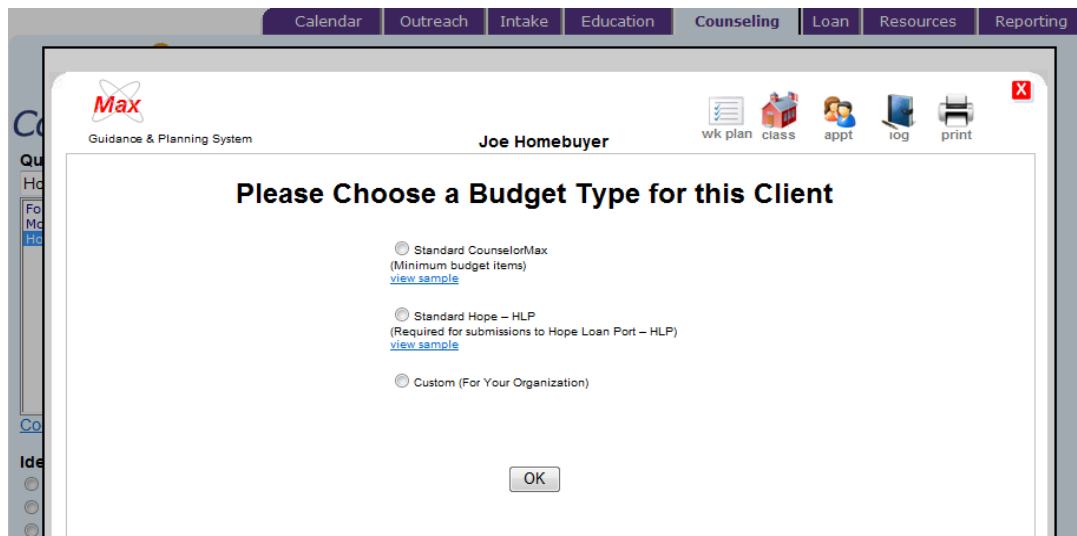
The last section of the form **Monthly Payments & Loan Balance/Past Due Amounts** is addressed later on in subsequent steps. You can leave it blank for now.

## Budget Creation – Monthly Worksheet

The next task in the standard work plan is the **Budget Creation – monthly worksheet** task. To complete it click on the **Budget** link under the **Function** column:

This will expose the “choose budget” sub-form. Depending on the options your agency Admin has enabled in your version of CounselorMax, you should see up to three of the following options:

1. **Standard CounselorMax:** a basic but effective budget template with a simple set of income and expense categories.
2. **Standard Hope – HLP (HOPE LoanPort)** budget: a budget template developed to collect all budget data required to electronically transmit a case to the HOPE LoanPort. Because the HOPE LoanPort has a precise and fixed set of budget items, this budget is not customizable. If your agency Admin has not enabled the HOPE LoanPort budget, you will not see this option.
3. **Custom (for your agency):** a custom budget template configured by your Agency Admin. It contains those items your agency Admin considers important to collect for your agency cases. If the agency Admin has not created and enabled a custom budget, you will not see this option.



The screenshot shows a web application interface for CounselorMax. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. Below the navigation bar, the user's name 'Joe Homebuyer' is displayed. The main content area is titled 'Please Choose a Budget Type for this Client'. It contains three radio button options: 'Standard CounselorMax (Minimum budget items)' with a 'view sample' link, 'Standard Hope – HLP (Required for submissions to Hope Loan Port – HLP)' with a 'view sample' link, and 'Custom (For Your Organization)'. An 'OK' button is located at the bottom of the form.

Select the budget type you wish to create for your client by clicking on the corresponding radio button and then clicking the **OK** button.

# CounselorMax User Guide

This takes you to the “budget editing” form for that budget. For example, see below the Standard CounselorMax budget template:

The screenshot shows the CounselorMax budget editing interface. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. Below this, the user's name 'Joe Homebuyer' is displayed. The main content area is titled 'Income' and includes a table with the following items and values:

Income Item	Value
Employment	\$0
Overtime	0
Interest & Dividend	0
Net Rental Income	0
Other Income	0
Withholding	(0)
<b>Net Income</b>	<b>\$0</b>

Below the Income section is the 'Fixed Expenses' section, which includes a list of expense categories with input fields:

Fixed Expense Item	Value
Auto	0
Child Support/Alimony	0
Credit Card Min Payments	0
Credit Card Min Payments (details)	0
Credit Collections	0
Education	0
Housing Payment	0
Installment Loans	0
Installment Loans (details)	0
Insurance	0
Medical	0

Any budget you create will be divided into three main sections:

1. Income
2. Fixed Expenses
3. Discretionary Expenses

The CounselorMax budget tool allows you to enter two types of budgets for your clients: fixed and discretionary.

# CounselorMax User Guide

Category	Amount
<b>Fixed Expenses</b>	
Auto	0
Child Support/Alimony	0
Credit Card Min Payments	0
Credit Card Min Payments <a href="#">(details)</a>	0
Credit Collections	0
Education	0
Housing Payment	0
Installment Loans	0
Installment Loans <a href="#">(details)</a>	0
Insurance	0
Medical	0
Savings	0
Tax	0
Utilities	0
<b>Discretionary Expenses</b>	
Charity	0
Dining	0
Entertainment	0
Food and Groceries	0

To enter fixed or discretionary budget amounts for your clients, simply enter the desired figure in the text box to the right of each budget line item.

**Note:** The items that appear on the fixed or discretionary categories are designated as such by the CounselorMax design team in the case of the Standard CounselorMax budget, the HOPE LoanPort budget designers in the case of the Hope LoanPort budget, or by your agency Admin in the case of Custom budget.

Remember to click the **Save** button to save the values you have entered. If you leave the form without saving, your entries will not be saved to the database.

Credit Collections	0
Education	0
Housing Payment	0
Installment Loans	0
Installment Loans <a href="#">(details)</a>	0
Insurance	0
Medical	0
Savings	0
Tax	0
Utilities	0
<b>Discretionary Expenses</b>	
Charity	0
Dining	0
Entertainment	0
Food and Groceries	0
Gifts	0
Household	0
Miscellaneous	0
Pet Expense	0
Public Transportation	0
Rental Property	0

**Save**

# CounselorMax User Guide

You've now completed all Level 1 counseling tasks for this customer. If you have an NFMC grant, you can now report this customer as a level 1 customer. However, you may want to wait until the client is resolved (level 2 tasks and possibly designate the client as a level 3 client, if your grant allows this).

## Budget Validation – review financial information

The next task on the standard work plan is to validate and finalize the budget, the first Level 2 task.

After confirming the accuracy of the budget created earlier, click on the “E” button for this task to complete the task completion form. Enter the date completed, notes and an outcome of “**Complete**” to finalize the task. If you need to fine tune the client’s budget, make sure you edit it prior to finalizing the task.

The screenshot shows a web browser window titled 'Web Page Dialog' displaying a task completion form for 'John Smith' on '4/18/2008'. The form includes the following fields and options:

- Expected Date To Be Completed: 4/27/2008
- Date Completed: 4/27/2008
- Action: Budget Validation - review financial information
- Action Details: Customer kept track of expenses for one month. Compared to projected, adjusted and finalized.
- Rationale: Level 2
- Outcome: Complete

An 'OK' button is visible at the bottom left of the form. The browser address bar shows the URL: http://www.counselormax.com/HCPDemo/Counseling/WorkPlanEdit.aspx

## Steps to Solution – Choose Workout Method Task

The next Level 2 task is to choose a workout method for the client’s liens, which you entered earlier. On the **Liens and Payments** form, click on the **Liens** link under the **Function** column of the work plan form.

Budget Validation - review financial information	Level 2	<a href="#">Liens</a>	Complete	4/27/2008	120		
Steps to Solution - choose workout method	Level 2	<a href="#">Liens</a>		4/15/2008	300		
Steps to Solution - contact lien holder (offer)	Level 2	<a href="#">Liens</a>		Pending	300		



# CounselorMax User Guide

This takes you to the **Liens and Payments** summary form. Select the **Edit** button for the first lien for which you want to complete a workout plan.

Printer Friendly Version Add New

### Liens and Payments

Save Changes Was Successful!

Position	Lien Holder Name	Lien Holder Type	Work Out Status	Monthly Payments Current	Modified	Past Due Amount	Work Out Method	Edit	Delete
1	Lender Inc.	Mtg Lender	Pending	\$2,000.00	\$1,600.00	\$4,000.00	Payoff		
<b>Total:</b>				\$2,000.00	\$1,600.00	\$4,000.00			

This opens the detail form for the lien.

Scroll down and you should see the final section of the Liens and Payments form: the **Monthly Payments & Loan Balance / Past Due Amounts** section. This is where you can document proposed workout values for the lien. Enter current values, modified values (proposed at this point); work out method and the status of the request/proposal as well as any lien specific comments or loans.

### Monthly Payments & Loan Balance / Past Due Amounts

	Current Values	Modified Values	Work Out Method	Work Out Request Status
Monthly Pmt	<input type="text" value="2000"/>	<input type="text" value="1600"/>	Modify - lower rate and pmt	Pending
Current Rate	<input type="text" value="8.2"/>	<input type="text" value="7"/>	Modify - lower rate and pmt	Pending
Past Due Amount	<input type="text" value="4000"/>	<input type="text" value="4000"/>	Payoff	Pending
Principal Balance Current	<input type="text" value="200000"/>	<input type="text" value="200000"/>	-- no request --	Pending
Term (months remaining)	<input type="text" value="320"/>	<input type="text" value="318"/>	Payoff	Pending
Comments	<input type="text" value="Will propose to lower payments and rate and pay arrears."/>			

# CounselorMax User Guide

When you're done entering all of the current, modified, workout method and status fields for each lien on the client's property, click the **Save** button to view the Lien **summary** form:

Max  
Guidance & Planning System

Printer Friendly Version Add New

**Save Was Successful!**

Position	Lien Holder Name	Lien Holder Type	Work Out Status	Monthly Payments Current	Modified	Past Due Amount	Work Out Method	Edit	Delete
1	Lender Inc.	Mtg Lender	Pending	\$2,000.00	\$1,600.00	\$4,000.00	Payoff		
2	City of Boston	Tax Assessor	Pending	\$60.00	\$60.00	\$120.00	Payoff		
<b>Total:</b>				\$2,060.00	\$1,660.00	\$4,120.00			

The consistent format of the summary form should be familiar by now. It displays any existing liens and allows you to edit, delete or add additional liens. Keep in mind that a lien may not be a mortgage. You may also want to enter owed taxes, etc. that may be current liens on the property.

When you've entered all existing liens and finalized a work-out request status for each (as shown below), you can go to the **Work Plan** form, click on the **Liens** task and finalize the status of the task.

Monthly Payments & Loan Balance / Past Due Amounts

	Current Values	Modified Values	Work Out Method
Monthly Pmt	2000	1600	Modify - lower rate and pmt
Current Rate	8.2	7	Modify - lower rate and pmt
Past Due Amount	4000	4000	Payoff
Principal Balance Current	200000	200000	-- no request --

Work Out Request Status  
 Pending  
 --- Select One ---  
 Accepted  
 Counter-offer  
 Denied  
 Pending  
 Pending

John Smith 4/18/2008

Expected Date: 5/15/2008  
 To Be Completed  
 Date Completed: 4/23/2008  
 Action: Steps to be taken - choose workout method  
 Action Date is: Developed workout plan and documented for all existing liens.  
 Rationale: amount 2  
 Status: Complete

# CounselorMax User Guide

## Steps-to-solution: Contact Lien Holder (offer)

The next task in the process is to contact the lien holder(s) and make a proposal based on the work out plan we've devised. CounselorMax makes it easy for you to complete this task.

To begin, click on the **Liens** link within the work plan form. This opens up the **Contact Lien Holder** form. Fill it out with the lien holder's address, notes, your contact info, and click **"OK"**:

**Max**  
Guidance & Planning System

### Contact Lien Holder

Recipient Name: Harry Loans

Recipient Address: 1 Spring Street  
Suite 3  
Boston, MA 02111

Loan or Account # (optional): 99999999

Notes: Dear Mr. Loans, we are proposing the following workout plan for our client Mr. Smith. Please see the details below:

Your Contact Info: John Counselor  
NHS of Boston  
100 State Street  
Boston, MA 02111

OK

This opens up a form with a printable letter format of the proposed workout. It includes information on all other lien holders and the status of each. This is often useful information that any one particular lien holder will want to see before committing to a resolution:

**Max**  
Guidance & Planning System

To: Harry Loans  
1 Spring Street  
Suite 3  
Boston, MA 02111

Date: 4/18/2006

Re: Subject: 12 Main Street, Boston, MA 02110  
99999999

Dear Mr. Loans, we are proposing the following workout plan for our client Mr. Smith. Please see the details below:

Lien Holder Name	Lien Holder Type	Work Out Status	Monthly Payments Current	Modified	Past Due Amount	Work Out Method
Lender Inc.	Mtg Lender	Pending	\$2,000.00	\$1,800.00	\$4,000.00	Payoff
City of Boston	Tax Assessor	Pending	\$80.00	\$80.00	\$120.00	Payoff
<b>Total</b>			<b>\$2,080.00</b>	<b>\$1,880.00</b>	<b>\$4,120.00</b>	

# CounselorMax User Guide

You can print and mail, fax or email the proposal to the lien holder(s).

To conclude the task, click on the **Work Plan** icon at the top of the form, click on the **Edit** button for the task and fill out the task completion form:

John Smith 4/18/2008

Expected Date To Be Completed: 5/7/2008

Date Completed: 4/23/2008

Action: Steps to Solution - contact lien holder (offer)

Action Details: Sent letters with proposal to each lien holder.

Rationale: Level 2

Outcome: Complete

OK

http://www.counselormax.com/HCPDemo/Counseling/WorkPlanEdit.asp

As you receive a proposal acceptance, counter offer, or rejection from the lien holder, go back to the **Liens and Payments** form and update the status of the **Workout Request Status** drop-down list for each item.

Max  
Outcomes & Planning System

Original Lien Holder: Loans R Uc Original Loan #: 88888888 Start Rate: 6

Pmt Prior to Rate: 1400 Mtg Insurance Type: Private Mtg Type Insurance Interest: Only

Monthly Payments & Loan Balance / Past Due Amounts

Current Values	Modified Values	Work Out Method
Monthly Pmt: 2000	1500	Modify - lower rate and pmt
Current Rate: 8.2	/	Modify - lower rate and pmt
Past Due Amount: 4000	4000	Payoff
Principal Balance Current: 200000	200000	no request...
Term (months remaining): 320	318	Payoff

Comments: Will propose to lower payments and rate and pay arrears.

Back to List of Liens and Payments

Work Out Request Status: Pending, ---Select One---, Accepted, Counter Offer, Denied, Pending, Pending

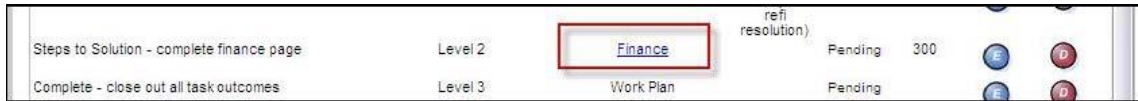
You can finalize all of the lien related work plan tasks when all of the workout items are finalized.

# CounselorMax User Guide

## Steps to Solution - Complete Finance Page Task

The next task is to document all of the financing that went into the client's resolution. This allows you to track the Dollar amount involved in resolving the client's case. Not all cases involve financing, but most do.

To access the financing form click on the **Finance** link in the Function column of the work plan:



If this is the first financing piece you are entering, a new **Source of Funds** form should be displayed where you can enter the first financing source for the customer. Fill out all available data and at least all of the required fields and click save.

**Max**  
Guidance & Planning System

wk plan class appt log print

### Source of Funds

Required Fields Must Be Filled-in

Subject: 12 Main Street, Boston, MA 02110

Funds Type*	Loan	Funding Type*	Private Lending Institution	Lien Position*	1
Source Name*	Bank Of America	Loan Type*	Mtg - Fixed	Funding Amt \$*	200000
Loan Term Mnth*	360	Term Type*	30	Less Costs \$*	0
Interest Rate*	6	Doc Type	Full Document Provided	Net Funding Amt \$	200000
Account Number	9999999	Mortgage Insurance Type	None	Principal & Int Pmt*	1200

**Additional Information**

Deferred Loan	<input type="checkbox"/>	Mortgage Insurance	90
Forgiveable	<input type="checkbox"/>	Monthly Payment	1290
Eligible for Sale to NHSA	<input type="checkbox"/>		

SAVE

# CounselorMax User Guide

This takes you to the Financing Summary Form:

Printer Friendly Version

### Finance Summary

[Add New](#)

Source and amount of Outstanding Debt

Amount of past due payments to be paid	\$4,120.00
Amount of unpaid balances to be paid	\$0.00
<b>Total Amount needed to Payoff Debt</b>	<b>\$4,120.00</b>

Source & Amount of Financing (net of costs)

Save Was Successful!

Name of Company/Grantor/Source of Cash	Type	New Monthly Payment	Net Amount of New Loan / Grant	Edit	Delete
Bank Of America	Loan	\$1,290.00	\$200,000.00		
<b>Total:</b>		<b>\$1,290.00</b>	<b>\$200,000.00</b>		

You can now add new source of financing, edit existing ones, or delete them.

Click on the work plan icon to return to the work plan form.

## Designate Level 3

The **Designate Level 3** task is an optional task related to NFMC grants. The structure of NFMC grants allows organizations to count a client as a Level 3 client if both Level 1 and Level 2 tasks are completed within the same reporting period and your organization is eligible to report level 3s, not all are. If you're not sure if your organization can report level 3s, or how many you can report, check with your NFMC grant admin.

To report a client as a Level 3 client to NFMC, simply click on the "E" (edit) button in the task row:

# CounselorMax User Guide

This will open the task resolution form. To mark the client as Level 3 reportable, select “yes” from the **Outcome** drop-down list. Also enter a “**date completed**” or leave it blank to auto-populate the current date.

Steps to Solution - contact lien holder (offer)	Level 2	<a href="#">Liens</a>	Pending	300	
Steps to Solution - complete finance page	Level 2	<a href="#">Finance</a>	Pending	300	
Designate Level 3	Level 1		Pending		
Complete enter case resolution	Closecut & Resolution	<a href="#">Resolution</a>	Pending		

Frank Thomas 5/8/2008

Expected Date To Be Completed: 5/11/2008

Date Completed: 5/8/2008

Action: Designate Level 3

Action Details:

Rationale: Level 1

Outcome: yes

OK

https://www.counselormax.com/HCPDemo/Counseling/WorkPlanEdit.a Internet

**Note:** Marking a client as “Level 3” reportable does not ensure that the CounselorMax auto-generated NFMC report will count the client as a Level 3. The system must also detect that all other Level 3 requirements are completed:

1. All Level 1 tasks are marked as completed
2. All Level 2 tasks are marked as completed
3. Both fall within the same reporting period
4. And finally, the Designate Level 3 task is completed and it too falls in the reporting period.

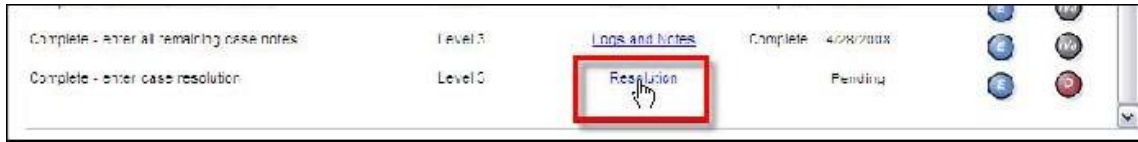
If all of these conditions are met, the customer will appear in the report with one row as a Level 3 client.

# CounselorMax User Guide

## Complete – Enter Case Resolution

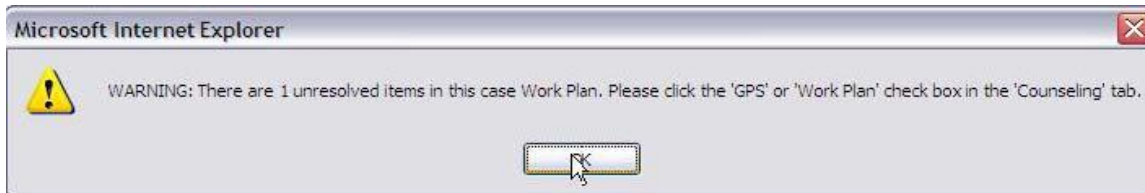
You've completed all of the required tasks for this client. You are now ready to resolve the case and include it in any relevant reports.

Click on the **Resolution** link to open the client resolution form.



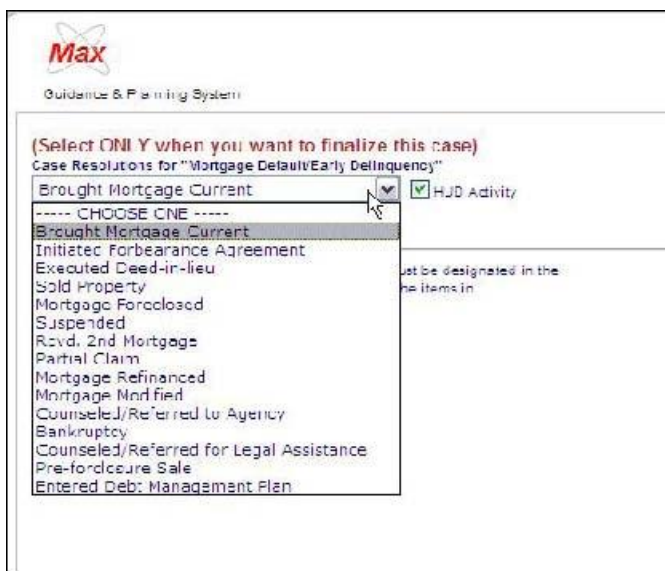
This opens up the resolution form where you can select a relevant resolution for the client's case and finalize data entry.

If there are any tasks not completed, you should receive a message warning you that not all tasks are complete:



If so, go back to the work plan form, find the tasks at issue, and complete them before resolving the case. Otherwise, you should see the resolution form.

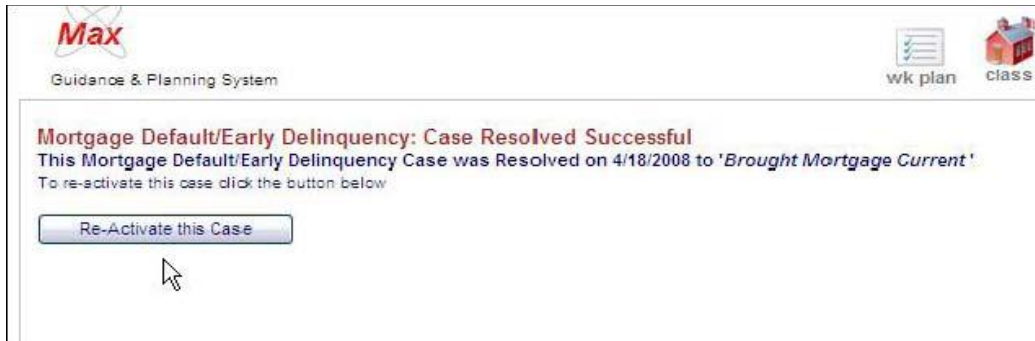
Choose the appropriate resolution from the resolution drop-down list and click “**OK**” to save:





# CounselorMax User Guide

The case is resolved (reportable within CounselorMax) and you should see the **resolved case** form. You can reactivate the case and edit if necessary.



You have now completed a full MD case resolution sample.

## 8.2.2 Client Log

The **Client Log** checkbox allows you to track activities with your client. You can add new client activities or edit or cancel existing activities. For example, you can note any particular client preferences or change in assigned counselor.

# CounselorMax User Guide

## 8.2.3 Case Profile

On the Case Profile screen, the sub-tabs give you data fields to enter all of the pertinent information for Credit, Liabilities, Dependents, Subject Property, Residence, Income, Assets and Other. Each of these sub-tabs has fields that are required to be filled in and are noted by an asterisk.

The screenshot displays the CounselorMax software interface. At the top, a navigation bar contains tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header area features the CounselorMax logo and the text 'Client Demo' with a folder icon, followed by 'Guidance & Planning System (GPS)'. Below the header, there are several sections: 'Quick Client Search' with a list of client names, 'Co-Applicant Search', and 'Identify Clients' with radio button options. The 'Case Profile' section is highlighted with a red box and contains a sub-tabbed interface. The 'Credit' sub-tab is selected, showing a 'Summary' section with a red asterisk and the text '\* = Required'. Below this, there are input fields for 'Number of Accounts 30 Days Late', '60 Days', '90 Days', 'Perm Res Alien', 'Divorce', 'Credit Score', 'Repository', 'Last Foreclosure Date', 'Last Bankrupt Date', and 'Judgments - Balance \$'. A 'Save' button is located at the bottom of the form.

- **Credit** - The '**Credit**' tab provides data fields reflecting information on the credit report.
- **Subject Property** - The '**Subject Property**' tab provides data fields relevant to the property associated with the client's service type.
- **Residence** - The '**Residence**' tab provides data fields to complete the client's current residence.
- **Assets** - The '**Assets**' tab provides data fields to complete relevant to the clients liquid and tangible assets.
- **Liabilities** - The '**Liabilities**' tab provides data fields to complete that reflect monthly financial obligations that may or may not appear on the credit report.
- **Dependents** - The '**Dependents**' tab provides drop down options for dependent ages and their relationship to the client.

# CounselorMax User Guide

- **Income** - The '**Income**' tab provides data fields that reflect the employment income of the client. HUD Area Median Income will automatically calculate from the information entered here or on the '**Intake**' tab.
- **Other** - The '**Other**' tab provides data fields that reflect non employment income of the client.

This information follows the standard requirements for a Fannie Mae 1003 Universal Residential Loan Application.

**NOTE:** If your organization has an existing relationship with First American CREDCO, you can pull a tri-merge credit report through the CounselorMax system and import liability accounts and credit scores in the system. At the time of publication of this manual, First American CREDCO is the only company that allows for credit to be pulled and imported into CounselorMax. Otherwise, all data must be input manually.

## 8.2.4 Budget

You can develop budgets that can be done in weekly or monthly formats. When you click on the Budget checkbox, the first prompt is given for you to '**Create New**'.

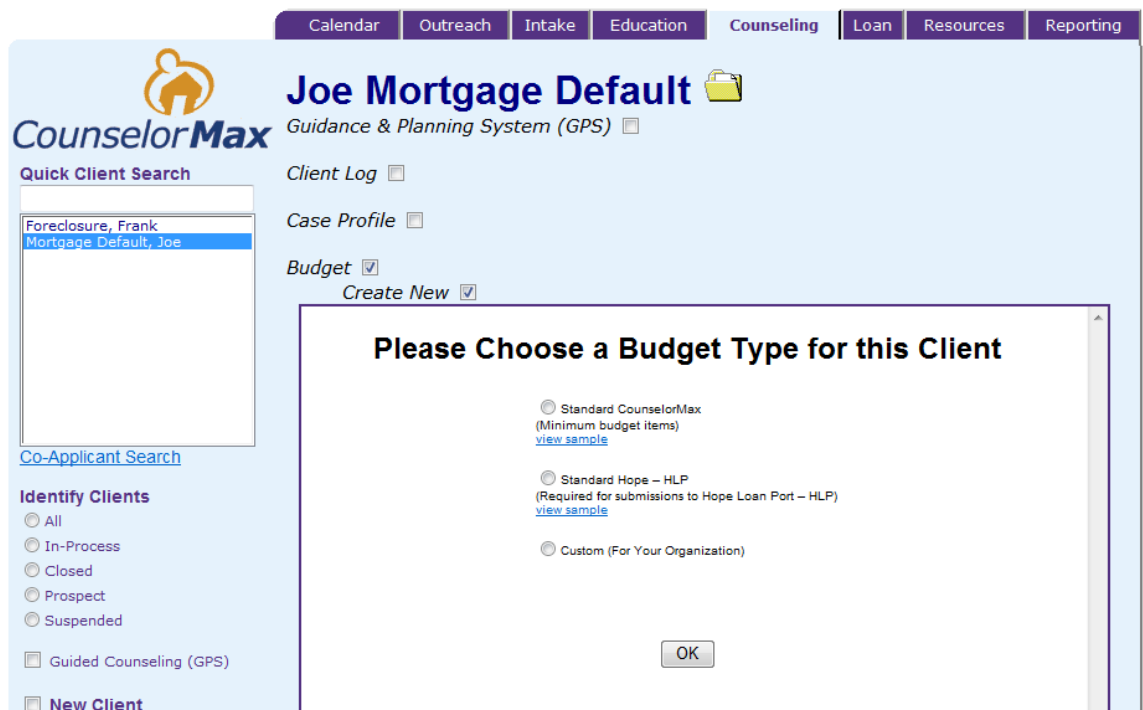


To create a new budget, click on the **Create New** checkbox on the above screen.

This will expose a sub-form with options for budget type selection. Depending on the options your agency Admin has enabled in your version of CounselorMax, you should see up to three of the following options:

# CounselorMax User Guide

1. **Standard CounselorMax:** a basic, but effective budget with a simple set of income and expense categories.
2. **Standard Hope – HLP (Hope LoanPort) budget:** this is a budget developed to collect all budget data required for loan modification package submitted to the HOPE LoanPort. Because the HOPE LoanPort has a precise and fixed set of budget items, this budget is not customizable. If your agency Admin has not enabled the HOPE LoanPort budget, you will not see this option.
3. **Custom (for your agency):** this is a custom budget configured by your agency Admin. It contains those items your agency admin considers important to collect for your case load. If the Admin has not created and enabled a custom budget, you will not see this option.



Any budget you create will be divided into three main sections:

1. Income
2. Fixed Expenses
3. Discretionary Expenses

# CounselorMax User Guide

Select the budget type you wish to create for your client by clicking on the corresponding radio button and then click “OK”. For example, if you select the **Standard CounselorMax** budget, you should see the following screen below:

Calendar | Outreach | Intake | Education | Counseling | Loan | Resources | Reporting

**Joe\_8.12**

Guidance & Planning System (GPS)

Client Log

Case Profile

Budget

Create New

Income <a href="#">(update)</a>	
Employment	\$0
Overtime	0
Interest & Dividend	0
Net Rental Income	0
Other Income	0
Withholding	(0)
<b>Net Income</b>	<b>\$0</b>

Discretionary Expenses	
Auto	<input type="text" value="0"/>
Charity	<input type="text" value="0"/>
Child Support/Alimony	<input type="text" value="0"/>
Credit Card Min Payments	<input type="text" value="0"/>
Credit Card Min Payments <a href="#">(details)</a>	<input type="text" value="0"/>
Credit Collections	<input type="text" value="0"/>
Dining	<input type="text" value="0"/>
Education	<input type="text" value="0"/>
Entertainment	<input type="text" value="0"/>
Food and Groceries	<input type="text" value="0"/>

You can use this screen to enter your client’s budget information.

With the budget creation/editing form displayed (see above) you can begin to enter values for each item.

# CounselorMax User Guide

## Entering client income data in the budget

CounselorMax already has a standard CounselorMax income forms in the **Case Profile** section to enter client income sources so you want to avoid double entry of data. If income sources already exist, this is immediately visible in the budget's income section.

Click on the **update** link next to the **Income** heading to jump to the **Case Profile** form and enter income sources:

The screenshot shows the CounselorMax interface for client Frank Sinatra. The top navigation bar includes Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header displays the client's name and the system name, Guidance & Planning System (GPS). On the left, there is a Quick Client Search list with 'Sinatra, Frank' selected. Below that are options for identifying clients (All, In-Process, Closed, Prospect, Suspended) and checkboxes for Guided Counseling (GPS) and New Client. The main content area shows the Budget section with a 'Create New' checkbox checked. The Income section is expanded, showing a table of income sources with values. The Net Income is \$0. Fixed Expenses are also listed with values of 0.

Income Source	Value
Employment	\$0
Overtime	0
Interest & Dividend	0
Net Rental Income	0
Other Income	0
Withholding	(0)
<b>Net Income</b>	<b>\$0</b>

Fixed Expense	Value
Auto	0
Child Support/Alimony	0
Credit Card Min Payments	0
Credit Collections	0
Education	0
Housing Payment	0

The screenshot shows the CounselorMax interface for client Frank Sinatra, similar to the previous one. However, a Windows Internet Explorer dialog box is overlaid on the screen. The dialog box contains a question mark icon and the text: "You are about to transferred to this case's profile. Would you like to proceed?". There are OK and Cancel buttons at the bottom of the dialog box.

# CounselorMax User Guide

The screenshot displays the CounselorMax software interface. At the top, there is a navigation menu with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header area includes the CounselorMax logo and the client name "Frank Sinatra" with a folder icon and the text "Guidance & Planning System (GPS)". Below this, there are options for "Quick Client Search", "Client Log", and "Case Profile". The "Case Profile" section is expanded, showing a summary of the client's information. The summary is organized into columns: Liabilities (Credit), Dependents (Subj Prop), Income (Residence), and Other (Assets). The "Income" section is highlighted, and a red asterisk indicates that certain fields are required. The required fields include: Employer, Date Start (mm/dd/yyyy), Date End (mm/dd/yyyy), Self Employed (checkbox), Bus Type, Monthly Gross Income, Monthly Net Income, Title, Phone, Address, City, State (dropdown menu), and Zip Code. The "Identify Clients" section on the left lists various client names, with "Sinatra, Frank" selected. Below the list are radio buttons for "All", "In-Process", "Closed", "Prospect", and "Suspended", and checkboxes for "Guided Counseling (GPS)" and "New Client".

## Entering client Fixed and Discretionary Expenses

The CounselorMax budget tool allows you to enter two types of budgets for your clients: fixed and discretionary.

The screenshot shows the "Budget" tool interface. At the top, there is a "Budget" checkbox and a "Create New" checkbox. Below this, there is a table with two main sections: "Fixed Expenses" and "Discretionary Expenses". Each section contains a list of expense categories with corresponding text boxes for entering amounts. The "Fixed Expenses" section includes: Auto, Child Support/Alimony, Credit Card Min Payments, Credit Collections, Education, Housing Payment, Installment Loans, Insurance, Medical, Savings, Tax, and Utilities. The "Discretionary Expenses" section includes: Charity and Dining. All text boxes currently contain the number "0".

To enter fixed or discretionary budget amounts for your clients simply enter the desired figure in the text box to the right of each budget line item.

**Note:** The items that appear on the fixed or discretionary categories are designated as such by the CounselorMax design team in the case of the standard CounselorMax budget, the HOPE LoanPort budget designers in the case of the Hope LoanPort budget, or by your agency Admin in the case of custom budgets.

# CounselorMax User Guide

Remember to click the **Save** button to save the values you have entered. If you leave the form without saving your entries will not be saved to the database.

Category	Amount
Medical	0
Savings	0
Tax	0
Utilities	0
<b>Discretionary Expenses</b>	
Charity	0
Dining	0
Entertainment	0
Food and Groceries	0
Gifts	0
Household	0
Miscellaneous	0
Pet Expense	0
Public Transportation	0
Rental Property	0

## Working with an existing client Budget

You can easily edit any previously saved budget. To do so, go to the **Counseling** tab and click on the **Budget** checkbox. This displays three budget options:

Calendar Outreach Intake Education **Counseling** Loan Resources Reporting

Dev CounselorMax JDB\_test\_NFMC2 Guidance & Planning System (GPS)

Quick Client Search: Client Log Case Profile

**Budget**  View Budget   
Edit Existing Budget   
Replace Existing Budget

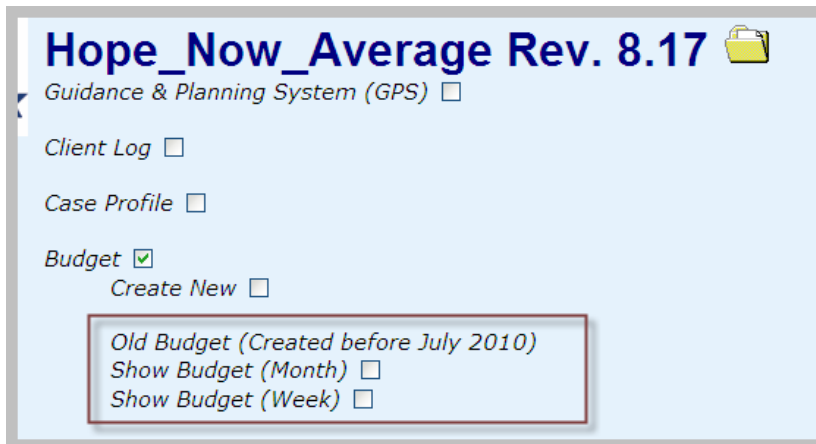
1. **View Budget:** this option allows you to view an existing budget. If no budget has been created for the case, click on this option will display a budget with no income or expense entries, as no data has been saved yet.
2. **Edit Existing Budget:** this option allows you to edit an existing budget.
3. **Replace Existing Budget:** this option allows you to replace the existing budget. The existing budget gets deleted and replaced by a new budget if this option is selected. A warning message should appear asking you to confirm that you wish to do this (see the screen display in the Replace Existing Budget section below).



# CounselorMax User Guide

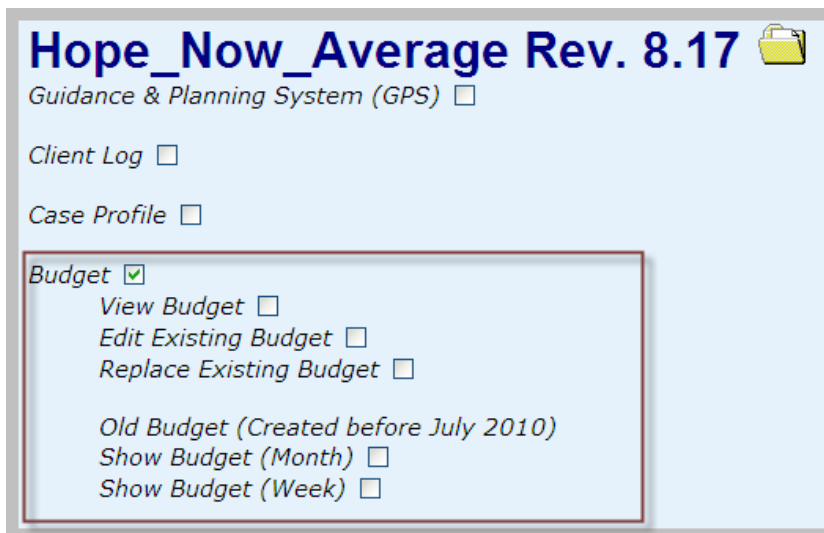
4. **Legacy Budgets** - If a case had a pre-existing budget in CounselorMax created before 7/21/2010, you will be able to view and print the pre-existing legacy budget, but you will not be able to edit it. If you need to edit the budget, you should print the budget and use it to create a similar budget using the new functionality.

If a case has a legacy budget attached to it, you should see the following:



Click on the **Show Budget (Month)** or **Show Budget (Week)** checkboxes to view the existing budgets. All of the budget data you entered for this case is saved in the database.

If you create a new budget for this case, you still have access to the old budget. You should see the following if both a new and legacy budget are saved in CounselorMax:




# CounselorMax User Guide

## 8.2.4.1 View Budget

Click on the **View Budget** checkbox to view the existing budget in a printable (not-editable) format. This is ideal for printing the budget to present to your clients. The printable budget also contains four weekly columns that allow your client to track their expenses in order to obtain more realistic budget line-item numbers.

Below is a partial sample budget on the **View Budget** screen:



Client Name: Testy \_8.10    Case Number: 6338

CounselorMax - Budget vs. Actual Worksheet    Please enter your actual expenses here

Budget	Week 1	Week 2	Week 3	Week 4
<b>Income</b>				
Employment	\$4,000			
Overtime	400			
Interest & Dividend	75			
Net Rental Income	0			
Other Income	300			
Withholding	(1,125)			
<b>Net Income</b>	\$3,650			
<b>Fixed Expenses</b>				
Auto	300			
Child Support/Alimony	0			
Credit Card Min Payments	200			
Credit Collections	0			
Education	90			
Housing Payment	1,200			
Installment Loans	100			
Insurance	50			
Medical	100			
Savings	100			
Tax	0			
Utilities	200			
<b>Discretionary Expenses</b>				
Charity	50			
Dining	300			
Entertainment	100			
Food and Groceries	300			
Gifts	100			
Household	200			
Miscellaneous	200			
Pet Expense	0			
Public Transportation	50			
Rental Property	0			
<b>Total Expenses</b>	\$3,640			
<b>Net Surplus (Deficit)</b>	10			

**Foot Notes:**

Total Fixed Expense = \$(2,340)	Fixed Exp Ratio: (64.11%)
Total Discretionary Expense = \$(1,300)	Disc Exp Ratio: (35.62%)
Total Expenses = \$3,640	Exp Ratio: 99.73%

## 8.2.4.2 Edit Existing Budget

To edit an existing budget, from the **Counseling** tab, click on the **Budget** checkbox and then click on the **Edit Existing Budget** checkbox. This displays the budget in “edit” mode and all of the previously entered values for the budget you previously saved for the client.

# CounselorMax User Guide

You can now enter additional budget amounts or change existing amounts. Remember to click the **Save** button when you are done or your values will not be saved.

Budget

View Budget

Edit Existing Budget

Income <small>(update)</small>	
Employment	\$4,000
Overtime	400
Interest & Dividend	75
Net Rental Income	0
Other Income	300
Withholding	(1,125)
<b>Net Income</b>	<b>\$3,650</b>

**Fixed Expenses**

Auto	300
Child Support/Alimony	0
Credit Card Min Payments	
Credit Card Min Payments <small>(details)</small>	200
Credit Collections	0
Education	90
Housing Payment	1,200
Installment Loans	
Installment Loans <small>(details)</small>	100
Insurance	50

Replace Existing Budget

## 8.2.4.3 Replacing an Existing Budget

You can replace an existing budget with another budget template. From the **Counseling** tab, click on the **Budget** checkbox and click on the **Replace Existing Budget** checkbox. The system will prompt you to confirm that you want to overwrite the previously saved budget with a new template.

Budget

View Budget

Edit Existing Budget

Replace Existing Budget

Income (update)

Employment	\$4,000
Overtime	
Interest & Dividend	
Net Rental Income	
Other Income	
Withholding	
<b>Net Income</b>	

Fixed Expenses

Auto	300
Child Support/Alimony	0
Credit Card Min Payments	
Credit Card Min Payments <small>(details)</small>	200
Credit Collections	0
Education	90
Housing Payment	1,200
Installment Loans	
Installment Loans <small>(details)</small>	100
Insurance	50

Message from webpage

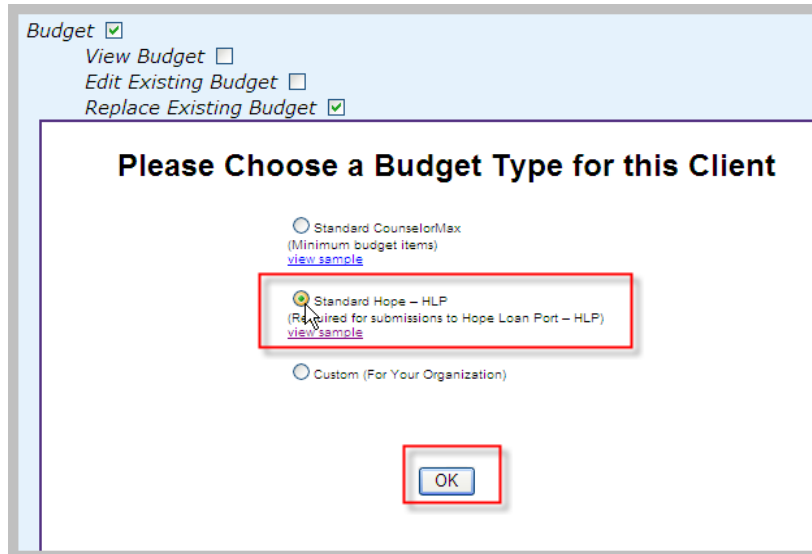
Warning: You are about to overwrite this client's budget. Would you like to proceed?

OK Cancel

If you click **“OK”** you cannot undo your choice and the previous budget will be deleted.

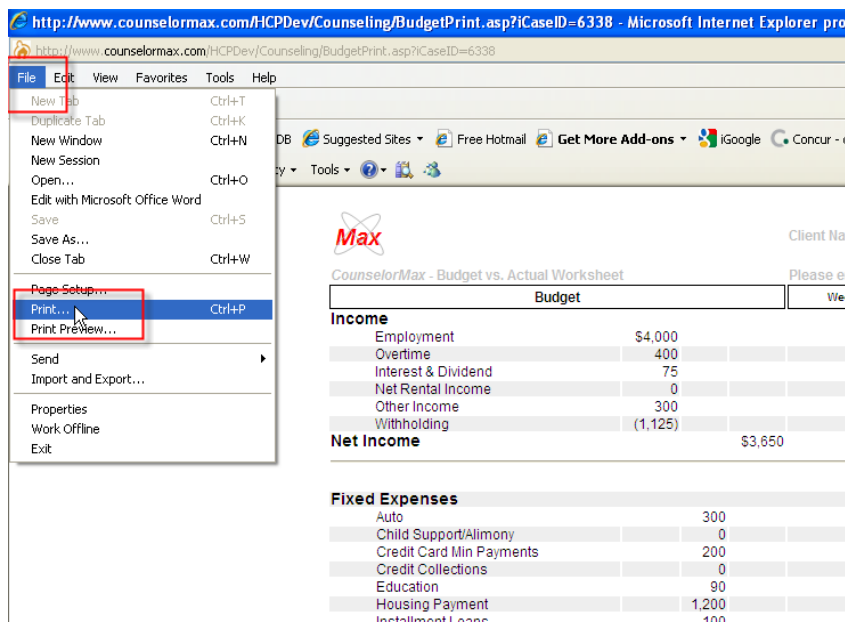
# CounselorMax User Guide

Once you are sure you want to replace the existing budget click on the **OK** button on the warning pop-up message. This returns you to the form where you can select the budget template you wish to use for this client by selecting the appropriate radio button and clicking on the **OK** button. This takes you to a new budget form where you can enter line-item values.



## 8.2.4.4 Printing the budget

To print the budget, simply use the standard print command on your browser. In Internet Explorer, click on the **File** pull-down menu in the top-left menu bar, and select **Print** from the menu choices:



# CounselorMax User Guide

**8.2.5 Assign Counselor** From this area, counselors can assign or re-assign a selected client to another counselor.

## 8.2.6 Tools

When the **Tools** checkbox is selected, counselors can utilize some financial programs such as a mortgage calculator, amortization schedule and a home affordability calculator.

**NOTE:** While these third-party tools are functional, NeighborWorks America neither represents nor warrants the accuracy of the information these tools provide. These tools are for counselors to utilize for informational purposes only.

## 8.2.7 Pre-Qualify

The **Pre-Qualify** checkbox features the ability to enter secondary financing sources as a manner of determining overall ability to qualify for financing. While this tool is functional, NeighborWorks America neither represents nor warrants the accuracy of the information this tool provides.

# CounselorMax User Guide

## 8.2.8 Work Plan

By clicking on **Work Plan** (or action plan) checkbox, you can Add, Edit or Cancel a specific set of tasks that the client needs to complete to achieve the **Case Resolution** status.

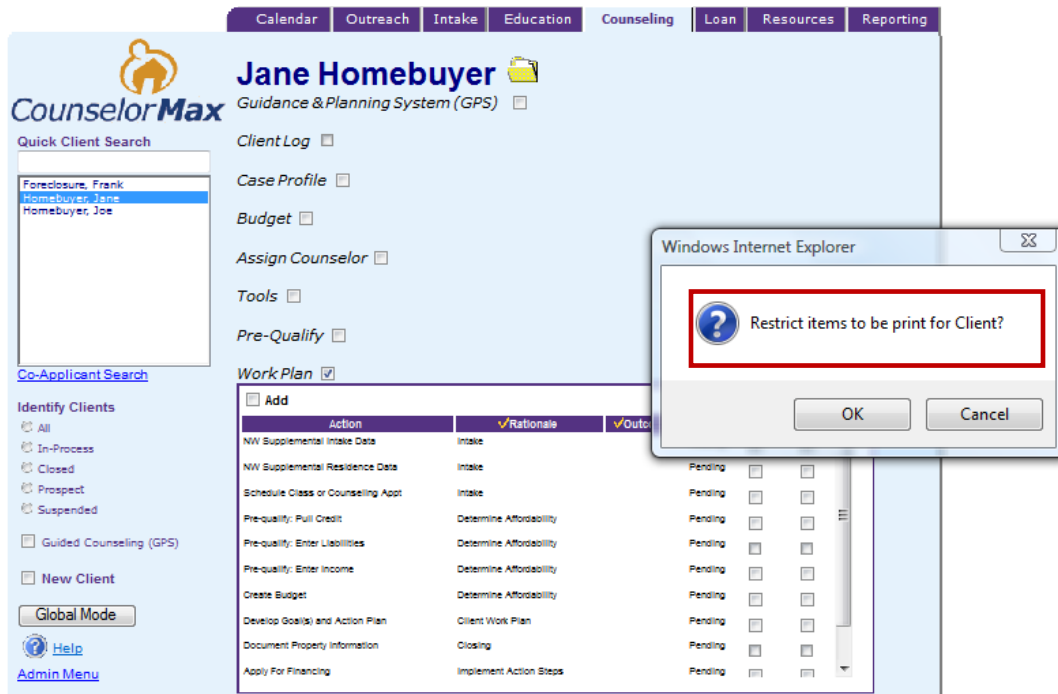
**NOTE:** If you have inadvertently doubled a Workplan, you can delete the incorrect one here.

The screenshot shows the CounselorMax software interface. The top navigation bar includes tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header displays 'Client Demo' and 'Guidance & Planning System (GPS)'. On the left, there is a 'Quick Client Search' dropdown menu with a list of client names: Counselor, Joe; Demo, Client; Doe, Jane; Doe, Sharon; and Homeowner, Joe. Below this is a 'Co-Applicant Search' section and an 'Identify Clients' section with radio buttons for All, In-Process, Closed, Prospect, and Suspended. There are also checkboxes for 'Guided Counseling (GPS)' and 'New Client', along with a 'Global Mode' button and a 'Help' link. The main content area features several checkboxes: Client Log, Case Profile, Budget, Assign Counselor, Tools, Pre-Qualify, and Work Plan (which is checked). Below the Work Plan checkbox is a table with columns: Action, Rationale, Outcome, Date, Cancel, and Edit. The table contains several rows of tasks, with the first row highlighted. A red box highlights the 'Add' button and the first row of the table. The 'Date' column for the first row is highlighted with a red box.


Action	✓Rationale	✓Outcome	✓Date	Cancel	Edit
NW Supplemental Intake Data	Intake	Complete	12/16/2009	<input type="checkbox"/>	<input type="checkbox"/>
NW Supplemental Residence Data	Intake	Complete	12/16/2009	<input type="checkbox"/>	<input type="checkbox"/>
Schedule Class or Counseling Appt	Intake	Complete	12/16/2009	<input type="checkbox"/>	<input type="checkbox"/>
Pre-qualify: Full Credit	Determine Affordability	Complete	12/16/2009	<input type="checkbox"/>	<input type="checkbox"/>
Pre-qualify: Enter Liabilities	Determine Affordability	Completed	12/16/2009	<input type="checkbox"/>	<input type="checkbox"/>
Pre-qualify: Enter Income	Determine Affordability	Completed	12/16/2009	<input type="checkbox"/>	<input type="checkbox"/>
Create Budget	Determine Affordability	Completed	12/16/2009	<input type="checkbox"/>	<input type="checkbox"/>
Develop Goal(s) and Action Plan	Client Work Plan		Pending	<input type="checkbox"/>	<input type="checkbox"/>
Document Property Information	Closing		Pending	<input type="checkbox"/>	<input type="checkbox"/>
Apply For Financing	Implement Action Steps		Pending	<input type="checkbox"/>	<input type="checkbox"/>

# CounselorMax User Guide

**Work Plan** is for both counselors and clients. You can click on **Print** checkbox on the upper right corner of the Work Plan screen shown above and you should be prompted with the option to “**Restrict items to be print for Client?**”



If you select “**OK**”, you should see the client view as follows:



**NeighborWorks**  
CHARTERED MEMBER  
202-555-1212

**Jane Homebuyer**
**6/20/2010**

Action	Action Details	<input checked="" type="checkbox"/> Reason	<input checked="" type="checkbox"/> Outcomes	<input checked="" type="checkbox"/> Date	<input checked="" type="checkbox"/> Date To Be Completed
NW Supplemental Residence Data	Intake				

This plan must be completed to obtain funding

---

Jane Homebuyer (Borrower)
(Date)

---

(Counselor)
(Date)

# CounselorMax User Guide

If you select “**Cancel**”, you should see the counselor view that includes client activities and additional counselor activities as follows:



**Jane Homebuyer**

**6/20/2010**

Action	Action Details	Reason	Outcomes	Date	Date To Be Completed
NW Supplemental Intake Data		Intake			
NW Supplemental Residence Data		Intake			
Schedule Class or Counseling Appt		Intake			
Pre-qualify: Pull Credit		Determine Affordability			
Pre-qualify: Enter Liabilities		Determine Affordability			
Pre-qualify: Enter Income		Determine Affordability			
Create Budget		Determine Affordability			



# CounselorMax User Guide

## 8.2.9 Case Resolution

Once all of the tasks and education have been satisfactorily completed by the client and the counselor has completed all of their required activities, the case is ready to be resolved with a resolution. Depending on the **Service Type**, there are service type specific resolutions that can be selected based on client activity,

If the client does not complete all of the required steps and the process does not reach a resolution within a reasonable amount of time, the case is given a resolution of **Suspended**.

The screenshot displays the CounselorMax web application interface. At the top, there are navigation tabs: Calendar, Outreach, Intake, Education, Counseling (selected), Loan, Resources, and Reporting. The main header area includes the CounselorMax logo and the text 'Client Demo' with a folder icon. Below this, it says 'Guidance & Planning System (GPS)' with a 'NEW' badge. On the left side, there is a 'Quick Client Search' section with a list of client names: Counselor, Joe; Demo, Client; Doe, Jane; Doe, Sharon; Homeowner, Joe. Below that is a 'Co-Applicant Search' link. The 'Identify Clients' section has radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended'. There are also checkboxes for 'Guided Counseling (GPS)' and 'New Client', and a 'Global Mode' button. At the bottom left, there are links for 'Help', 'Admin Menu', 'Logout', and 'Legacy Clients', along with the text 'Available for 377 Days'. The main content area on the right contains several menu items: 'Client Log', 'Case Profile', 'Budget', 'Assign Counselor', 'Tools', 'Pre-Qualify', 'Work Plan', and 'Case Resolution' (which is checked). Below 'Case Resolution', there is a red instruction: '(Select ONLY when you want to finalize this case)'. This is followed by a dropdown menu labeled 'Case Resolutions for Home Purchase' with the text '---- CHOOSE ONE ----' and a checked checkbox for 'HUD Activity'. A 'Resolve this Case' button is located at the bottom of this section.

For example, you can select **Fulfilled, Suspended, Enter Lease Purchase Pgm or Decided Not to Purchase** when you click “---Choose One---” pull-down list under **Case Resolutions** for “Home Purchase”.

# CounselorMax User Guide

## Chapter 9: Loan

The Loan tab allows counselors to perform functions relating to their clients' loan application process and contains the following options (checkboxes): **Credco** and under Case Profile heading - **Property Details, Loans/Programs, Closing Agents and Download FNM File.**

This tab only has functions under **Client Mode**. There are no Loan functions in **Global Mode** (as is displayed on the CounselorMax screen when you click Global Mode on the Loan tab).

**NOTE:** Make sure that the Social Security number is entered as this is required to export files. Only the last four digits of the Social Security number appear on any reports.

### 9.1 Credco

The **Credco** checkbox displays a login screen that takes the counselor outside of CounselorMax to an external application that provides the selected client's credit report.

The screenshot displays the CounselorMax web application interface. At the top, there is a navigation menu with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The 'Loan' tab is selected. Below the navigation, the user's name 'Joe Homebuyer' is displayed with a folder icon. A checkbox labeled 'Credco (New & Re-Issued Credit Reports)' is checked, and a link for 'Sample Credit Report' is visible. On the left side, there is a 'Quick Client Search' section with a dropdown menu showing 'Foreclosure, Frank' and 'Homebuyer, Joe'. Below this is a 'Co-Applicant Search' section and an 'Identify Clients' section with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended', and a checkbox for 'Guided Counseling (GPS)'. The main content area shows a 'Data Flite Login and Password (required for credit reports)' form with fields for 'Login' and 'Password', and a 'First Time Login?' link. There are also links for 'New User Guide' and 'Change password'. At the bottom of the form, there is an 'OK' button and a link that says 'Click here to update this case's credit profile without pulling a credit report.' Red boxes highlight the 'Credco' checkbox, the 'Sample Credit Report' link, and the 'Click here to update...' link.

You are not required to use this **Credco** checkbox (Credco credit report services). However, if your agency uses other credit reporting services, the client's credit report information needs to be entered into CounselorMax manually using the **Click here** link on the bottom of the screen shown above.

# CounselorMax User Guide

## 9.2 Property Details

In **Client Mode**, click on the **Property Details** checkbox and a **Subject Property** screen will appear. Enter the required fields relating to the selected client's case and click **'Save'** when complete.

**Client Demo**

Credco (New & Re-Issued Credit Reports)  
[Sample Credit Report](#)

**Quick Client Search**

Counselor, Joe  
**Demo Client**  
Doe, Jane  
Doe, Sharon  
Homeowner, Joe

**Case Profile**  
 **Property Details (show)**

**Subject Property**  
\* = Required

Street Address: 1001 Pre-Dual Ave  
City: Washington  
State \*: DC  
Purch Price \*: 200000  
MSA \*: District of Columbia-Washington-Arlington-Alexandria, DC VA-MD

REO:     Sect 8 (purchase):     Sect 8 (rental):

Bedrooms:     Units:     Zip Code:

Census Tract:  (\$SCCCTTTT.TT) [Lookup](#)    Market Value:     Land Price:

	Monthly	Balance
1st Mort P & I	1000	150000
2nd Mort P & I	<input type="text"/>	<input type="text"/>
Hazard & Ins.	40	
Mortgage Ins.	45	
Prop Taxes	125	
HOA	<input type="text"/>	
Other	<input type="text"/>	
<b>TOTAL</b>	<b>1210</b>	<b>150000</b>

**Identify Clients**

All  
 In-Process  
 Closed  
 Prospect  
 Suspended

Guided Counseling (GPS)

New Client

[Help](#)  
[Admin Menu](#)  
[Logout](#)  
[Legacy Clients](#)  
Available for: 376 Days

**NOTE:** Only the fields marked by a red \* are required to save the subject property.

# CounselorMax User Guide

## 9.3 Closing Agent

After completing the Property Details checkbox, click on the Closing Agent checkbox and complete the closing agent information. Click **'Save'** when complete.

The screenshot shows the CounselorMax web application interface. The main header includes the CounselorMax logo and the text "Client Demo" with a folder icon. Below this, there are links for "Credco (New & Re-Issued Credit Reports)" and "Sample Credit Report". The left sidebar contains a "Quick Client Search" box with a list of names: "Counselor, Joe", "Demo, Client", "Doe, Jane", "Doe, Sharon", and "Homeowner, Joe". Below this is a "Co-Applicant Search" section and an "Identify Clients" section with radio buttons for "All", "In-Process", "Closed", "Prospect", and "Suspended". There is also a "Guided Counseling (GPS)" checkbox, a "New Client" checkbox, a "Global Mode" button, and links for "Help", "Admin Menu", "Logout", and "Legacy Clients". The main content area shows a "Case Profile" section with checkboxes for "Property Details (show)", "Closing Agent (show)", "Loans/Programs (show)", and "Download FNM File (show) NEW". The "Closing Agent (show)" checkbox is checked, and a form titled "Closing Information" is displayed. The form has a red border and a red asterisk indicating required fields. The fields include: "Settlement Date" (mm/dd/yyyy), "R/E Agent First Name", "R/E Agent Street Address", "R/E Agent City", "R/E Agent State", "R/E Agent Zip Code", "R/E Agent Phone Area Code", and "R/E Agent Phone". A "Save" button is located at the bottom of the form.

## 9.4 Loans/Programs

Next, click on the **Loans/Programs** checkbox and complete the loan information. Click **'Save'** when complete.

The screenshot shows the CounselorMax web application interface. The main header includes the CounselorMax logo and the text "Client Demo" with a folder icon. Below this, there are links for "Credco (New & Re-Issued Credit Reports)" and "Sample Credit Report". The left sidebar contains a "Quick Client Search" box with a list of names: "Counselor, Joe", "Demo, Client", "Doe, Jane", "Doe, Sharon", and "Homeowner, Joe". Below this is a "Co-Applicant Search" section and an "Identify Clients" section with radio buttons for "All", "In-Process", "Closed", "Prospect", and "Suspended". There is also a "Guided Counseling (GPS)" checkbox, a "New Client" checkbox, a "Global Mode" button, and links for "Help", "Admin Menu", "Logout", and "Legacy Clients". The main content area shows a "Case Profile" section with checkboxes for "Property Details (show)", "Closing Agent (show)", "Loans/Programs (show)", and "Download FNM File (show) NEW". The "Loans/Programs (show)" checkbox is checked, and a form titled "Closing Information" is displayed. The form has a red border and a red asterisk indicating required fields. The fields include: "Lender", "Program Name", "Lender Referral Type" (---Select One---), "Rate", "Term", "Lien Position" (1), "Loan Approved" (Yes/No radio buttons), "Reason For Rejection", "Lender Street Address", "Lender City", "Lender State", "Lender Zip Code", "Lender Phone Area Code", and "Lender Phone". A "Save" button is located at the bottom of the form.

# CounselorMax User Guide

## 9.5 Download FNM File

Once the **Case Profile** information is completed, click download FNM file which is the Fannie Mae data extension file equivalent to a 1003 loan application form. The file can be exported and imported to and from loan origination programs to auto populate corresponding data fields.

**NOTE:** This function creates a file which can be imported into another software application such as a loan origination system if the import function exists in that application.



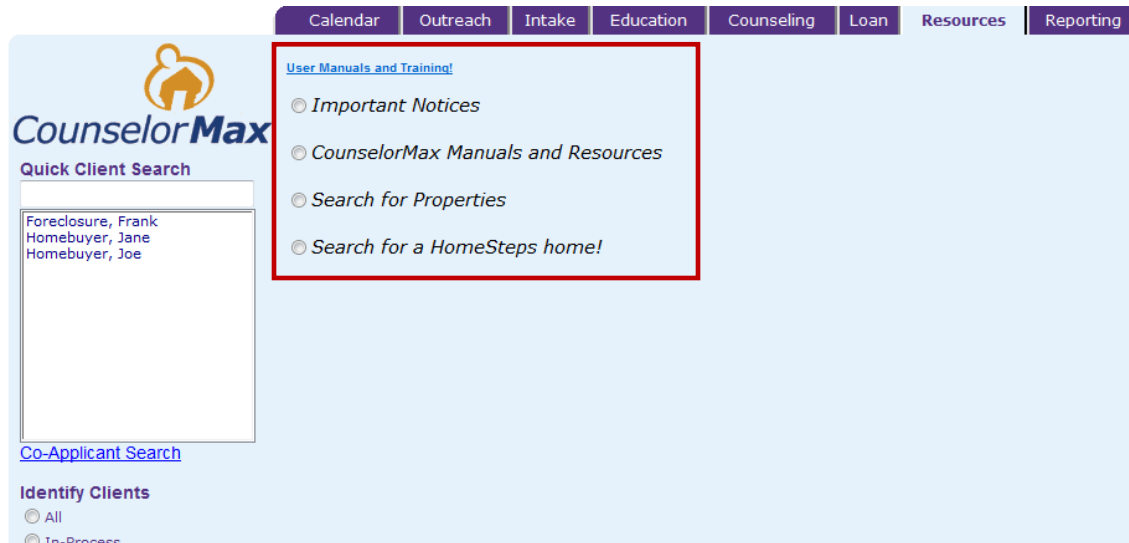
# CounselorMax User Guide

## Chapter 10: Resources

The **Resources Tab** provides access to CounselorMax reference materials and home counseling resources to help you provide assistance to your clients.

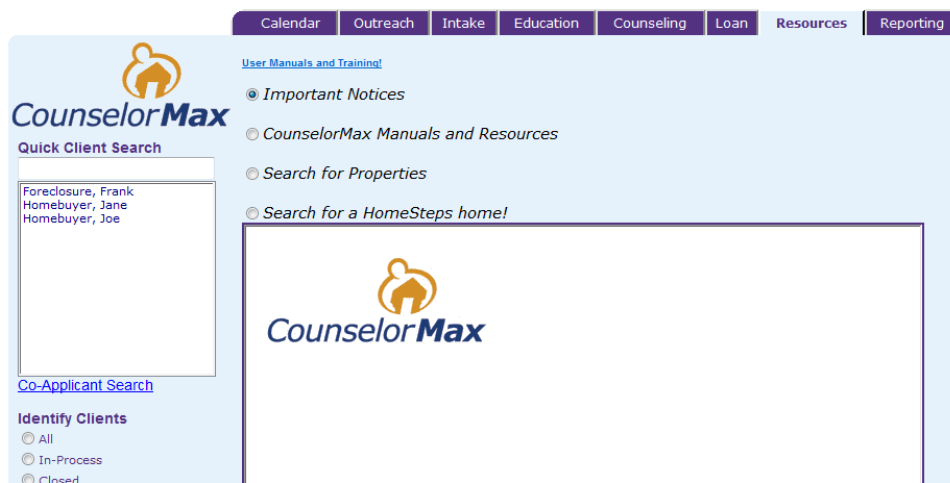
### 10.1 Global/Client Mode

The Global and Client Modes are identical on the **Resources** tab.



There are four radio buttons to choose from:

- Click on the **Important Notices** radio button to review notices from CounselorMax relating to changes and updates on resources available.

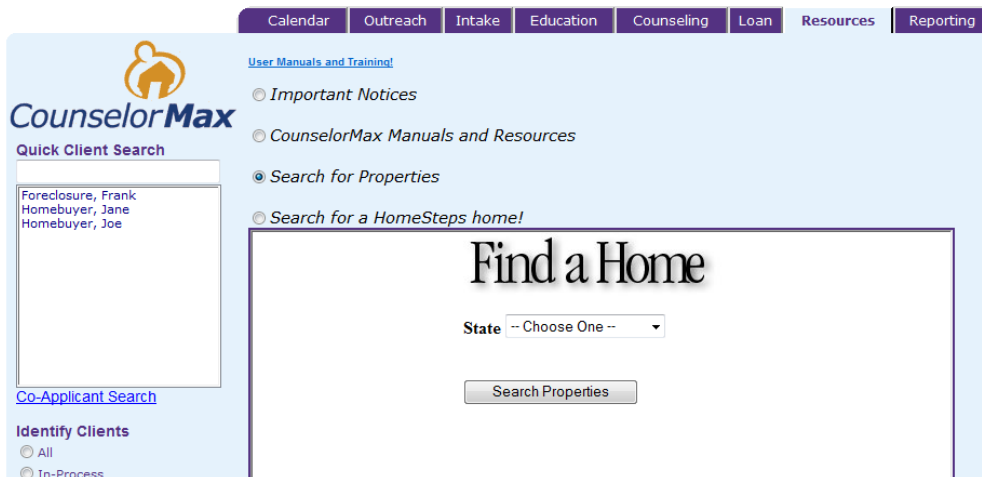


# CounselorMax User Guide

- Click on the **CounselorMax Manuals and Resources** radial button to obtain CounselorMax information such as Frequently Asked Questions (FAQs), system settings, training materials, software release information, 9902 HUD reporting, administrative settings, and signing up to receive credit reports for your clients from Credco.



- Click on the **Search for Properties** radial button to perform property searches for properties in a specific area of the country. Use price range, city and state information to perform the property search.



- Click on the **Search for a Home Steps home** radial button to access Freddie Mac's *Home Steps* Web site. *Home Steps* provides information on Freddie Mac's foreclosed properties by state, and access to valuable tools to help your

# CounselorMax User Guide

client in the home buying process including a home mortgage calculator, financing information, and information on finding a realtor.

The screenshot displays the CounselorMax web application interface. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main content area is divided into several sections:

- Header:** Features the CounselorMax logo and a link for [User Manuals and Training!](#)
- Search Options:** A list of radio buttons for selecting search criteria:
  - Important Notices
  - CounselorMax Manuals and Resources
  - Search for Properties
  - Search for a HomeSteps home!
- Quick Client Search:** A search box containing the text: "Foreclosure, Frank Homebuyer, Jane Homebuyer, Joe".
- Co-Applicant Search:** A link for [Co-Applicant Search](#).
- Identify Clients:** A list of radio buttons for filtering clients:
  - All
  - In-Process
  - Closed
  - Prospect
- HomeSteps Advertisement:** A large box containing the HomeSteps Asset Services logo (A Freddie Mac Unit) and the following text:

HomeSteps is a unit of Freddie Mac, and markets the company's foreclosure homes. Each home is sold through a real estate agent.

For a list of our current homes for sale, please click on the link below:  
[Home Search](#)

Once you and your buyer find a home you like, please contact the listing agent for more details.

For more information, you may call: 1-800-972-7555.



# CounselorMax User Guide

## Chapter 11: Reporting

Although CounselorMax has been designed as a client management system, it has a complete suite of reporting functions. Many housing agencies are required to provide reports to the Department of Housing and Urban Development (HUD), NeighborWorks America (NWA), the National Foreclosure Mitigation Council (NFMC) or other funding sources. All reports are run from **Global Mode**.

CounselorMax gives you the option to create and run two types of reports: 1) Standard and 2) Custom reports.

**NOTE:** All reports have control reports features that counselors can utilize view any errors and to make any corrections before finalizing their reports.

### 11.1 Standard Reports

The **Select Standard Reports HUD 9902 & NFMC** checkbox is the default view in the **Reporting** tab. Under this checkbox, counselors have the capability to produce standard reports from pre-selected data fields which are standardized from the funding source or governmental agency.

To run a standard report, determine the standard report you would like to run by selecting the report type under the **Select One** heading. Once the report type is selected, additional selection options appear below the Select One section for you to select reporting time period. Below are various reports you can run under the Reporting tab.

# CounselorMax User Guide

## YTD 9902

When you click on **YTD 9902** report, the following screen is displayed:

Calendar Outreach Intake Education Counseling Loan Resources Reporting

**CounselorMax** Global Mode Custom Reports

Quick Client Search

Counselor, Joe  
Demo, Client  
Doe, Jane  
Doe, John  
Doe, Sharon  
Homeowner, Joe  
Scott, Michael

Co-Applicant Search

Identify Clients

All  
 In-Process  
 Closed  
 Prospect  
 Suspended

New Client

Select Standard reports:  
HUD-9902 & NFMC

Select One:

HUD 9902  YTD 9902  Quarterly 9902  Quarterly CARS

NFMC Report  NW Compliance Report

End Date 1/1/2010 mm/dd/yy

Run YTD Interim Report Control Report

[Top 10 Reasons Why My 9902 Report is Wrong](#)  
[How Does the 9902 Work?](#)  
[2006-2008: Resolution Mapping](#)

Letters, Reminders, & Logs

[Down Load Clients & Cases](#)

[List of Deleted Clients](#)

Select the year for the report and click the **Run YTD Interim Report** button to run the report. This displays the requested report.

The following is an example of a **HUD 9902 Report** reflecting a report run with a full reporting period. Users also have the options to run a **Year to Date (YTD)** report and a quarterly report set at the counselor's discretion.

# CounselorMax User Guide

**Housing Counseling  
Agency  
Activity Report**

**U.S. Department of Housing and Urban  
Development**  
Office of Housing  
Federal Housing Commissioner

OMB Approval No. 2502-0261  
(Exp. 3/28/2009)

**Read the instructions and Public Reporting Statement on the back of this form.**

1. Counseling Agency Name		2. Reporting Period and Budget	
<b>Agency Name</b> NeighborWorks America Your Name: 202-555-1212 counselormax@nw.org		From:	10/1/2009
Agency ID:		To:	
Agency Type:		Date Submitted:	9/30/2010
Address: 1325 G St. NW Suite 800 Washington, DC 20005		Total Annual Housing Counseling Program Budget, All Sources:	
Parent Agency Name (if applicable)		\$	
Agency ID:		HUD-Funded Activity Ratio:	
Agency Type:			
		All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds
3. Ethnicity of Clients			
a.	Hispanic	1	1
b.	Not Hispanic	5	3
c.	Chose not to respond		
<b>Section 3 Total:</b>		6	4
4. Race of Clients			
Single Race			
a.	American Indian/Alaskan Native		
b.	Asian	3	1
c.	Black or African American		
d.	Native Hawaiian or Other Pacific Islander		
e.	White	1	1
Multi-Race			
f.	American Indian or Alaska Native <i>and</i> White		
g.	Asian <i>and</i> White	1	1
h.	Black or African American <i>and</i> White		
i.	American Indian or Alaska Native <i>and</i> Black or African American		
j.	Other multiple race	1	1
k.	Chose not to respond		
<b>Section 4 Total:</b>		6	4

# CounselorMax User Guide

Counselors can run a **HUD 9902 Control Report** by selecting **HUD 9902** and clicking on the **Control Report** link on the bottom portion of the screen.



This report is a way for agencies to conduct quality control and review their data before completing and filing their HUD 9902 Report. The Control Report provides the Admin or counselors the ability to view data based on the corresponding sections of the HUD 9902 report. Rather than simply reporting data in numeric form, the control report includes client level data. This is vital in conducting quality control and serving as a form of a self-audit to ensure common errors such as client duplication aren't occurring on the reports.

# CounselorMax User Guide

Below is an example of a HUD 9902 Control Report:

## HUD 9902 Control Report

10/1/2009 to 9/30/2010

### Section 3: Ethnicity of Clients - All Clients

Client #	Case #	Name	Ethnicity	Service	Case Date	Resolution	Resolve Date	HUD #
12315	8353	Homeowner, Joe	Asian & Hispanic	Home Purchase	12/17/2009	Suspended	12/21/2009	
Sub Total Hispanic (Sect. 3.a): 1								
12320	8354	Counselor, Joe	Asian	Mortgage Default/Early Delinquency	12/17/2009	Brought Mortgage Current	12/21/2009	000001
12320	8354	Counselor, Joe	Asian	Education	12/17/2009	Other Workshop	12/21/2009	000001
12322	8352	Demo, Client	White Non Hispanic	Home Purchase	12/16/2009	Fulfilled	12/21/2009	
12290	8247	Doe, Jane	Asian	Home Purchase	12/10/2009		Missing	
12328	8360	Doe, John	American Indian/Alaskan & Black	Mortgage Default/Early Delinquency	12/28/2009		Missing	
12284	8256	Doe, Sharon	Other Multiple Race/Non Hispanic	Home Purchase	12/10/2009		Missing	
12327	8359	Scott, Michael	White Non Hispanic	Education	12/22/2009	Completed Financial Literacy Workshop	12/22/2009	
Sub Total Non-Hispanic (Sect. 3.b): 7								
TOTAL: 8								

### Section 4: Race of Clients - All Clients

Client #	Case #	Name	Race	Service	Case Date	Resolution	Resolve Date	HUD #
12320	8354	Counselor, Joe	Asian	Mortgage Default/Early Delinquency	12/17/2009	Brought Mortgage Current	12/21/2009 9:53:00 PM	000001
12320	8354	Counselor, Joe	Asian	Education	12/17/2009	Other Workshop	12/21/2009 9:53:00 PM	000001
12290	8247	Doe, Jane	Asian	Home Purchase	12/10/2009	Missing		
Sub Total Asian (Sect. 4.b): 3								
12322	8352	Demo, Client	White Non Hispanic	Home Purchase	12/16/2009	Fulfilled	12/21/2009 9:53:00 PM	
12327	8359	Scott, Michael	White Non Hispanic	Education	12/22/2009	Completed Financial Literacy Workshop	12/22/2009 11:05:00 PM	
Sub Total White (Sect. 4.e): 2								
12315	8353	Homeowner, Joe	Asian & Hispanic	Home Purchase	12/17/2009	Suspended	12/21/2009 9:53:00 PM	
Sub Total White/Asian (Sect. 4.g): 1								
12328	8360	Doe, John	American Indian/Alaskan & Black	Mortgage Default/Early Delinquency	12/28/2009	Missing		
Sub Total Black/Indian (Sect. 4.i): 1								
12284	8256	Doe, Sharon	Other Multiple Race/Non Hispanic	Home Purchase	12/10/2009	Missing		
Sub Total Other (Sect. 4.j): 1								

## NFMC Reports

CounselorMax gives counselors the ability to run and submit reports to their grantors affiliated with the National Foreclosure Mitigation Council or NFMC. This report can be run by selecting **NFMC Report** under **Select One** option on the **Reporting** tab.



# CounselorMax User Guide

After it is run, the **NFMC Report** alerts the counselor of any items not completed and reports all of the information required by **NFMC**.

## NFMC Audit Report: Candidates for Download

For customer receiving foreclosure counseling between 1/1/2010 - 1/31/2010

### Arizona Department of Housing/Arizona Housing Finance Authority

Action	Case Id	Last Name	First Name	Grantor	1st Action	Last Action	Actions Left	Level	Level Designation	Counselor	Exceptions	In Download?
<a href="#">Modify</a>	8360	Doe	John	Arizona Department of Housing/Arizona Housing Finance Authority	1/1/2010	1/1/2010	18 actions remaining	Level 1	Level 4a		n/a	no
<a href="#">Modify</a>	8360	Doe	John	Arizona Department of Housing/Arizona Housing Finance Authority	1/1/2010	1/1/2010	18 actions remaining	Level 2	Level 4a		n/a	no

Any outstanding actions left to be completed can be done by clicking “**Modify**” under the **Action** heading which takes the counselor to the **GPS**.

## NW Compliance Reports

Agencies affiliated with NeighborWorks America also have reports they are required to run. The interface in CounselorMax in **Global Mode** is similar to HUD and NFMC Reports. The key difference is the ability to run reports by **counselor**, by **download status** and in the **time intervals** available.

Calendar Outreach Intake Education Counseling Loan Resources Reporting

**CounselorMax** Global Mode Custom Reports

Quick Client Search

Counselor, Joe  
Demo, Client  
Doe, Jane  
Doe, John  
Doe, Sharon  
Homeowner, Joe  
Scott, Michael

Co-Applicant Search

Identify Clients  All

Select Standard reports:  
HUD-9902 & NFMC

Select One:

HUD 9902  YTD 9902  Quarterly 9902  Quarterly CARS

NFMC Report  NW Compliance Report

Choose One:

All Case Statuses  Download Process  Summary Download

By Counselor: ---Select One--- (optional)

Fiscal Year: 1 Fiscal Year: 2009-2010

Quarter: 1

OK

[Reporting Rules](#)

# CounselorMax User Guide

Below is an example of a NW Compliance Report:

## NW Audit Report: Candidates for Download

For customer receiving counseling between 10/1/2009 - 12/31/2009

Action	Case Id	Last Name	First Name	Work Plan	1st Action	Last Action	Actions Left	Counselor	Exceptions	In Download?
<a href="#">Modify</a>	8352	Demo	Client	New Home Buyer	12/16/2009	12/16/2009	4 actions remaining		n/a	no

Any remaining actions can be completed in the GPS by selecting “**Modify**” under the **Action** heading.

## 11.2 Custom Reports

Counselors can create custom reports to be run from CounselorMax. Below is what you should see when **Custom Reports** checkbox is selected:

The screenshot displays the CounselorMax Global Mode interface. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header area includes the CounselorMax logo and the text "Global Mode" with a globe icon. Below the header, the "Custom Reports" checkbox is checked. The interface is divided into several sections:

- Quick Client Search:** A search box containing the text "Foreclosure, Frank Homebuyer, Joe".
- Co-Applicant Search:** A link for searching co-applicants.
- Identify Clients:** Radio buttons for selecting client status: All, In-Process, Closed, Prospect, and Suspended.
- New Client:** A checkbox for adding a new client.
- Select the Source of Your Report:** A dialog box with a list of report sources: All Fields, NeighborWorks® Compliance, and NFMC. An "OK" button is visible below the list.
- Saved Reports:** A table listing saved reports with columns for Report Name, Change Name, and Delete. The table contains several entries, including "All Fields" and "2009 Loan Closings".

# CounselorMax User Guide

You run a custom report by selecting the fields that the report will include. When you run custom reports it is important to know the data fields that the report should contain. By selecting “**All Fields**”, you can select all the fields needed for the specific custom reporting.



Once “**All Fields**” is selected, the list of available fields is displayed. This is the most comprehensive list of all the fields in the system.





# CounselorMax User Guide

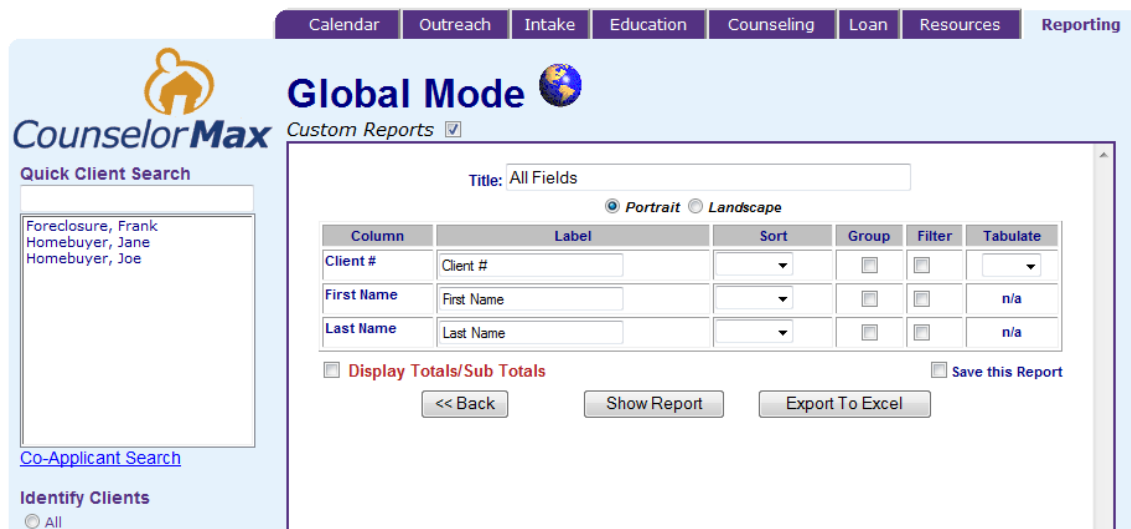
Select the appropriate fields to open the sub-categories. Once the subcategories are opened, select them individually or hold down the **CTRL** button to select multiple items. Click the arrow to move them individually or the double arrows to move over all of the subcategories in an open field.



To run the report, press the **Submit Query** button at the bottom of the screen.

# CounselorMax User Guide

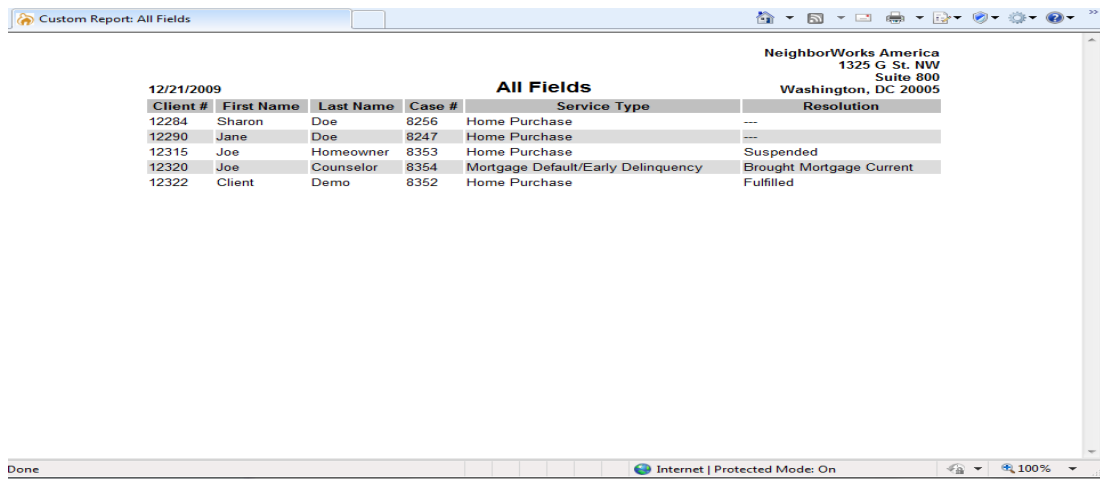
Before running the report, you can design the report to display the way that the agency or funding source requests or requires the reports:



As seen above, the report can be titled, sorted, grouped or filtered in any manner the agency or funding source specifies. In addition, the report can be exported to Microsoft Excel.

In most cases, the counselor can select “**Show Report**” to view the report determined by the set parameters. The report displays the criteria requested by the counselor.

**NOTE:** Counselors can export the reports to Excel and further manipulate the data for reporting purposes.



# CounselorMax User Guide

## 11.3 Letters, Reminders & Logs

The **Letters, Reminders & Logs** checkbox on the **Reporting** tab allows counselors to run reports showing the following as seen on the screen below: **Show All of Your Reminders, Print Batch Letters (Any Active), Print Batch Letters (Yours: Canceled & Active), and View All of Your Client Logs.**

The screenshot shows the CounselorMax web application interface. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The Reporting tab is active. The main content area is light blue and contains the following elements:

- Global Mode** with a globe icon and a **Custom Reports** checkbox.
- Quick Client Search** section with a search box containing "Foreclosure, Frank" and "Homebuyer, Joe".
- Select Standard reports:** section with a checkbox for "HUD-9902 & NFMC".
- Letters, Reminders, & Logs** section with a checked checkbox and four links: [Show All of Your Reminders](#), [Print Batch Letters \(Any Active\)](#), [Print Batch Letters \(Your's: Canceled & Active\)](#), and [View All of Your Client Logs](#).
- [Down Load Clients & Cases](#) link.
- [List of Deleted Clients](#) link.
- Co-Applicant Search** link.
- Identify Clients** section with radio buttons for "All", "In-Process", "Closed", "Prospect", and "Suspended".

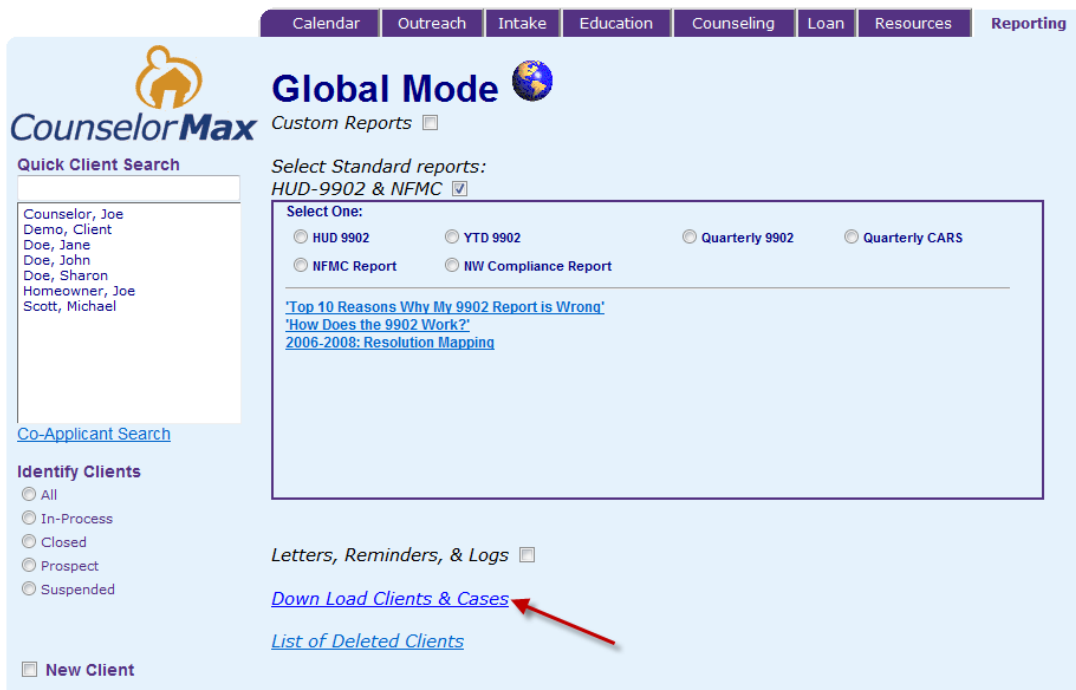
# CounselorMax User Guide

## 11.4 Download Clients and Cases

Once an agency has determined they have complete and accurate reports, the report data can be exported from CounselorMax into a file that can be transmitted or emailed to their funding source or governmental agency.

In order to create a file that can be transmitted, the counselor can click on the **Download Clients and Cases** link on the **Reporting** tab. Doing so exports the selected clients to Excel in a .csv (comma separated values) file.

**NOTE:** The standard and customized reporting functions should be utilized for most reporting needs as these functions allow you to tailor the reports to your needs.



When prompted, the counselor should **SAVE** the file to a folder or location on their computer where they are able to retrieve it to transmit or e-mail to the funding source or governmental agency. When it is time to transmit or send the file, the counselor can simply locate the .csv file and transmit via email or the proper vehicle.

## 11.5 List of Deleted Clients

The last option on the **Report** tab is the **List of Deleted Clients** link. As the name implies, this option produces a list of clients that have been deleted by the agency counselors.

# CounselorMax User Guide

## Chapter 12: Introduction to the GPS

As introduced in Chapter 1, the Guidance and Planning System, GPS, serves as an overlay to the Classic CounselorMax application that allows counselors to capture more detailed client data fields that are not necessarily all available in Classic CounselorMax. GPS is available to everyone while the Full GPS is available to NeighborWorks agencies and agencies that opted to install GPS.

The functionalities under these services will be covered in their respective sections below. First see below some general information on GPS access and work plan creation in GPS.

### 12.1 Accessing GPS

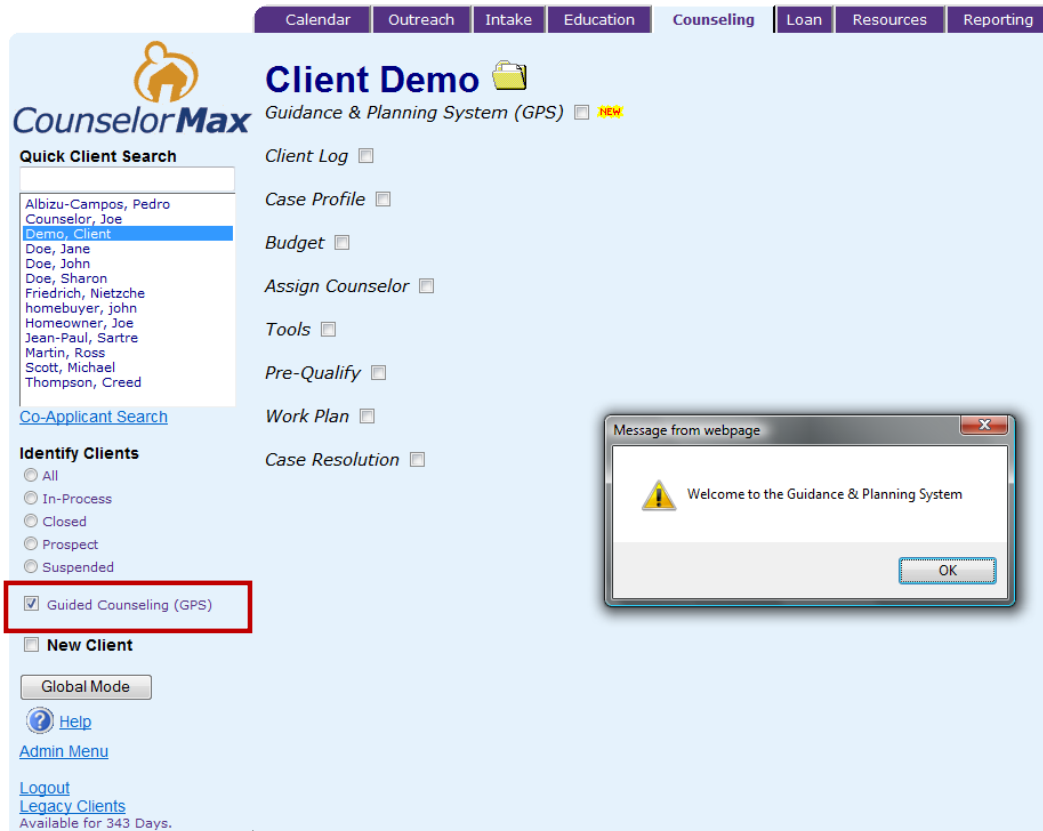
To access the **GPS**, you must first be in “**Client Mode**” and your client must have an active case (i.e., the required information on the **Case Data** sub-tab under the **Intake** tab has been completed).

The screenshot shows the CounselorMax interface with the 'Intake' tab selected. The 'Case Data' sub-tab is active, and a red box highlights the 'Case Data' label. The form contains the following fields:

- Service Required:** Service Type \* (dropdown: ---Select One---, note: Custom Service Types in red will NOT be included in the 9902)
- HUD Activity:**
- Case Term:** Long Term (180+ days) (dropdown)
- Total Co-Apps \* (include spouse):**
- Referral Source \* (Press 'Ctrl' to select more than one):** (dropdown: ---Select One or More---, options: Ad 5/14/10 (NWA), Church, City)
- Additional Fields:**
- Demographics:**
  - Race \*:** (dropdown: ---Select One---)
  - Number in Household \*:** (dropdown)
  - Gender \*:**  Male  Female
  - Head of Household?:**
  - Veteran?:**
  - Foreign Born?:**
  - Housing Choice Voucher?:**
  - Additional Fields:**
- Ethnicity:** (dropdown: ---Select One---)
- Age:**
- Birthdate (mm/dd/yyyy) \*:**
- Disabled?:**
- Disabled Dependent?:**

# CounselorMax User Guide

At this point, the application opens up the **Counseling** tab with a pop-up message “**Welcome to the Guidance & Planning System**”.



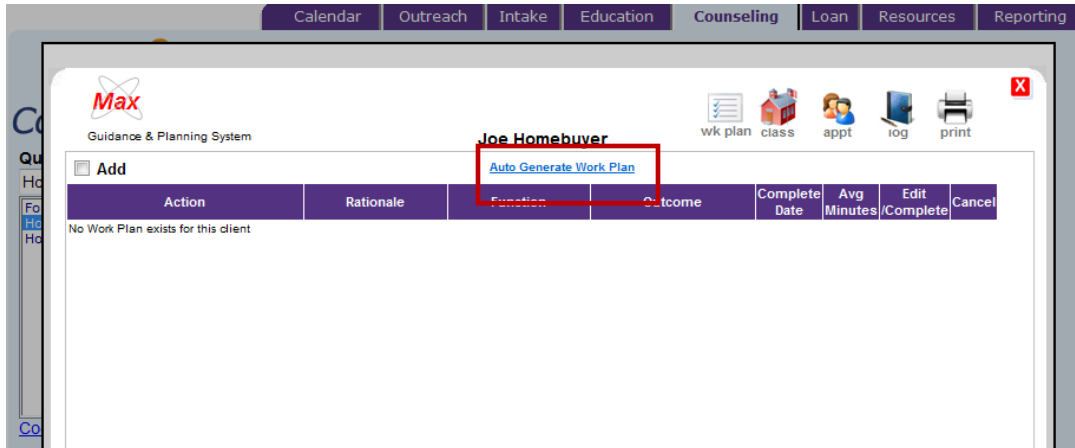
Once you click “**OK**” on the pop-up screen, the main screen opens up on the Counseling tab in Client Mode. In addition to all the selection checkboxes that appear in Classic CounselorMax, this screen displays the **Guidance & Planning System** checkbox in Main Work Space as well as a **Guided Counseling (GPS)** checkbox on the Left Side Navigation.

**Note:** You will not see the **Guided Counseling (GPS)** checkbox on the Left Side navigation area until you have entered data on one of the GPS screens.

# CounselorMax User Guide

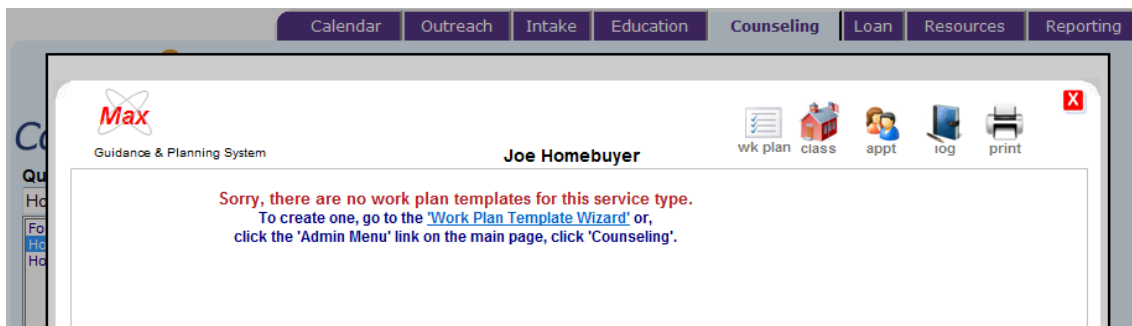
## 12.2 Generate Work Plan

Once you gain access to the GPS, click on the **Guidance & Planning System** checkbox to view the pop up screen that allows you to **Auto Generate Work Plan** a set of work plans.



Once you click “OK” on the above screen, you should see the Work Plan Template for Home Purchase Service Type as seen below:

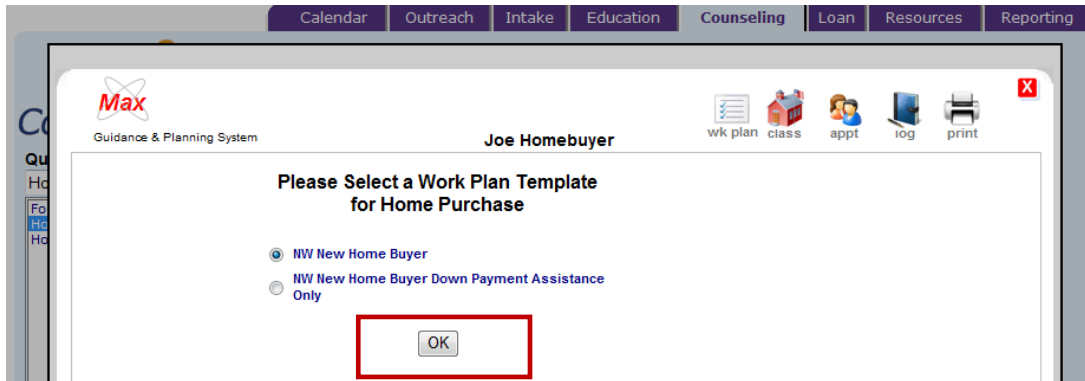
Depending on the **Service Type** selected during intake, you may or may not have a set of work plans under Auto Generate Work Plan link. For example, if you select **Rehab** for Service Type under the **Intake Case Data** tab, you will see the following when you click on the **Auto Generate Work Plan** link:



This is because the **Rehab** Service Type does not have a preset work plan. Therefore, unless your Admin has previously set up a set of customized work plans, there will not be any work plan templates.

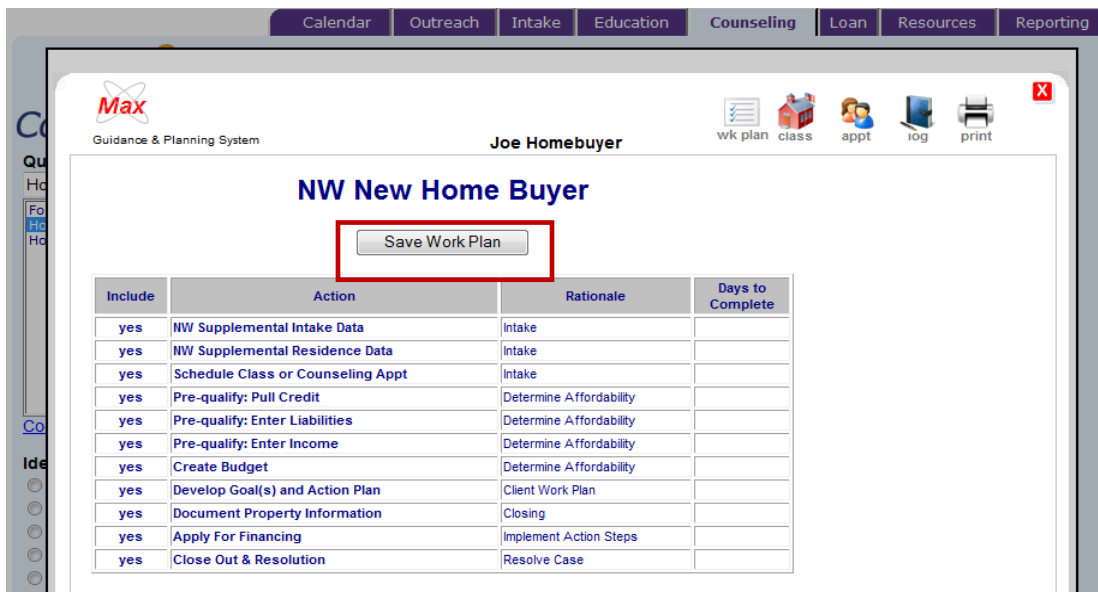
# CounselorMax User Guide

On the other hand, if you selected **Home Purchase** under Service Type under the Intake Case Data tab, below is what you will see when you click on the **Auto Generate Work Plan** link:



As shown on the screen above, you have options to select a **'Work Plan Template'** which would have been previously set up as a default in CounselorMax by the Admin in your agency. Once you select **NW New Home Buyer** option and click **"OK"**, the work plan template list appears.

**NOTE:** The Work Plan Template standard options are determined by the Service Type you select. In addition, custom work plan templates can be created by the Admin for your agency (see Admin Menu Functions in Appendix A).



Click on the **Save Work Plan** button to save.



# CounselorMax User Guide

## 12.3 Work Plans in the GPS

See below the standard work plan under **NW New Home Buyer**.

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>		Pending			
NW Supplemental Residence Data	Intake	<a href="#">Residence</a>		Pending			
Schedule Class or Counseling Appt	Intake	(reminder)		Pending			
Pre-qualify: Pull Credit	Determine Affordability	<a href="#">Credit Report</a>		Pending			
Pre-qualify: Enter Liabilities	Determine Affordability	<a href="#">Liabilities</a>		Pending			
Pre-qualify: Enter Income	Determine Affordability	<a href="#">Income</a>		Pending			
Create Budget	Determine Affordability	<a href="#">Budget</a>		Pending			
Develop Goal(s) and Action Plan	Client Work Plan	Client Work Plan		Pending			
Document Property Information	Closing	<a href="#">Subject Property</a>		Pending			
Apply For Financing	Implement Action Steps	<a href="#">Property &amp; Finance</a>		Pending			
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>		Pending			

All of the work plans in the GPS have 3 components: **Action, Rationale and Function**. Once you have reached this work plan screen, the **Function** component (see the Function heading above) flow from top to bottom with headings at the top of the page.

While the first two components, **Action** and **Rationale**, do not require any activity, the third field, **Function**, may need additional information. To select a function, simply click on the link below the Function link. Once you are in the new screen, any required blank fields (as noted by a red asterisk) or any clickable links, which may lead to embedded pages with blank fields, should be completed.

# CounselorMax User Guide

For example, when you click on the **Income** link under the **Function** heading for the **Action** entitled **Pre-qualify: Enter Income**, the following pop-up form appears and the fields on this form needs to be completed:

Guidance & Planning System

Joe Homebuyer

**Employment Income**

Required Fields Must Be Filled-in

SAVE

Other Income

Employer\*  Date Start (mm/dd/yyyy)\*

Date End (mm/dd/yyyy)  Years In Profession

Self Employed  Title\*

Bus Type\*  Phone (  )

Mnthly Gross Income\* \$  Mnthly Net Income\* \$

Address  City

State  Zip Code

Farm Worker

After all fields are completed it is always important to hit “**Save**”. The screen usually re-directs you to the **Work Plan** screen again; but if not, you can select the **Work Plan** icon along the top of the page to return to the **Work Plan** screen.

Guidance & Planning System

Client Demo

Auto Generate Work Plan

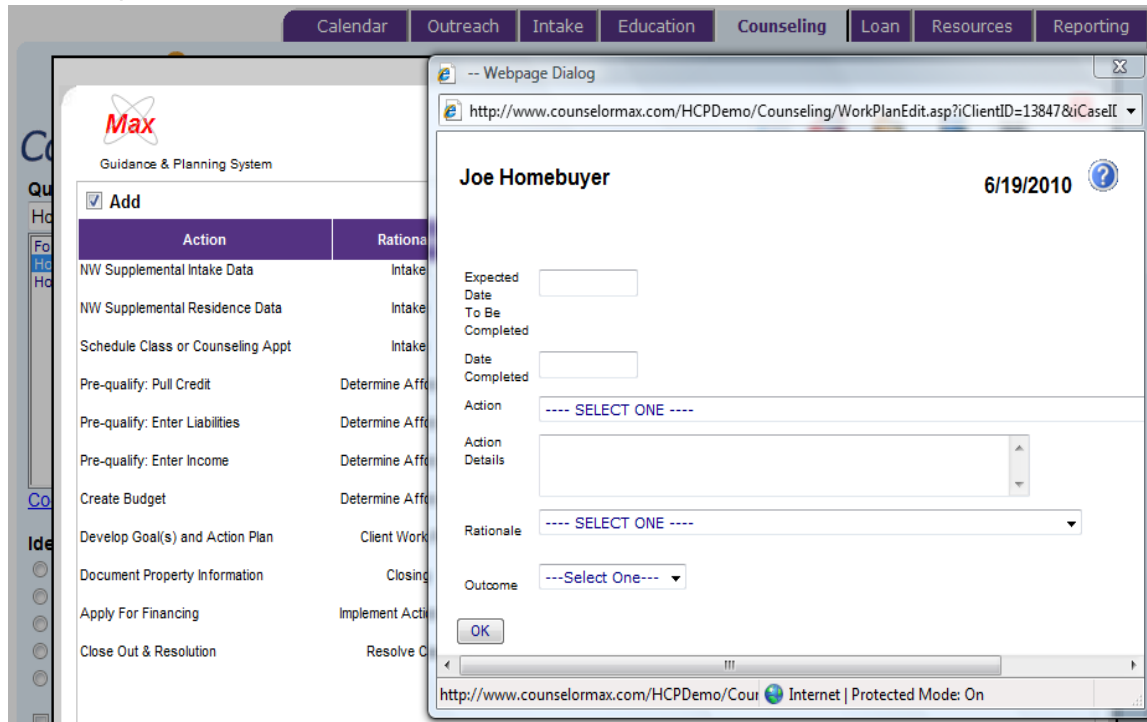
Action	Rationale	Function	Outcome	Complete	Avg	Edit	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>	Complete	12/16/2009			
NW Supplemental Residence Data	Intake	<a href="#">Residence</a>	Complete	12/16/2009			
Schedule Class or Counseling Appt	Intake	(reminder)	Complete	12/16/2009			
Pre-qualify: Pull Credit	Determine Affordability	<a href="#">Credit Report</a>	Complete	12/16/2009			
Pre-qualify: Enter Liabilities	Determine Affordability	<a href="#">Liabilities</a>	Completed	12/16/2009			
Pre-qualify: Enter Income	Determine Affordability	<a href="#">Income</a>	Completed	12/16/2009			
Create Budget	Determine Affordability	<a href="#">Budget</a>	Completed	12/16/2009			
Develop Goal(s) and Action Plan	Client Work Plan	<a href="#">Client Work Plan</a>	Pending				
Document Property Information	Closing	<a href="#">Subject Property</a>	Pending				
Apply For Financing	Implement Action Steps	<a href="#">Property &amp; Finance</a>	Pending				
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>	Pending				
Unsuccessful: Dev Alt Housing Plan	Implement Action Steps	<a href="#">Client Work Plan</a>	Pending				

# CounselorMax User Guide

After all of the work is complete for a work plan action, you must click on the **Edit/Complete** button for that **Action**. In the screen that appears, complete any vacant fields and in the final step select “**Complete**” from the drop-down list next to **Outcome**. Click “**OK**” and the Outcome field on the **Work Plan** screen will reflect “**Complete**”.

**NOTE:** All actions in the work plan must reflect a **Complete** status prior to case resolution.

In the Work Plan screen, you can also add an action by clicking on the **Action** checkbox on the top left corner:



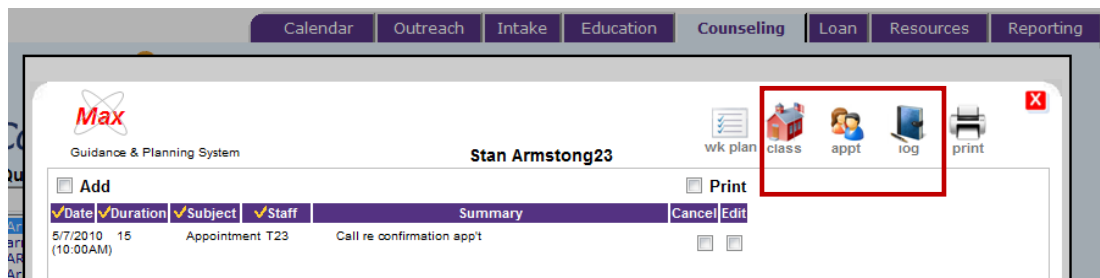
This screen allows you to add any additional Action you want to track for your client.

# CounselorMax User Guide

## 12.4 Class, Appt, and Log Functions

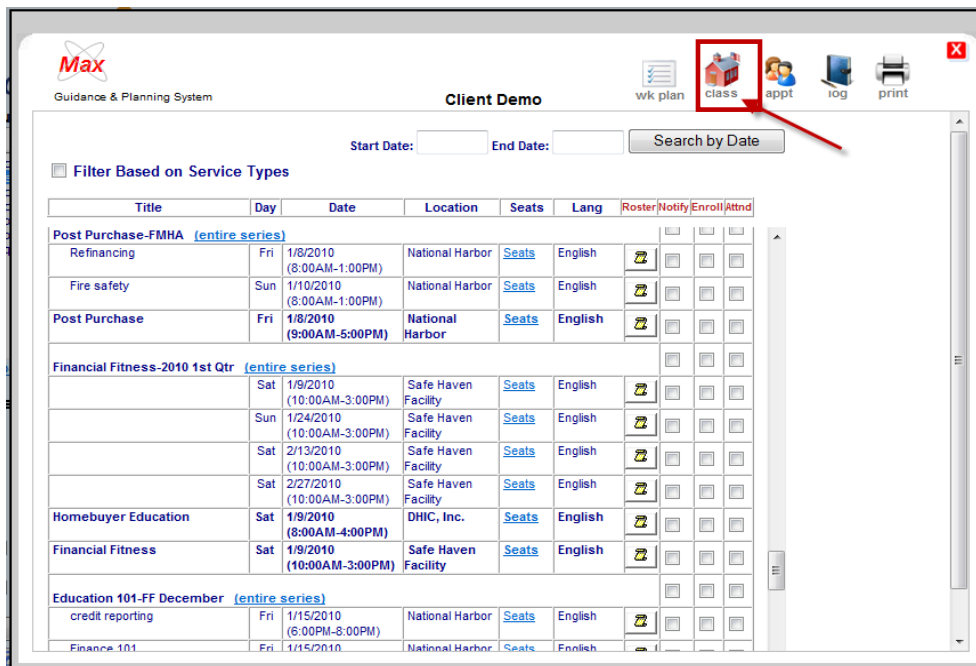
In addition to completing work plans in the GPS, you can also click on the **Class**, **Appt** or **Log** icon at the top right corner of the screen in order to link to Classic CounselorMax for the following functions:

1. **Class** links to the class list that you would see in the **Education** tab;
2. **Appointment** links to the **Calendar** display you would see in the Calendar Tab; and
3. **Log** links to the log display you would see in the **Calendar** tab



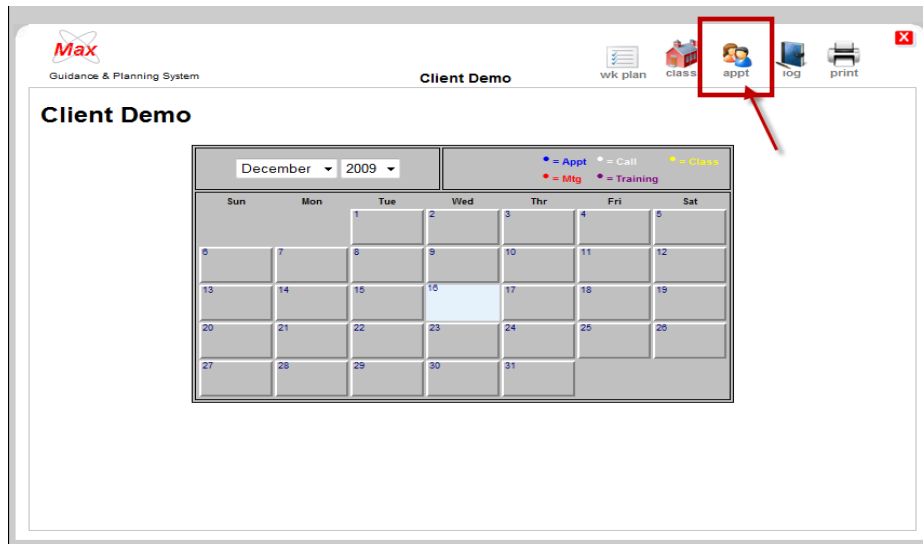
Below are the screen displays for the three functions:

1. Example of the display when the **Class** icon is clicked

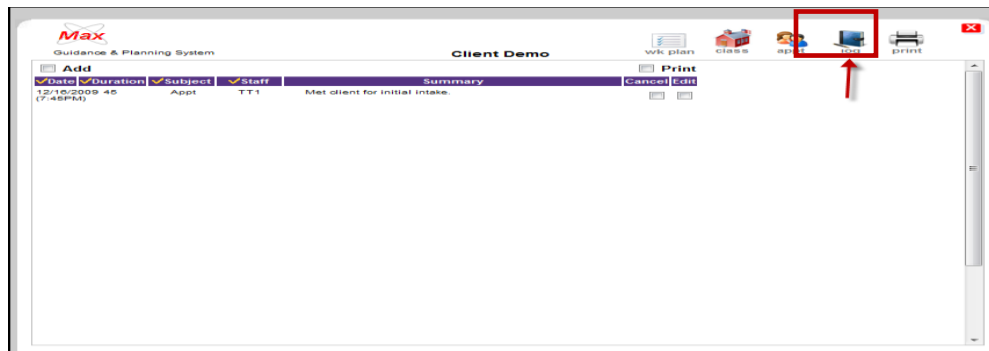


# CounselorMax User Guide

- This is an example of what the screen shows when the **Appt** button is selected. It is the same graphical display as the calendar in Classic CounselorMax interface.



- This is an example of what the screen displays when the **Log** button is selected. It is the same graphical display as the Client Log in the Classic CounselorMax interface.



**NOTE:** All functions in Classic CounselorMax, including case resolution, can be performed through the GPS. You are still in the **Counseling** Tab when you are linked to the 3 functions.

# CounselorMax User Guide

## 12.5 New Home Buyer Services

CounselorMax has always allowed you to collect new home buyer client service data. However, the traditional home buyer services data collection module in CounselorMax is generic and does not contain all of the data points required to report all of the required data points for the NeighborWorks Quarterly Production report.

As a NeighborWorks chartered organization you must use the following module and procedure to ensure that you accurately capture all of the data required.

### Client Intake

1. Create a standard client intake in CounselorMax (for details refer to the following document: How to Create a Client Intake in CounselorMax). Make sure to select **Home Buyer Services** from the **Service Type** drop-down, as this is the only service path that will later provide you with the data entry forms associated with NeighborWorks new home buyer data collection.

The screenshot shows the CounselorMax interface for a client named Joe Homebuyer. The top navigation bar includes tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header displays the CounselorMax logo and the client's name, Joe Homebuyer, with a 'Print Intake' link. On the left, there is a 'Quick Client Search' box with a list of search results including 'Homebuyer, Joe', 'Foreclosure, Frank', 'Mortgage Default, Joe', and 'Homebuyer, Joe'. Below this is a 'Co-Applicant Search' link and an 'Identify Clients' section with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended'. A 'New Client' checkbox is also present. The main content area is titled 'Case Data:' and contains several sections: 'Service Required:' with a 'Service Type' dropdown set to 'Home Purchase' (highlighted with a red box and a red warning note: 'Custom Service Types in red will NOT be included in the 9902'), a checked 'HUD Activity' box, a 'Case Term' dropdown set to 'Long Term (180+ days)', a 'Total Co-Apps' input field with '0', and a 'Referral Source' dropdown with options 'Ad 5/14/10 (NWA)', 'Church', and 'City'. Below this is an 'Additional Fields' checkbox. The 'Demographics:' section includes 'Race' (Asian & Hispanic), 'Number in Household' (4), 'Gender' (Male selected), 'Head of Household?' (checkbox), 'Veteran?' (checkbox), 'Foreign Born?' (checkbox), and 'Housing Choice Voucher?' (checkbox). There is another 'Additional Fields' checkbox. The 'Ethnicity' dropdown is set to '---Select One---' and the 'Age' input field contains '35'.

2. Enter all of the required fields to create a new case in CounselorMax (note that to access some of the fields you must click on the **Additional Fields** green checkboxes to expose the additional fields on the screen:

- Total Co-Apps (enter 0 if there are none)
- Referral Source (you or your agency admin can customize the list of options)
- Race
- Number in Household
- Gender
- Birth date

# CounselorMax User Guide

- Household Annual Income
- County (the list will narrow down the available options based on the client's address)
- Current Residence (status)

In addition, you need to enter the following NeighborWorks required fields if you have the information:

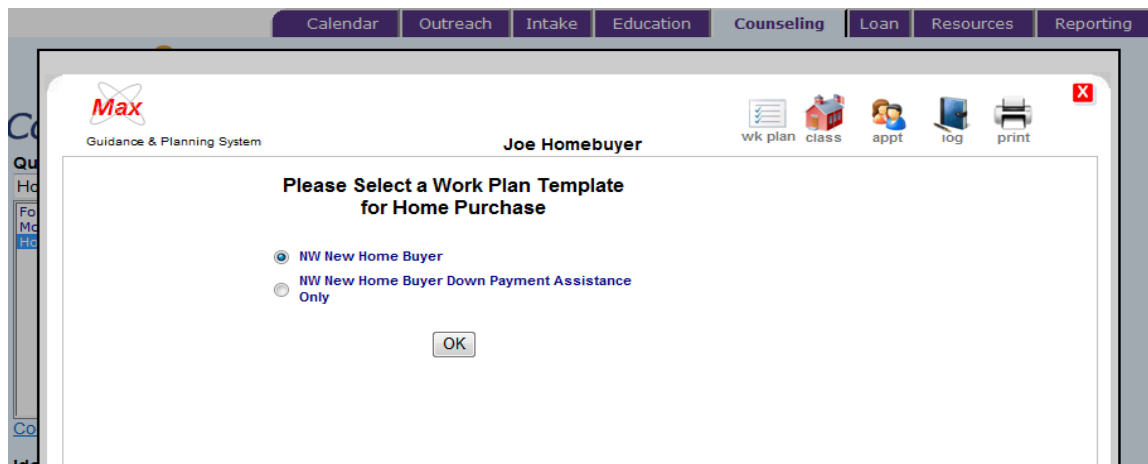
- Veteran
- Foreign Born
- Housing Choice Voucher (does the customer have a housing choice voucher to help subsidize their rent or mortgage payments)
- Head of Household
- Disabled
- 1st Time Home Buyer
- Authorization to Release Information

While these fields are not required to save a case in CounselorMax they are required to report the case to NeighborWorks. If you do not have this data while you are filling out the intake form, leave these fields blank and you will have a chance to collect the data later.

3. Click the **Save Changes** button at the bottom of the form to save your data.

You should see a **Save Successfully!** pop-up message where you can click **“OK”**.

4. Next, you should see a Work Plan Generator form that asks you to select the type of service you are providing this client. If you have the NeighborWorks modules turned on for your organization, you will have two options similar to the following:



5. Select either **“NW New Home Buyer”** or **“NW New Home Buyer Down Payment Assistance Only”** depending on the level of service you are providing. In most cases, **“NW New Home Buyer”** is selected as the down payment assistance service is rare.

# CounselorMax User Guide

6. Once you've selected the appropriate service level by clicking on the radio button, click "OK".

7. You will see a GPS or (Guidance and Planning System) work plan generator form:

Include	Action	Rationale	Days to Complete
yes	NW Supplemental Intake Data	Intake	
yes	Service Type	Intake	
yes	NW Supplemental Residence Data	Intake	
yes	Pre-qualify: Pull Credit	Determine Affordability	
yes	Pre-qualify: Enter Liabilities	Determine Affordability	
yes	Pre-qualify: Enter Income	Determine Affordability	
yes	Create Budget	Determine Affordability	
yes	Develop Goal(s) and Action Plan	Client Work Plan	
yes	Document Property Information	Closing	
yes	Apply For Financing	Implement Action Steps	
yes	Close Out & Resolution	Resolve Case	
yes	Unsuccessful: Dev Alt Housing Plan	Implement Action Steps	

The form displays the pre-created work plan items required to successfully manage the client case and collect all of the data required. You need to click on the **Save work plan** button to create the client's work plan and access the data entry forms.

8. Once you save the New Home Buyer Full Information work plan for this client, the GPS page is created and you can see an easy to use form that allows you to access and view all client data from one central location:

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit/Complete	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>		Pending			
NW Supplemental Residence Data	Intake	<a href="#">Residence</a>		Pending			
Schedule Class or Counseling Appt	Intake	(reminder)		Pending			
Pre-qualify: Pull Credit	Determine Affordability	<a href="#">Credit Report</a>		Pending			
Pre-qualify: Enter Liabilities	Determine Affordability	<a href="#">Liabilities</a>		Pending			
Pre-qualify: Enter Income	Determine Affordability	<a href="#">Income</a>		Pending			
Create Budget	Determine Affordability	<a href="#">Budget</a>		Pending			
Develop Goal(s) and Action Plan	Client Work Plan	<a href="#">Client Work Plan</a>		Pending			
Document Property Information	Closing	<a href="#">Subject Property</a>		Pending			
Apply For Financing	Implement Action Steps	<a href="#">Property &amp; Finance</a>		Pending			
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>		Pending			
Unsuccessful: Dev Alt Housing Plan	Implement Action Steps	<a href="#">Client Work Plan</a>		Pending			



# CounselorMax User Guide

The form contains 12 pre-defined work plan items. The concept behind the form is that if you complete each of the listed items, you will have (1) performed all the steps necessary to serve the client fully for this line of business – as such, the GPS serves as a useful process template for counselors and other staff – and (2) collected all of the data required to report a new Home Buyer Full Information client to NeighborWorks America in the Quarterly Production report.

## Using the GPS Form and Carrying out the Service Steps

Using the GPS is simple. Each action item requires one or at most two steps: (1) complete data entry in a satellite page (not all action steps have a satellite page but most do) and (2) mark the step as completed when you finish entering all of the data required or have carried out all of the tasks steps. See below for discussion on each action step and how each step can be completed.

### 12.5.1 Collect NW Supplemental Intake Data

This step exists simply to collect additional demographic and client data that is not in the generic client Intake Screen in Classic CounselorMax. Since not all users of CounselorMax are NeighborWorks Chartered members, these data points are not included in the generic intake form. You need to collect these additional data points here. To access the GPS form that contains these data points, click on the link labeled **Client Summary** in the **Function** column of the GPS:

The screenshot shows the CounselorMax interface with a table of work plan items. The table has the following structure:

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit/Complete	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>	Fending				
Service Type	Intake	(reminder)	Fending				

This takes you to the **Client Summary** form where the form displays (3) yes or no questions, as well as additional NeighborWorks fields. Since a case can have more than one “applicant” the form, the first presents a summary list with the client and any co-applicants you may have entered in the Intake form.

# CounselorMax User Guide

Once you finish entering all of the fields in the **Client Summary** form and return to the GPS main form, click on the “E” or edit button on **NW Supplemental Data** row to open the task completion sub-form:



This opens the task completion form. If you select an outcome, the completed date will auto-populate to today's date. You can always back date a completed date for the task.

This will mark the task as completed in the GPS. When you click the **OK** button, it will return you to the GPS and you will see the task marked as “**Complete**” in the **Outcome** column and see the completion date you entered.



## 12.5.2 Schedule Class or Counseling Appointment

The next step in the GPS service process is to schedule the client to a home buyer class, one-on-one counseling appointment or both. In some cases the client may have already attended a class or counseling session and you need to simply enter the data after the fact. In either case the steps are the same.

# CounselorMax User Guide

## Schedule or Document Class Attendance

To schedule a client to a class, click on the **Class** icon at the top right corner of the main GPS form:



This opens up the class schedule form:

Simply click on the **Enroll** checkbox next to the class or classes you wish to enroll the client in. If the client has already attended the class, after enrolling them, click the **Attnd** checkbox to record their attendance.



## Schedule Client to an Appointment

To schedule a client to a counseling session click on the **Appt** icon on the top right corner of the GPS form:



# CounselorMax User Guide

This opens the client calendar form:

**Tom Homebuyer**

October 2008

Legend:  
• = Appt • = Call  
• = Class • = Mtg • = Test  
• = Training

Sun	Mon	Tue	Wed	Thr	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Double click on the date you want to schedule the client for a counseling session.

Click on the **Add Event** button:

**Max**  
Guidance & Planning System

Navigation: wk plan class appt tog print

**Tom Homebuyer** **Tuesday, October 21, 2008**

Enter all of the required fields and click **“OK”** to save the session. You don't need to return to the session to mark the attendance. The system assumes that the client attended the session unless you delete it.

# CounselorMax User Guide

**Max**  
Guidance & Planning System

Tom Homebuyer Tuesday, October 21, 2008

Add Event

Type	Staff	Description	Location	Start (Date/Time)	End (Date/Time)
Appt	JDB JIF RKD	Individual Intial	Office	10/21/2008 4:00 PM	10/21/2008 5:00 PM

OK

You can enter as many classes and appointments as you wish per customer.

**NOTE:** Remember to mark **Action** item complete when the client is finished with all classes and counseling by clicking on the “E” edit button in the GPS for the **Schedule Class or Counseling Appt** task and select **Complete** for the status.

## 12.5.3 Collect NW Supplemental Residence Data

This form collects additional NeighborWorks required information about the client’s current residence (not the home they’re purchasing but the one they live in when coming to you for services). Click on the **Residence** link to access the form:

**Max**  
Guidance & Planning System

Add [Auto Generate Work Plan](#)

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit / Complete	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>	Complete	10/13/2008		E / N/A	N/A
Service Type	Intake	(reminder)	New Home Owner, Full Information	10/13/2008		E / N/A	N/A
NW Supplemental Residence Data	Intake	<a href="#">Residence</a>	Complete	10/13/2008		E / N/A	N/A
Pre-qualify: Pull Credit	Determine Affordability	<a href="#">Credit Report</a>	Complete	10/13/2008		E / N/A	N/A
Pre-qualify: Enter Liabilities	Determine Affordability	<a href="#">Liabilities</a>	Completed	10/13/2008		E / N/A	N/A

# CounselorMax User Guide

Make sure you enter all of the required data fields:

**Max**  
Guidance & Planning System

wk plan class appt log print

## Residence

\* = Required

Street Address:  City:

State:  Current Res:  Zip Code:

Residence Type \*

Sect 8 rent \*  Colonias

Census Tract \*   
[lookup](#)

Housing Arrangement \*

Household Type \*

[Back to Profile](#)

## Data Fields:

- The address information is transferred over from the Intake screen. If you need to make any corrections or changes you can do so here.
- **Current Residence:** optional field.
- **Residence Type:** select the best option from the drop-down list.
- **Section 8 Rent?** Does the client have a housing choice voucher that they use towards their rent? If so, check this checkbox, if not leave it blank.
- **Colonias:** does the client live in a “colonias” community? “Colonias” are communities near the border with Mexico with substandard infrastructure and other defining characteristics. They are designated as such by the Federal government. If you are unsure, or you do not serve clients residing close to the border with Mexico, always leave this blank. If you are certain they do reside in a Colonias, check it for a “yes” answer.
- **Census Tract:** enter the census tract where the client currently resides. You can click on the “lookup” link just underneath the “Census Tract” label to open up a window that takes you to the “**FFIEC**” web page:

# CounselorMax User Guide

**FFIEC** FEDERAL FINANCIAL INSTITUTIONS EXAMINATION COUNCIL  
*Promoting uniformity and consistency in the supervision of financial institutions*

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## Geocoding System

The FFIEC is under contractual agreement with Tele Atlas, its data source vendor for this system, which limits Internet users to one address at a time and obtain the appropriate geocoding information. For batch geocoding, please contact Tele Atlas at [InfoNA@teleatlas.com](mailto:InfoNA@teleatlas.com) for ordering the data.

Requirements: This system requires that you enter a street address along with either a city and state OR a zip code. The FFIEC web site ([www.ffiec.gov](http://www.ffiec.gov)) is a public web site. In order to see this public web site, you must configure your firewall systems properly to allow this seen by your network. Therefore, you should set the appropriate parameters consistent with your firewall technology and security policy to safeguard your network environment. You may need the assistance of Information Technology professionals trained to work with your telecommunications/security systems to configure the correct settings to enable the use of our web site while simultaneously protect your computer environment.

Year: 2008

Street Address: 1 Main Street

City:

State:

Zip Code: 02143

- Enter the street address and Zip Code for the client and the form will provide you with the Census Tract:

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## Geocoding System

### Geocode Search Result for 2008 HMDA/CRA Reporting

Street Address	1 MAIN ST	MSA/MD Code	15764
City Name	SOMERVILLE	State Code	25
State Abbreviation	MA	County Code	017
Zip Code	02145	Tract Code	3501.00

MSA/MD Name: CAMBRIDGE-NEWTON-FRAMINGHAM, MA  
State Name: MASSACHUSETTS  
County Name: MIDDLESEX COUNTY

# CounselorMax User Guide

Highlight and copy the “Tract Code” cell (Ctrl. + C), and paste it into the Census Tract field in CounselorMax.

- **Housing Arrangement:** select the best answer from the options in the drop-down list. For most clients “rent” will be the most appropriate, since they are in the process of buying a home.
- **Household Type:** select the best option from the drop-down list.

When you have entered all of the fields, make sure you click the **Save** button to save all of the entries to the database. You should get a **Saved Successfully!** pop-up message. Click **“OK”**.

This returns you to the **Residence** summary form. Click on the **Wk Plan** icon at the top of the form to return to the main work plan form:



There is a final but very important step. You must click the **“E”** button in the **NW Supplemental Residence Data** row. This will open the action status box. Select the proper outcome to mark the action item as **“Complete”**.

## 12.5.4 Pre-qualify: Pull Credit

The next step is to collect a Credit Score for the client and co-applicants. This is not a required step to successfully report the client to NeighborWorks; however, it is hard to imagine providing home buyer services to a client and not collecting their credit score in some form, so it is a best practice, and highly recommended that you collect a credit score for the client and co-applicants.

Click on the **Credit Report** link in the GPS form:





# CounselorMax User Guide

This will take you to the main Credit form:



The screenshot shows a web browser window with the title "Max Guidance & Planning System". The browser's address bar contains icons for "wk plan", "class", "appt", "log", and "print". The main content area is titled "Data Flite Login and Password (required for credit reports)". It features two input fields: "Login \*" and "Password \*". Below the fields are links for "First Time Login?", "New User Guide", and "Change password". A note states "If you require assistance, please call: (800) 423-1150". An "OK" button is located at the bottom left. A link at the bottom reads "Click here to update this case's credit profile without pulling a credit report."

You can enter a credit score in one of two ways: (1) automatically if you are set up to pull credit directly from First American Credco, or (2) manually.

## Auto-populate credit

This module allows you to pull a client's credit report and auto-populate the liabilities and score automatically.

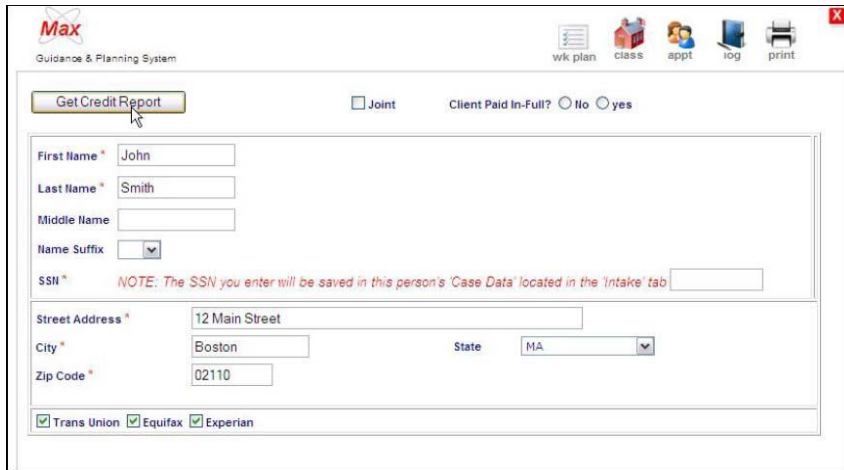
If you are set-up to pull credit reports from CounselorMax, enter your login name and password and click on the **OK** button.



This screenshot is identical to the previous one, but the "Login \*" field contains the text "mylogin" and the "Password \*" field contains a series of dots representing a masked password. A mouse cursor is hovering over the "OK" button.

# CounselorMax User Guide

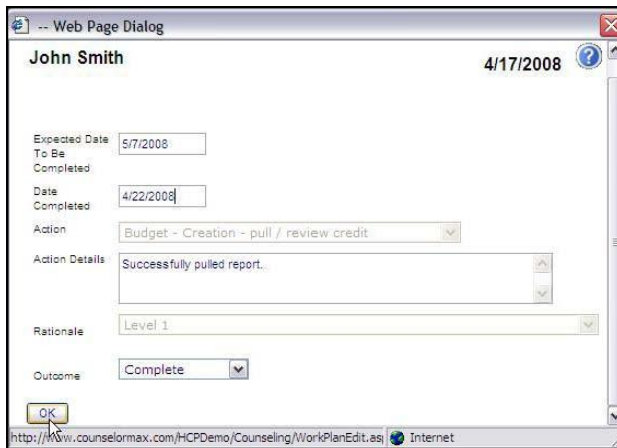
This opens the **Get Credit Report** form for the customer. Fill in all the required data and click on the **Get Credit report** button. This connects you to First American Credco, the report provider, and completes the data transfer.



The screenshot shows the 'Get Credit Report' form in the CounselorMax system. The form is titled 'Max Guidance & Planning System' and includes a 'Get Credit Report' button. Below the button are several input fields: 'First Name' (John), 'Last Name' (Smith), 'Middle Name', 'Name Suffix', 'SSN' (with a note: 'NOTE: The SSN you enter will be saved in this person's 'Case Data' located in the 'Intake' tab'), 'Street Address' (12 Main Street), 'City' (Boston), 'State' (MA), and 'Zip Code' (02110). There are also checkboxes for 'Trans Union', 'Equifax', and 'Experian'.

## Manual Credit Score Entry

If you are not set up in CounselorMax to collect credit data automatically, you can still complete this step manually. Simply collect the credit report by your standard means and once you have done so you can finalize the **Credit Report** task as you do with any task. Click on the **“E”** edit button, fill out the task finalization form and click **“OK”**:



The screenshot shows the 'Manual Credit Score Entry' form in the CounselorMax system. The form is titled 'John Smith' and includes a date '4/17/2008'. Below the title are several input fields: 'Expected Date To Be Completed' (5/7/2008), 'Date Completed' (4/22/2008), 'Action' (Budget - Creation - pull / review credit), 'Action Details' (Successfully pulled report...), 'Rationale' (Level 1), and 'Outcome' (Complete). There is an 'OK' button at the bottom left.

# CounselorMax User Guide

## 12.5.5 Pre-Qualify: Enter Liabilities

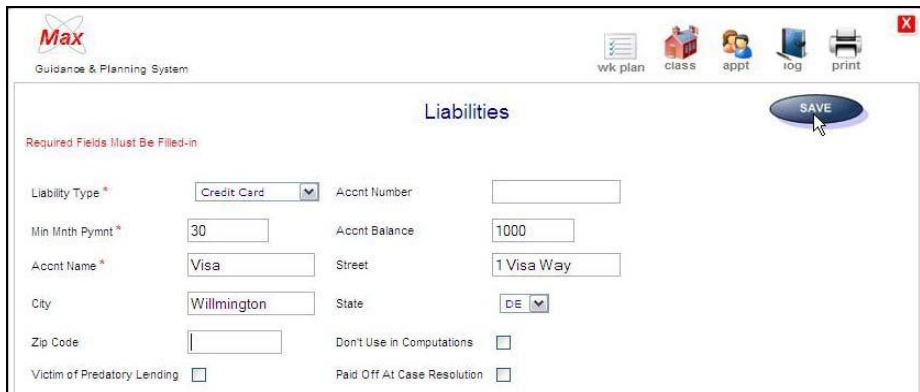
If you pull a credit report through CounselorMax from Credco automatically, all client liabilities data auto-populates for you. You can still access them to edit and fine tune the data. If you did not pull the credit report automatically, you can still enter liabilities manually. In either case, to view liabilities click on the **Liabilities** link within the work plan.



The screenshot shows the CounselorMax interface with a table of actions. The 'Liabilities' link is highlighted with a mouse cursor. The table has the following data:

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit / Complete	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>		Pending			
Service Type	Intake	(reminder)		Pending			
NW Supplemental Residence Data	Intake	<a href="#">Residence</a>		Pending			
Schedule Class or Counseling Appt	Intake	(reminder)		Pending			
Pre-qualify: Pull Credit	Determine Affordability	<a href="#">Credit Report</a>		Pending			
Pre-qualify: Enter Liabilities	Determine Affordability	<a href="#">Liabilities</a>		Pending			
Pre-qualify: Enter Income	Determine Affordability	<a href="#">Income</a>		Pending			

This opens the liabilities form. If no liabilities exist in the system, you should see a form that allows you to enter data for the client's first liability. Complete all required data fields and click **"SAVE"**. This saves your liability and takes you to the liability summary form:



The screenshot shows the 'Liabilities' form with the following fields and values:

- Liability Type\*: Credit Card
- Acct Number: [Empty]
- Min Mnth Pymnt\*: 30
- Acct Balance: 1000
- Acct Name\*: Visa
- Street: 1 Visa Way
- City: Wilmington
- State: DE
- Zip Code: [Empty]
- Don't Use in Computations:
- Victim of Predatory Lending:
- Paid Off At Case Resolution:

A 'SAVE' button is visible in the top right corner of the form.

# CounselorMax User Guide

If you click on the **Paid off at Case Resolution** checkbox at the bottom of the form, the liability will be added to the finance summary page. This is required when applying for loans, grants or work out scenarios.

Max  
Guidance & Planning System

Liabilities

Required Fields Must Be Filled-in

Liability Type: Loan Account Number: 11111111

Min Mnth Pymnt: 300 Account Balance: 13000

Account Name: GMAC Street: State: Zip Code: Don't Use in Computations:

Victim of Predatory Lending:  **Paid Off At Case Resolution:**

Back to List of Liabilities

SAVE

If you pulled a credit report through CounselorMax and the customer's credit information included some existing liabilities or you've already entered liabilities manually, you should be taken to the **Liabilities** summary form, from which you can access specific liabilities to review or edit, delete existing liabilities, or add new ones:

Max  
Guidance & Planning System

Liabilities

Add New

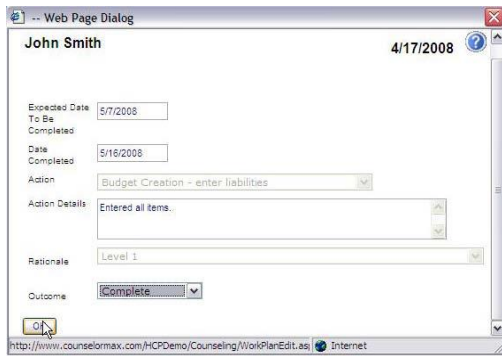
Name	Type	Applicant / Co-App	Min Pymnt	Balance	Edit	Delete
Visa	Credit Card	Smith, John	\$30.00	\$1,000.00	E	D
Total:			\$30.00	\$1,000.00		

The process is simple and entails clicking on the appropriate button “E” for edit, “D” for delete, and “Add New” to add a new liability.

Make sure you enter all relevant liabilities for the customer including all existing mortgages.

As usual, when you've documented all of the liabilities, make sure you click on the “E” button for the “Liabilities” task to flag the task as “Complete”:

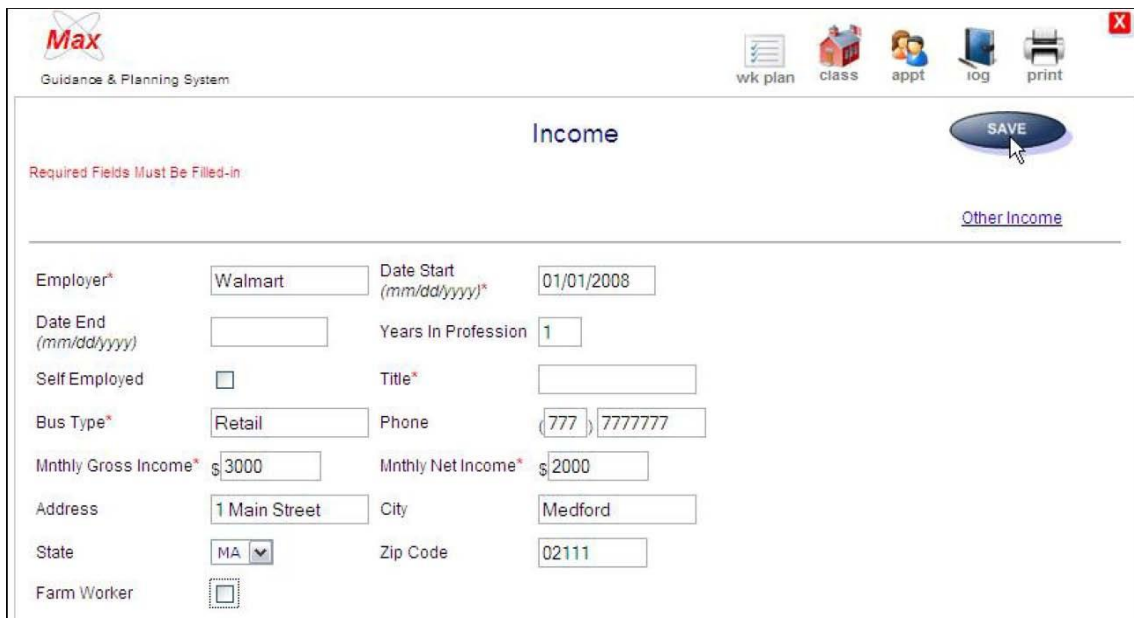
# CounselorMax User Guide



The task will be marked as completed when you return to the work plan.

## 12.5.6 Pre-Qualify: Enter Income

The next task in the process is to enter income data. Click on the **Income** link. If you have not entered income before, a new income form opens up. Complete all required items and click the **SAVE** button.



**Max**  
Guidance & Planning System

Income

Required Fields Must Be Filled-in

[Other Income](#)

Employer\* Walmart Date Start (mm/dd/yyyy)\* 01/01/2008

Date End (mm/dd/yyyy) Years In Profession 1

Self Employed  Title\*

Bus Type\* Retail Phone (777) 7777777

Mnthly Gross Income\* \$3000 Mnthly Net Income\* \$2000

Address 1 Main Street City Medford

State MA Zip Code 02111

Farm Worker

SAVE

Upon saving the first source of income the **Income Summary** form will display, listing all existing income sources. If at least one income exists, clicking on the **Income** link opens the Income summary form, and you can edit, delete, or add new income exactly as you did with liabilities.

# CounselorMax User Guide

Income does not have to be employment income. It can be any kind of income the customer has; for example, disability benefits, dividends, alimony payments, etc. Add these in the income sources too. To access the Other Income form, click on “Add New” button to view the standard “Income” form, and then click on the “Other income” link:

Max  
Guidance & Planning System

Required Fields Must Be Filled-in

Income

SAVE

Other Income

Employer\*  Date Start (mm/dd/yyyy)\*

Date End  Years In Profession

This displays the **Other Income** link:

Max  
Guidance & Planning System

Required Fields Must Be Filled-in

Other Income

SAVE

Income (employment)

Income Type\* Alimony  Mnthly Income\* 400

Fill out all required fields and save. This will return you to the income summary form:

Max  
Guidance & Planning System

Income

Add New

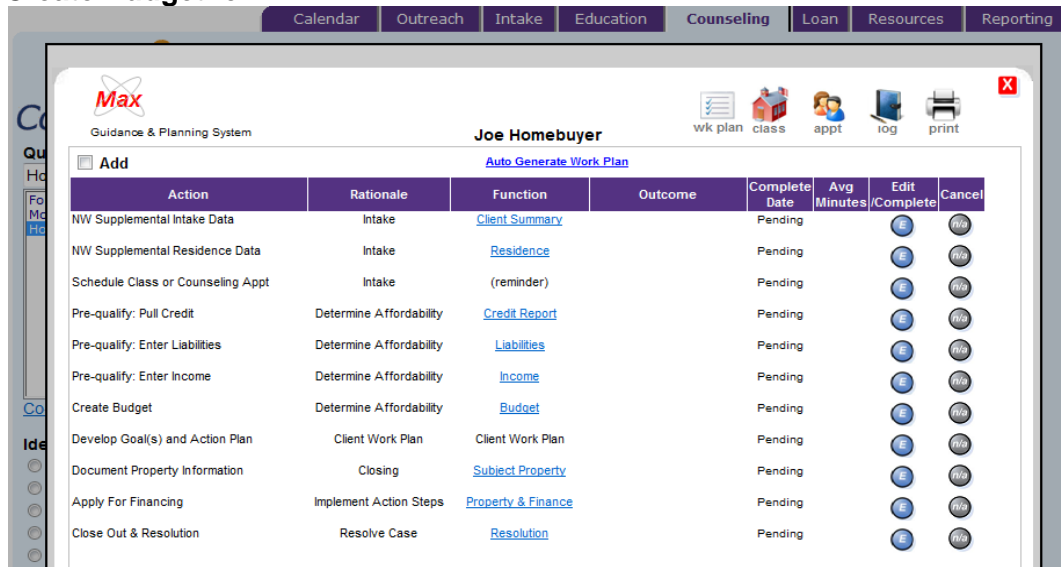
Company	Applicant / Co App	Monthly Gross	Monthly Net	Edit	Delete
Dividend Income	Smith, John	\$200.00	\$200.00		
Walmart	Smith, John	\$3,000.00	\$2,000.00		
Total:		\$3,200.00	\$2,200.00		

As always, return to the work plan form. When all sources of income are entered, complete the task by clicking on the “Edit” button. Enter a completion date, select “**Complete**” as the **Outcome** and save the information entered. The task should be marked as completed in the work plan GPS.

# CounselorMax User Guide

## 12.5.7 Create Client Budget

CounselorMax has a built-in client budget tool that allows you to work with the client to create a customized budget. To access the budget tool click on the **Budget** link in the **Create Budget** row:



This will expose the “choose budget” sub-form. Depending on the options your agency Admin has enabled in your version of CounselorMax, you should see up to three of the following options:

1. **Standard CounselorMax:** a basic, but effective budget with a simple set of income and expense categories.
2. **Standard Hope – HLP (HOPE LoanPort) Budget:** this is a budget developed to collect all budget data required to electronically transmit a case to the HOPE LoanPort. Because the HOPE LoanPort has a precise and fixed set of budget items, this budget is not customizable. If your agency Admin has not enabled the HOPE LoanPort budget, you will not see this option.
3. **Custom (for your agency):** this is a custom budget configured by your Agency Admin. It contains those items your agency Admin considers important to collect for your case load. If the agency Admin has not created and enabled a custom budget, you will not see this option.

# CounselorMax User Guide

Calendar Outreach Intake Education Counseling Loan Resources Reporting

Max  
Guidance & Planning System

Joe Homebuyer

wk plan class appt log print

### Please Choose a Budget Type for this Client

Standard CounselorMax  
(Minimum budget items)  
[view sample](#)

Standard Hope - HLP  
(Required for submissions to Hope Loan Port - HLP)  
[view sample](#)

Custom (For Your Organization)

OK

Select the budget type you wish to create for your client by clicking on the corresponding radio button and then clicking the **OK** button. This takes you to the “budget editing” form for that budget. In the following case, you will see the Standard CounselorMax budget as an example.

Calendar Outreach Intake Education Counseling Loan Resources Reporting

Max  
Guidance & Planning System

Joe Homebuyer

wk plan class appt log print

**Income** [\(update\)](#)

Employment	\$0
Overtime	0
Interest & Dividend	0
Net Rental Income	0
Other Income	0
Withholding	(0)

**Net Income** \$0

**Fixed Expenses**

Auto	0
Child Support/Alimony	0
Credit Card Min Payments	0
Credit Card Min Payments <a href="#">(details)</a>	0
Credit Collections	0
Education	0
Housing Payment	0
Installment Loans	0
Installment Loans <a href="#">(details)</a>	0
Insurance	0
Medical	0

Any budget you create will be divided into three main sections:

1. Income
2. Fixed Expenses
3. Discretionary Expenses



# CounselorMax User Guide

## Entering client income data in the budget

CounselorMax already has a Standard CounselorMax income form in the **Case Profile** section to enter client income sources so you want to avoid double entry of data. If income sources already exist, they will be immediately visible in the budget's income section.

Click on the **update** link next to the **Income** heading to jump to the **Case Profile** form and enter income sources:

The screenshot shows the CounselorMax interface for client Frank Sinatra. The top navigation bar includes Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header displays the client's name and 'Guidance & Planning System (GPS)'. On the left, there is a 'Quick Client Search' dropdown menu with a list of clients, including 'Sinatra, Frank'. Below this is an 'Identify Clients' section with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended', and checkboxes for 'Guided Counseling (GPS)' and 'New Client'. The main content area shows the 'Budget' section with a 'Create New' checkbox checked. The 'Income' section is expanded, showing a table with columns for category and amount. The 'Income' table includes: Employment (\$0), Overtime (0), Interest & Dividend (0), Net Rental Income (0), Other Income (0), and Withholding ((0)). The 'Net Income' is shown as \$0. Below the income section is the 'Fixed Expenses' section, which includes: Auto (0), Child Support/Alimony (0), Credit Card Min Payments (0), Credit Collections (0), Education (0), and Housing Payment (0).

This screenshot is similar to the previous one, but it features a 'Windows Internet Explorer' dialog box overlaid on the 'Income' section. The dialog box contains a question mark icon and the text: 'You are about to transferred to this case's profile. Would you like to proceed?'. There are 'OK' and 'Cancel' buttons at the bottom of the dialog box. The background interface remains the same, showing the 'Budget' form for Frank Sinatra.

# CounselorMax User Guide

The screenshot displays the CounselorMax software interface. At the top, there is a navigation menu with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header shows the CounselorMax logo and the client name "Frank Sinatra" with a folder icon. Below the header, there are several sections: "Quick Client Search" with a list of client names (Scott10, Michael through Sinatra, Frank), "Identify Clients" with radio buttons for All, In-Process, Closed, Prospect, and Suspended, and a "New Client" button. The "Case Profile" section is active, showing a "Summary" tab. The profile form includes fields for Liabilities (Credit), Dependents (Subj Prop), Income (Residence), and Other (Assets). A red asterisk indicates that certain fields are required. The form contains various input fields for Employer, Date Start, Date End, Years In Profession, Self Employed, Bus Type, Monthly Gross Income, Monthly Net Income, Phone, Address, City, State, and Zip Code.

## Entering client Fixed and Discretionary Expenses

The CounselorMax budget tool allows you to enter two types of budgets for your clients: fixed and discretionary.

The screenshot shows the CounselorMax budget tool interface for a client named "Joe Homebuyer". The interface features a navigation menu at the top with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header includes the CounselorMax logo, the client name "Joe Homebuyer", and several utility icons: wk plan, class, appt, iog, and print. The budget tool is divided into two main sections: "Fixed Expenses" and "Discretionary Expenses". Each section contains a list of expense categories with corresponding input fields for the amount. The "Fixed Expenses" section includes Auto, Child Support/Alimony, Credit Card Min Payments, Credit Collections, Education, Housing Payment, Installment Loans, Insurance, Medical, Savings, Tax, and Utilities. The "Discretionary Expenses" section includes Charity, Dining, Entertainment, and Food and Groceries. All input fields currently show a value of 0.

To enter fixed or discretionary budget amounts for your clients, simply enter the desired figure in the text box to the right of each budget line item.

# CounselorMax User Guide

**Note:** The items that appear on the fixed or discretionary categories are designated as such by the CounselorMax design team in the case of the Standard CounselorMax budget, the HOPE LoanPort budget designers in the case of the Hope LoanPort budget, or by your agency Admin in the case of Custom budget.

Remember to click the **Save** button to save the values you have entered. If you leave the form without saving, your entries will not be saved to the database.

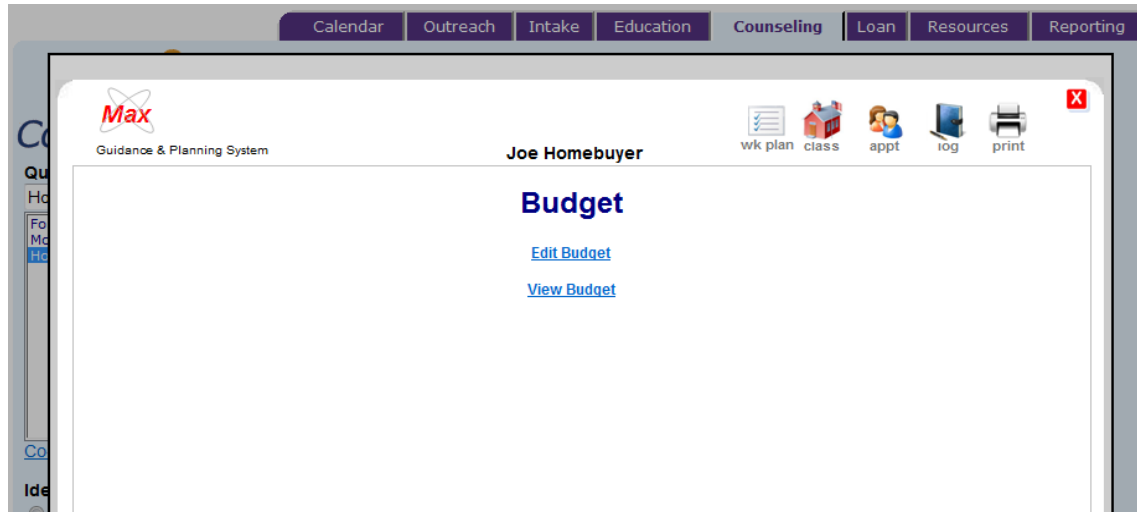
The screenshot shows the CounselorMax software interface. At the top, the logo 'Max' is visible, along with the text 'Guidance & Planning System' and the user name 'Joe Homebuyer'. There are several icons for navigation: 'wk plan', 'class', 'appt', 'log', and 'print'. The main area contains a list of budget categories, each with an input field containing the number '0'. The categories are: Credit Collections, Education, Housing Payment, Installment Loans, Insurance, Medical, Savings, Tax, Utilities, and a section for 'Discretionary Expenses' which includes Charity, Dining, Entertainment, Food and Groceries, Gifts, Household, Miscellaneous, Pet Expense, Public Transportation, and Rental Property. A 'Save' button is located at the bottom right of the form, highlighted with a red rectangular box.

Credit Collections	0
Education	0
Housing Payment	0
Installment Loans	0
Insurance	0
Medical	0
Savings	0
Tax	0
Utilities	0
<b>Discretionary Expenses</b>	
Charity	0
Dining	0
Entertainment	0
Food and Groceries	0
Gifts	0
Household	0
Miscellaneous	0
Pet Expense	0
Public Transportation	0
Rental Property	0

# CounselorMax User Guide

## Working with an existing client Budget

You can easily edit any previously saved budget. To do so, go back to the Work Plan form and click on the **Budget** link. This will display two budget options:



1. **Edit Budget:** this option allows you to edit an existing budget.
2. **View Budget:** this option allows you to view an existing budget. If no budget has been created for the case, clicking on this option will display a budget with no income or expense entries, as no data has been saved yet.

### 12.5.7.1 Edit Budget

To edit an existing budget, from the **Budget** form, click on the **Edit Budget** link. This displays the budget in “edit” mode and all of the previously entered values for the budget you previously saved for the client.

You can now enter additional budget amounts or change existing amounts. Remember to click the **Save** button when you are done or your values will not be saved.

# CounselorMax User Guide

## 12.5.7.2 View Budget

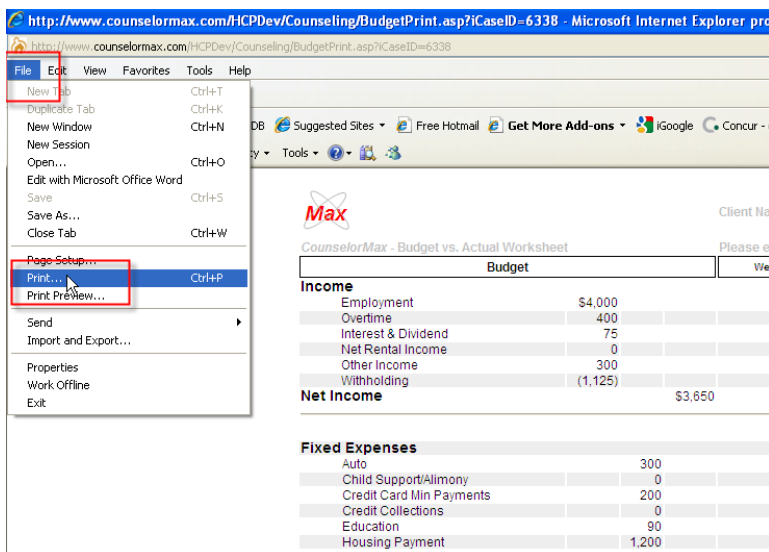
Click on the **View Budget** link to view the existing budget in a printable (not-editable) format. This is ideal for printing the budget to present to your clients. The printable budget also contains four weekly columns that allow your client to track their expenses in order to obtain more realistic budget line-item numbers.

Below is a partial sample budget on the **View Budget** screen:

Budget	Week 1	Week 2	Week 3	Week 4
<b>Income</b>				
Employment	\$0			
Overtime	0			
Interest & Dividend	0			
Net Rental Income	0			
Other Income	0			
Withholding	(0)			
<b>Net Income</b>	\$0			
<b>Fixed Expenses</b>				
Auto	0			
Child Support/Alimony	0			
Credit Card Min Payments	0			
Credit Collections	0			
Education	0			
Housing Payment	0			
Installment Loans	0			
Insurance	0			
Medical	0			
Savings	0			
Tax	0			
Utilities	0			
<b>Discretionary Expenses</b>				
Charity	0			
Dining	0			
Entertainment	0			
Food and Groceries	0			

## 12.5.7.3 Printing the budget

To print the budget, simply use the standard print command on your browser. In Internet Explorer, click on the **File** pull-down menu in the top-left menu bar, and select **Print** from the menu choices:



# CounselorMax User Guide

## 12.5.8 Develop Client Goals and Action Plan

This function is currently Not Available.

## 12.5.9 Document Property Information

The next work plan item is to collect detailed information on the property the client has purchased. To enter this data, click on the **Subject Property** link:

Create Budget	Determine Affordability	<a href="#">Budget</a>	Completed	10/13/2008		
Develop Goal(s) and Action Plan	Client Work Plan	<a href="#">Client Work Plan</a>	Pending			
Document Property Information	Closing	<a href="#">Subject Property</a>	Pending			

This opens the **Purchased Property** form. Make sure you enter all of the required fields.

The screenshot shows the 'Purchased Property' form in the CounselorMax system. The form is titled 'Guidance & Planning System' and includes a navigation bar with icons for 'wk plan', 'class', 'appt', 'log', and 'print'. The form fields are organized into several sections:

- Address and Location:** Street Address \*, City \*, State \*, MSA \*, Census Tract \*, Lease Number.
- Property Details:** Property Type \*, Land Ownership Type \*, FEMA Relief Type, # of Units, EnergyStar Home \* (radio buttons for 'y' and 'n').
- Unit Information:** Type of Unit \*, Built off site \* (checkbox).
- Financials:** Purchase Price \*, Rehab/Constr Costs + N/A, Closing Costs \*, Other Costs \*, Total Cash and Loans Required \*.
- Settlement:** Settlement Date.

A 'SAVE' button is located at the bottom right of the form. A link for 'Property and Finance Summary' is at the bottom left.

Some of the fields are dynamic. For example, if you click on the **Built off site** checkbox to indicate that the home is a manufactured home and built off site then the form reveals additional fields that must be answered: **What type of construction was used? What mortgage type? What land type does the manufactured home sit on?**

This close-up screenshot shows the dynamic fields that appear when the 'Built off site' checkbox is checked. The fields are:

- Constr Type:** A dropdown menu with '---Select One---'.
- Mort Type:** A dropdown menu with '---Select One---'.
- Land Type:** A dropdown menu with '---Select One---'.

# CounselorMax User Guide

Another example is the **Type of Unit** field. If you select “**Rehab**” or “**New**” for the **Type of Unit**, you will see an additional cost field for “**Rehab/Const. Cost**”:

Once you have entered all of the required fields, click on “**SAVE**”. Remember to mark the task as “**Complete**” in the GPS using the task completed form.

## 12.5.10 Apply (Enter) Financing

In addition to documenting property information, you also need to document the financing that went into the purchase of the home. Click on the **Property and Finance** link in the GPS:

Document Property Information	Closing	<a href="#">Subject Property</a>	Complete	10/13/2008		
Apply For Financing	Implement Action Steps	<a href="#">Property &amp; Finance</a>	Pending			
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>	Pending			
Unsuccessful: Dev Alt Housing Plan	Implement Action Steps	<a href="#">Client Work Plan</a>	Pending			

This will open the **Property and Finance** summary form:

**Property Transaction Details:**

Purchase Price (including construction costs included in purchase)	\$200,000.00
Rehab Construction Costs not included in purchase price	\$0.00
Closing Costs	\$2,000.00
Other Costs	\$3,000.00
<b>TOTAL Transaction Amount</b>	<b>\$205,000.00</b>

**Finance Transaction Details:**

Lien	Company	Type	Status	Monthly Pmt	Amount of New Loan / Grant	Edit	Delete
		Insurance					
		Property Tax					
		H.O.A.					
		Other					
TOTAL Monthly Payment (PITI)				\$0.00			
TOTAL FUNDS AVAILABLE (cash and borrowing)					\$0.00		
<b>Over or (Short) to close transaction:</b>					<b>(\$205,000.00)</b>		

[View Denied Loan Applications](#)

# CounselorMax User Guide

In the example above, you see that the total property costs from the **Subject Property** form add up to \$205,000. You need to enter financing records that add up to this number. These can be combinations of loans, grants, and liquid assets. To enter financing records, click on the link for the first record type you want to enter. In this example, you can add a new loan by clicking on the **Loan** link:

**Property Transaction Details:** [view / edit](#)

Purchase Price (including construction costs included in purchase)	\$200,000.00
Rehab Construction Costs not included in purchase price	\$0.00
Closing Costs	\$2,000.00
Other Costs	\$3,000.00
<b>TOTAL Transaction Amount</b>	<b>\$205,000.00</b>

**Finance Transaction Details:** Add: [Loan](#) [Grant](#) [Liquid Assets](#)

Lien	Company	Type	Status	Monthly Pmt	Amt of New Loan / Grant	Edit	Delete
		Insurance					
		Property Tax					
		H.O.A.					
		Other					
TOTAL Monthly Payment (PITI)				\$0.00			
TOTAL FUNDS AVAILABLE (cash and borrowing)					\$0.00		
<b>Over or (Short) to close transaction:</b>					<b>(\$205,000.00)</b>		

[View Denied Loan Applications](#)

This opens the new **Loan Form**. Enter at least all of the required fields and click **“Save”**:

**Max**  
Guidance & Planning System

Funder\*  Funding Type\*  Lien Position\*

Address  Contact Name

Address  Phone  City

Contact Fax  State  Zip

Email  Lender Type  Income Doc.

Loan Amt\*  Interest Rate\*  Term Type\*

Less Closing Costs  Interest Only

Net Loan Amt = \$190000 Monthly PI

Mtg Insurance Type  Monthly MI

Application Status\*  Reason for Rejection

Deferred Months  Deferral Type  Homeownership Voucher\*

Eligible for Sale to NHTSA\*  NWD Services\*


**SAVE**








# CounselorMax User Guide

Once you save the first loan (or any financing record) you will be returned to the **Property and Financing** detail form. You will see the new financing record added to the summary and the remaining financing balance will be decreased by the amount of the financing.

Add additional loans, grants or client or seller contributions (“liquid assets”) until the full price of the transaction is reached.









Guidance & Planning System

**Property Transaction Details:** [view / edit](#)

Purchase Price (including construction costs included in purchase)	\$200,000.00
Rehab Construction Costs not included in purchase price	\$0.00
Closing Costs	\$2,000.00
Other Costs	\$3,000.00
<b>TOTAL Transaction Amount</b>	<b><u>\$205,000.00</u></b>

**Finance Transaction Details:** Add: [Loan](#) [Grant](#) [Liquid Assets](#)

Lien	Company	Type	Status	Monthly Pmt	Amt of New Loan / Grant	Edit	Delete
1	First lender	Loan	Approved	\$1,300.00	\$190,000.00		
		Insurance					
		Property Tax					
		H.O.A.					
		Other					
TOTAL Monthly Payment (PITI)				<u>\$1,300.00</u>			
TOTAL FUNDS AVAILABLE (cash and borrowing)					<u>\$190,000.00</u>		
<b>Over or (Short) to close transaction:</b>					<b><u>(\$15,000.00)</u></b>		
<a href="#">View Denied Loan Applications</a>							

In this case, add an additional grant and a buyer’s portion (liquid asset) to account for the remaining \$15,000.

# CounselorMax User Guide

To begin, click on the **Grant** link to add a new grant. This takes you to the new **Grant** form. Enter at least all of the required fields and click **“Save”**:

**Max**  
Guidance & Planning System

wk plan class appt iog print

## Grants

Required Fields Must Be Filled-in

**Grantor\*** City DP Assistance Fund

**Funding Type\*** City Government

**Address1** **Contact Name**

**Address2** **Phone**

**City** **Fax**

**State** -- **Zip**

**Email** **Funding Amt\*** 5000

**Grant Type** --Select One-- **Less Costs**

**Status Type\*** Approved **Financial Self Sufficiency**

**SAVE** [Back to List of Grants](#)

Next, add the buyer's contribution by clicking on the **Liquid Asset** link above the financing summary and entering all of the required information and saving the record:

## Assets

Required Fields Must Be Filled-in

**Asset Type\*** Checking **Accnt Number**

**Accnt Balance\*** 10000 **Accnt Name**

**Accnt Co Street** **Accnt Co City**

**Accnt Co State** **Accnt Co Zip**

**Amount for Transaction\*** 10000 **Financial Self Sufficiency**

**Status\*** Verified

**SAVE** [Back to List of Assets](#)

# CounselorMax User Guide

Notice that the financing summary no longer displays a remaining balance:

**Property Transaction Details:** [view / edit](#)

Purchase Price (including construction costs included in purchase)	\$200,000.00
Rehab Construction Costs not included in purchase price	\$0.00
Closing Costs	\$2,000.00
Other Costs	\$3,000.00
<b>TOTAL Transaction Amount</b>	<b>\$205,000.00</b>

**Finance Transaction Details:** Add: [Loan](#) [Grant](#) [Liquid Assets](#)

Lien	Company	Type	Status	Monthly Pmt	Amt of New Loan / Grant	Edit	Delete
1	First lender	Loan	Approved	\$1,300.00	\$190,000.00	E	D
	City DP Assistance Fund	Grantor	Approved		\$5,000.00	E	D
		Checking	Verified		\$10,000.00	E	D
		Insurance				E	
		Property Tax				E	
		H.O.A.				E	
		Other				E	
TOTAL Monthly Payment (PITI)				\$1,300.00			
TOTAL FUNDS AVAILABLE (cash and borrowing)							<b>\$205,000.00</b>

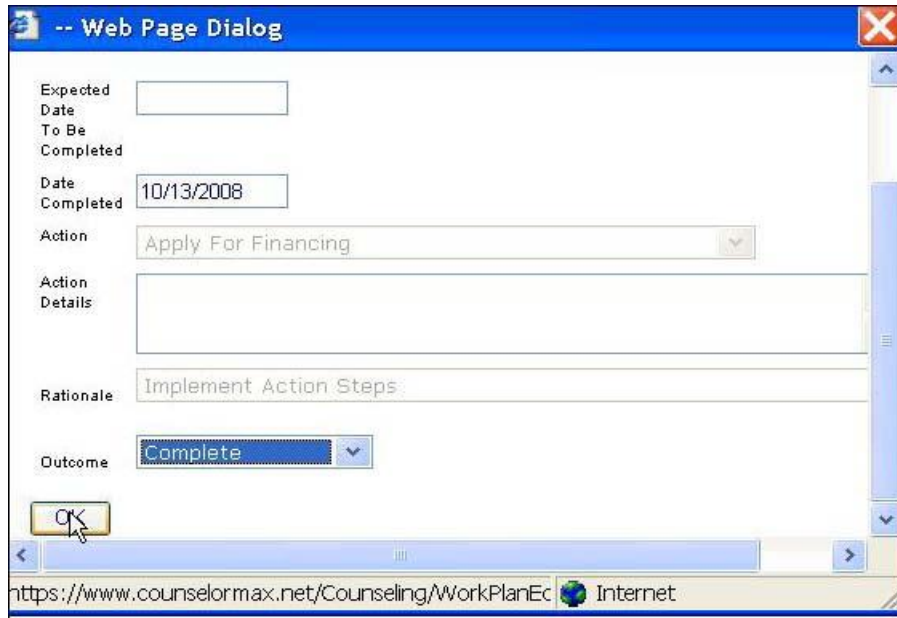
In this case, finish entering financing information. Of course, you need to enter the specific combination of loans, grants and liquid assets that comprised your client's transaction.

Note that at any time, you can go into an existing financing record and edit it by clicking on the "E" edit button to the right of the record. You can also delete a record by clicking the "D" to the right of the record.

When you are finished entering all financing, go back to the GPS and mark the task as completed:

Document Property Information	Closing	<a href="#">Subject Property</a>	Complete	10/13/2008	E	D
Apply For Financing	Implement Action Steps	<a href="#">Property &amp; Finance</a>	Pending		E	D
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>	Pending		E	D

# CounselorMax User Guide



## 12.5.11 Close Out and Resolution

Once you have completed all items in the work, you are ready to close out the case. Click on the **Resolution** link:



You may see the following pop-up:

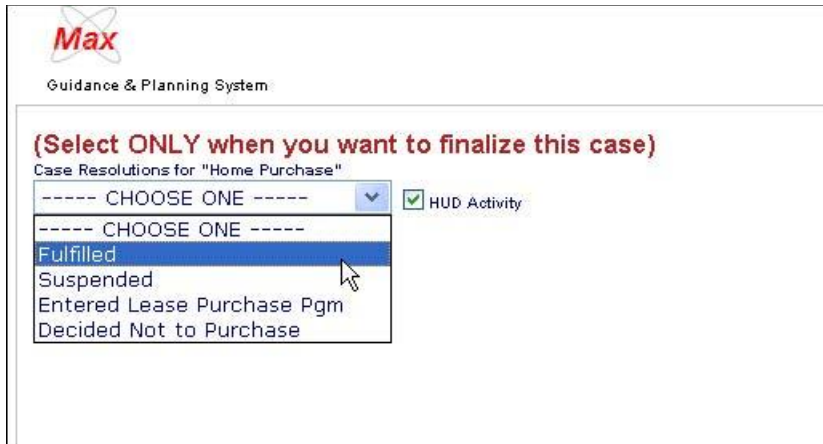


You can safely ignore this warning in this case because you are about to complete the only one outstanding item, **“Resolution”**.

Remember to close out the **Resolution** action item before you resolve the case.

This will open the **Resolution** form. You need to select the correct resolution for the case. In this case the customer successfully bought a home, so the correct option is **“Fulfilled”** which corresponds to **“Purchased Housing”** in the HUD 9902:

# CounselorMax User Guide



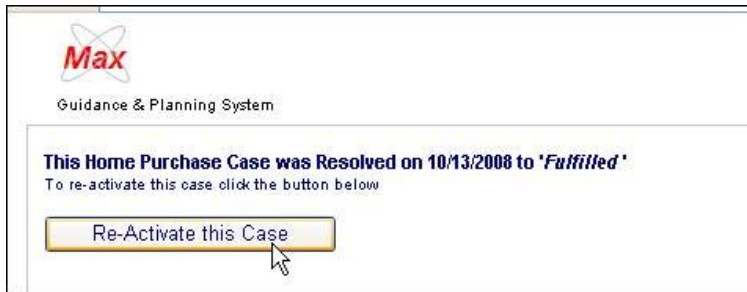
The screenshot shows the CounselorMax interface. At the top left is the 'Max' logo. Below it is the text 'Guidance & Planning System'. The main content area has a red heading: '(Select ONLY when you want to finalize this case)'. Below this heading is the text 'Case Resolutions for "Home Purchase"'. There are two dropdown menus, both labeled 'CHOOSE ONE'. The first dropdown menu is open, showing a list of options: 'Fulfilled', 'Suspended', 'Entered Lease Purchase Pgm', and 'Decided Not to Purchase'. A mouse cursor is pointing at the 'Fulfilled' option. To the right of the dropdown menus is a checkbox labeled 'HUD Activity', which is checked.

Other possible resolutions are:

- **“Suspended”** if the customer dropped out of the process.
- **“Entered Lease Purchase Pgm”** is self-explanatory.
- **“Decided Not to Purchase”** if the client decided that purchasing was not affordable or advisable as a result of your work with them.

The resolutions correspond to the HUD 9902 resolutions. If the customer attended counseling and or education and you entered these events in the GPS, the client will successfully show up on the HUD 9902 without any additional data entry.

Once you resolve the case, the form will update and you can see that the case is resolved. You can also go back and reactivate the case if you missed a step:



The screenshot shows the CounselorMax interface. At the top left is the 'Max' logo. Below it is the text 'Guidance & Planning System'. The main content area has a message: 'This Home Purchase Case was Resolved on 10/13/2008 to "Fulfilled"'. Below this message is the text 'To re-activate this case click the button below'. There is a button labeled 'Re-Activate this Case' with a mouse cursor pointing at it.

You can now return to the GPS form and mark the **Resolution** task as **Complete**.

At this point, you have completed entering all required data for the case.

# CounselorMax User Guide

## 12.6 Rehab Services

You can use the **CounselorMax Rehab** module to ensure that you accurately capture all of the data required to report housing rehab production to NeighborWorks.

### Client Intake

1. Create a standard client case using **Case Data** sub-tab within the **Intake** tab. Make sure you select “**Homeowner Services**” from the **Service Type** drop-down list as this is the only service path that will later provide you with the data entry forms associated with NeighborWorks rehab data collection.

**Ronald Rehab**

Contact Case Data

**Case Data:**

**Service Required:**

**Service Type \***  
[Service Map - Philly](#)

**HUD Activity**

**Case Term**

**Total Co-Apps \***  
*(include spouse)*

**Referral Source \***  
*Press 'Ctrl' to select more than one*

Additional Fields

**Demographics:**

**Race \***

**Number in Household \***

**Gender \***  
 Male  Female

**Head of Household?**

Veteran?

Foreign Born?

Housing Choice Voucher?

Additional Fields

2. Enter all of the required fields to create a new case (note that to access some of the fields you must click on the **Additional Fields** green checkboxes to expose the additional fields on the screen:

- Total Co-Apps (enter 0 if there are none)
- Referral Source (you or your agency Admin can customize the list of options)
- Race
- Number in Household
- Gender
- Birth date
- Household Annual Income
- County (the list will narrow down the available options based on the client's address)
- Current Residence (status)

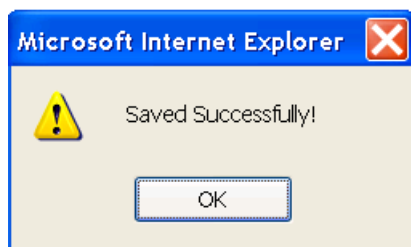
# CounselorMax User Guide

In addition, you will want to enter the following NeighborWorks required fields if you have the information:

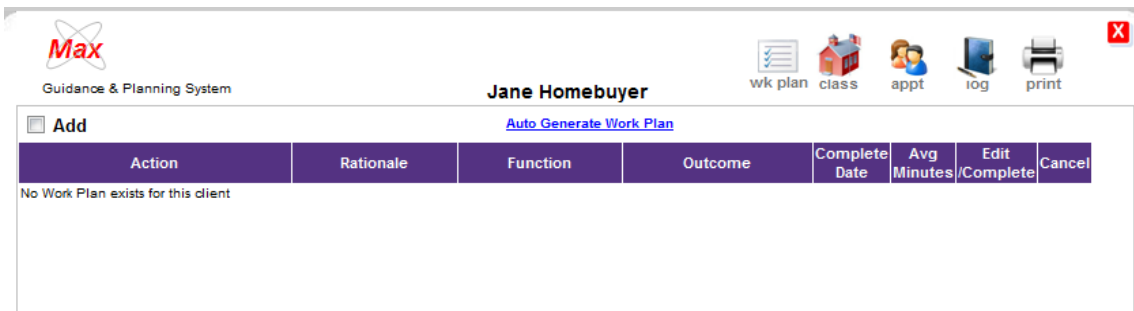
- Veteran
- Foreign Born
- Housing Choice Voucher (does the customer have a housing choice voucher to help subsidize their rent or mortgage payments)
- Head of Household
- Disabled
- 1<sup>st</sup> Time Buyer
- Authorization to Release Information

While these fields are not required to save a case in CounselorMax they are required to report the case to NeighborWorks. If you do not have this data while you are filling out the intake form, leave these fields blank and you will have a chance to collect the data later.

3. Click the **Save Changes** button at the bottom of the form to save your data. You should see a **Save Successfully!** pop-up message:



4. You will then see a **Auto Generate Work Plan** screen:



# CounselorMax User Guide

- Click on Auto Generate Work Plan link on the above screen and the following screen appears for you to select the work plan template for your client:

Max  
Guidance & Planning System

Jane Homebuyer

wk plan class appt tog print

**Please Select a Work Plan Template for Homeowner Services**

NW Rehab  
 NW Other Client Based Services  
 NW Refinance Non-Foreclosure  
 NW Reverse Mortgage

OK

- Select the “**NW Rehab**” button and click “**OK**”.
- You will see a GPS work plan template for NW Rehab as shown below:

Save Work Plan

Include	Action	Rationale	Days to Complete
yes	NW Supplemental Intake Data	Intake	
yes	NW Supplemental Residence Data	Intake	
yes	Schedule Class or Counseling Appt	Intake	
yes	Pre-qualify: Pull Credit	Determine Affordability	
yes	Document Financing	Closing	
yes	Document Property Information	Closing	
yes	Close Out & Resolution	Resolve Case	

The form displays the pre-created work plan items required to successfully manage the client case and collect all of the data required. Click on the **Save Work Plan** button to create the client’s work plan and access the data entry forms.



# CounselorMax User Guide

- Once you save the work plan for this client, the GPS page is created and you should see an easy to use form that allows you to access and view all client data from one central location:

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit / Complete	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>		Pending			
NW Supplemental Residence Data	Intake	<a href="#">Residence</a>		Pending			
Schedule Class or Counseling Appt	Intake	(reminder)		Pending			
Pre-qualify: Pull Credit	Determine Affordability	<a href="#">Credit Report</a>		Pending			
Document Financing	Closing	<a href="#">Finance Page</a>		Pending			
Document Property Information	Closing	<a href="#">Subject Property</a>		Pending			
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>		Pending			

The form contains 7 pre-defined work plan items. The concept behind the form is that if you complete each of the listed items you will have (1) performed all the steps necessary to serve the client fully for this line of business – as such, the GPS serves as a useful process template for counselors and other staff – and (2) collected all of the data required to report a rehab client information to NeighborWorks in the Quarterly Production report.

## Using the GPS Form and Carrying out the Service Steps

Each action item requires one or at most two steps: (1) complete data entry in a satellite page (not all action steps have a satellite page but most do) and (2) mark the step as completed when you finish entering all of the data required or carried out all of the tasks steps. See below for discussion on each action step and how each step can be completed.

### 12.6.1 Collect NW Supplemental Intake Data

This step exists simply to collect additional demographic and client data that is not on the Intake tab within Classic CounselorMax. You need to collect these additional data points here. To access the satellite page that contains these data points click on the link labeled “**Client Summary**” under the **Function** heading of the GPS:

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit / Complete	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>		Pending			
Service Type	Intake	(reminder)		Pending			

# CounselorMax User Guide

This takes you to the **Client Summary** form where the form displays three yes or no questions, the additional NeighborWorks fields. You may have already answered these in the Intake screen; if not, you have a second chance to enter them here:

Case Summary

1st Time home buyer \*  y  n

Housing Choice Voucher? \*  y  n

Veteran? \*  y  n

OK

Once you finish entering all of the fields in the **Client Summary** form and return to the GPS main form, click on the “E” or edit button on **NW Supplemental Data** row to open the task completion sub-form:

Max  
Guidance & Planning System

Auto Generate Work Plan

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit/Complete	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>		10/13/2008		<input checked="" type="radio"/>	<input type="radio"/>
Service Type	Intake	(reminder)	New Home Owner, Full	10/13/2008		<input type="radio"/>	<input type="radio"/>

This opens the task completion form. If you select an outcome in the Outcome pull-down list, the completed date auto-populates to today's date. You can always back date a completed date for the task:

-- Web Page Dialog

Expected Date To Be Completed

Date Completed 10/12/2008

Action NW Supplemental Intake Data

Action Details

Rationale Intake

Outcome Complete

OK

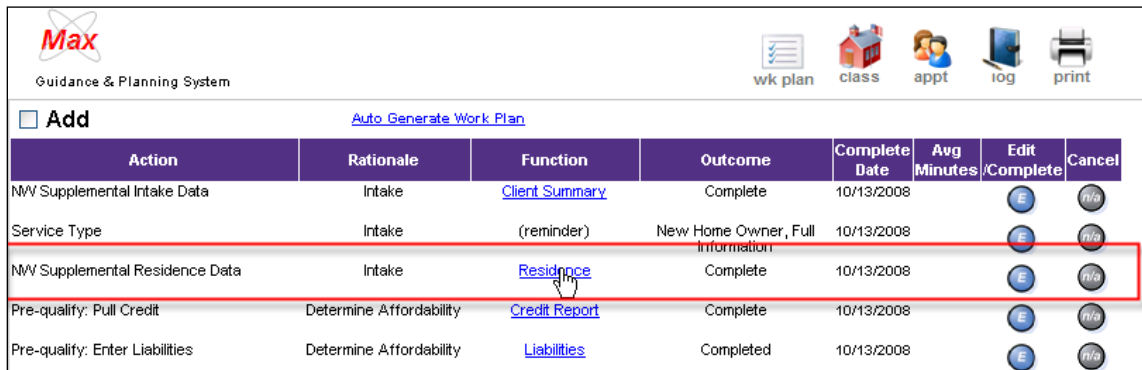
http://www.counselormax.com/HCPDemo/Counseling/M Internet

# CounselorMax User Guide

This marks the task as completed in the GPS. When you click the **OK** button, it returns you to the GPS and you should see the task marked as “**Complete**” in the **Outcome** column and see the completion date you entered.

## 12.6.2 Collect NW Supplemental Residence Data

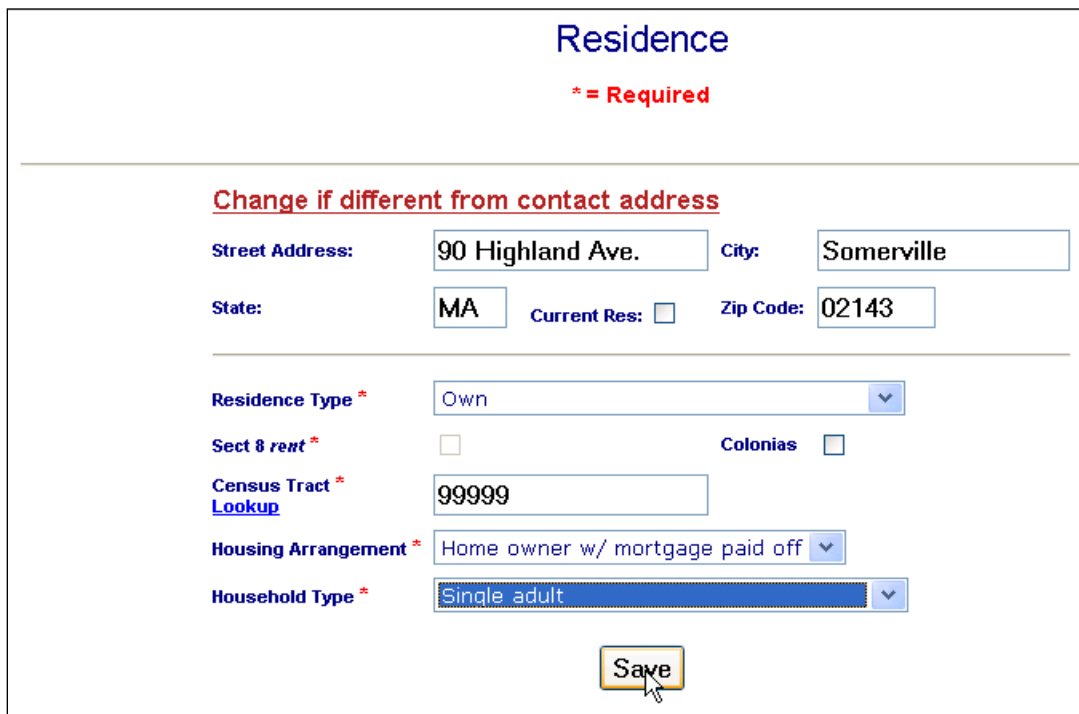
This form collects additional NeighborWorks required information about the client’s current residence (not the home they’re purchasing but the one they live in when coming to you for services). Click on the **Residence** link to access the form:



The screenshot shows the CounselorMax interface with a table of tasks. The 'Residence' task is highlighted with a red box. The table has the following columns: Action, Rationale, Function, Outcome, Complete Date, Avg Minutes, Edit, and Cancel.

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>	Complete	10/13/2008			
Service Type	Intake	(reminder)	New Home Owner, Full Information	10/13/2008			
NW Supplemental Residence Data	Intake	<a href="#">Residence</a>	Complete	10/13/2008			
Pre-qualify: Pull Credit	Determine Affordability	<a href="#">Credit Report</a>	Complete	10/13/2008			
Pre-qualify: Enter Liabilities	Determine Affordability	<a href="#">Liabilities</a>	Completed	10/13/2008			

Make sure you enter at least all of the required fields:



**Residence**  
\* = Required

**Change if different from contact address**

**Street Address:** 90 Highland Ave. **City:** Somerville

**State:** MA **Current Res:**  **Zip Code:** 02143

**Residence Type \*** Own

**Sect 8 rent \***  **Colonias**

**Census Tract \*** 99999

**Housing Arrangement \*** Home owner w/ mortgage paid off

**Household Type \*** Single adult

**Save**

# CounselorMax User Guide

## Data Fields:

- The address information is transferred over from the Intake screen. If you need to make any corrections or changes you can do so here.
- **Current Residence:** optional field.
- **Residence Type:** select the best option from the drop-down list.
- **Section 8 Rent?** Does the client have a housing choice voucher that they use towards their rent? If so, check this checkbox, if not leave it blank.
- **Colonias:** does the client live in a “colonias” community? “Colonias” are communities near the border with Mexico with substandard infrastructure and other defining characteristics. They are designated as such by the Federal government. If you are unsure, or you do not serve clients residing close to the border with Mexico, always leave this blank. If you are certain they do reside in a Colonias, check it for a “yes” answer.
- **Census Tract:** enter the census tract where the client currently resides. You can click on the “lookup” link just underneath the “Census Tract” label to open up a window that takes you to the “**FFIEC**” web page:

**FFIEC** FEDERAL FINANCIAL INSTITUTIONS EXAMINATION COUNCIL  
*Promoting uniformity and consistency in the supervision of financial institutions*

| [FFIEC Main](#) | [Disclaimer](#) | [Privacy Policy](#) | [Contact Us](#) | [Search](#) | [FFIEC Census](#)

## Geocoding System

The FFIEC is under contractual agreement with Tele Atlas, its data source vendor for this system, which limits Internet users to e address at a time and obtain the appropriate geocoding information. For batch geocoding, please contact Tele Atlas at [InfoNA@t](mailto:InfoNA@t) for ordering the data.

Requirements: This system requires that you enter a street address along with either a city and state OR a zip code. The FFIEC web s ([www.ffiec.gov](http://www.ffiec.gov)) is a public web site. In order to see this public web site, you must configure your firewall systems properly to allow this seen by your network. Therefore, you should set the appropriate parameters consistent with your firewall technology and security polic safeguard your network environment. You may need the assistance of Information Technology professionals trained to work with your telecommunications/security systems to configure the correct settings to enable the use of our web site while simultaneously protect computer environment.

Year: 2008

Street Address: 1 Main Street

City:

State:

Zip Code: 02143

# CounselorMax User Guide

- Enter the street address and Zip Code for the client and the form will provide you with the Census Tract:

FFIEC FEDERAL FINANCIAL INSTITUTIONS  
Promoting uniformity and consistency in the supervision of

FFIEC Main | Disclaimer | Privacy Policy | Contact Us | Search | Bar

## Geocoding System

Geocode Search Result for 2008 HMDA/CRA Reporting

Street Address	1 MAIN ST	MSA/MD Code	15764
City Name	SOMERVILLE	State Code	25
State Abbreviation	MA	County Code	017
Zip Code	02145	Tract Code	3501.00

MSA/MD Name: CAMBRIDGE-NEWTON-FRAMINGHAM, MA  
State Name: MASSACHUSETTS  
County Name: MIDDLESEX COUNTY

Highlight and copy the “Tract Code” cell (Ctrl. + C), and paste it into the Census Tract field in CounselorMax.

- **“Housing Arrangement”**: select the best answer from the options in the drop-down list. For most clients, “rent” is the most appropriate, since they are in the process of buying a home.
- **“Household Type”**: select the best option from the drop-down list.

When you have entered all of the fields, make sure you click the **Save** button to save all of the data entered. You should get a **Saved successfully!** pop-up message. Click **“OK”**. This will return you to the **Residence** summary form. Click on the **Wk Plan** icon at the top of the form to return to the main work plan form:

Max  
Guidance & Planning System

wk plan class appt iog print

Add [Auto Generate Work Plan](#)

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit / Complete	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>	Complete	10/16/2008			
NW Supplemental Residence Data	Intake	<a href="#">Residence</a>	Pending				
Schedule Class or Counseling Appt	Intake	(reminder)	Pending				
Pre-qualify: Pull Credit	Determine Affordability	<a href="#">Credit Report</a>	Pending				
Document Financing	Closing	<a href="#">Finance Page</a>	Pending				

# CounselorMax User Guide

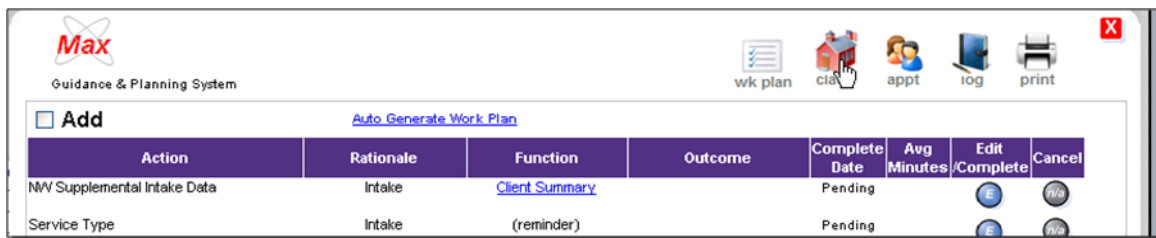
There's a final but very important step. You must click the **Edit** button in the **NW Supplemental Residence Data** screen. This opens the action status box. Select the proper outcome to mark the action item as **"Complete"**.

## 12.6.3 Schedule Class or Counseling Appointment

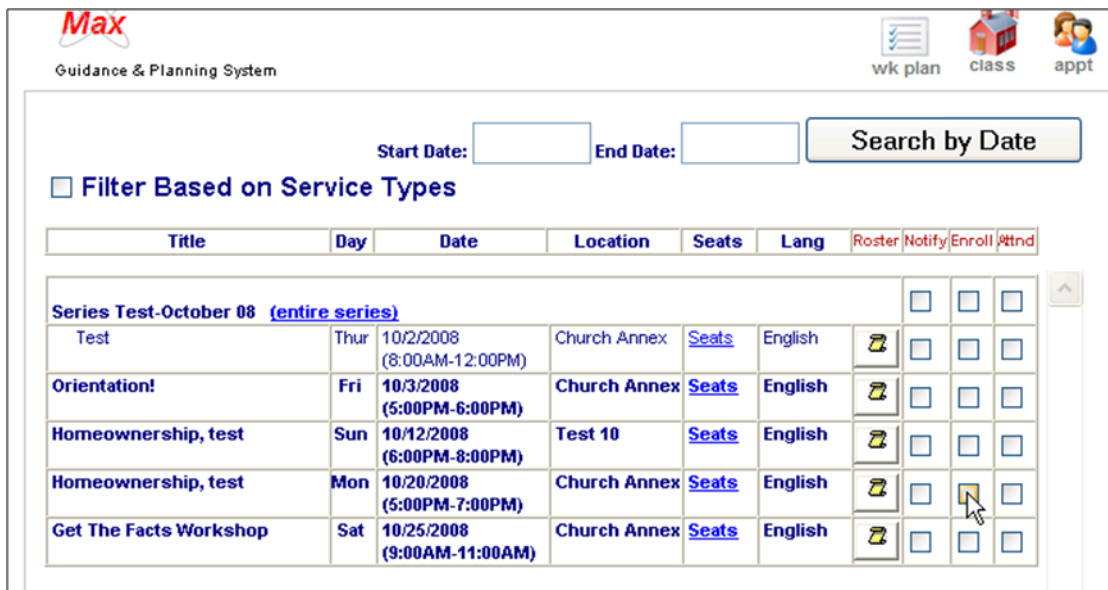
The next step in the GPS service process is to schedule the client to a class, one-on-one counseling appointment or both, if appropriate. This is not a requirement for client reporting, but it is important that you capture this information for HUD and NeighborWorks reporting. In some cases, the client may have already attended a class or counseling session and you need to simply enter the data after the fact. In either case, the steps are the same.

### Schedule or Document Class Attendance

To schedule a client to a class click on the **Class** icon at the top right corner of the GPS form:



This opens up the class schedule form:



Simply click in the **Enroll** checkbox next to the class or classes you wish to enroll the client in. If the client has already attended the class, after enrolling them, click the **Attnd** checkbox to record their attendance.

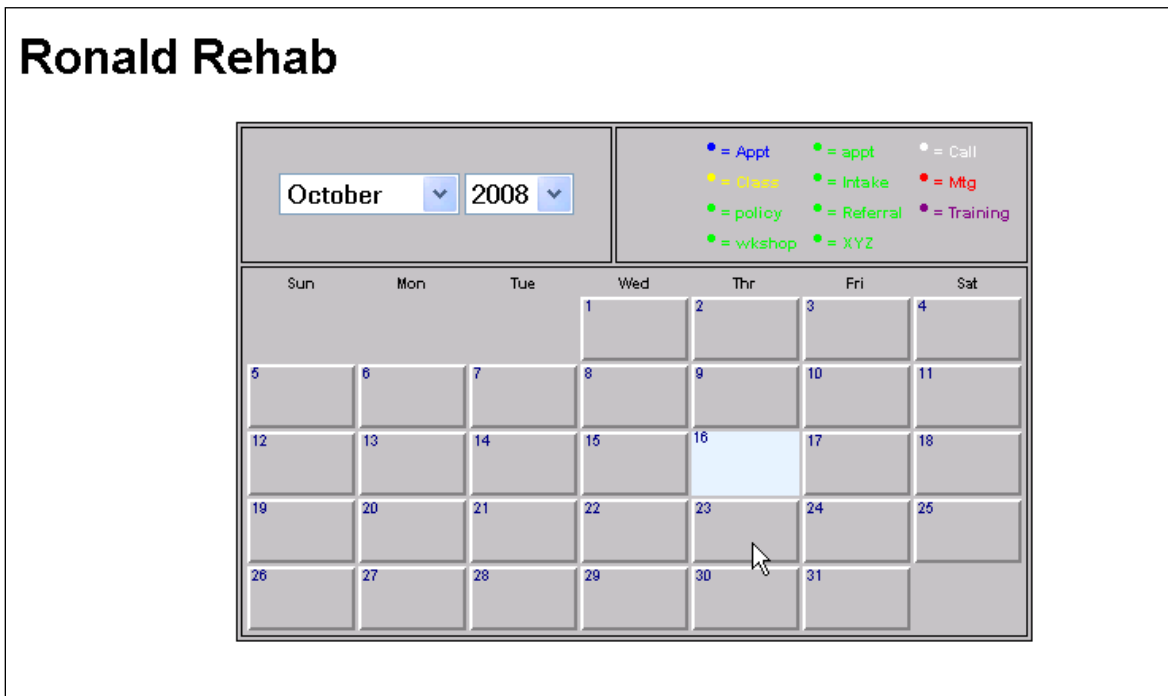
# CounselorMax User Guide

## Schedule Client to an Appointment

To schedule a client to a counseling session click on the **Appt** icon on the top right corner of the GPS form:



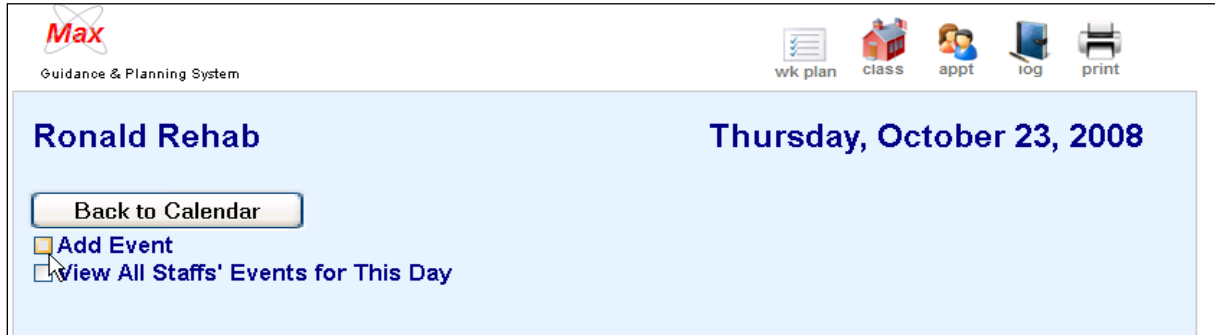
This will open the client calendar form:



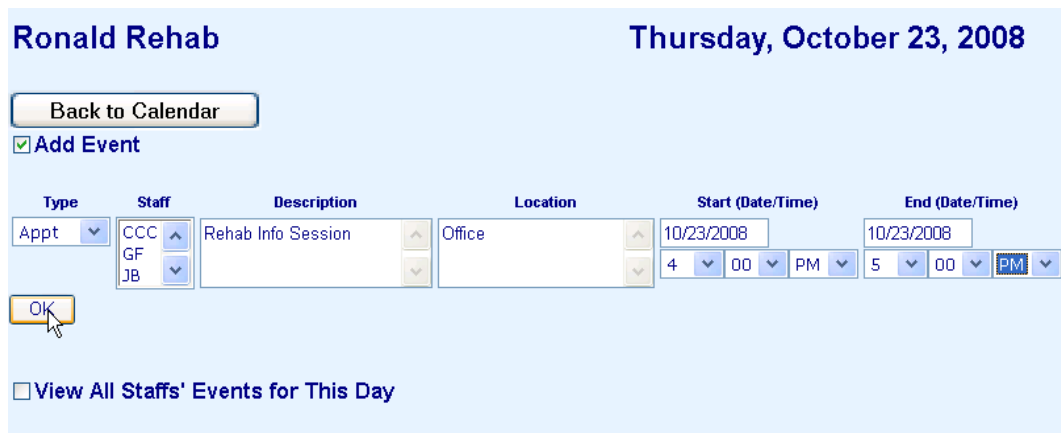
Double click on the date you want to schedule the client for a counseling session.

# CounselorMax User Guide

Click on the **Add Event** button:



You will see a screen display as shown below:



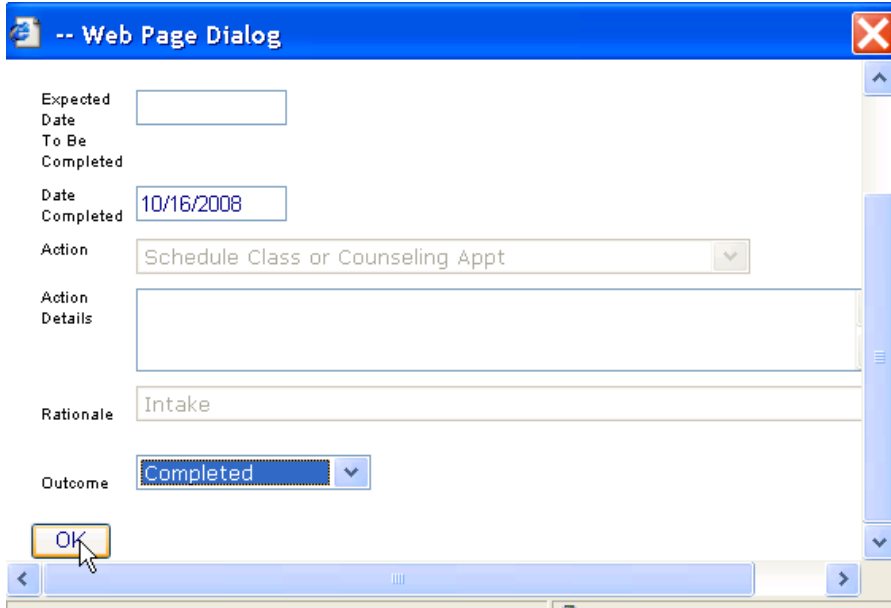
Enter all of the required fields and click **“OK”** to save the session. You don't need to return to the session to mark the attendance. The system assumes that the client attended the session unless you delete it.

You can enter as many classes and appointments as you wish per customer.













Remember to Mark Action Item **Complete**: When the client is finished with all classes and counseling, click on the **“E”** edit button in the GPS for the **Schedule Class or Counseling Appt** task and select **“Complete”** for the status.



# CounselorMax User Guide



Make sure the GPS reflects the item as complete.

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit / Complete	Cancel
NW Supplemental Intake Data	Intake	<a href="#">Client Summary</a>	Complete	10/16/2008		 	
NW Supplemental Residence Data	Intake	<a href="#">Residence</a>	Complete	10/16/2008		 	
Schedule Class or Counseling Appt	Intake	(reminder)	Completed	10/16/2008		 	
Pre-qualify: Pull Credit	Determine Affordability	<a href="#">Credit Report</a>	Pending			 	

## 12.6.4 Pre-qualify: Pull Credit

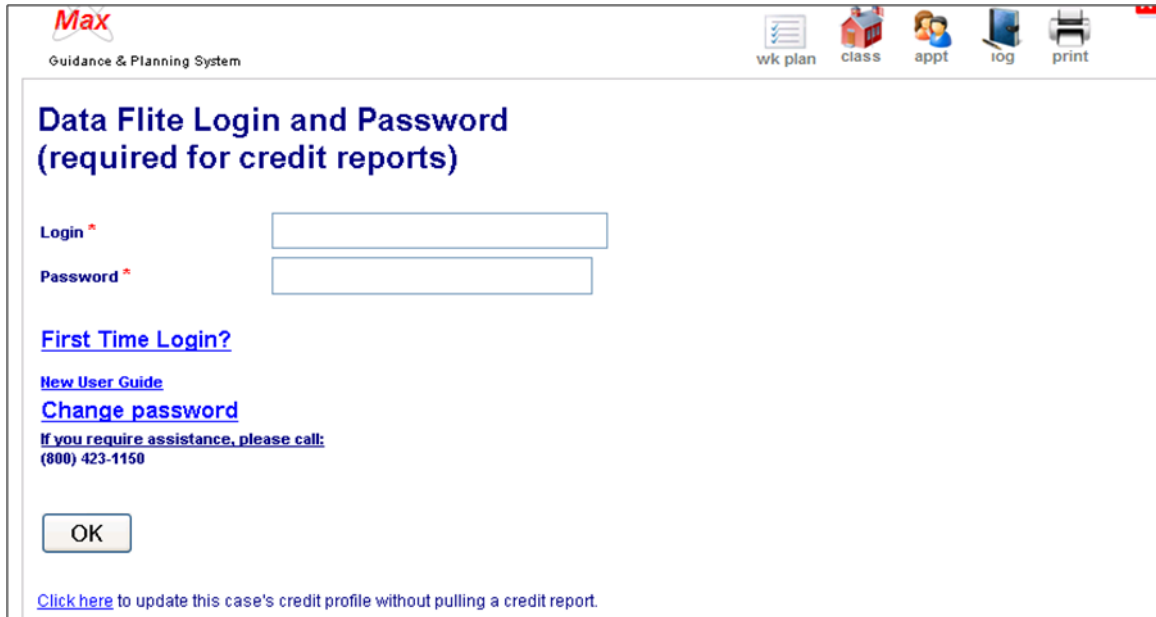
The next step is to collect a Credit Score for the client and co-applicants if this is part of your service process. This is not a required step to successfully report the client to NeighborWorks. However, this is a best practice as it is hard to imagine providing services to a client and not collecting their credit score in some form. Thus, it is highly recommended that you collect a credit score for the client and co-applicants.

Click on the **Credit Report** link in the GPS form:

Service Type	Intake	(reminder)	Pending	 	
NW Supplemental Residence Data	Intake	<a href="#">Residence</a>	Pending	 	
Pre-qualify: Pull Credit	Determine Affordability	<a href="#">Credit Report</a>	Pending	 	
Pre-qualify: Enter Liabilities	Determine Affordability	<a href="#">Liabilities</a>	Pending	 	

# CounselorMax User Guide

This takes you to the main Credit form:



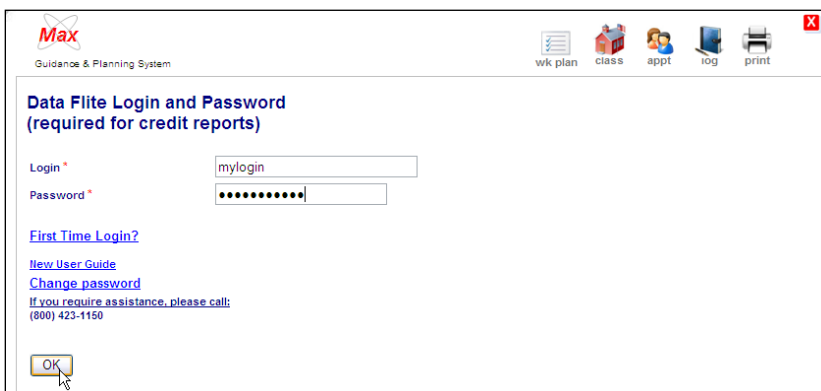
The screenshot shows a web browser window with the 'Max' logo and 'Guidance & Planning System' text. The main heading is 'Data Flite Login and Password (required for credit reports)'. There are two input fields: 'Login \*' and 'Password \*'. Below the fields are links for 'First Time Login?', 'New User Guide', and 'Change password'. A note states 'If you require assistance, please call: (800) 423-1150'. An 'OK' button is at the bottom left. A footer link says 'Click here to update this case's credit profile without pulling a credit report.' The browser's top toolbar includes icons for 'wk plan', 'class', 'appt', 'log', and 'print'.

You can enter a credit score in one of two ways: (1) automatically if you are set up to pull credit directly from First American Credco, or (2) manually.

## Auto-populate credit

As is the case for Classic CounselorMax, the MD module allows you to pull a client's credit report and auto-populate the liabilities and score automatically.

If you are set-up to pull credit reports from CounselorMax enter your login name and password and click on "OK".



This screenshot is identical to the previous one, but the 'Login \*' field contains the text 'mylogin' and the 'Password \*' field contains a series of dots. A mouse cursor is hovering over the 'OK' button.

# CounselorMax User Guide

This opens up the **Get Credit Report** form for the customer. Fill in all the required data and click on the **Get Credit report** button. This connects you to First American Credco, the report provider, and completes the data transfer.

The screenshot shows the 'Get Credit Report' form in the CounselorMax interface. At the top, there is a 'Max' logo and the text 'Guidance & Planning System'. On the right, there are icons for 'wk plan', 'class', 'appt', 'log', and 'print'. The main form area has a 'Get Credit Report' button highlighted with a mouse cursor. Below the button are several input fields: 'First Name' (John), 'Last Name' (Smith), 'Middle Name', 'Name Suffix', 'SSN' (with a red note: 'NOTE: The SSN you enter will be saved in this person's 'Case Data' located in the 'Intake' tab'), 'Street Address' (12 Main Street), 'City' (Boston), 'State' (MA), and 'Zip Code' (02110). At the bottom, there are three checked checkboxes: 'Trans Union', 'Equifax', and 'Experian'.

## Manual Credit Score Entry

If you are not set up in CounselorMax to collect credit data automatically, you can still complete this step manually. Simply collect the credit report by your standard means and once you have done so you can finalize the "Credit Report" task as you do with any task. Click on the **Edit** button, fill out the task finalization form and click **OK**:

The screenshot shows a 'Web Page Dialog' window titled 'John Smith' with the date '4/17/2008'. The form contains the following fields: 'Expected Date To Be Completed' (5/7/2008), 'Date Completed' (4/22/2008), 'Action' (Budget - Creation - pull / review credit), 'Action Details' (Successfully pulled report), 'Rationale' (Level 1), and 'Outcome' (Complete). An 'OK' button is highlighted at the bottom left. The URL at the bottom of the dialog is 'http://www.counselormax.com/HCPDemo/Counseling/WorkPlanEdit.asx'.

# CounselorMax User Guide

## 12.6.5 Document Property Information

The next work plan item is to collect detailed information on the client's rehab property. To enter this data click on the **Subject Property** link as shown below:

Document Financing	Closing	<a href="#">Finance Page</a>	Pending		
Document Property Information	Closing	<a href="#">Subject Property</a>	Pending		
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>	Pending		

This opens the **Subject Property** form. Make sure you enter all of the required fields.

<b>Street Address *</b>	<input type="text" value="90 Highland Ave."/>	<b>Apt/Unit #</b>	<input type="text"/>
<b>City *</b>	<input type="text" value="Somerville"/>	<b>State *</b>	<input type="text" value="MA"/>
<b>MSA *</b>	<input type="text" value="Middlesex County-Boston-Cambridge-Quincy, MA-NH HUD Metro FMR A"/>		
<b>Census Tract *</b>	<input type="text" value="99999"/> <a href="#">Lookup</a>	<b>Lease Number</b>	<input type="text"/>
<b>Property Type</b>	<input type="text" value="Single Family"/>	<b>Land Ownership Type*</b>	<input type="text" value="Fee simple"/>
<b>FEMA Relief Type</b>	<input type="text" value="---Select One---"/>	<b># of Units *</b>	<input type="text" value="1"/>
<b>Type of Unit*</b>	<input type="text" value="Rehabilitated"/>		
<b>NWO Rehab/Const</b>	<input checked="" type="checkbox"/>		
<b>Rehab Amt *</b>	<input type="text" value="\$ 20000"/>	<b>Certificate of Completion Date</b>	<input type="text"/>
<b>Closing Costs</b>	<input type="text" value="+ 500"/>		
<b>Other Costs</b>	<input type="text" value="+ 10000"/>		
<b>Total Cash and Loans Required *</b>	<input type="text" value="= 30500"/>		
<a href="#">Property and Finance Summary</a>			

Once you have entered all of the required fields, click on **“Save”**. Remember to mark the task as **“Complete”** in the GPS using the task completed form.

## 12.6.6 Document Financing

In order to document property information, you need to document the financing information for the purchase of the home. Click on the **Finance Page** link:


Document Financing	Closing	<a href="#">Finance Page</a>	Pending		
Document Property Information	Closing	<a href="#">Subject Property</a>	Pending		
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>	Pending		




# CounselorMax User Guide

This will open the Finance Page summary form:



Guidance & Planning System



### Property Transaction Details [view / edit](#)

Rehab Amount	\$20,000.00
Closing costs	\$500.00
Other	\$10,000.00
<b>TOTAL Transaction Amount</b>	<b>\$30,500.00</b>

### Finance Summary:

Add: [Loan](#) [Grant](#) [Liquid Assets](#)

Lien	Company	Type	Status	Monthly Prmt	Amt of New Loan / Grant	Edit	Delete
TOTAL Grants & Assistance						\$0.00	
<b>Over or (Short) to close transaction:</b>						<b>(\$30,500.00)</b>	

[View Denied Loan Applications](#)

In the example above, you can see that **Rehab Amount** plus **Closing costs** plus **Other** add up to \$30,500. You need to enter financing records that add up to this number. They can be combinations of loans, grants, and liquid assets. To enter financing records, click on the link for the first record type you want to enter. In this example, add a new loan by clicking on the **Loan** link:

### Property Transaction Details [view / edit](#)

Rehab Amount	\$20,000.00
Closing costs	\$500.00
Other	\$10,000.00
<b>TOTAL Transaction Amount</b>	<b>\$30,500.00</b>

### Finance Summary:

Add: [Loan](#) [Grant](#) [Liquid Assets](#)

Lien	Company	Type	Status	Monthly Prmt	Amt of New Loan / Grant	Edit	Delete
TOTAL Grants & Assistance						\$0.00	
<b>Over or (Short) to close transaction:</b>						<b>(\$30,500.00)</b>	

[View Denied Loan Applications](#)

This opens the new Loan Form. Enter at least all of the required fields and click **“Save”**:

# CounselorMax User Guide

Once you save the first loan (or any financing record) you will be returned to the Financing Page form. You can see the new financing record added to the summary and the remaining financing balance decrease by the amount of the financing.

Add additional loans, grants or client or seller contributions (“liquid assets”) until the full price of the transaction is reached.

**Property Transaction Details** [view / edit](#)

Rehab Amount	\$20,000.00
Closing costs	\$500.00
Other	\$10,000.00
<b>TOTAL Transaction Amount</b>	<b>\$30,500.00</b>

**Finance Summary:**    Add: [Loan](#)   [Grant](#)   [Liquid Assets](#)

Lien	Company	Type	Status	Monthly Pmt	Amt of New Loan / Grant	Edit	Delete
2	NHS Rehab Loan Pool	Assistance / Loan	Approved	\$0.00	\$28,000.00		
					<u>\$28,000.00</u>		
<b>Over or (Short) to close transaction:</b>					<u><b>(\$2,500.00)</b></u>		
<a href="#">View Denied Loan Applications</a>							

In this case, you need to add an additional “**Liquid Asset**” (buyer’s portion to account for the remaining \$2,500 balance).

Next, you can add the buyer’s contribution by clicking on the **Liquid Asset** link next to the Financing Summary and entering all of the required information and click on “**Save**”.

Guidance & Planning System wk plan   class   appt   iog   print

## Assets

Required Fields Must Be Filled-in

---

<b>Asset Type*</b>	Checking <input type="button" value="v"/>	<b>Acct Number</b>	<input style="width: 90%;" type="text"/>
<b>Acct Balance*</b>	5000 <input style="width: 90%;" type="text"/>	<b>Acct Name</b>	<input style="width: 90%;" type="text"/>
<b>Acct Co Street</b>	<input style="width: 90%;" type="text"/>	<b>Acct Co City</b>	<input style="width: 90%;" type="text"/>
<b>Acct Co State</b>	<input style="width: 90%;" type="text"/>	<b>Acct Co Zip</b>	<input style="width: 90%;" type="text"/>
<b>Amount for Transaction*</b>	2500 <input style="width: 90%;" type="text"/>	<b>Financial Self Sufficiency</b>	<input type="checkbox"/>
<b>Status*</b>	Verified <input type="button" value="v"/>		

[Back to List of Assets](#)

# CounselorMax User Guide

On the screen below, notice that the financing summary no longer displays a remaining balance:

Property Transaction Details [view / edit](#)

Rehab Amount	\$20,000.00
Closing costs	\$500.00
Other	\$10,000.00
<b>TOTAL Transaction Amount</b>	<b>\$30,500.00</b>

**Finance Summary:** Add: [Loan](#) [Grant](#) [Liquid Assets](#)

Lien	Company	Type	Status	Monthly Pmt	Amnt of New Loan / Grant	Edit	Delete
2	NHS Rehab Loan Pool	Assistance / Loan	Approved	\$0.00	\$28,000.00		
		Checking	Verified		\$2,500.00		
TOTAL Grants & Assistance					\$30,500.00		
<b>Over or (Short) to close transaction:</b>					<b>\$0.00</b>		

[View Denied Loan Applications](#)

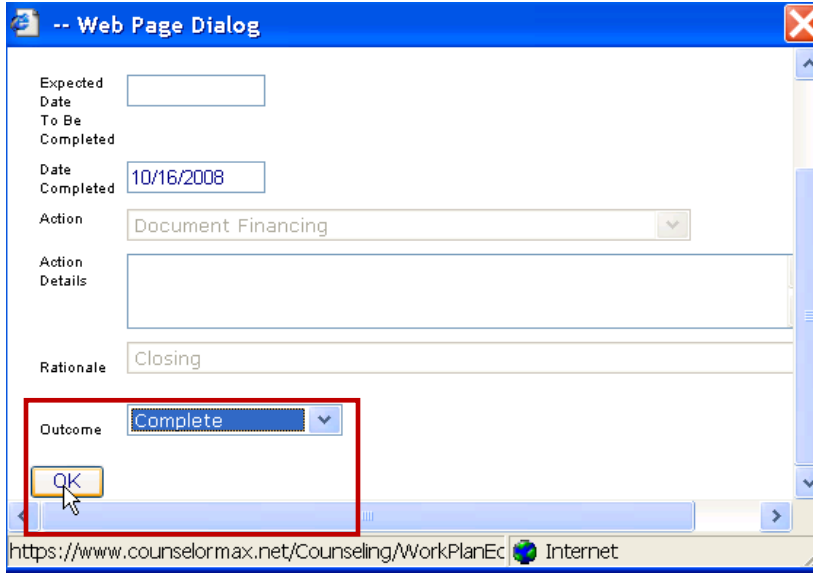
At this point, you are finished entering financing information.

At any time, you can go into an existing financing record and edit by clicking on the “E” edit button to the right of the record. You can also delete a record by clicking the “D” to the right of the record. See below:

Document Financing	Closing	<a href="#">Finance Page</a>	Pending		
Document Property Information	Closing	<a href="#">Subject Property</a>	Pending		

When you are finished entering all financing go back to the GPS and mark the task as completed:

# CounselorMax User Guide





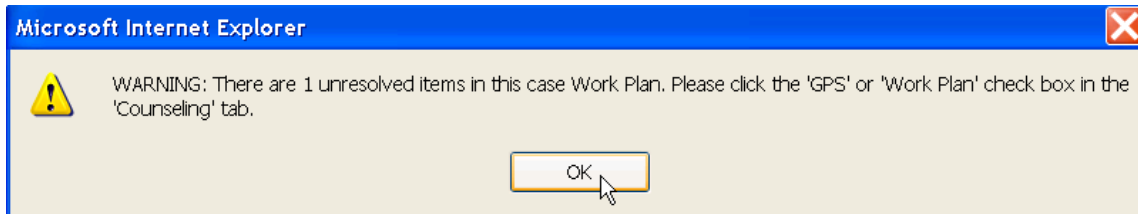
# CounselorMax User Guide

## 12.6.7 Close Out and Resolution

Once you have completed all items in the work plan, click on the **Resolution** link:

Document Property Information	Closing	<a href="#">Subject Property</a>	Complete	10/16/2008		
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>	Pending			

You may see the following pop-up screen:



You can safely ignore this message in this case as the only one outstanding item, **Resolution**, is about to be completed.

Click on the **Resolution** Action item. This will open the **Resolution** form. You need to select the correct resolution for the case. In this case, the customer received a home improvement loan so the correct option is **“Rcvd. Home Equity/Home Improvement Loan”** as shown below:

Guidance & Planning System

**(Select ONLY when you want to finalize this case)**  
Case Resolutions for "Homeowner Services"

Rcvd. Home Equity/Home Improvement Loan  HUD Activity

----- CHOOSE ONE -----

- Counseled on HECM; Declined Mortgage
- Referred to Other Agency
- Obtained a HECM
- Rcvd. Home Equity/Home Improvement Loan**
- Mortgage Refinanced
- Sold House, Chose Alt. Housing Solution
- Suspended
- Rcvd. Consumer Loan (Unsecured)
- Obtained a Non-FHA Reverse Mortgage
- Complete Financial Mgt/Budget Counseling
- Complete Home Maintenance Counseling
- Counseled and Utilities Brought Current
- Counseled/Referred for Legal Assistance

The resolutions correspond to the HUD 9902 resolutions. If the customer attended counseling and/or education and you entered these events in the GPS, the client will successfully show up on the HUD 9902 without any additional data entry.

Once you resolve the case, the form will update and you should see that the case is resolved:

# CounselorMax User Guide

## Homeowner Services: Case Resolved Successful

This Homeowner Services Case was Resolved on 10/16/2008 to 'Rcvd. Home Equity/Home Improvement Loan'

To re-activate this case click the button below

Re-Activate this Case

**NOTE:** You can also go back and click on the **Re-Activate this Case** button if you missed a step.

You can now return to the GPS form and mark the **Resolution** task as **“Complete”** in the GPS to finalize the case.

You have completed entering all required data for the case.

## 12.7 Other Client Services

You can use the **Other Client Based Services** module to ensure that you accurately capture all of the data required to report client based services that cost less than \$2,000 to NeighborWorks. This is an important category of production that you should not ignore. If you do any significant level of production, the number of investment dollars and affected units could be significant and they could have a large impact on your reported dollars and units of investment.

# CounselorMax User Guide

## Client Intake

1. Create a standard client intake in CounselorMax. Make sure to select “**Homeowner Services**” from the **Service Type** drop-down list as this is the only service path that will later provide you with the data entry forms associated with NeighborWorks data collection.

The screenshot shows the 'Case Data' form for a client named 'Joe Repair'. The form is divided into several sections:

- Service Required:**
  - Service Type \***: A dropdown menu with 'Homeowner Services' selected. A red box highlights this dropdown with the text 'Custom Service Types in red will NOT be included in the 9902'.
  - Service Map - Philly**: A link.
  - HUD Activity**: A checked checkbox.
  - Case Term**: A dropdown menu with 'Long Term' selected.
  - Total Co-Apps \***: An empty text input field.
  - Referral Source \***: A multi-select dropdown menu with options: 'Agency', 'bank', and 'Housing Authority'. Below the options is the text 'Press 'Ctrl' to select more than one'.
- Additional Fields**: A checkbox that is currently unchecked.
- Demographics:**
  - Race \***: A dropdown menu with '---Select One---' selected.
  - Number in Household \***: A dropdown menu.
  - Gender \***: Radio buttons for 'Male' and 'Female'.
  - Head of Household?**: A checkbox.
  - Veteran?**: A checkbox.
  - Foreign Born?**: A checkbox.
  - Housing Choice Voucher?**: A checkbox.
- Additional Fields**: A checkbox that is currently unchecked.
- Ethnicity**: A dropdown menu with '---Select One---' selected.
- Age**: A text input field.
- Birthdate (mm/dd/yyyy) \***: A text input field.
- Disabled?**: A checkbox.
- Disabled Dependent?**: A checkbox.
- Education**: A dropdown menu with '---Select One---' selected.
- Marital Status**: A dropdown menu with '---Select One---' selected.

2. Enter all of the required fields to create a new case in CounselorMax:
  - Total Co-Apps (enter 0 if there are none)
  - Referral Source (you or your agency admin can customize the list of options)
  - Race
  - Number in Household
  - Gender
  - Birth date
  - Household Annual Income

# CounselorMax User Guide

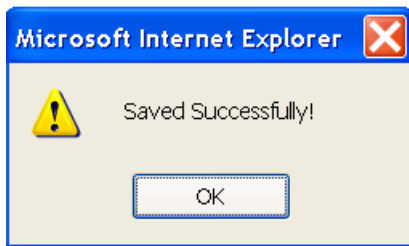
- County (the list will narrow down the available options based on the client's address)
- Current Residence (status)

In addition, you need to enter the following NeighborWorks required fields if you have the information:

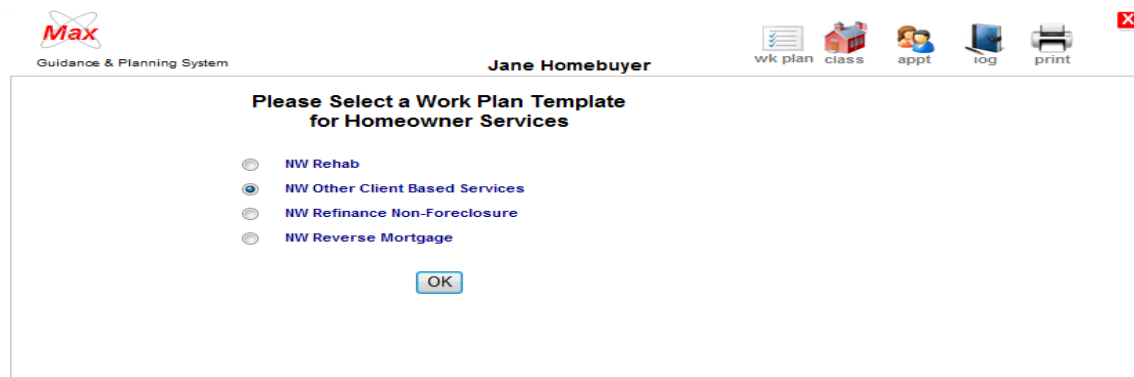
- Veteran
- Foreign Born
- Housing Choice Voucher (does the customer have a housing choice voucher to help subsidize their rent or mortgage payments)
- Head of Household
- Disabled
- 1<sup>st</sup> Time Home Buyer
- Authorization to Release Information

While these fields are not required to save a case in CounselorMax, they are required to report the case to NeighborWorks. If you do not have this data while you are filling out the **Case Data** sub-tab on the **Intake** tab, leave these fields blank and you will have a chance to collect the data later.

3. Click the **Save Changes** button at the bottom of the form to save your data. You should see a **"Saved Successfully!"** pop-up message:



4. You should then see the following screen to select the Type of Service you are providing this client. See the following options:



5. Select the **NW Other Client Based Services** radio button.

# CounselorMax User Guide

- Once you've selected the appropriate service level by clicking on the radio button, click "OK".
- You should see the GPS work plan generator form:

Save Work Plan

Include	Action	Rationale	Days to Complete
yes	Client Project Data	Other Projects	
yes	Close Out & Resolution	Resolve Case	

The form displays the pre-created work plan items required to successfully manage the client case and collect all of the data required. Click on the **Save Work Plan** button to create the client's work plan and access the data entry forms.

- Once you save the work plan for this client, the GPS page is created and you should see an easy to use form that allows you to access and view all client data from one central location:

Guidance & Planning System

Add
[Auto Generate Work Plan](#)

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit / Complete	Cancel
Client Project Data	Other Projects	<a href="#">Project Data</a>		Pending			
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>		Pending			

The form contains 2 pre-defined work plan items. The concept behind the form is that if you complete each of the listed items you will have (1) performed all the steps necessary to serve the client fully for this line of business – as such, the GPS serves as a useful process template for counselors and other staff – and (2) collected all of the data required to report a **NW Other Client Based Services** client to NeighborWorks America in the Quarterly Production report.

## Using the GPS Form and Carrying out the Service Steps

Each action item requires one or at most two steps: (1) complete data entry in a satellite page (not all action steps have a satellite page but most do) and (2) mark the step as completed when you finish entering all of the data required or carried out all of the tasks steps. See below for discussion on each action step and how each step can be completed.

### 12.7.1 Collect "Client Project Data"

# CounselorMax User Guide

This step is where you enter the entire project and related financing data. It's a simple form with relatively few data points. To access the satellite page that contains these data points, click on the link labeled **"Project Data"** under the **Function** column heading of the GPS:

Max  
Guidance & Planning System

Auto Generate Work Plan

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit /Complete	Cancel
Client Project Data	Other Projects	<a href="#">Project Data</a>		Pending			
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>		Pending			

This will take you to the "Other Client Based Service". There are two steps to entering the data in this form:

1. Enter and save the basic service record.
2. Enter all required financing to cover the service costs.

To begin enter all of the required service fields as below. In this example, you are tracking an **Emergency Home Repair** service:

Max  
Guidance & Planning System

Other Client Based Services

Required Fields Must Be Filled-in

**SAVE**

Service Name\*

Service Cost\*

Start Date (mm/dd/yyyy)

End Date (mm/dd/yyyy)

Service Type\*

Units\*

Service Description\*

# CounselorMax User Guide

Note that you do not yet have financing records, or even the option to save financing records. You will not have these until you click on the save button to record the service record in the database:

Once you click the **Save** button and successfully save the record notice that the financing portion of the screen becomes active and you can now enter financing records:

The screenshot shows the 'Other Client Based Services' form in the CounselorMax system. At the top left is the 'Max' logo and 'Guidance & Planning System' text. On the top right are icons for 'wk plan', 'class', 'appt', 'log', and 'print'. A 'SAVE' button is highlighted with a mouse cursor. The form title is 'Other Client Based Services'. Below the title is a link: 'Required Fields Must Be Filled-in Back to List of Other Client Based Services'. The form fields are: 'Service Name\*' (Emergency Home Repair), 'Service Cost\*' (1000), 'Start Date (mm/dd/yyyy)' (10/20/2008), 'End Date (mm/dd/yyyy)' (10/22/2008), 'Service Type\*' (Emergency Repair), and 'Units\*' (1). The 'Service Description\*' is 'Fixed emergency plumbing problem for Joe Repair.'. Below these fields is a red-bordered box containing 'Source Name\*' (---Select One---), 'Funding Amt\*' (\$), and 'Funding Type\*' (---Select One---). A 'Save Funds' button is located at the bottom right of this box.

You can now enter one or more financing records to justify the cost of the services. You must enter at least enough financing to add up to the total service cost. In this case it's "\$1,000".

In this example, you will enter two records: an emergency \$500 loan and a \$500 grant to cover the entire \$1000. To do this, you need to first enter all of the required financing fields and click on "**Save**":

1. Source Name
2. Funding Amount
3. Funding Type

# CounselorMax User Guide

Notice that this saves the financing record and gives you the option to add more records if you need to:

Max  
Guidance & Planning System

Other Client Based Services

Required Fields Must Be Filled-in  
[Back to List of Other Client Based Services](#)

Service Name\* Emergency Home Repair Service Cost\* 1000

Start Date (mm/dd/yyyy) 10/20/2008 End Date (mm/dd/yyyy) 10/22/2008

Service Type\* Emergency Repair Units\* 1

Service Description\* Fixed emergency plumbing problem for Joe Repair.

Funding Source\* Emergency Repair Loan Pool Funding Amt\* \$500 Funding Type\* NWO Loan Funds

Save Funds

Once you click “**Save Funds**”, the record is saved. If you made a mistake and need to edit or delete the record, you can click on the **Edit** and **Delete** buttons to access the record and make changes:

Max  
Guidance & Planning System

Other Client Based Services

Required Fields Must Be Filled-in  
[Back to List of Other Client Based Services](#)

Service Name\* Emergency Home Repair Service Cost\* 1000

Start Date (mm/dd/yyyy) 10/20/2008 End Date (mm/dd/yyyy) 10/22/2008

Service Type\* Emergency Repair Units\* 1

Service Description\* Fixed emergency plumbing problem for Joe Repair.



Add New

Grantor	Funding Amt	Funding Type	Edit	Delete
Emergency Repair Loan Pool	\$500.00	NWO Loan Funds		
<b>Total:</b>	\$500.00			



# CounselorMax User Guide

To add an additional financing record, click on the **Add New** button in the financing section of the form:

<b>Service Type*</b>	Emergency Repair	<b>Units*</b>	1
<b>Service Description*</b>	Fixed emergency plumbing problem for Joe Repair.		
<a href="#">Add New</a>			
<b>Grantor</b>	<b>Funding Amt</b>	<b>Funding Type</b>	<b>Edit</b> <b>Delete</b>
Emergency Repair Loan Pool	\$500.00	NWO Loan Funds	 
<b>Total:</b>	\$500.00		

This adds a financing row and you can enter all the required fields and save it:

Guidance & Planning Systemwk planclassapptlogprint

[SAVE](#)      **Other Client Based Services**

[Required Fields Must Be Filled-In](#)  
[Back to List of Other Client Based Services](#)

**Service Name\*** Emergency Home Repair      **Service Cost\*** 1000

**Start Date** (mm/dd/yyyy) 10/20/2008      **End Date** (mm/dd/yyyy) 10/22/2008

**Service Type\*** Emergency Repair      **Units\*** 1

**Service Description\*** Fixed emergency plumbing problem for Joe Repair.

---

**Service Name\*** Emergency Repair Grant Pool      **Funding Amt\*** \$ 500      **Funding Type\*** NWO Other

[to List of Service Funding](#)      [Save Funds](#)

# CounselorMax User Guide

Once you save this record, you should see it reflected in the financing section along with any other records you have added:

Service Description\* Fixed emergency plumbing problem for Joe Repair.

[Add New](#)

Grantor	Funding Amt	Funding Type	Edit	Delete
Emergency Repair Loan Pool	\$500.00	NWO Loan Funds		
Emergency Repair Grant Pool	\$500.00	NWO Other		
<b>Total:</b>	\$1,000.00			

Once you've finished entering all of the financing (remember that the financing should always add up to exactly the service cost), you can return to the GPS form to mark this task as completed by clicking on the **wk plan** icon at the top left of the form:

Guidance & Planning System

[wk plan](#) [class](#) [appt](#) [log](#) [print](#)

**SAVE** Other Client Based Services

[Required Fields Must Be Filled-in](#)  
[Back to List of Other Client Based Services](#)

Service Name\*  Service Cost\*

Start Date (mm/dd/yyyy)  End Date (mm/dd/yyyy)

Service Type\*  Units\*

This brings you back to the GPS form. You must now mark the action item as **“Complete”** to signal to the GPS that this step is finalized. This is a required step. If you do not mark this, you will not be able to report the client. Click on the **Edit Complete** button to the left of the action item to open the status form:

Guidance & Planning System

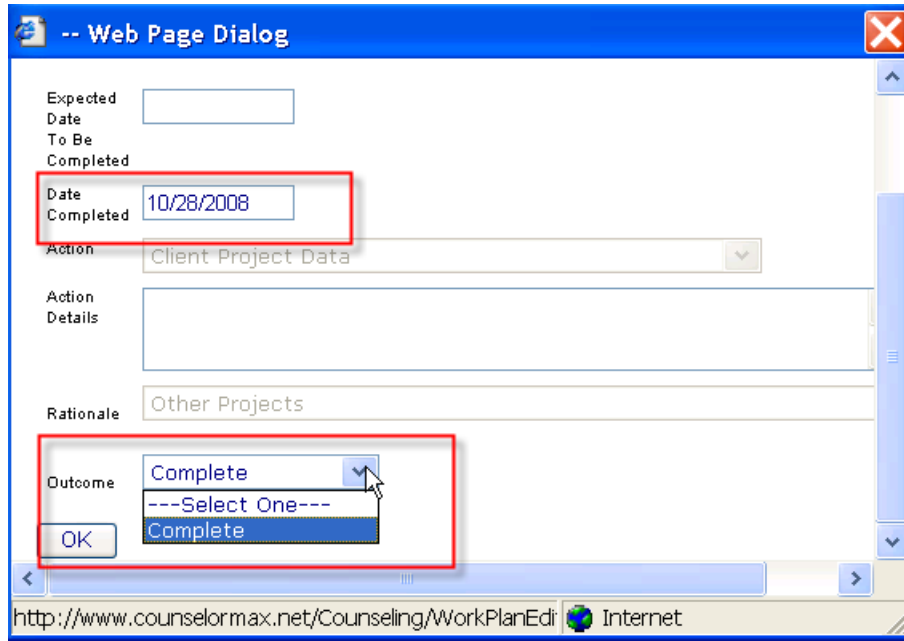
[wk plan](#) [class](#) [appt](#) [log](#) [print](#)

**Add** [Auto Generate Work Plan](#)

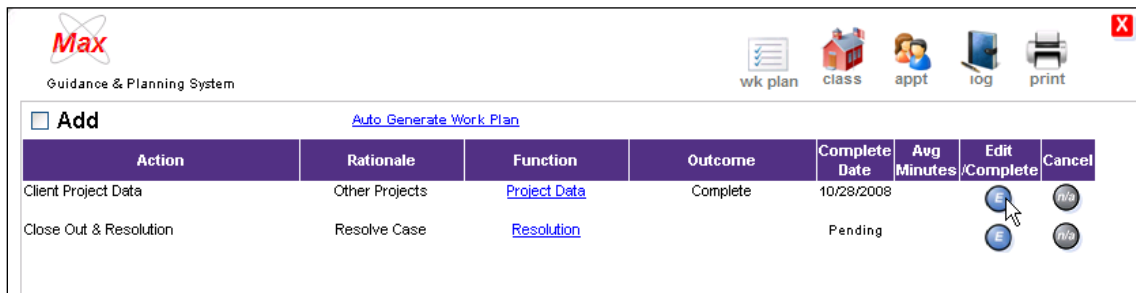
Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit Complete	Cancel
Client Project Data	Other Projects	<a href="#">Project Data</a>		Pending			
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>		Pending			

# CounselorMax User Guide

This opens the task resolution form. All you need to do is select “**Complete**” from the **Outcome** drop-down list. This auto-populates the **Date Completed** date. If you prefer, you can enter a different date. Once you have entered these two fields, click on the **Save** button to save the status.



This returns you to the GPS form. Note that the task is now marked as “**Complete**”:

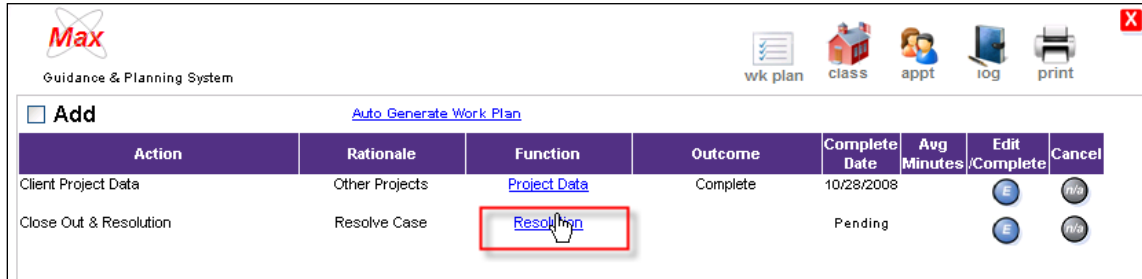


If you need to go back and change the status, simply click on the **Edit** button for the task again and change the status back to “**Not Completed**”.

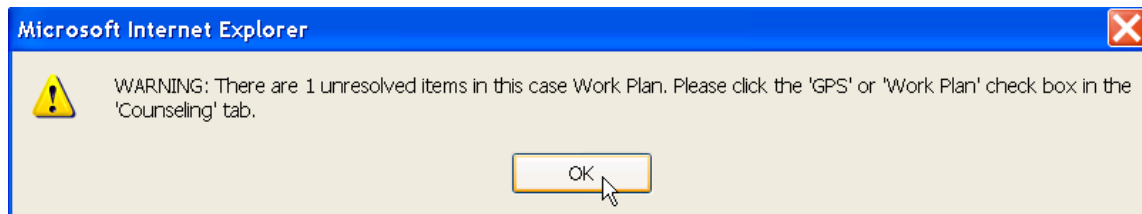
# CounselorMax User Guide

## 12.7.2 Close Out and Resolution

Once you have fully documented the service in the **Project Data** link and have marked the item as “**Complete**”, you are ready to resolve the service. This is required to report the services to NeighborWorks. To do this, click on the **Resolution** link:

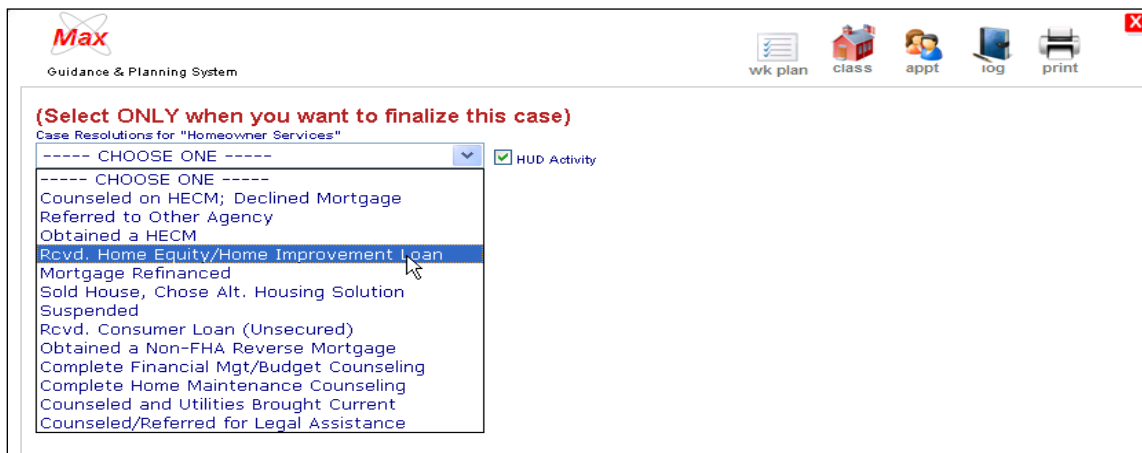


You may see the following pop-up:



You can safely ignore it in this case as the only one outstanding item, “**Resolution**”, is about to be completed.

This will open the **Resolution** form. You need to select the correct resolution for the case. In this case the best option from the list is “**Recvd. Home Equity/Home Improvement Loan**”. If none of the options are appropriate (e.g., they simply received an emergency repair grant), select “**Suspended**” and this will still be reported. “Suspended” maps to “**Other**” outcome in the 9902 report:



# CounselorMax User Guide

Click the **Resolve This Case** button to save the resolution. Then click on the **wk plan** icon to return to the work plan. Click on the **Edit** button to the left of the **Resolve Case** task to open the task resolution form, mark it as “**Completed**” and click on “**OK**”.

Expected Date To Be Completed:

Date Completed: 10/28/2008

Action: Close Out & Resolution

Action Details:

Rationale: Resolve Case

Outcome: Completed

OK

http://www.counselormax.net/Counseling/WorkPlanEdit

Note that the action item is now marked as “Completed” in the GPS:

Max  
Guidance & Planning System

Auto Generate Work Plan

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit / Complete	Cancel
Client Project Data	Other Projects	<a href="#">Project Data</a>	Complete	10/28/2008			
Close Out & Resolution	Resolve Case	<a href="#">Resolution</a>	Completed	10/28/2008			

You have completed entering all required data for the case.

## 12.8 Mortgage Default Services (MD GPS) – refer to Section 8.2.1

# CounselorMax User Guide

## Chapter 13: Admin Menu Functions

CounselorMax has two distinct modes: **Global Mode** and **Client Mode**. While Global Mode and Client Mode are necessary for day to day use of CounselorMax, the **Admin Menu** is used for the overall administration of the system.

When an agency acquires a license for CounselorMax, the agency should ensure that minimum of two users have the privileges of admin access. The users who have admin access are responsible for the following:

- 1) Set up the agency on CounselorMax,
- 2) Add counselors as users
- 3) Set up courses and class dates
- 4) Other customizations

Much of the customization of CounselorMax will be done shortly after activating the agency's software license.

To access the **Admin Menu**, the users must be logged into CounselorMax. As discussed on Chapter 2, the **Admin Menu** link is located in the lower left corner.

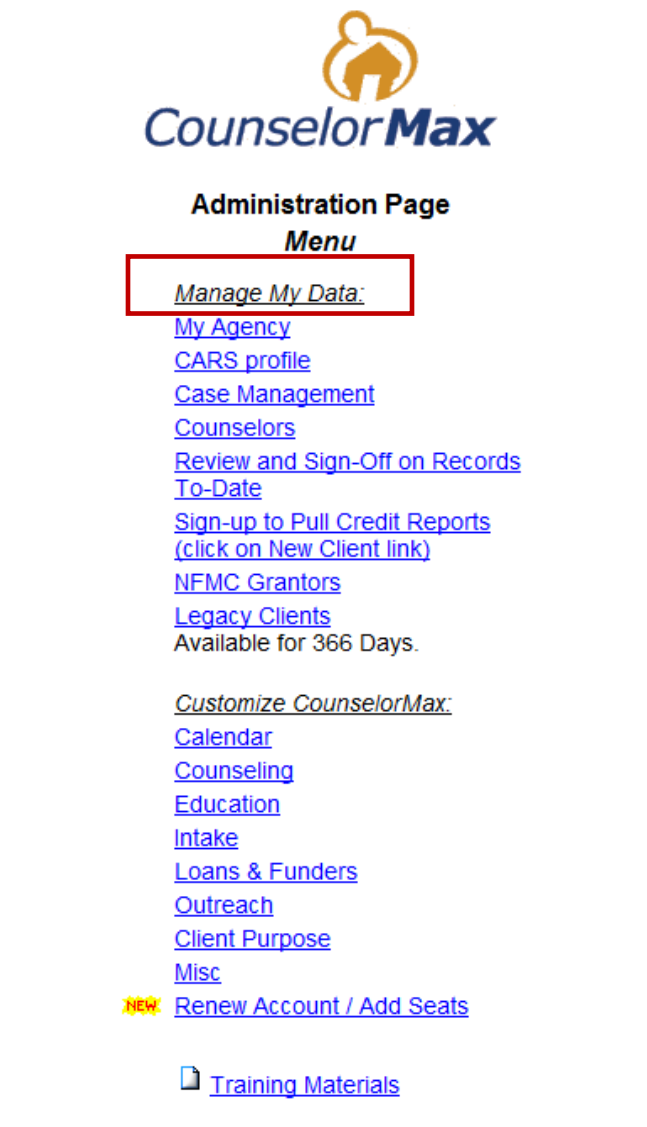
The screenshot displays the CounselorMax web application interface. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header area shows "Student S50" with a globe icon. Below this, there is a "Reminders" table with columns for Subject, Action, Details, Days, Edit, Delete, and Done. The table lists several reminders, including "Intake - collect subject property info (Francis Foreclosure50)", "Budget Creation - monthly worksheet (Francis Foreclosure50)", "Budget Validation - review financial information (Francis Foreclosure50)", and "Call Harry to get income docs (Harry Homebuyer#50)".

On the left side, there is a "Quick Client Search" section with a list of client names, including Armstrong, Stan, ARMSTRONG, STAN, Default, Cindy, Default, Joe, Dorfman, David, Dorfman, David, foreclose, sally, Foreclosure, Frank, Goldwyn-Meyer, Metro, Homebuyer, Jane, Homebuyer, Joe, Homebuyer, John, homeowner, Joe, Jackson, Marsha. Below this is a "Co-Applicant Search" section and an "Identify Clients" section with radio buttons for All, In-Process, Closed, Prospect, and Suspended. There is also a "New Client" checkbox and a "Global Mode" button.

At the bottom left, there is a "Help" link and an "Admin Menu" link, which is highlighted with a red rectangular box. Other links include "Logout" and "Legacy Clients". The footer of the page indicates "Available for 178 Days."

# CounselorMax User Guide

Click on the **Admin Menu** link and the following **Administration Page Menu** screen will appear:




## 13.1 Manage My Data

Once the admin menu is accessed, all of the active links are displayed. The first eight links are functions that will be used on a consistent basis by the administrators for each license to manage the agency's data.

# CounselorMax User Guide

## 13.1.1 My Agency

The **My Agency** link is used as the contact information that CounselorMax will use for flyers, letters, reports, etc. This should be the first step an administrator takes after CounselorMax has been purchased and the license is activated.

  
**CounselorMax**  
All Cases  
[\[Main Menu\]](#)  
[CARS profile](#)

**Required Fields Must Be Filled-in**

Organization *	NeighborWorks America		
Contact Name *	Your Name	Contact Phone *	202-555-1212
Contact EMail *	counselormax@nw.org	Street Address *	1325 G St NW
Street Address 2	Suite 800	City *	Washington
State *	DC	Zip Code *	20005
Neighborworks America Id	9999		

**NOTE:** NeighborWorks America Id field above is used by NeighborWorks organizations to enter its organization ID for information purposes.


As with all pages in CounselorMax, the user should always save before moving on to the next page. Click **“Save Changes”**.



# CounselorMax User Guide

## 13.1.2 CARS Profile

The CARS Profile holds agency specific information and has been used for HUD reporting purposes.

  
**CounselorMax**  
**CARS Profile**  
**[Main Menu]**

**Required Fields Must Be Filled-in**

HCS ID \* 12341

EIN (00-0000000) \* 1496325874

Faith Based

Colonias

Migrfarm Worker

Counseling Budget \* \$ 100000

HCS Password \* ●●●●

Save Changes

**HCS ID** = Housing Counselor System ID

**EIN** = Employee Identification Number

**HCS Password** = HUD assigned password

Enter data in the required fields and click **“Save Changes”**.

# CounselorMax User Guide

## 13.1.3 Case Management

The **Case Management** link allows an administrator to **edit, update or delete** any information on active and resolved cases. If the user is seeking an individual client, they can be identified by the first letter of their last name selected along the top. In the case where the administrator needs to locate multiple clients or may not be able to identify them by name, there is a series of selection criteria that can be used to sort and select a client. The **Client Status** field is mandatory for a search and all other fields are optional to select.

After the clients have been narrowed down by the selection criteria, the admin/user will have the option to **edit or delete** the client.

**CounselorMax**

**Case Management**  
Select any combination of the following:

[\(Main Menu\)](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Client Status

And/Or,  
HUD Activity  yes  no

And/Or,  
Date Case Created  To:

And/Or,  
Service Type

And/Or,  
Funding Source

And/Or,  
Education/Outreach Service

And/Or,  
Case ID

Or,  
Suspect Duplicates

Or,  
Missing 'Percent of Area Median Income' (AMI %)

**NOTE:** The case number will be added on this screen. Also, limit your search criteria for best results.

# CounselorMax User Guide

For example, if you select “**Fulfilled**” in the **Client Status** pull-down list above and click “**OK**”, the following screen appears:

  
**CounselorMax**  
[\[Main Menu\]](#)  
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Client #	Case #	Last Name	First Name	Case Created	Resolution Date	Service Type	Resolution	Case Status	HUD #	HUD Activity	Edit	Delete
14088	10355	Monroe	Kevin	7/1/2010	7/1/2010	Home Purchase	Fulfilled	Fulfilled		1	<input type="checkbox"/>	<input type="checkbox"/>

Once a client has been selected, click on “**Edit**” and the client’s record appears and the admin can edit any of the information that needs to be updated or corrected.

  
**CounselorMax**  
[\[Main Menu\]](#)  
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Required Fields Must Be Filled-in

### Kevin Monroe

[Update Closing Information](#)  
[Update Closing Loan Programs](#)  
[Update Subject Property](#)  
[Guidance & Planning System \(GPS\)](#)

<b>Date Case Created *</b>	7/1/2010	<b>Resolution Date</b>	7/1/2010
<b>Service Type *</b>	Home Purchase	<b>Resolution</b>	Fulfilled
	Custom Service Types in red will NOT be included in the 9902 report		
<b>Race *</b>	White Non hispanic	<b>Ethnicity</b>	NonHispanic
<b>Age</b>	32	<b>SSN</b>	
<b>Number in Household *</b>	2	<b>Household* Annual Income</b>	80000
<b>Borrower Income</b>	(Monthly)	<b>Female Head of Household?</b>	<input checked="" type="checkbox"/>
<b>Education</b>	High School GED	<b>Disabled?</b>	<input type="checkbox"/>
<b>Marital status</b>	Married	<b>Current Residence *</b>	None
<b>Gender *</b>	<input checked="" type="radio"/> Male <input type="radio"/> Female	<b>1st Generation Home Buyer?</b>	<input type="checkbox"/>
<b>1st Time Home Buyer?</b>	<input type="checkbox"/>	<b>Referral Source *</b>	<small>Press the 'Ctrl' button to select more than one source</small> --Select One or More-- Ad 5/14/10 (NWA) Church City
<b>Total Co-Apps * (Include spouse)</b>	1		
<b>County *</b>	Urn County/Urn County, OH		
<b>Funding Sources</b>	<small>Press the 'Ctrl' button to select more than one source</small> --Select One or More-- Associated Bank		

All of the information that had been previously entered into CounselorMax by users is accessible to the admin for modification. By clicking the **Save Changes** button on the bottom of the above screen (you need to scroll down to see the button), the admin can make changes to any information and overwrite the information that existed previously.

# CounselorMax User Guide

The admin can further edit the case information by clicking on the above four links on the top of the screen: **Update Closing Information, Update Closing Loan Programs, Update Subject Property and Guidance & Planning System (GPS).**

## 13.1.4 Counselors

The Counselors link gives the admin access to add, edit or delete any user under the CounselorMax license. The functions of adding, editing or deleting users is the responsibility of the agency's administrator(s).

When you click on the **Counselors** link, the following screen appears:

  
**CounselorMax**  
Counselors and Other Users  
[\[Main Menu\]](#)

Next page > [1](#) [2](#) [3](#)

First Name	Last Name	Middle Name	Initials	Title	EMail	User Type	Edit	Delete
Student	S26	T	T26	Trainer	Email26@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S27	T	T27	Trainer	Email27@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S28	T	T28	Trainer	Email28@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S29	T	T29	Trainer	Email29@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S30	T	T30	Trainer	Email30@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S31	T	T31	Trainer	Email31@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S32	T	T32	Trainer	Email32@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S33	T	T33	Trainer	Email33@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S34	T	T34	Trainer	Email34@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S35	T	T35	Trainer	Email35@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S36	T	T36	Trainer	Email36@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S37	T	T37	Trainer	Email37@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S38	T	T38	Trainer	Email38@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S39	T	T39	Trainer	Email39@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S40	T	T40	Trainer	Email40@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S41	T	T41	Trainer	Email41@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S42	T	T42	Trainer	Email42@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S43	T	T43	Trainer	Email43@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S44	T	T44	Trainer	Email44@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S45	T	T45	Trainer	Email45@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>
Student	S46	T	T46	Trainer	Email46@CMax.com	CMax Admin	<input type="checkbox"/>	<input type="checkbox"/>

Next page > [1](#) [2](#) [3](#)

# CounselorMax User Guide

## Add Counselors

Click on **Add New** button to add new counselors/users. When adding new users:

1. Use correct organizational e-mail
2. Fill out all fields
3. Double Check all entries (*spelling, periods, letter case*)
4. User Type: Select appropriate security level
  - a. Administrator = Access to all functions
  - b. Assistant = Access limited to 'Calendar', 'Intake', 'Outreach', and 'Education' functions
  - c. Counselor = Access to all functions except 'Admin.' functions
5. Number of individuals with Admin right
  - a. Should be a minimum of two,
  - b. Limit the overall number to three (3) for data integrity

The new users should promptly receive two emails with:

1. Their login and
2. Their password
  - a. The Admin should remind the new users to change their passwords after logging in the first time

The number of users and Admin:

1. To check for the number of users allotted to your organization:
  - a. Click on Admin Menu> Renew/Add Seats to view the number of “seats”
  - b. For additional seats, click on the Admin Menu> Renew/Add Seats
2. The number of individuals with CounselorMax Admin rights
  - a. Minimum of Two
  - b. Overall limit of three (3) for data integrity

# CounselorMax User Guide

## Edit Counselors

Click the checkbox under **Edit** on the right side of the user you want to select. After a user is selected to edit, the admin can edit or correct a user's profile.

  
**CounselorMax**  
Counselors and Other Users  
[\[Main Menu\]](#)

**Required Fields Must Be Filled-in**

**WARNING:** This form is intended to allow you to correct this Counselor's Profile. Do not change the Counselor's name to a different person.

To add a new Counselor go back and click the 'Add New' button.

First Name *	<input type="text" value="Student"/>	Middle Name *	<input type="text" value="T"/>
Last Name *	<input type="text" value="S26"/>	Initials *	<input type="text" value="T26"/>
Title *	<input type="text" value="Trainer"/>	EMail *	<input type="text" value="Email26@CMax.com"/>
User Type *	<input type="text" value="CMax Admin"/>	HECM Certified	<input type="checkbox"/>

- Administrator = Access to all functions
- Assistant = Access limited to 'Calendar', 'Intake', 'Outreach', and 'Education' functions
- Counselor = Access to all functions except 'Admin.' functions

[Back to List of Users](#)

**NOTE:** It is important to note that user names should NOT be changed in editing a user profile because it may affect data integrity. In addition, the admin can assign different levels of access - **Administrator, Assistant or Counselor** - to each individual user.

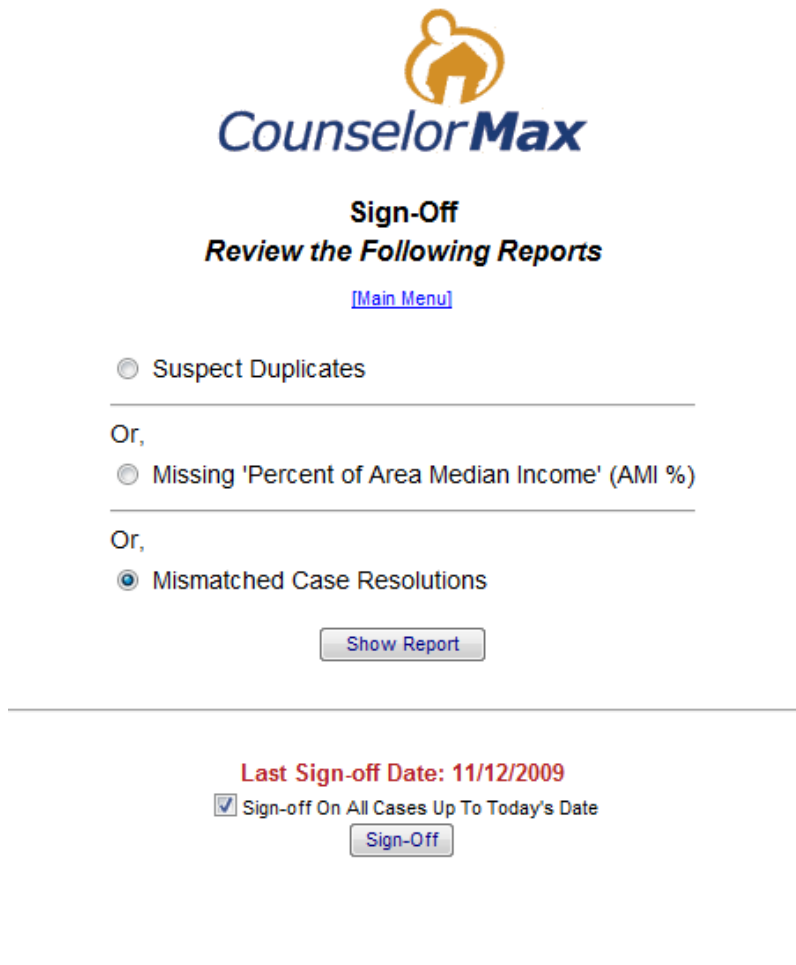
## Removing Counselors

Removing a counselor will delete the counselor name and inactivate login but all case information remains in the system.

# CounselorMax User Guide

## 13.1.5 Review & Sign-Off on Records To-Date

Admin can use the **Review & Sign-Off on Records** link to select reports based on certain criteria, review them for accuracy and sign-off on their accuracy once they have been reviewed.



The screenshot shows the CounselorMax web application interface for signing off on reports. At the top is the CounselorMax logo, which consists of an orange icon of a person and a house above the text "CounselorMax". Below the logo, the heading "Sign-Off" is displayed in bold, followed by the sub-heading "Review the Following Reports". A blue link labeled "[Main Menu]" is positioned below the sub-heading. There are three radio button options for selecting report criteria: "Suspect Duplicates", "Missing 'Percent of Area Median Income' (AMI %)", and "Mismatched Case Resolutions". The "Mismatched Case Resolutions" option is selected. A "Show Report" button is located below the radio buttons. A horizontal line separates this section from the bottom section, which displays the "Last Sign-off Date: 11/12/2009" in red text. Below this date is a checked checkbox labeled "Sign-off On All Cases Up To Today's Date" and a "Sign-Off" button.

# CounselorMax User Guide

## 13.1.6 Sign-up to Pull Credit Reports

As discussed in Chapter 8, if you have a relationship with Credco, you are eligible to sign up to pull credit reports through CounselorMax. Credco is the only credit reporting company that such a relationship exists with for CounselorMax. Click on the **Sign-up to Pull Credit Reports** link and you will see the following screen:

CoreLogic  
Credco

Company Products & Services Become A Customer Partners FAQ's Training

Thank you for choosing CoreLogic Credco as your credit information provider through our strategic partnership with EMT Applications, Inc.

We offer you fast, easy access to current and complete merged credit information products:

- Instant Merge® Report** - access to credit information from all three national bureaus. Easy-to-read, merged reports eliminate duplicate tradelines.
- Merge Plus Report** - clarification of up to 3 items on Instant Merge Report.
- Residential Mortgage Credit Report (RMCR)** - the mortgage industry standard.
- Rapid ReCheck** - ability to potentially affect credit scores by expediting credit file updates directly at the repository level in 48-72 hours.
- Anthem Report** - Our non-traditional credit report exceeds secondary market requirements while delivering the most cost-effective credit reporting solution for clients with little or no credit history.
- ProScan ID** - simple and reliable way to verify

**CounselorMax**

Required fields \*

Company Information

- \* **Company Name:**
- \* **Address:**
- \* **City:**
- \* **State:**
- \* **Zip:**
- \* **Number of Users:**
- \* **Estimated Volume:**

Primary Contact Information

- \* **First Name:**
- \* **Last Name:**
- \* **Job Title:**

Enter the required data on the above screen to set up a Credco account.

If you pulled a credit report from CounselorMax automatically, all of the client's credit data and liabilities will be auto-populated for you. You can still access them to edit and fine tune the data. If you did not pull the credit report automatically, you can still enter liabilities manually. Refer to Chapter 8 (Section 8.2.1.4) for additional information on credit report and liabilities manual entry process.




# CounselorMax User Guide

## 13.1.7 NFMC Grantors

If the agency receives funding from the NFMC through a direct NFMC grantee, there may be specific reports that are required.

From this section you can add or delete NFMC grantees that are granting funds for the agency.

[\[Main Menu\]](#)

  
**CounselorMax**  
**NFMC - Grants**

NFMC Grantor	Edit	Delete
Arizona Department of Housing/Arizona Housing Finance Authority	<input checked="" type="checkbox"/>	<input type="checkbox"/>
California Housing Finance Agency	<input type="checkbox"/>	<input type="checkbox"/>
CATHOLIC CHARITIES USA	<input type="checkbox"/>	<input type="checkbox"/>
Centro Campesino Farmworker Center, Inc.	<input type="checkbox"/>	<input type="checkbox"/>
Community HousingWorks	<input type="checkbox"/>	<input type="checkbox"/>
Community Ventures Corporation	<input type="checkbox"/>	<input type="checkbox"/>
Community Ventures Corporation	<input type="checkbox"/>	<input type="checkbox"/>
Corporation to Develop Communities of Tampa	<input type="checkbox"/>	<input type="checkbox"/>
Delaware State Housing Authority	<input type="checkbox"/>	<input type="checkbox"/>
Family Services, Inc.	<input type="checkbox"/>	<input type="checkbox"/>
Illinois Housing Development Authority	<input type="checkbox"/>	<input type="checkbox"/>
Michigan State Housing Development Authority	<input type="checkbox"/>	<input type="checkbox"/>
Montana Board of Housing/Housing Division	<input type="checkbox"/>	<input type="checkbox"/>
Montana Board of Housing/Housing Division	<input type="checkbox"/>	<input type="checkbox"/>
NATIONAL COUNCIL OF LA RAZA	<input type="checkbox"/>	<input type="checkbox"/>
NATIONAL FOUNDATION FOR CREDIT COUNSELING, INC.	<input type="checkbox"/>	<input type="checkbox"/>
Neighborhood Housing Services of New York City, Inc.	<input type="checkbox"/>	<input type="checkbox"/>
Neighborhood Housing Services of Orange County, Inc.	<input type="checkbox"/>	<input type="checkbox"/>
NeighborWorks HomeOwnership Center Sacramento Region	<input type="checkbox"/>	<input type="checkbox"/>
NeighborWorks Waco	<input type="checkbox"/>	<input type="checkbox"/>
New Jersey Housing and Mortgage Finance Agency	<input type="checkbox"/>	<input type="checkbox"/>
Oak Hill Community Development Corp.	<input type="checkbox"/>	<input type="checkbox"/>
Pennsylvania Housing Finance Agency	<input type="checkbox"/>	<input type="checkbox"/>
Richmond (CA) Neighborhood Housing Services, Inc.	<input type="checkbox"/>	<input type="checkbox"/>
Salt Lake Neighborhood Housing Services, Inc.	<input type="checkbox"/>	<input type="checkbox"/>
San Juan Neighborhood Housing Services, Inc.	<input type="checkbox"/>	<input type="checkbox"/>
Springfield Neighborhood Housing Services, Inc.	<input type="checkbox"/>	<input type="checkbox"/>
The Unity Council	<input type="checkbox"/>	<input type="checkbox"/>
Washington State Housing Finance Commission	<input type="checkbox"/>	<input type="checkbox"/>

# CounselorMax User Guide

## 13.1.8 Legacy Clients

When CounselorMax is activated at an agency, the agency has 90 days to enter any active client files and cases from a legacy system to CounselorMax. See below the screen that appears when you click on **Legacy Client**. You can use the **Legacy Clients** link first to set up your client information and then click on the **Legacy Cases** link to enter that client case information to CounselorMax.



### Legacy Clients and Cases

NOTE: This is intended for legacy data - it will only be available for the next 193 Days.

[Legacy Clients](#)

[Legacy Cases](#)

**NOTE:** The screenshot of the **Admin Menu** was taken from a version of CounselorMax that is a training site and reflects a term of longer than 90 days. However, your version of CounselorMax will have a maximum of 90 days for Legacy Clients.

See below the screen that appears when you click on the **Legacy Client** link:



Legacy Clients  
[\[Main Menu\]](#)

Required Fields Must Be Filled-in

<b>First Name</b>	<input type="text"/>	<b>Last Name</b>	<input type="text"/>
<b>Middle Name</b>	<input type="text"/>	<b>Name Suffix</b>	<input type="text"/>
<b>Street Address</b>	<input type="text"/>		
<b>City</b>	<input type="text"/>	<b>State</b>	<input type="text" value="-- Choose One --"/>
<b>Zip Code</b>	<input type="text"/>	<b>Home Phone</b>	<input type="text"/> <input type="text"/>
<b>Work Phone</b>	<input type="text"/> <input type="text"/>	<b>Other Phone</b>	<input type="text"/> <input type="text"/>
<b>Preferred Language</b>	<input type="text" value="Chinese"/>	<b>Sponsor</b>	<input type="text" value="None"/>
<b>E-Mail</b>	<input type="text"/>	<b>Create Date</b>	<input type="text" value="Jan"/> <input type="text" value="1"/> <input type="text" value="2009"/>
<input type="button" value="Save"/>			

# CounselorMax User Guide

In addition to the **Legacy Clients** link in the main **Admin Menu**, you can go directly to **Legacy Clients** from the main CounselorMax page as seen below on the lower left corner:

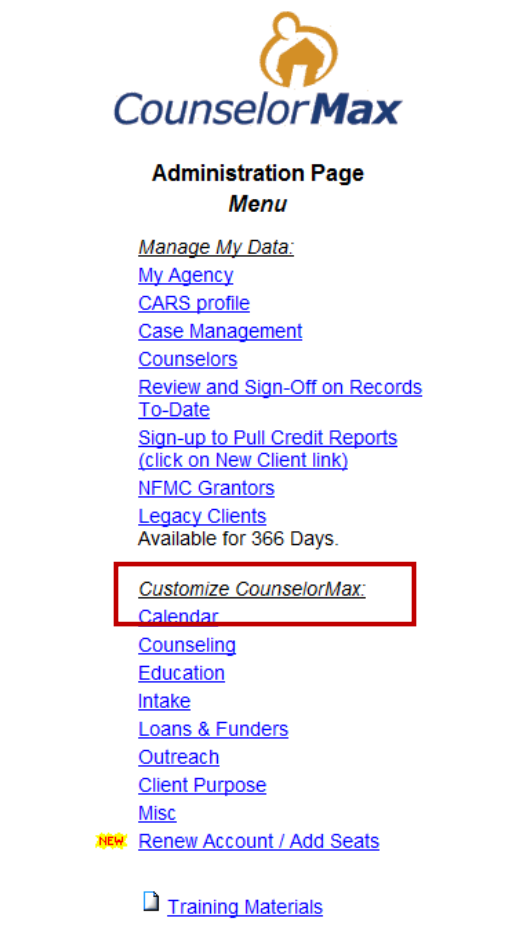
The screenshot displays the CounselorMax interface for a specific student, S50. The top navigation bar includes links for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header shows the student's name, S50, and a globe icon. Below this, there is a 'Reminders' table with columns for Subject, Action, Details, Days, Edit, Delete, and Done. The table lists several reminders, including 'Intake - collect subject property info (Francis Foreclosure50)', 'Budget Creation - monthly worksheet (Francis Foreclosure50)', and 'Budget Validation - review financial information (Francis Foreclosure50)'. To the left of the main content, there is a 'Quick Client Search' section with a list of client names: Foreclosure, Frank; Goldwyn-Meyer, Metro; Homebuyer, Jane; Homebuyer, Joe; and Music, Debbie. Below this is a 'Co-Applicant Search' section and an 'Identify Clients' section with radio buttons for All, In-Process, Closed, Prospect, and Suspended. There is also a 'New Client' checkbox and a 'Global Mode' button. At the bottom left, there is a 'Logout' link and a 'Legacy Clients' link, which is highlighted with a red box. Below the 'Legacy Clients' link, it says 'Available for 193 Days.' To the right of the search and identify sections, there is a 'Select Another Calendar' dropdown menu set to 'S50, Student' and a calendar view for June 2010. The calendar shows a grid of days with various icons representing different types of events: Appt (blue square), Call (grey circle), Class (yellow triangle), Mtg (red circle), Training (purple circle), and Workshop (green circle).

# CounselorMax User Guide

## 13.2 Customize CounselorMax

One of the unique features of CounselorMax is the ability for users with Admin privileges to **customize data fields** from the Admin Menu which will correlate to the appropriate data entry points in Classic CounselorMax or the Guidance & Planning System (GPS).

By customizing CounselorMax, each agency can create custom reports that can provide a true reflection of the specific circumstances of their clients and/or to reflect the requests or stipulations of various funding sources.



Each of the hyperlinks under the **Customize CounselorMax** section have embedded links with functions that correlate to data fields in the operational side of CounselorMax.

**NOTE:** Administrators are cautioned not to over-customize CounselorMax and to limit the number of users in the agency with Admin level access. This will allow a better control over who can customize data fields.

# CounselorMax User Guide

## 13.2.1 Calendar

The calendar functions in CounselorMax are used by the counselor to track their appointments, calls, meetings, trainings and educational components of their work flow and their clients. CounselorMax comes with some options that are pre-loaded and cannot be edited or removed. Those items are **Appointment, Class, Training, Meeting and Call**.

Click on the **Calendar** link under the **Customize CounselorMax** menu to see the following links, each representing customizable fields:



### Calendar *Administration Page*

- [Event Types](#)
- [Client Log Subjects](#)
- [Client Log Actions](#)
- [Reminder Actions](#)
- [Custom Reminder Letters](#)
- [Reminder Letters](#)
- [Reminder Types](#)

[\[Main Menu\]](#)

### Event Types

When you click on the **Event Types** link, you will see the following:



### Administration *Calendar: Event Types*

[\[Main Menu\]](#)

# CounselorMax User Guide

You can **Edit Record**, **Create New** or **Delete** Event Types on the screen above.

For example, click on **Create New** and enter a new customized Event Type on the screen below:

**CounselorMax**

**Calendar: Event Types**

\* = Required

Event Type \* Workshop

Target Type Client

Save Changes

Items That Are Already Available:

- Appt
- Call
- Mtg
- Class
- Training
- Workshop

[Listing]

**NOTE:** Target Type is geared toward 1) Staff or 2) Client type.

## Client Log Subjects

The **Client Log** is the function in CounselorMax that counselors can use to track activities and time spent with clients throughout the counseling process.

**CounselorMax**

**Administration**

**Calendar: Subjects**

Seminar

Edit Record Create New Delete

[Main Menu]

# CounselorMax User Guide

CounselorMax comes with Client Log Subjects pull-down list. This is typically used when using the Client Log on the Counseling tab and if there is other activities the Agency typically participates in that are date specific or recurring.

## Client Log Actions

Administrators can also customize Client Log Actions for users to select while in the Client Log on the Counseling tab.



CounselorMax is pre-loaded with the actions of **Phone**, **Walk-in Consultation**, **Case Mgt**, **Email** and **Voice mail**. These actions are available in a drop-down list in the client log.

## Reminder Actions

The **Reminder Action** (discussion below) directs the counselor on what action they need to do that corresponds to specific Client Log Subjects in a calendar reminder.



# CounselorMax User Guide

CounselorMax comes with **Phone, Meeting, Appt Letter, Class, Close Letter and Survey** under the **Reminder Action** set up. Additional reminder actions that are pertinent to the work flow of each agency can be added.

## Custom Reminder Letters

A **Custom Reminder Letter** can be set up from the Admin Menu in CounselorMax so the agency's counselors can send specific and relevant letters to the client.



The letters can be further customized with the logo of the agency which can be uploaded into the system as well as with agency specific information which will appear at the bottom of the letter when it is printed. Letters are saved and can be re-used or modified by the Letter Title and by Letter Type.

You can create a Custom Reminder Letter similar to the letter shown below by clicking on **Create New** on the screen shown above. See below for an example of a letter creation in progress:



# CounselorMax User Guide

**CounselorMax**

Misc: Letters  
\* = Required

Letter Title \*  
Missing documents

Letter Type \*  
Misc Events

Include Logo?  
 yes, include logo  
**WARNING: If you check this, please remember to upload your logo**

Include Footer Images?  
 yes, include footer

Body \*  
Dear [Client autopopulated by system - do not erase]  
Please provide the missing information in order to complete the processing for your home improvement loan. They are the following:  
-ID  
-bank statements  
-2008 federal tax returns  
-2008 W-2s  
<<  Insert Event Details

English

[Preview Letter](#)

[Save Changes](#)

[\[Listing\]](#)

Letters can be written in multiple languages but will not automatically translate into any other language from English.


**NOTE:** CounselorMax currently does not have email capabilities. If you want to send a letter via e-mail, you need to save the letter on your local drive and use your email application to attach the file before sending your e-mail.

## Reminder Letter

A more general use Reminder Letter can also be created and customized from the Admin Menu. These can be used as standard reminder letters for clients who have an appointment about a home purchase, for example, listing the items that will be needed for completion of the file.

Below is an example of the letter template:

# CounselorMax User Guide

  
**Calendar: Appointment Reminder Letters**  
\* = Required

Intro \*

Appointment details will automatically be inserted here...

Body \*

Signature Block \*

Language  
English

Save

## Reminder Types

Adding **Reminder Types** supplement the existing options in the calendar reminder section.

  
**Administration**  
*Reminder Types*

Follow up

Edit Record Create New Delete

[\[Main Menu\]](#)

# CounselorMax User Guide

The options that come with CounselorMax are **Follow up, Appt, Class, Closing, Work Plan, and Meeting**. Adding options gives the counselor some additional tasks they can perform with the client or on the client's behalf.

## 13.2.2 Counseling

Click on the **Counseling** link under the **Customize CounselorMax** main link:



### Administration Page Menu

#### Manage My Data:

[My Agency](#)  
[CARS profile](#)  
[Case Management](#)  
[Counselors](#)  
[Review and Sign-Off on Records To-Date](#)  
[Sign-up to Pull Credit Reports \(click on New Client link\)](#)  
[NFMC Grantors](#)  
[Legacy Clients](#)  
Available for 178 Days.

#### Customize CounselorMax:

[Calendar](#)  
[Counseling](#)  
[Education](#)  
[Intake](#)  
[Loans & Funders](#)  
[Outreach](#)  
[Client Purpose](#)  
[Misc](#)  
[Renew Account / Add Seats](#)

 [Training Materials](#)

You should see the following links:

# CounselorMax User Guide



## **Counseling Administration Page**

### **Payments & Closing Cost**

[Closing Costs](#)

[Hazard Insurance](#)

[Property Tax](#)

[PreQual Signature Instructions](#)

### **Budgets**

[Budget Selection](#)

[Customize Budget](#)

### **Work Plan**

[Workplan Rationales](#)

[Workplan Actions](#)

[Workplan Outcomes](#)

[Work Plan Signature Instructions](#)

### **Profile Items**

[Asset Types](#)

[Income Types](#)

[Liabilities](#)

# CounselorMax User Guide

## 13.2.2.1 Payments & Closing Cost

The first section of links under the **Counseling** link is related to creating a customized template for closing on a residential real estate mortgage under the **Payments & Closing Cost** section. This is useful for agencies that have clients that they assist throughout the mortgage process.

- **Closing Costs** – This link allows the administrator to input static data for some general loan fees such as title insurance, appraisal, wire transfer fees and some office fees. For example, when you click on **Closing Costs** link, you should see the following screen:



From this screen, you can click on “Edit record” to edit any of the fees associated with closing costs:

The screenshot shows the CounselorMax logo and the text "Counseling: Closing Costs". Below this, a red asterisk indicates that fields marked with an asterisk are required. The form contains the following fields:

Credit Report Fee *	<input type="text" value="25"/>	Title Ins Base Premium *	<input type="text" value="100"/>
Title Ins Amt Per K *	<input type="text" value="200"/>	Agent Attorney Base Premium *	<input type="text" value="0"/>
Agent Attorney Amt Per K *	<input type="text" value="0"/>	Wire Transfer 1st TD *	<input type="text" value="20"/>
Wire Transfer 2nd TD *	<input type="text" value="20"/>	Office Fee *	<input type="text" value="175"/>
Appraisal Fee *	<input type="text" value="400"/>		

At the bottom of the form, there is a "Save Changes" button and a blue link labeled "[Listing]".

- **Hazard insurance**– this link allows the administrator to input a percentage of the loan amount that is reflective of local averages for hazard insurance coverage.
- **Property Tax** - this link allows the administrator to input a percentage of the loan amount that is reflective of local averages for property taxes.

# CounselorMax User Guide

- **PreQual Signature Instructions** – This link gives the agency the opportunity to write additional text to the disclosure that comes with CounselorMax for the client to read and agree with before signing a document verifying their information. This practice is optional for agencies.

## 13.2.2.2 Budgets

Agency Admins, with “Administrator” rights in CounselorMax have the following new functionality:

1. Select which budget templates are available to counselors and clients.
2. Create and customize an agency custom budget.

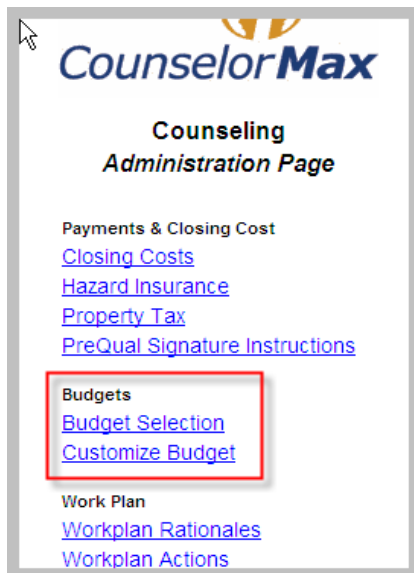
To create a custom agency budget you must have “Admin” privileges in CounselorMax.

From any page in the CounselorMax Classic, click on the **Admin Menu** link. From the main Admin Menu screen, click on the **Counseling** link and you should see two new links in the “Counseling” admin form:

1. **Budget selection:** used by agency Admin to designate which budget templates are available to the agency counselors.
2. **Customize budget:** used by agency Admin to create a custom budget template.

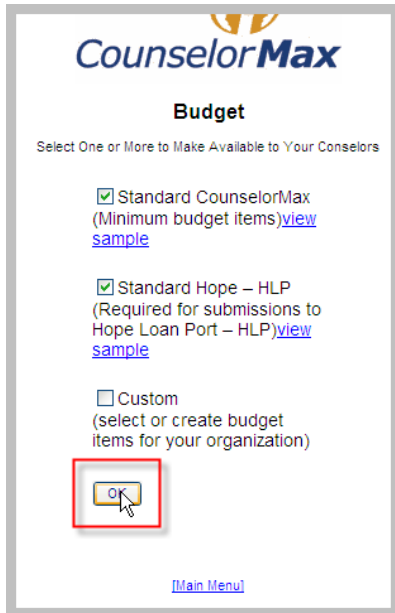
### Budget Selection

To select which budget templates are available to counselors, click on the **Admin Menu** link followed by the **Counseling** link. You should see the following new options:



# CounselorMax User Guide

Next, click on the **Budget Selection** link. This displays the following form:



The screenshot shows the CounselorMax interface for budget selection. At the top is the CounselorMax logo. Below it is the heading "Budget" and the instruction "Select One or More to Make Available to Your Counselors". There are three radio button options: "Standard CounselorMax (Minimum budget items)" with a checked box and a "view sample" link; "Standard Hope – HLP (Required for submissions to Hope Loan Port – HLP)" with a checked box and a "view sample" link; and "Custom (select or create budget items for your organization)" with an unchecked box. A red box highlights the "OK" button at the bottom left. A "[Main Menu]" link is at the bottom right.

You should see up to three of the following options:

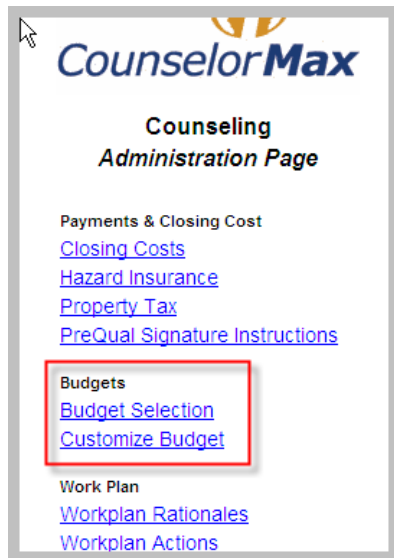
1. **Standard CounselorMax:** a basic but effective budget with a simple set of income and expense categories.
2. **Standard Hope – HLP (Hope LoanPort) budget:** this is a budget developed to collect all budget data required for loan modification package submitted to the HOPE LoanPort. Because the HOPE LoanPort has a precise and fixed set of budget items, this budget is not customizable. If your agency Admin has not enabled the HOPE LoanPort budget, you will not see this option.
3. **Custom (for your agency):** this is a custom budget configured by your agency Admin. It contains those items your agency admin considers important to collect for your case load. If the Admin has not created and enabled a custom budget, you will not see this option.

Check off the budget(s) you wish to make available to your counselors. You can change the available options at any time but counselors will only be able to use the templates you have checked and saved on this form.

# CounselorMax User Guide

## Customize Budget

Admin can create a custom agency budget template that counselors can use for their clients. This provides agencies with the ability to standardize an agency budget. While the **Standard CounselorMax** and **Standard HOPE – HLP** budgets have pre-set budget items that Admin cannot customize but can make available to counselors, the Admin can create and save a custom agency budget template and make it available for counselors.



Click on the **Customize Budget** link to reveal the following budget customization form (the view below is a partial view):

The screenshot shows the CounselorMax Budget customization form. The title is "Budget" and the instruction is "Select the budget items or categories and decide if you want to add more." The form is a table with two columns: "Budget Category/Item" and "Include Check Box if Discretionary". The "Auto" category is highlighted with a red box. The "Include" column has checkboxes, and the "Check Box if Discretionary" column has checkboxes, some of which are checked.

Budget Category/Item	Include	Check Box if Discretionary
Auto: <a href="#">(add new item)</a>	<input checked="" type="checkbox"/>	
Auto Loan	<input type="checkbox"/>	<input type="checkbox"/>
Auto Tags/Inspection	<input type="checkbox"/>	<input type="checkbox"/>
Auto Repairs / Maint	<input type="checkbox"/>	<input type="checkbox"/>
Gasoline	<input type="checkbox"/>	<input type="checkbox"/>
Parking / Tolls	<input type="checkbox"/>	<input type="checkbox"/>
Auto	<input type="checkbox"/>	<input type="checkbox"/>
Car Wash	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Charity: <a href="#">(add new item)</a>	<input checked="" type="checkbox"/>	
Church Donations	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other Gift/Donation	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Child Support/Alimony: <a href="#">(add new item)</a>	<input checked="" type="checkbox"/>	
Credit Card Min Payments: <a href="#">(add new item)</a>	<input checked="" type="checkbox"/>	
Credit Card	<input type="checkbox"/>	<input type="checkbox"/>
Credit Collections: <a href="#">(add new item)</a>	<input checked="" type="checkbox"/>	
Debt Management Plan	<input type="checkbox"/>	<input type="checkbox"/>
IRS or other Taxes	<input type="checkbox"/>	<input type="checkbox"/>
Judgement	<input type="checkbox"/>	<input type="checkbox"/>
Credit Collections	<input type="checkbox"/>	<input type="checkbox"/>
Dining: <a href="#">(add new item)</a>	<input checked="" type="checkbox"/>	
Starbucks	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Education: <a href="#">(add new item)</a>	<input checked="" type="checkbox"/>	
School Fees/Books/Supplies	<input type="checkbox"/>	<input checked="" type="checkbox"/>
School Lunches	<input type="checkbox"/>	<input type="checkbox"/>
Tuition	<input type="checkbox"/>	<input type="checkbox"/>



# CounselorMax User Guide

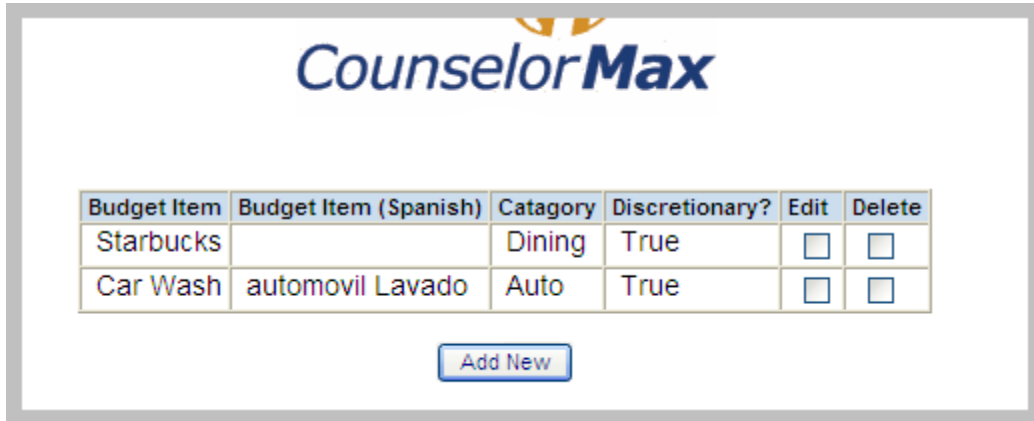
- **Adding Line Items to your Custom Agency Budget** - To include a budget line item in your agency custom budget, simply check the item you wish to include. This adds the item to the template. Check as many items as you wish to include. Each time you check an item you also have the option to designate it as a “fixed” expense (default) or as a discretionary expense.
- **Designating Line Items as Fixed or Discretionary** - To designate an item as discretionary, meaning the client has some control over the amount they spend on this item (e.g., entertainment), check the “Check box if discretionary” checkbox to the right of each item. This will lump the item in the “discretionary” section of the final budget.
- **Adding Custom Line Items to the Agency Custom Budget** - You can add custom line items to your agency custom template. To do so, identify which category of expense the item should fall under (e.g., education). Click on the **add new item** link to the right of the expense category to add a new custom line item as shown below:

Credit Card Min Payments:	<a href="#">(add new item)</a>	✓	
Credit Card		<input type="checkbox"/>	<input type="checkbox"/>
Credit Collections:	<a href="#">(add new item)</a>	✓	
Debt Management Plan		<input type="checkbox"/>	<input type="checkbox"/>
IRS or other Taxes		<input type="checkbox"/>	<input type="checkbox"/>
Judgement		<input type="checkbox"/>	<input type="checkbox"/>
Credit Collections		<input type="checkbox"/>	<input type="checkbox"/>
Dining:	<a href="#">(add new item)</a>	✓	
Starbucks		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Education:	<a href="#">(add new item)</a>	✓	
School Fees/Books/Supplies		<input type="checkbox"/>	<input checked="" type="checkbox"/>
School Lunches		<input type="checkbox"/>	<input type="checkbox"/>
Tuition		<input type="checkbox"/>	<input type="checkbox"/>
Books / school supplies		<input type="checkbox"/>	<input type="checkbox"/>

**NOTE:** If you revise the Custom budget subsequent to the initial customization, the existing Custom budget will not reflect the subsequent revision. You will need to print the existing Custom budget and use it to create a new budget to conform to the new Custom budget. Thus, before making any changes to the Custom budget, the Admin has to make careful consideration as retrofitting the new Custom budget to existing Custom budget is not possible.

# CounselorMax User Guide

This takes you to the **Add new Budget Line Item** form. Click on the **Add New** button to create a new item. If you have any pre-existing budget items, you should see them listed here as well.

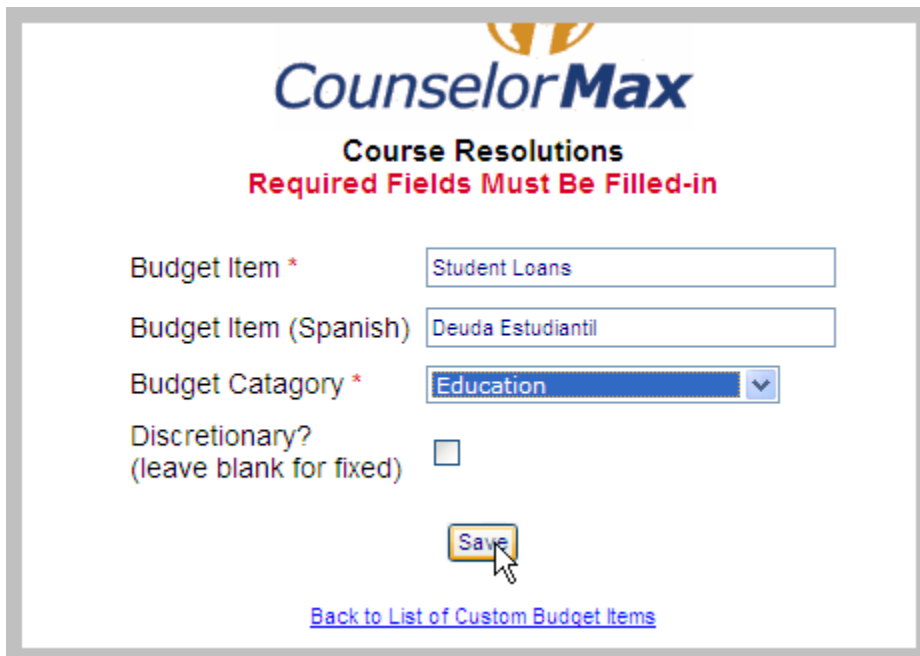


The screenshot shows the CounselorMax logo at the top. Below it is a table with the following data:

Budget Item	Budget Item (Spanish)	Category	Discretionary?	Edit	Delete
Starbucks		Dining	True	<input type="checkbox"/>	<input type="checkbox"/>
Car Wash	automovil Lavado	Auto	True	<input type="checkbox"/>	<input type="checkbox"/>

Below the table is a blue button labeled "Add New".

Enter the label for the custom budget item in the **Budget Item** text box. Optionally, you can enter the label in Spanish and the Budget Item label will be available in Spanish. Select the budget category from the **Budget Category** pull-down list based on where you want to view the custom item. In this example, **Education** is selected. Click on the **Discretionary** checkbox if you want to designate this item as discretionary. Finally, click on the save button to save the new item.



The screenshot shows the CounselorMax logo and the text "Course Resolutions" and "Required Fields Must Be Filled-in". The form contains the following fields:

- Budget Item \*: Student Loans
- Budget Item (Spanish): Deuda Estudiantil
- Budget Category \*: Education (selected from a dropdown menu)
- Discretionary? (leave blank for fixed):

Below the fields is a yellow "Save" button with a mouse cursor pointing to it. At the bottom of the form is a blue link: [Back to List of Custom Budget Items](#)

## CounselorMax User Guide

When counselors select the **Custom (for your Agency)** budget option for a client, the counselor has access to the new custom budget item:

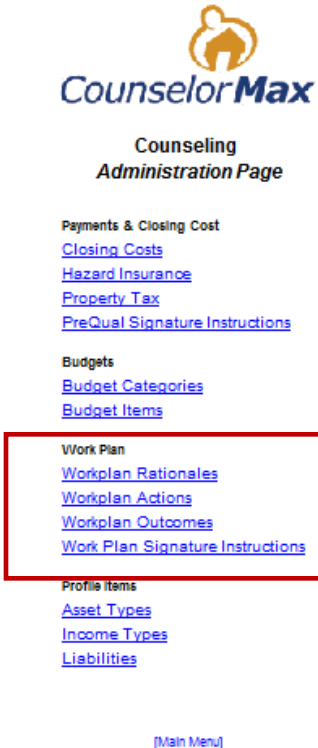
Utilities	<input type="text" value="0"/>
<b>Discretionary Expenses</b>	
Charity	<input type="text" value="0"/>
Dining	<input type="text" value="0"/>
Education	
Student Loans	<input type="text" value="0"/>
Food and Groceries	<input type="text" value="0"/>
Gifts	
Birthday Gifts	<input type="text" value="0"/>


**NOTE:** If you revise the Custom budget subsequent to the initial customization, the existing Custom budget will not reflect the subsequent revision. You will need to print the existing Custom budget and use it to create a new budget to conform to the new Custom budget. Thus, before making any changes to the Custom budget, the Admin has to make careful consideration as retrofitting the new Custom budget to existing Custom budget is not possible.

# CounselorMax User Guide

## 13.2.2.3 Work Plan

The next item in the **Counseling** link is the **Work Plan** link which provides you the ability to customize a work plan using the following links: **Workplan Rationales**, **Workplan Actions**, **Workplan Outcomes** and **Workplan Signature Instructions**.



  
**CounselorMax**

Counseling  
Administration Page

Payments & Closing Cost  
[Closing Costs](#)  
[Hazard Insurance](#)  
[Property Tax](#)  
[PreQual Signature Instructions](#)

Budgets  
[Budget Categories](#)  
[Budget Items](#)

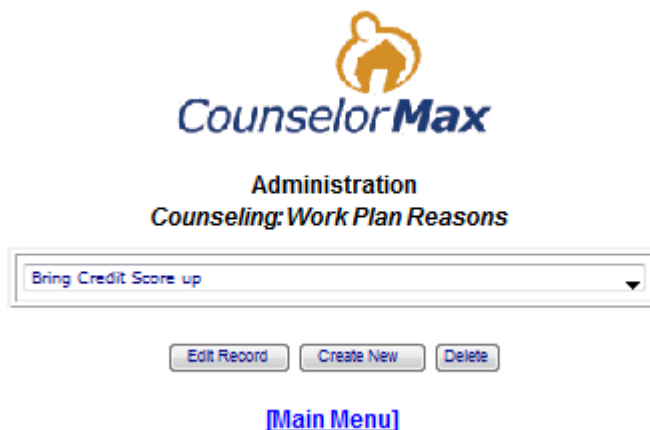
Work Plan  
[Workplan Rationales](#)  
[Workplan Actions](#)  
[Workplan Outcomes](#)  
[Work Plan Signature Instructions](#)


Profile Items  
[Asset Types](#)  
[Income Types](#)  
[Liabilities](#)

[Main Menu](#)

As custom Work Plans are developed, the following corresponding items should be considered.

- **Workplan Rationales (or Work Plan Reasons)** - The underlying reason for a specific work plan being developed. A new rationale can be created or an existing one can be edited or deleted.



  
**CounselorMax**

Administration  
Counseling: Work Plan Reasons


Bring Credit Score up ▼

[Edit Record](#) [Create New](#) [Delete](#)

[Main Menu](#)

# CounselorMax User Guide

See below some existing **Work Plan Reasons**:



**CounselorMax**

**Counseling: Work Plan Reasons**

\* = Required

Workplan Reason (Rationale) \*

Items That Are Already Available:

Front-end ratio exceeds the recommended "target" for this program.
Back-end ratio exceeds the recommended "target" for this program.
Duration of employment is below minimum program requirement
Liquid assets are below reserve requirement
Liquid assets are below minimum contribution of "Borrowers own funds"
Credit score is below the minimum for this program
Foreclosure too recent
Tax lien must be paid
Bankruptcy too recent
Too many "30 day lates" on the credit report
Too many "60 day lates" on the credit report
Too many "90 day lates" on the credit report
Open judgments exceed the cumulative max for this program
Number of commercial credit items below min
Prepare to submit loan docs
Save Home HEMAP Appeals
Home Purchase
Save Home Conventional Loans
Tenant Rights
Rental Delinquent
Tenant Ed
Save Home FHA Insured Loans

- **Workplan Actions** - Activity that will be completed by the client at the direction of the counselor. A new action can be created or an existing one can be edited or deleted.



**CounselorMax**

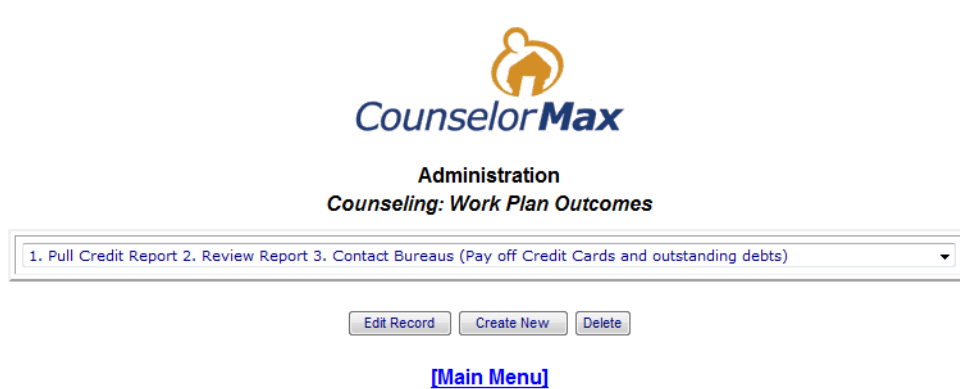
**Administration**  
**Counseling: Work Plan Actions**

[\[Main Menu\]](#)

# CounselorMax User Guide

- **Workplan Outcomes** - Desired end result of the created work plan. A new outcome can be created or an existing one can be edited or deleted.



- **Work Plan Signature Instructions** – Instructions for the client when signing their work plan outlined by the counselor. A new instruction can be created or an existing one can be edited or deleted.



# CounselorMax User Guide

See below a listing of instructions already in existence in CounselorMax:



## Counseling: Workplan Signature Instructions

\* = Required

Workplan Signature Instruction

Language

### Items That Are Already Available :


This plan must be completed to obtain funding
I have read and understand the above statement and
I understand that I am not obligated to use servic
This must be completed before both parties live to
I will complete all task assigned to me.
I have read and understand the above statement
This plan must be completed before moving into th
I have read and understand the above statement and
I understand this plan must be completed in order
I will listen and follow all action plan steps as
I will adhere to this plan to meet the desired out
I have read and understand that the actions must b
I agree with suggested workplan.
I am ready and willing to follow the workplan that
By signing this I agree to complete the tasks ina
I agree to adhere to this plan to the best of my a
I have read agree to terms.

[\[Listing\]](#)

# CounselorMax User Guide

## Profile Items

Finally under the Counseling category, the administrator can customize certain profile items: Asset Types, Income Types and Liabilities.



**Counseling**  
*Administration Page*

Payments & Closing Cost  
[Closing Costs](#)  
[Hazard Insurance](#)  
[Property Tax](#)  
[PreQual Signature Instructions](#)

Budgets  
[Budget Categories](#)  
[Budget Items](#)

Work Plan  
[Workplan Rationales](#)  
[Workplan Actions](#)  
[Workplan Outcomes](#)  
[Work Plan Signature Instructions](#)

**Profile Items**  
[Asset Types](#)  
[Income Types](#)  
[Liabilities](#)

[Main Menu](#)

- **Asset Types** and **Income Types** – These links allow administrators to add, edit or delete asset and income types. For example, when you click on **Asset Types** link, you should see the following screen showing **Liquid Asset Types**:



**Administration**  
*Counseling: Liquid Asset Types*

401k

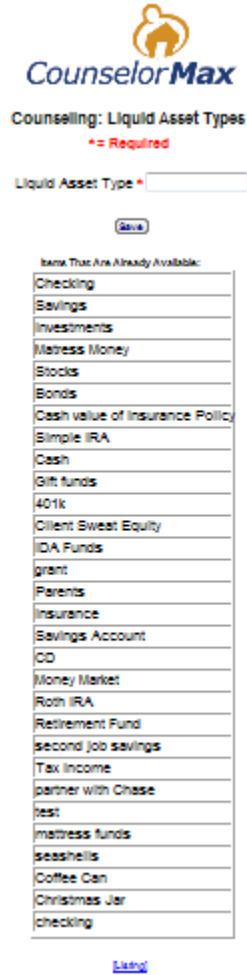
[Edit Record](#) [Create New](#) [Delete](#)

[Main Menu](#)



# CounselorMax User Guide

See below the existing **Liquid Asset Types** in CounselorMax:



The screenshot shows the CounselorMax logo at the top, followed by the text "Counseling: Liquid Asset Types" and a red asterisk indicating a required field. Below this is a dropdown menu for "Liquid Asset Type" with a "Go" button. A list of asset types is displayed, including "Checking", "Savings", "Investments", "Mattress Money", "Stocks", "Bonds", "Cash value of Insurance Policy", "Simple IRA", "Cash", "Gift funds", "401k", "Client Sweat Equity", "IRA Funds", "grant", "Parents", "Insurance", "Savings Account", "CD", "Money Market", "Roth IRA", "Retirement Fund", "second job savings", "Tax Income", "partner with Chase", "test", "mattress funds", "seashells", "Coffee Can", "Christmas Jar", and "checking". A "List" link is located at the bottom of the list.

The **Liabilities** link will typically be items added as expenses the client can incur on a monthly basis that may not be reported on a credit report.



The screenshot shows the CounselorMax logo at the top, followed by the text "Administration" and "Counseling: Liability Types". Below this is a dropdown menu for "Unsecured loan" with a downward arrow. At the bottom are three buttons: "Edit Record", "Create New", and "Delete". A "[Main Menu]" link is located below the buttons.

# CounselorMax User Guide

Items such as alimony, child support, undocumented personal loans, etc. are examples of liabilities that can be customized in this menu.



## Counseling: Liability Types

\* = Required

Liability Type \*

Items That Are Already Available:

Credit Card
Lease
Lien
Judgement
Loan
Student Loan
Mortgage
Unsecured loan
1st Mortgage
2nd Mortgage
Line Of Credit
Property Taxes
Home Owners Insurance
Auto Loan
Land
Student Loan
Child Support
Installment Debt
Auto Loan
Mortgage
Personal Loan
Revolving Accounts
Alimony

# CounselorMax User Guide

## 13.2.3 Education

The **Education** section of the **Admin Menu** is the hub for creating all educational activities such as classes, courses and series.



### Administration Page Menu

#### Manage My Data:

[My Agency](#)

[CARS profile](#)

[Case Management](#)

[Counselors](#)

[Review and Sign-Off on Records](#)

[To-Date](#)

[Sign-up to Pull Credit Reports](#)

[\(click on New Client link\)](#)

[NFMC Grantors](#)

[Legacy Clients](#)

Available for 178 Days.

#### Customize CounselorMax:

[Calendar](#)

[Counseling](#)

[Education](#)

[Intake](#)

[Loans & Funders](#)

[Outreach](#)

[Client Purpose](#)

[Misc](#)

[Renew Account / Add Seats](#)

 [Training Materials](#)

# CounselorMax User Guide

See below the main screen under the **Education** link:

**Initial Education Set Up:**

- [Class Locations](#) - set up new class locations using the wizard
- [Instructors](#) - add instructors names to the system
- [Courses & HUD 9902 resolutions](#) - add a new course "title" & assign a 9902 resolution

**New Class Wizard** single or series classes

- [Single Class Set Up](#) - set up a class the begins and ends the same day
- [Series Class Set Up](#) - (multiple classes that make up one course)

• = required field

**Edit /Delete**

- [Class Locations](#)
- [Class Instructors](#)
- [HUD 9902 Course Resolutions \(req for 9902\)](#)
- [Courses](#)
- [Single Classes](#)
- [Series Course](#)
- [Series Classes](#)
- [Default Notice Letters](#)
- [Default Enrollment Reminder Letters](#)

**Custom Letters and Reminders**

- [Custom Notice & Enrollment Letters](#)

[\[Main Menu\]](#)

## Initial Education Set Up

Upon activation of CounselorMax, users with admin level privileges will be able to set up all educational activities, starting with the **Initial Education Set Up**.

- **Class Location** – this link allows the administrator to establish or create locations where educational activities will take place. These will be frequently used and/or new locations that are added for classes. In addition, directions, landmarks or other specific locators can be added and will be included with any correspondence containing the class address.
- **Instructors** – this link allows the administrator to input the names of staffers or housing partners that will teach or facilitate a class or a series of classes.
- **Courses & HUD 9902 Resolutions** - this link allows the administrator to add courses and assign a HUD 9902 Resolution for each particular class.

**NOTE:** The initial Education setup has to be in the system. Otherwise, you will not be able to put classes, etc. in the system.

# CounselorMax User Guide

## New Class Wizard

**CounselorMax**

**Education Administration Page**

**Initial Education Set Up:**

- [Class Locations](#) - set up new class locations using the wizard
- [Instructors](#) - add instructors names to the system
- [Courses & HUD 9902 resolutions](#) - add a new course "title" & assign a 9902 resolution

**New Class Wizard** single or series classes

- [Single Class Set Up](#) - set up a class the begins and ends the same day
- [Series Class Set Up](#) - (multiple classes that make up one course)

• = required field

**Edit /Delete**

- [Class Locations](#)
- [Class Instructors](#)
- [HUD 9902 Course Resolutions \(req for 9902\)](#)
- [Courses](#)
- [Single Classes](#)
- [Series Course](#)
- [Series Classes](#)
- [Default Notice Letters](#)
- [Default Enrollment Reminder Letters](#)

**Custom Letters and Reminders**

- [Custom Notice & Enrollment Letters](#)

[Main Menu](#)

In the **New Class Wizard** section, users with Admin level privileges can create classes in either an individual single class or as part of a series of classes.

- **Single Class Set Up** - In the Single Class Set Up, users can follow a step by step process of setting up an individual instance of a class.

**CounselorMax**

**Single Class**

Status

► **Step 1** Avoid Duplicates: View current list of single classes to see if the class already exists:

Step 2

- Financial Literacy (Dec 10, 2009 - Spanish)
- Foreclosure (Dec 10, 2009 - English)
- Foreclosure Forensics (Dec 12, 2009 - English)
- Foreclosure Prevention (Jan 5, 2010 - English)
- Foreclosure Prevention Workshops (Dec 25, 2009 - English)

Finished

Class Exists      Enter Class

◀BACK      NEXT▶

# CounselorMax User Guide



## Single Class

Required Fields Must Be Filled-in

Status	Course	Financial Literacy		
Step 1	-----			
Step 2	Start Date & Time	02/01/2010	End Time	
Finished	<i>mm/dd/yyyy</i>	9 00 AM	*	4 00 PM
	Instructor *	Bond, James	Location *	Main Office
	Capacity *	20	Language *	English
	Outreach Sponsor	---Select One---	Class Coordinator *	One, Student
	NOTE: Classes that span more than one day should be made into separate class for each day			
	<a href="#">◀ BACK</a>		<a href="#">NEXT ▶</a>	



## Class

Status	
Step 1	Completed
Step 2	<b>Congratulations!</b> You have successfully entered a new class class
▶ Finished	Would you like to set up another class?
	<a href="#">Yes ▶</a>
	<a href="#">No ▶</a> return to menu

# CounselorMax User Guide

- **Series Class Set Up** - In the Series Class Set up, users can follow a step by step process of setting up a group of individual classes that will take place over multiple dates that will comprise a series. To a new course series, click on **Create New** button on the screen shown below:



This brings up the course series setup screen. Complete all the required fields and click on the **Save** button:

**CounselorMax**  
Education: Course Series

\* = Required

Course \* ABCs of Homebuying Series Title (ex. 'Oct') \* Homebuyers guide course series

Start Date mm/dd/yyyy \* 1/1/10 End Date mm/dd/yyyy \* 12/31/10

Language \* English Outreach Sponsor Citibank

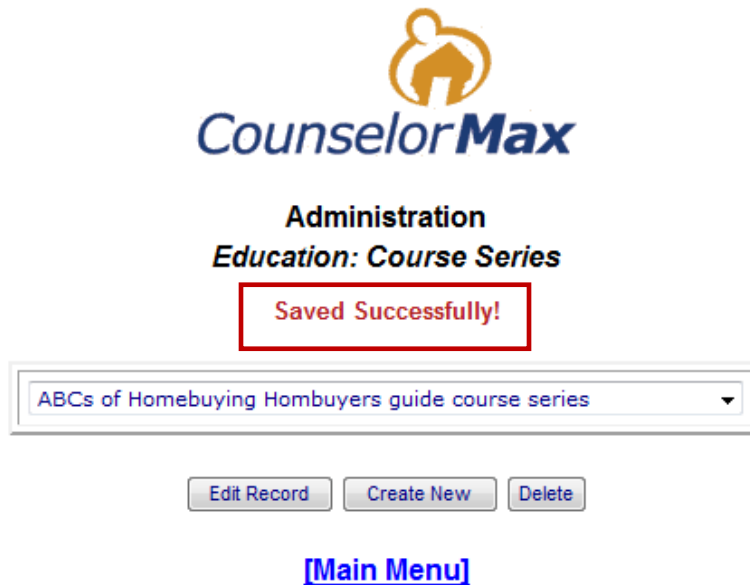
Save

Items That Are Already Available:

hbe March2010
Foreclosure March 2010 Series
Homebuyer Education 1 Principles of Homeownership
East Flatbush 8 Hour Home Buyer Education Class MarchSeries
Homebuyer Education 1 March
Money - Money - Money March
Jeff's Foreclosure Seminar March
homebuyer ed by sharika 2010 Fin. Lit.
Homebuyer Education 1 Monday
Learning to use CounselorMax April Series
Financial Literacy Richmond April

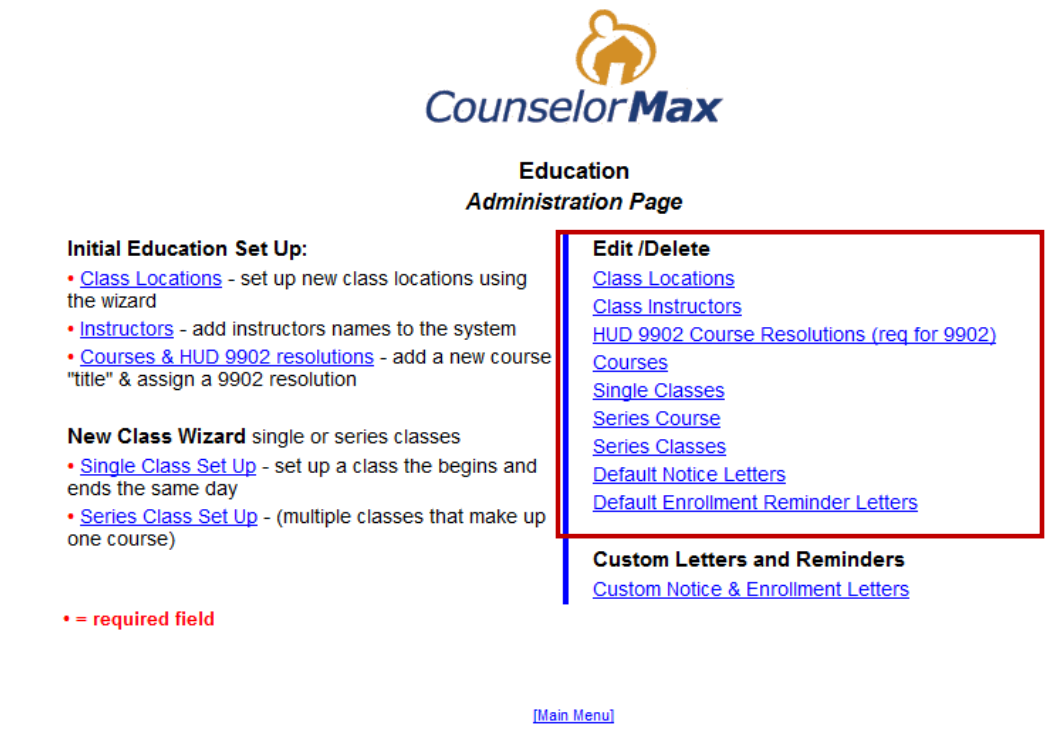
# CounselorMax User Guide

You should see the following screen with **Saved Successfully!** Message:



The screenshot shows the CounselorMax logo at the top. Below it, the text reads "Administration" and "Education: Course Series". A red-bordered box contains the message "Saved Successfully!". Below this is a dropdown menu with the text "ABCs of Homebuying Hombuyers guide course series". At the bottom of the dropdown are three buttons: "Edit Record", "Create New", and "Delete". Below the buttons is a blue link labeled "[Main Menu]".

Once classes or courses have been set up in CounselorMax, there are a series of things that can be edited or deleted as shown below under the **Edit/Delete** section:



The screenshot shows the CounselorMax logo at the top. Below it, the text reads "Education" and "Administration Page". On the left side, there are two sections: "Initial Education Set Up:" and "New Class Wizard". The "Initial Education Set Up:" section contains three bullet points with links: "Class Locations", "Instructors", and "Courses & HUD 9902 resolutions". The "New Class Wizard" section contains two bullet points with links: "Single Class Set Up" and "Series Class Set Up". Below these sections is a red asterisk followed by the text "= required field". On the right side, there is a red-bordered box containing the heading "Edit /Delete" and a list of links: "Class Locations", "Class Instructors", "HUD 9902 Course Resolutions (req for 9902)", "Courses", "Single Classes", "Series Course", "Series Classes", "Default Notice Letters", and "Default Enrollment Reminder Letters". Below the red-bordered box is the heading "Custom Letters and Reminders" and a link "Custom Notice & Enrollment Letters". At the bottom of the page is a blue link labeled "[Main Menu]".



# CounselorMax User Guide

- **Class Locations** - Users with admin access can **'Add'**, **'Edit'** or **'Delete'** **'Locations'** where classes will be held.
- **Instructors** - Users with admin access can **'Add'**, **'Edit'** or **'Delete'** **'Instructors'** for classes to be held.
- **HUD 9902 Course Resolutions** - Users with admin access can **'Edit'** or **'Delete'** classes previously set with a corresponding HUD 9902 Resolution.
- **Courses** - Users with admin access can **'Add'** a **'New Class'** or **'Edit'** details such as **'Course Title'**, **'Course Synopsis'** and **'Resolution'** of an existing **'Course'**.
- **Single Classes** - Users with admin access can **'Add'** a **'New Class'** or **'Edit'** details such as **'Course'**, **'Date'**, **'Start & End Time'**, **'Instructor'**, **'Location'**, **'Capacity'**, **'Language'** and **'Class Coordinator'** for an existing class. In addition, a HUD number can be assigned for the class.
- **Series Course** - Users with admin access can **'Add'** a **'New Class'** or **'Edit'** details such as **'Course Title'**, the **'Series Title'** under which the course exists, the **'Dates'** of the course, the **'Language'** and **'Outreach Sponsor'**. It is important to note that if the course is changed after students have been enrolled, all students must be re-enrolled.
- **Series Classes** - Users with admin access can **'Edit'** details of a series such as **Series Dates'**, **'Start & End Times'**, **'Topics'**, **'Instructors'**, **'Class Coordinator'**, **'Capacity'** and **'Location'**. From this screen users can also add **'new'** or **'delete'** existing classes in the series.
- **Default Notice Letters** - Users with admin access can **'Create'** a standard letter to be sent to registered or enrolled clients for any upcoming **'Class'**, **'Course'** or **'Series'**. These letters will contain general information for the client or prospective client as well as the details of the selected class.
- **Default Enrollment Reminder Letters** - Users with admin access can **'Add'** a standard letter to be sent to clients or prospective clients interested in becoming enrolled in an upcoming **'Class'**, **'Course'** or **'Series'**. These letters will contain general information as well as the details of the selected event.

# CounselorMax User Guide

## Custom Letters and Reminders

In addition to the default letters and enrollment reminders that can be set up, users with admin level access can use the **Custom Notice & Enrollment Letters** link to customize notice and enrollment letters to be sent out to clients or prospective clients.

**CounselorMax**

Misc: Letters  
\* = Required

Letter Title \*  
Missing documents

Letter Type \*  
Misc Events

Include Logo?  
 yes, include logo  
**WARNING: If you check this, please remember to upload your logo**

Include Footer Images?  
 yes, include footer

Body \*  
Dear [Client autopopulated by system - do not erase]  
Please provide the missing information in order to complete the processing for your home improvement loan. They are the following:  
-ID  
-bank statements  
-2008 federal tax returns  
-2008 W-2s

English

[Preview Letter](#)

Save Changes

# CounselorMax User Guide

## 13.2.4 Intake

The **Intake** link in the main **Admin Menu** directly corresponds to the **Intake** tab, Case Data sub-tab entry fields in Classic CounselorMax and in the GPS.



### Administration Page Menu

#### Manage My Data:

[My Agency](#)

[CARS profile](#)

[Case Management](#)

[Counselors](#)

[Review and Sign-Off on Records](#)

[To-Date](#)

[Sign-up to Pull Credit Reports](#)

[\(click on New Client link\)](#)

[NFMC Grantors](#)

[Legacy Clients](#)

Available for 178 Days.

#### Customize CounselorMax:

[Calendar](#)

[Counseling](#)

[Education](#)

[Intake](#)

[Loans & Funders](#)

[Outreach](#)

[Client Purpose](#)

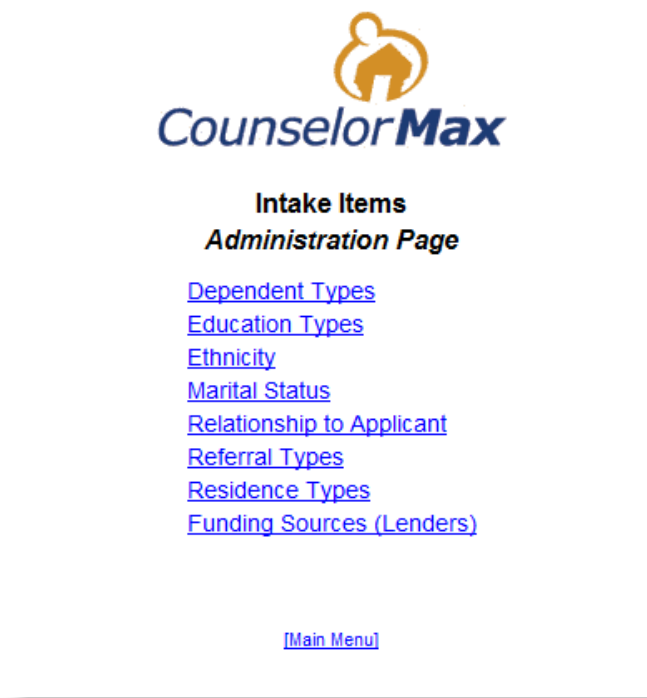
[Misc](#)

[Renew Account / Add Seats](#)

 [Training Materials](#)

Each link under the Intake link, users have the ability to **Add, Edit or Delete** data that appears in the drop- down lists.

# CounselorMax User Guide



- **Dependent Types** – This link allows you to customize the type of relationship the dependent has to the case client.



Typically this will be a child or a non-working adult sharing the household.

# CounselorMax User Guide



## Intake: Dependent Types

\* = Required

Dependent Type \*

### Items That Are Already Available:

Son
Daughter
Spouse
Granddaughter
Son
grandchild
Grandparents
parent
Domestic Partner
Parent
Foster Child
Daughter
Grandson

[\[Listing\]](#)

- **Education Types** – This link allows you customize the education type specific to the highest level of education completed by the client. Some of the predefined Education Types are: GED, High School, and College.



## Administration Education Types

[\[Main Menu\]](#)

# CounselorMax User Guide

- **Ethnicity** – This link allows you to customize the sub-category of the HUD designated ‘Race’ category.



## Administration Outreach: Ethnicity Types

[Edit Record](#) [Create New](#) [Delete](#)

[\[Main Menu\]](#)

For example, a client can be designated as ‘**White/Hispanic**’ with an added ethnicity of ‘**Cuban**’. The sub category is not HUD reportable but can be relevant to custom reporting. See below the screen that appears when you click “**Create New**”:



## Outreach: Ethnicity Types

\* = Required

Ethnicity \*

[Save](#)

Items That Are Already Available:

Mexican
Puerto Rican
Hispanic
Non-Hispanic
Irish/Italian
Maliseet Indian
Greek
Hmong
nonhispanic

[\[Listing\]](#)

**NOTE:** This Ethnicity field is voluntary and is not a HUD 9902 required field while Race and Ethnicity in **Race** field is a required field for HUD 9902 in CounselorMax.

# CounselorMax User Guide

Below are some other items under **Intake Items**. These items have similar screens as those shown above.

- **Marital Status** – This link allows you to customize the drop-down list that has a pre-populated list of different marital status type of the client.
- **Relationship to Applicant** – You should use this link if there is a co-applicant on the client file and you want to customize the pre-populated list.
- **Referral Types** – You can use this link to customize the list of referral type - how the client was sent to or located the agency.
- **Residence Types** – This link allows you to customize the residence type - the current living situation of the client, for example '**Renting**', '**Living With Family**' or '**Living Rent Free**'.
- **Funding Sources** – Click on this link if you would like to customize the funding source - various means the clients can borrow money or receive financial assistance for their specific '**Service Type**'.

The items under Intake Items allow the counselors to report statistics on clients and track clients whether it's by referral types, funding sources or any other attributes of the clients shown above.

## 13.2.5 Loans and Funders

The **Loans and Funders** link in the main **Admin Menu** also closely correlates to the '**Intake**' case data entry fields in Classic CounselorMax and the GPS.



### Administration Page Menu

#### Manage My Data:

- [My Agency](#)
- [CARS profile](#)
- [Case Management](#)
- [Counselors](#)
- [Review and Sign-Off on Records To-Date](#)
- [Sign-up to Pull Credit Reports \(click on New Client link\)](#)
- [NFMC Grantors](#)
- [Legacy Clients](#)
- Available for 177 Days.

#### Customize CounselorMax:

- [Calendar](#)
- [Counseling](#)
- [Education](#)
- [Intake](#)
- [Loans & Funders](#)
- [Outreach](#)
- [Client Purpose](#)
- [Misc](#)
- [Renew Account / Add Seats](#)

- [Training Materials](#)

# CounselorMax User Guide

In each link, users have the ability to **Add, Edit or Delete** data that will appear in the drop-down lists:



## Loans Administration Page

### Lenders

- [Lenders /Funders](#)
- [Loan Term & Conditions](#)
- [Lender Documents](#)
- [Lender Cautions](#)
- [Lender Referrals](#)

[\[Main Menu\]](#)

- **Lenders/Funders** – are the group of financial institutions or other organizations that the clients either have or seek to have a financial relationship with.




## Administration Counseling: Lenders/Funding Sources

[\[Main Menu\]](#)



# CounselorMax User Guide

You can use this link to customize the groups. See below some **Funding Sources**:



**Counseling: Lenders/Funding Sources**  
\* = Required

Lender/Grantor Name\*

Grantor  
(Funding Source Indicator)

Items That Are Already Available:

HUD Section 8
CHFA
HTF
CDBG
HOME STARTS
RHSA
Citizens Bank
TD BankNorth
RTN
Wachovia Bank
cooven
hsbc
Local Government
Kentucky Bank
USDA RCDI
Federal Home Loan Bank

- **Loan Term & Conditions** – this link allows the user to customize loan program details such as **Lender**, **Program Name**, **Term** and **Lien Position** for programs.



**Administration**  
*Counseling: Loan Programs Term & Conditions*

[\[Main Menu\]](#)

# CounselorMax User Guide

It also allows the Admin to customize Lender. See below the **Loan Programs Term & Conditions** screen as well as the existing **Lender** list:

**CounselorMax**

**Counseling: Loan Programs Term & Conditions**

\* = Required

Lender *	<input type="text" value="---Select One---"/>	Program Name *	<input type="text"/>
Term *	<input type="text"/>	Lien Position *	<input type="text" value="---Select One---"/>
Mort Rate (Low) [ex. .0045 = .45%]	<input type="text"/>	Mort Rate (High) [ex. .0065 = .65%]	<input type="text"/>
Req Other	<input type="text"/>	Fees Other	<input type="text"/>
Accept Non-Traditional Credit	<input type="checkbox"/>		

Items That Are Already Available:

Freddie Mac
Freddie Mac
Freddie Mac
Freddie Mac
Freddie Mac
Home Ownership Center
Freddie Mac
HPD
HPD
NHS
PHC
CDBG
bbbb bank
Bank of America
Bank of New Orleans
Saundra Bank
Bank of New Orleans

- **Lender Documents** – Below is the screen display for this link. **This link is currently not in use.**
- **Lender Cautions** – this link provides a drop-down list of lenders but is currently not customizable.
- **Lender Referrals** – this link provides a list of type of lender referrals and you can customize the list.

**CounselorMax**

**Administration**  
**Loan: Lender Referral Types**

[\[Main Menu\]](#)

# CounselorMax User Guide

See below is the predefined list of the **Lender Referral Type**:



## Loan: Lender Referral Types

\* = Required

Lender Referral Type\*

### Items That Are Already Available:

Offers down payment assistance
Flexible ratios
Income Targeted
No PMI
High LTV
"FHA" Guidelines
MHP Soft Second

[\[Listing\]](#)

# CounselorMax User Guide

## 13.2.6 Outreach

In the **Outreach** link of the main **Admin Menu**, Admins have the ability to **Create** and **Customize** outreach materials for their agency, to increase the volume of clients, or inform the clients or community of their events and services.



### Administration Page Menu

#### Manage My Data:

- [My Agency](#)
  - [CARS profile](#)
  - [Case Management](#)
  - [Counselors](#)
  - [Review and Sign-Off on Records](#)
  - [To-Date](#)
  - [Sign-up to Pull Credit Reports](#)  
(click on New Client link)
  - [NFMC Grantors](#)
  - [Legacy Clients](#)
- Available for 177 Days.

#### Customize CounselorMax:

- [Calendar](#)
- [Counseling](#)
- [Education](#)
- [Intake](#)
- [Loans & Funders](#)
- [Outreach](#)
- [Client Purpose](#)
- [Misc](#)
- [Renew Account / Add Seats](#)

 [Training Materials](#)

Below are the links under Outreach:



### Outreach Administration Page

- [Client Purpose](#)
- [Outreach Sponsors](#)
- [Letters](#)

**NOTE: You must create Outreach Purpose, Sponsor, and Programs before creating an Outreach Flyer**

- [Outreach Purposes](#)
- [Outreach Programs](#)
- [Outreach Flyers](#)

[\[Main Menu\]](#)

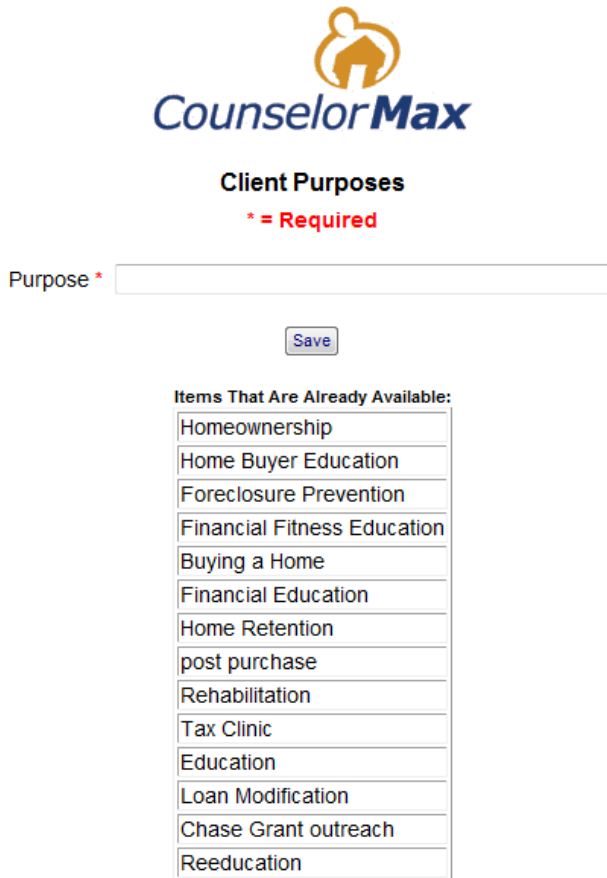
- **Client Purposes** - the desired client outcome of receiving collateral material from the agency. Admin users can customize this field by clicking **Create New**. The

# CounselorMax User Guide

Client Purpose field in CounselorMax is blank and you can add this field to use for their purpose.



Click on **Create New** button and the following screen will appear:



Once the **Client Purposes** field setup with any customized purposes, it is utilized in setting up new clients in **Outreach** as shown below:

# CounselorMax User Guide

The screenshot shows the CounselorMax interface with a navigation bar at the top containing 'Calendar', 'Outreach', 'Intake', 'Education', 'Counseling', 'Loan', 'Resources', and 'Reporting'. The main header includes the CounselorMax logo and 'Global Mode' with a globe icon. Below the header, there are several sections: 'Quick Client Search' with a list of names, 'Mailing Labels (show) [checkbox]', 'Add New Prospect (view) [checkbox]', and 'Identify Clients' with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended'. The 'Add New Prospect' form is the central focus, featuring a red box around the 'Purpose' dropdown menu, which is currently set to 'None'. Other fields include 'First Name \*', 'Last Name \*', 'Middle Name', 'Name Suffix', 'Street Address \*', 'City \*', 'State \*', 'Zip Code \*', 'Home Phone', 'Work Phone', 'Other Phone', 'Preferred Language' (set to 'English'), 'Sponsor' (set to 'None'), and 'EMail'. A 'Do Not Contact' checkbox and a 'Save' button are also present.

- **Outreach Sponsors** are typically the partners the agency has enlisted to support the event or program they are promoting with the outreach. The Outreach Sponsor field in CounselorMax is blank and you can add this field to use for their purpose.



## Administration Outreach Sponsors

Banco Popular

[Edit Record](#) [Create New](#) [Delete](#)

[\[Main Menu\]](#)

# CounselorMax User Guide

Below is the **Outreach** screen display where the Sponsor field is utilized by counselors when setting up new clients:

The screenshot shows the CounselorMax interface with the 'Outreach' tab selected. The main heading is 'Global Mode' with a globe icon and the text 'Distribute Outreach Material: (slow)'. Below this is a 'Quick Client Search' list with names like 'Armstrong, Stan' and 'ARMSTRONG, STAN'. To the right, there's a 'Mailing Labels (show)' checkbox and an 'Add New Prospect (view)' link. The central form is titled '\* = Required' and includes fields for 'First Name', 'Last Name', 'Middle Name', 'Name Suffix', 'Street Address', 'City', 'State', 'Zip Code', 'Home Phone', 'Work Phone', 'Other Phone', 'Preferred Language', 'E-Mail', and 'Sponsor'. The 'Sponsor' dropdown menu is highlighted with a red box. There are also checkboxes for 'Do Not Contact' and a 'Save' button.

- **Letters** can be **created and customized** to reflect the specifics of an event or program and can be individualized to each recipient.

The screenshot shows the CounselorMax Administration interface. The main heading is 'Administration' with the text 'Misc: Letters' below it. There is a dropdown menu with 'Pre Purchase Workshop Reminder (Misc Events)' selected. Below the dropdown are three buttons: 'Edit Record', 'Create New', and 'Delete'. At the bottom, there is a link for '[Main Menu]'.

Admin users can click on **Create New** on the above screen to create a new letter template as shown below:

# CounselorMax User Guide



Misc: Letters

\* = Required

Letter Title \*

Letter Type \*

Include Logo?  
 yes, include logo  
**WARNING: If you check this, please remember to upload your logo**

Include Footer Images?  
 yes, include footer

Body\*

[Preview Letter](#)

[\[Listing\]](#)

- **Outreach Purposes** specify the desired impact from a created '**Outreach Flyer**'.
- **Outreach Programs** refer to the summary of the details of an outreach campaign.
- **Outreach Flyers** allows the user to create a flyer with specific details of an upcoming event or program.



# CounselorMax User Guide



HCP Admin  
Misc: Outreach Flyers  
\* = Required

Header *	<input type="text" value="Do You Have a Friend or Family Member Facing Foreclosure"/>
Sub Header *	<input type="text" value="We can help you"/>
Body *	<input type="text" value="Don't Be A Victim"/> <input type="text" value="We are a HUD certified agency that has been established in 1850 B.C"/>
Footer *	<input type="text" value="Call Us Now"/>
Sub Footer *	<input type="text" value="Don't Wait Another Minute"/>
Outreach Title *	<input type="text" value="Foreclosure Workshop"/>
Language *	<input type="text" value="English"/>

[Sample](#)

[Flyers \[Listing\]](#)

# CounselorMax User Guide

## 13.2.7 Client Purpose

The **Client Purpose** link in the main **Admin Menu** simply allows users to **Create, Edit or Delete** the desired outcome of a client who comes into the agency for services.



### Administration Page Menu

#### Manage My Data:

- [My Agency](#)
- [CARS profile](#)
- [Case Management](#)
- [Counselors](#)
- [Review and Sign-Off on Records To-Date](#)
- [Sign-up to Pull Credit Reports \(click on New Client link\)](#)
- [NFMC Grantors](#)
- [Legacy Clients](#)
- Available for 177 Days.

#### Customize CounselorMax:

- [Calendar](#)
- [Counseling](#)
- [Education](#)
- [Intake](#)
- [Loans & Funders](#)
- [Outreach](#)
- [Client Purpose](#)
- [Intise](#)
- [Renew Account / Add Seats](#)

-  [Training Materials](#)

**NOTE:** Same as Client Purposes in Outreach.

# CounselorMax User Guide

## 13.2.8 Misc

The **Misc** link within the main **Admin Menu** encompasses many other customizable features of CounselorMax which are not grouped into another menu or section. Many features in this link will be reflected on custom reports.



- **Footer Images** refers to images that can be uploaded that will appear at the bottom of letters or flyers created in CounselorMax.
- **Language** refers to the language certain letters and flyers are created in.

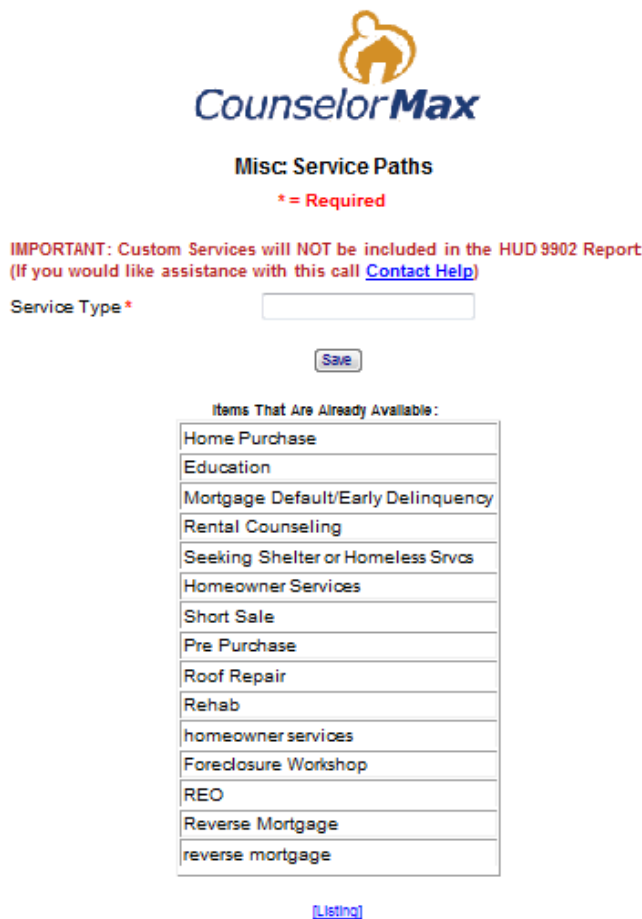
**NOTE:** CounselorMax does not perform language translation.

- **Letters** allows users to **Create** or **Edit** customized letters for outreach or follow up.
- **Logo** allows the user to upload a graphic image file that will appear at the top of letters or flyers created in CounselorMax.
- **Service Types** allows users to create additional **Service Types** outside of the standard HUD recognized service types.

# CounselorMax User Guide



Admin users may want to avoid over-customizing this field as some specific service types are already part of the available service types in CounselorMax.



For example, on the screen above, the customized **Service Type Short Sale** is already part of the existing **Service Type Mortgage Default/Early Delinquency** that does not need to be set up separately.

- **Resolution Types** allows users to create additional **Resolutions** outside of the standard HUD recognized service types. If you have a Service Type, you would have a Resolution Type associated with that Service Type.

## CounselorMax User Guide

- **Suspend Reasons** allows users to create additional **Reasons** for a client file to be suspended outside of the standard HUD recognized suspension reasons.
- **Release Authorization Form** allows you to upload a MS Word document which will serve as an authorization for the agency to receive client information from a third party.
- **Projects** refer to an agency's ability to create and manage internal projects or projects for NeighborWorks America.
- **Project Service Types** allows users to assign specific **Service Types** to existing or proposed **Projects**.

### 13.2.9 Renew Account / Add Seats

When an agency signs up for and activates CounselorMax, it is set up as an annual subscription. The accounts are renewable each year at the anniversary of the activation of the license. The agency can edit the method of payment or add additional seats from this menu.

**NOTE: The cost of CounselorMax<sup>®</sup> is \$495 for one year and includes 1 license for 5 users. Additional users can be added at the cost of \$150 per each additional user seat.**

# CounselorMax User Guide

## Appendix A: How to use the HOPE LoanPort™ - CounselorMax data transfer tool

CounselorMax has the capacity to transmit data to the **HOPE LoanPort™** (“HLP”) for organizations registered to use the portal. To obtain more information on the HOPE LoanPort and to learn how to sign up to become a user of the HOPE LoanPort please visit [www.hopeloanportal.org](http://www.hopeloanportal.org).

In order to use the CounselorMax HLP functionality your housing counseling agency must be signed up to use the HLP and you must have a user name and password (Counselor ID) to successfully send a transmittal. You cannot obtain an account and a valid counselor ID from CounselorMax or from CounselorMax support staff. You must contact the HLP and go through their setup process to obtain these.

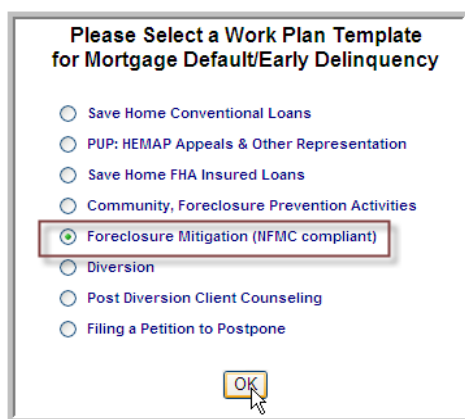
### A.1 Prerequisites for using the HLP features in CounselorMax

You must meet all of the following prerequisites to successfully transmit a case to the HLP:

1. Your agency must be a registered HUD Counseling organization
2. You must be approved for use by the HLP
3. You must have an active Counselor ID, user name and password for the HLP site.
4. The client you are submitting data for must be a candidate for a loan modification as outlined in the HLP requirements.

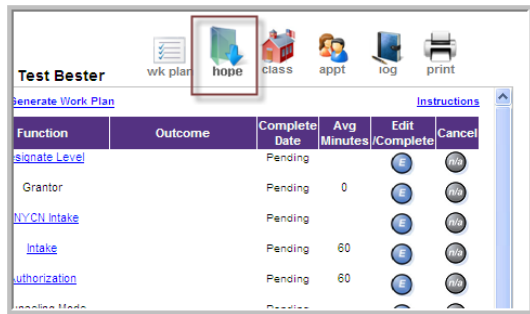
### A.2 Accessing the HLP functionality from CounselorMax

You gain access to the HLP features in CounselorMax via the Mortgage Delinquency NFMC Compliant GPS. Create a Mortgage Default/Early delinquency case via the Intake tab and select the **Foreclosure Mitigation/NFMC Compliant** GPS option from the list when prompted.



# CounselorMax User Guide

Once the GPS is saved, you will see the **HOPE** Icon at the top right of the GPS:



Click on this icon to access the new HLP forms in CounselorMax.

There are two forms you access from the icon that you will need to complete to successfully transmit a case to the HLP:

1. The **HLP Questionnaire** which collects supplemental data not otherwise collected in CounselorMax via the Intake, GPS, or Budget forms in standard CounselorMax.
2. The **transmittal** form, where you enter your HLP Counselor ID, the client's primary and secondary (optional) loan numbers and mortgage companies. You can then review your transmittal for completeness on this form, and when complete, transmit it to the HLP.

## A.3 Collecting the data required to transmit a case to the HLP

### Collecting the required fields

In addition to completing the two HOPE forms in CounselorMax you must also collect at least the minimum required data points to successfully transmit a case. These data points and the forms that are located in CounselorMax are:

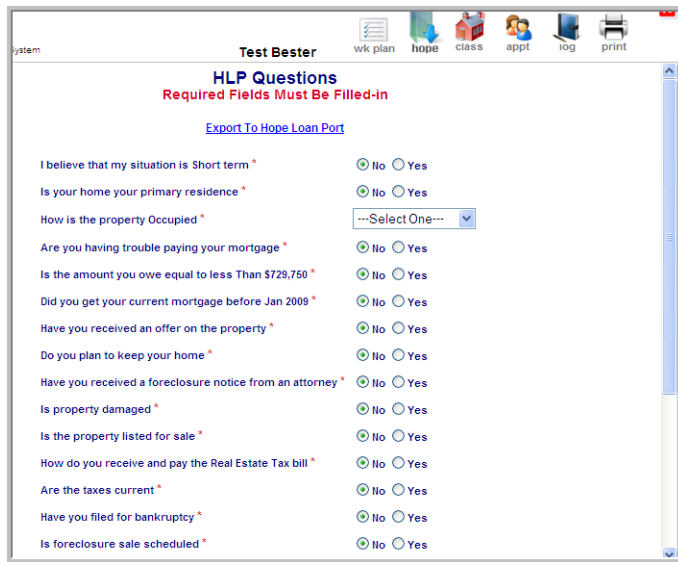
1. Client First Name: Outreach
2. Client Last Name: Outreach
3. Client Address (all relevant fields): Outreach
4. Client SS#: Intake
5. Birth Date: Intake
6. All Foreclosure Property Address: GPS Property form
7. Borrower Income: Counseling Profile Income form or GPS Income Form
8. Employer Information (if employed): Counseling Profile Income form or GPS Income Form

# CounselorMax User Guide

## Collecting supplemental fields

While this is the minimum data you must collect to successfully transmit a case to the HLP, CounselorMax collects a full data set. For a full list of fields and where they are located within the CounselorMax interface, refer to the HOPE\_Loan\_Port\_List\_Of\_Fields.xls document available at <http://counselormax.com/Training/support.html>.

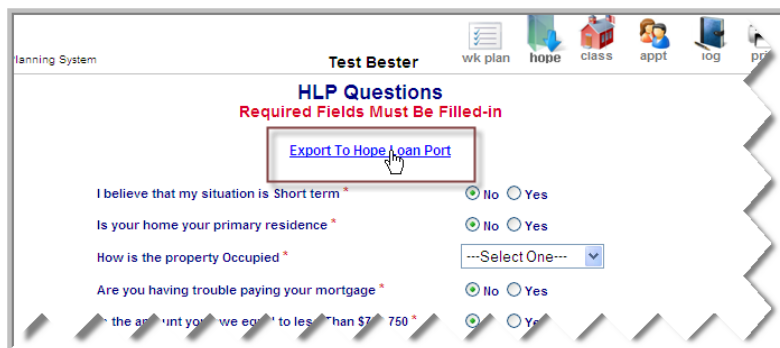
You must also complete the required HLP questionnaire. To complete this, click on the **HOPE** icon while in the GPS. You will see the following form:



The screenshot shows a web browser window titled "Test Bester" with a navigation bar containing icons for "wk plan", "hope", "class", "appt", "log", and "print". The main content area is titled "HLP Questions" with a red warning: "Required Fields Must Be Filled-in". Below this is a link "Export To Hope Loan Port". The form contains 14 questions, each with a red asterisk indicating it is required. The questions and their options are:

- I believe that my situation is Short term \* (radio buttons: No, Yes)
- Is your home your primary residence \* (radio buttons: No, Yes)
- How is the property Occupied \* (dropdown menu: --Select One--)
- Are you having trouble paying your mortgage \* (radio buttons: No, Yes)
- Is the amount you owe equal to less Than \$729,750 \* (radio buttons: No, Yes)
- Did you get your current mortgage before Jan 2009 \* (radio buttons: No, Yes)
- Have you received an offer on the property \* (radio buttons: No, Yes)
- Do you plan to keep your home \* (radio buttons: No, Yes)
- Have you received a foreclosure notice from an attorney \* (radio buttons: No, Yes)
- Is property damaged \* (radio buttons: No, Yes)
- Is the property listed for sale \* (radio buttons: No, Yes)
- How do you receive and pay the Real Estate Tax bill \* (radio buttons: No, Yes)
- Are the taxes current \* (radio buttons: No, Yes)
- Have you filed for bankruptcy \* (radio buttons: No, Yes)
- Is foreclosure sale scheduled \* (radio buttons: No, Yes)

At a minimum you must answer all of the required questions (red asterisks). Next click on the **Export to Hope Loan Port** link:



This screenshot is identical to the previous one, but a red rectangular box highlights the "Export To Hope Loan Port" link, and a mouse cursor is positioned over it.

This will take you to the submittal form:

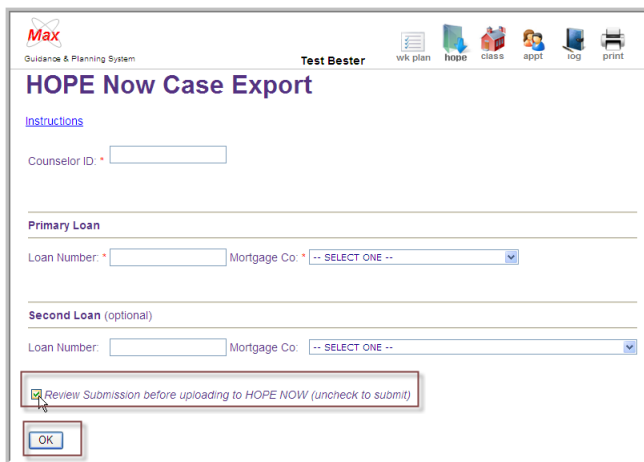


# CounselorMax User Guide

## Reviewing a transmittal prior to submission

Prior to submitting a case to the HLP you should use the review functionality to test for completeness. The review function will identify any required fields that are missing from the transmittal. If the review reveals missing fields, you must go back and fill in these fields or the transmittal will fail. To use the review function for the transmittal, enter all of the required fields in the submittal form:

1. Counselor ID: provided by the HLP
2. Primary Loan Number
3. Mortgage Co. (you must select from the drop-down list. If the mortgage company or loan servicer is not listed in the drop-down they do not participate in the HLP and you cannot use the HLP to communicate with them. Contact the servicer or the HLP to inquire about their participation in the HLP.
4. Next check off the **Review submission before uploading to HOPE NOW (uncheck to submit)** checkbox and click the **OK** button:



The screenshot shows the 'HOPE Now Case Export' form. At the top, there is a navigation bar with the 'Max' logo and 'Guidance & Planning System' text. Below the navigation bar, the title 'HOPE Now Case Export' is displayed. The form contains several input fields: 'Counselor ID' with a text box, 'Primary Loan' section with 'Loan Number' and 'Mortgage Co.' (a dropdown menu), and 'Second Loan (optional)' section with 'Loan Number' and 'Mortgage Co.' (a dropdown menu). A checkbox labeled 'Review Submission before uploading to HOPE NOW (uncheck to submit)' is checked. An 'OK' button is located at the bottom left of the form.

5. If any required fields are missing you will see them listed in the return message as below:



The screenshot shows the 'HOPE Now Case Export' form with an error message. The error message is 'Primary Loan missing for this case' and is highlighted with a red box. Below the error message, it says 'Review your [submission](#), correct missing values, and try again.'

6. If no fields are missing you will see a list of the fields that will be transmitted with the corresponding values:

# CounselorMax User Guide



## Submitting the Data to the HLP

To submit the data, after reviewing it, click on the **Submit your case to HOPE NOW** link, which will return you to the submittal form. Once on the submittal form, make sure you uncheck the **Review submission before uploading to HOPE NOW (uncheck to submit)** checkbox and click on the **OK** button. This will send the transmittal to the HLP server. You will receive a confirmation message that the transmittal was successful. Conversely, if for some reason the transmittal fails, you will receive a failure message explaining the cause of the failed transmittal. Correct the problem and try again.



You can now log into the HLP to review and finalize the information and transmit it to the servicer via the HLP application. Go to [www.hopeloanportal.org](http://www.hopeloanportal.org) to find documentation for details on using that system.