

Housing Counseling Management System



Training Document

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Product Information Site www.counselormax.com © 2001
Production site www.counselormax.net ©2001

Technology used in this application has been developed by EMT Applications, Inc.

Computer Settings:

Screen Setting

To see the tab frame in it's entirety (without scrolling) you should set your screen settings to the following:

Desktop Area: 1024 x 768
Color Palette: High Color 16 Bit (or higher)

- To adjust your screen setting, right click on the desktop (the blank area of the screen). You should see a box appear that has **Active Desktop** ► on top.
- Click on the word **Properties** on the bottom of the box. This will open the Display Properties box.
- Click on the tab labeled "**Settings**". You should see a box with a picture of your computer monitor in it.
- In the "**Color Palette**" list box, choose **High Color (16 bit)**. (or higher)
- In the "**Desktop area**" section, slide the indicator towards "more" until you see the setting change to 1024 x 768.
- Click Apply (on bottom of Display Properties). You will be notified that windows will adjust your settings.....etc. click OK to accept the changes. Once the new settings appear, click Yes to keep the new settings.
- Click OK to save the settings.

Browser – Microsoft Internet Explorer



If you are using a PC that does not have IE 5.5, you can download a free copy at the following address:

<http://www.microsoft.com/windows/ie/default.htm>

Browser – Settings (Important!)

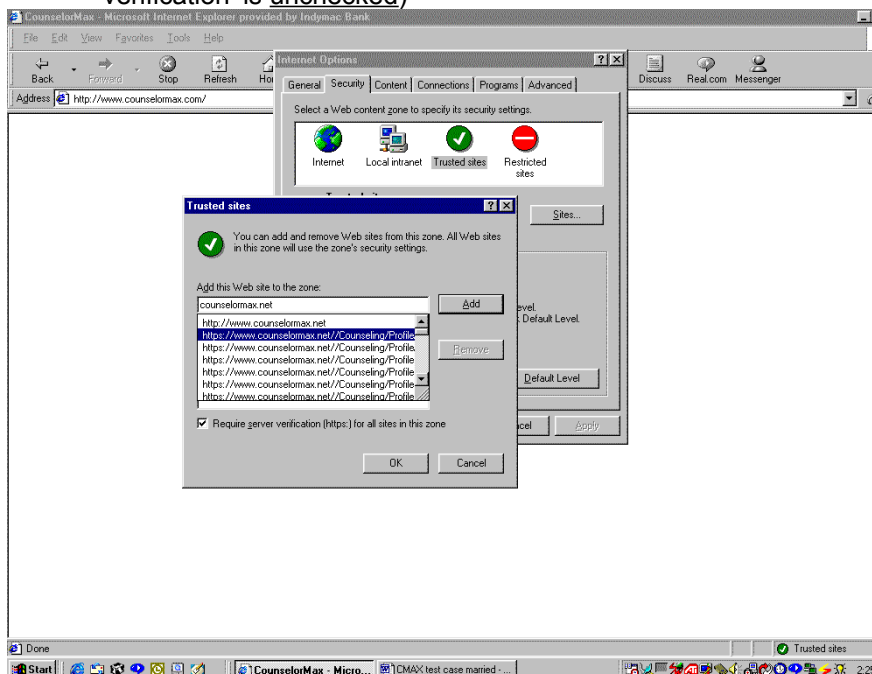


On the browser menu bar:

- Click 'Tools | Internet Options'
- Select the 'Security' tab
- Click 'Trusted Sites'
- Click the 'Sites' button



- Add www.counselormax.net (important: make sure the check box called 'Require server verification' is **unchecked**)



Printer Settings:

- Set your printer by going to File|Page Setup...

Page Setup

Paper

Size:
Letter (8.5 x 11 in.)

Source:
Auto

Headers and Footers

Header
Footer

Orientation
☒ Portrait
☐ Landscape

Margins (inches)

Left: 0.5 Right: 0.5
Top: 0.5 Bottom: 0.5

OK Cancel Printer...

- Make sure to change the margins to 0.5
- Make sure the headers and footers are blank

CounselorMax Management System

Product Overview

EMT Applications, Inc. (EMT) has developed an electronic solution to assist housing counselors perform their jobs more effectively and efficiently. The **CounselorMax** Management System provides the housing counseling agencies with a web-based solution to manage all aspects of client communication and scheduling, client analysis of credit and income information, and data mining tools to create real time internal and external reports.

The **CounselorMax** Management System was developed with the housing counseling process in mind. Many industry professionals were studied and surveyed during the development to ensure that all necessary business processes were incorporated into one easy to use product. The following is a sampling of the tools that the **CounselorMax** provides:

- Contact Management System
- Staff & Client Calendars
- Client Evaluations (pre-qual)
- Client Budget
- Integrated Credit Reporting
- Group Class scheduling
- Loan Applications (electronic shipping)
- Credit Reports (integrated)
- Loan Comparisons (programmable)
- Home & Agent Searches
- Various Standard & Custom Reports

Given that the **CounselorMax** is a web-based product, it allows not only access to the database of information to everyone in a particular office from various PC's, but it also allows the accessibility from remote locations, which provides ultimate efficiency for both office and client. The CounselorMax uses asp technology, which is run on Compaq servers maintained and hosted by Data Return.

Global Mode and Client Mode

There are two modes within the navigational aid known as the Tab Frame, Global and Client. All work performed on a particular [client] file is done within the client mode. Group and user functions are performed in the global mode.

Confidentiality Statement and Agreement

1. All Information furnished will be used by the receiving Party solely for the purpose of evaluating a possible business opportunity between the Parties and unless and until the Parties have entered into a legally binding, definitive license agreement (the "Agreement") such Information will be kept confidential by the receiving Party and its affiliates and advisors; provided, however, that the receiving Party may disclose the furnished Information or portions thereof to those of its directors, officers and employees and representatives of its advisors (the persons to whom such disclosure is permissible being collectively called "Representatives") who need to know such Information for the purpose of evaluating the possible business opportunity (it being understood that those Representatives will be informed of the confidential nature of the Information and will be directed by the receiving Party not to disclose to any other person any Information relating to the furnishing Party). Each Party agrees to be responsible for any breach of this agreement by its affiliates, advisors or Representatives.

In the event that either of the Parties is requested or required (by oral questions, interrogatories, requests for information or documents, subpoenas, civil investigative demands or similar processes) to disclose any Information furnished in the course of its dealings with the other Party or its affiliates, advisors or Representatives, it is agreed that the Party so requested or required to disclose any Information will (i) provide the other Party with prompt notice thereof and copies of the documents requested or required to be disclosed so that the furnishing Party may seek an appropriate protective order or waive compliance with the provisions of this agreement and (ii) consult with the other Party as to the advisability of the other Party's taking of legally available steps to resist or narrow such request. It is further agreed that, if in the absence of a protective order or the receipt of a waiver hereunder the Party so requested or required to disclose Information is nonetheless, in the opinion of its legal counsel, compelled to disclose Information concerning the other Party to any tribunal or to any party to a proceeding before any tribunal or else stand liable for contempt or suffer other censure or penalty, the Party so requested or required to disclose Information may disclose such Information to such tribunal or party without liability hereunder; provided, however, that the Party so requested or required to disclose Information shall give the other Party written notice of the Information to be so disclosed as far in advance of its disclosure as is practicable and shall use its best efforts to obtain, to the greatest extent practicable, an order or other reliable assurance that confidential treatment will be accorded to such Information so required to be disclosed.

2. The term "Information" does not include any information that: (i) is or becomes generally available to and known by the public (other than as a result of an unpermitted disclosure directly or indirectly by the receiving Party or its affiliates, advisors or Representatives), (ii) is or becomes available to the receiving Party on a non-confidential basis from a source other than the furnishing Party or its affiliates, advisors or Representatives, provided that such source is not and was not bound by confidentiality agreement with or other obligation of secrecy to the furnishing Party of which the receiving Party has knowledge; or (iii) has already been or is hereafter independently acquired or developed by the receiving Party without violating any confidentiality agreement with or other obligation of secrecy to the furnishing Party.

3. If the Parties do not proceed with a business venture, or if the furnishing Party so requests the Housing Counseling Client at any time, the receiving Party will return promptly to the furnishing Party or destroy all copies, extracts or other reproductions in whole or in part of the Information in the possession of the receiving Party or its affiliates, advisors or Representatives, and the receiving Party will destroy or cause to be destroyed all copies of any memoranda, notes, analyses, compilations, studies or other documents prepared by the receiving Party or for its use based on, containing or otherwise reflecting any Information relating to the furnishing Party. Such destruction shall, if requested, be certified in writing to the furnishing Party by an authorized officer supervising such destruction.

4. Except with the prior written consent of the other Party or as required by applicable law, each Party will not, and will direct its affiliates, advisors and Representatives not to, disclose to any person either the fact that any investigations, discussions or negotiations are taking place concerning a possible business venture between the Parties or that any Information has been requested or received, or any of the terms, conditions or other facts with respect to any such possible business venture, including the status thereof. In the event either Party determines that it is required by applicable law to make any such disclosure, such Party shall so advise the other Party immediately and shall consult and cooperate to the greatest extent feasible with respect to the timing, manner and contents of such disclosure. The term “person” as used throughout this agreement will be interpreted broadly to include, without limitation, any corporation, Party, partnership or other entity or individual.

Warning

This application is designed to accommodate a multi-user office and is capable of file sharing. When manipulating the data in “case scenario” scripts, it is possible that two Users may try to access the same file at the same time. To avoid this from happening, **you will be asked to set up a new Client in your name (Outreach module). You will use this client file to perform all subsequent tasks during the demonstration. Follow the instructions from Outreach through counseling diligently to insure that you do not encounter any problem using duplicate data entered by another User.**

Please do not make any changes to information in other case files unless specifically asked to do so in the exercise.

Calendar / Tab Frame

I. Part I. Global Mode



Figure 1. Display of Calendar Tab

Reminder

Purpose: a reminder is a task or note to yourself, a colleague, or a group, that you need to complete by a given period of time. Reminders include placing or returning phone calls, preparing reports and other documentation by a specified time frame, or a “post it”. Reminders are always reviewed daily and are the default view when the User logs onto CounselorMax.

Exercise:

1. Add a reminder for yourself

Begin by checking (click) the “Add” box (located in upper left corner of reminders).

Enter the following information:

Date: Default today's date o.k.
Subject: misc.
Action: Phone

Staff: Staff denotes whom it will be assigned to – note system displays staff initials¹

Comments: “Call Mindy to make arrangements for luncheon with HUD”

Number of Days: [5]

SAVE reminder by clicking the [OK] button.

Edit the reminder: Using the same reminder that you have just created, check [EDIT] and make changes to ALL fields. When you are done, click [OK] and review the information in the reminder screen.

Deleting the reminder: If you wish, you may cancel or delete the reminder. By checking [Delete], you will delete the reminder that you have just created.

Reminder is **Done**: If you check [Done] on a new reminder. The reminder should not be viewable once you have done this.

2. Add a reminder for multiple staff

Begin by checking (click) the “Add” box (located in upper left corner of reminders).

Enter the following information:

Date: Default today’s date o.k.

Subject: Budget

Action: Meeting

Staff : jdb, rkd, ggg (**hold ctrl button while selecting the staff members**)

Comments: “We have 30 days to complete the budget figures for our department. If you have any requests or changes to your current budget, forward them to my office.”

Number of Days: [15]

Save reminder by clicking [OK] button.

Edit the reminder: using the same reminder that you have just created, click the edit box and make changes to ALL fields. When you are done, click [OK] and review the information in the reminder screen.

Deleting the reminder: If you wish, you may cancel or delete the reminder. By checking [Delete], you will delete the reminder that you have just created.

Reminder is **Done**: Click done on a new reminder. The reminder should not be viewable once you have done this.

¹ Staff members are always represented by there initials i.e. John D. Beneventi = jdb.

Calendar

Purpose: Calendar, in global mode, allows the user to post an event that is not client specific, for one or more individuals on that organizations system. All staffs events and appointments will be tracked using this function.

Exercise:

1. Add event for yourself

Add an event to your Calendar

Before you select a date, verify that your Calendar is set on your personal calendar (the user name should appear in the list box left of the Calendar Image). If you need to reset your calendar, click on the list box arrow, using your cursor, highlight the name of the person that you wish to view. The new calendar will appear (*note the name on top of the tab frame will indicate the person's calendar that you are working in).

Click on a date 30 days from today (select the month from the list box. The dates are represented by numbered squares).

Check (click) the Add Event box (a new view should appear).

Enter the following:

Type:	Call
Staff:	default is OK – no input needed
Description:	Board Meeting Prep / conference with Directors
Location:	Office
Start Date:	11/19/2001 (default date – no input necessary)
Start Time:	6:00 PM
End Date:	11/19/01- (default date – no input necessary)
End Time:	9:00 PM

Click [OK] button to save.

Review the result

To end session - Click button "Back to Calendar"

Edit: Make changes to the event that you have just created. Note- you will have to input the time.

Cancel: Cancel the event that you have just created – you must fill in an explanation.

Undo Cancel: Click cancel a second time to UNDO the previously canceled event. This should result in removal of the strike through and notation of why the event was canceled.

2. Add an event to the Schedule for a group (using view staff schedule)

To add a group class to schedule;

1. On the calendar, open any future date.
2. Make sure that all staff are available by opening the “ view all staffs events for the day”.
3. Decide on an hour during the day that all participants are available (i.e. 2:00 to 3:00 PM no events scheduled across the matrix). (remember to close the ““ view all staffs events for the day”).
4. Upon verification of an open time slot, check (click) “add event”;
5. Enter the following information:
 - Type: mtg
 - Staff: JDB, DTQ etc. until all counselors have been highlighted (hold ctrl button while selecting the staff members)
 - Description: CounselorMax Training
 - Location: Main Training Facility
 - Start Date: (default date – no input necessary)
 - Start Time: 2:00 PM
 - End Date: (default date – no input necessary)
 - End Time: 3:00 PM

Click “ok” button to save.

Review the result (check the view all staff events for this day)

Click button “Back to Calendar”

Make sure that you see the symbols, can re-open the calendar and view your posted event.

Edit: Make changes to the event that you have just created.

Cancel: Cancel the event that you have just created – you must fill in an explanation.

Undo Cancel: Click cancel a second time to UNDO the previously canceled reminder. This should result in removal of the strike through and notation of why the event was canceled.

Note: You can use this calendar function to block off times that a counselor or User does not want to take any appointments. By doing this, a receptionist or other User would not accidentally schedule an appointment when you are busy, absent, or do not wish to be disturbed.

Outreach Exercises

II. Part I. Outreach - Global Mode

Calendar Outreach Intake Education Counseling Loan Resources Reporting

CounselorMax Global Mode

Upload Referrals (show)

Distribute Outreach Material (show)

Add New Prospects (show)

Quick Client Search

King, Andrew
Legacy, Ben
Legacy, Ben
Legacy, Ben
Lisa, GREWER
Loud, Page T
Lopez, John
Lopez, John
Lu, Lucy
Medina, Rosa M
Martinez, Diana
Martinez, Billy
Martinez, Laura
Martinez, Mary
Medina, Joe

Identify Clients

☐ All
☐ In Process
☐ Closed
☐ Prospect
☐ Suspended
☐ New Client

Global Mode

* Required

First Name *
Last Name *
Middle Name
Home 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

Figure 2. Outreach Tab Default View

Purpose: to create a prospective client file and distribute flyers and notices to an individual client, or group of clients, filtered by status and service path.

To get to the outreach section, you need to click on the "outreach tab"

Exercise:

1. Create A New Prospect

In the outreach module, click on the "add new prospect" box and input the following:

First Name: (type your first name)
Last Name: (type your last name)
Address: 12386 Brimming Way, apt 102
Phoenix, AZ 85035
Preferred language: English
Home Phone: 602-999-9999
Work Phone: 602-888-8888
Sponsor: EMT Applications

Click the [SAVE] button

Note - The system will default to client mode. If you were to continue with a full Intake, you could simply click on the Intake tab and fill in the required fields.

To Delete Contact Info: clicking on this box will delete the client file from the system

2. Manage Marketing Programs (to select and view the mailers)

- Click (check) the box that is marked “Distribute Outreach Material” to view the potential marketing programs that are available to your clients (these programs are created by the system administrator).
-
- To view the actual mailer, Click on the desired version of the document (the system allows multiple languages, the default setting is for [English](#) and [Spanish](#)).
-

3. Distribute Existing fliers (Batch Printing)

First default to the Global Mode – click the **[GLOBAL MODE]** button on the nav panel.

Check the box that is marked **[Distribute Outreach Material]** to view the potential marketing programs that are available to your clients.

Once you have chosen the appropriate mailer from the listing, check the **[Distribute]** box to activate the subset client (sort) function.

- Select a group of clients (your discretion remember to press the Ctrl button when choosing the clients at random)
 - Press the ‘Create Flyers’ button – (Notice how the flyers appear in a pop-up browser. This is the view that you would print from. To see the printed materials the way that they would appear on a page from the menu press file / Print Preview).
 - If you were to print the outreach materials (from the menu bar) select File / Print from the drop down box on the top of Internet Explorer, then pressing the OK button on the “print” pop up;
 - At the end of this exercise you will be asked if the documents printed OK? **Please hit cancel so that you do not update the records.** In normal circumstances clicking [OK] would notate the client file that the outreach piece had been sent. By canceling the acknowledgment, the file history is NOT updated.
-



Figure 3. Outreach Distribution (client mode)

Part II. Outreach - Client Mode

Switch to 'Client Mode' by selecting the new client you created in Section I (yourself). Do this by typing your last name into the Quick Client Search, then press **[ENTER]**.

1. Distribute Existing flyer

Click in the box that is marked **[Distribute Outreach Material]** to view the potential marketing programs that are available to your clients.

Click on the **[Distribute]** check box to display the flyer with client's address at the top.

- Print the document by selecting the File/Print from the drop down box on the top of Internet Explorer, then pressing the OK button on the "print" pop up;

To end this exercise, press the Global Mode button located on the lower left hand corner of the screen

Intake Exercise

Intake - Client Mode

Calendar Outreach Intake Education Counseling Loan Resources Reporting

CounselorMax William Morton

Quick Client Search

Morton, William
Murray, Charlene
Newman, Ronald
Newton, Connor
Ontiveros, Winnie
Ontiveros, Winnie
Rome, Sam
Rose, Charlene
Rufford, Justin
Salinas, Panchito
Sanwald, Rosey
Smart, Stay
SMITH, YVETTE
Smithens, John
Son, Ben

Identify Clients
☐ All
☐ In-Process
☐ Closed
☐ Prospect
☐ Suspended
☐ New Client

Global Mode

Logout

Case Data:

Service Required:
Service Type * Home Purchase
Custom Service Types in red will NOT be included in the 9902 report

HUD Activity
☒

Total Co-Apps * (include spouse) 1

Referral Source *
Select One or More
Dispel the Myths
Mail
Walk-in
Press the 'Ctrl' button to select more than one source

☐ Additional Fields

Demographics:
Race * American Indian/Alaskan & Hispanic
Number in Household * 2
Gender * ☒ Male ☐ Female

☐ Additional Fields

Financial Info:
Household Annual Income * 45000
County * Los Angeles County
Current Residence * Rent
Authorization to Release Information ☒ [Click Here to Print Form](#)
(note: to change this go to Admin/Misc/Release Form)

Figure 3.1 – Intake Client Mode

By its very nature, Intake is only accessible from the client mode, therefore you must either create a new client (by clicking the new button on the tab frame) first making the client a prospect then reverting to the Intake mode (see “Outreach” section, exercise #1.).

Purpose: Intake collects specific client data (HDMA, household, social sec. Etc.) and allows the counselor to establish a service path thereby making the client an active case.

Exercise:

Once a client has called in response to a flyer, you must intake the client to setup an “Active” file. To do so perform the following task;

1. Intake (new file)

Starting from the Global mode:

- Since you entered yourself as a client in the last exercise, **type your name** (last name first) into the search box from the global mode view
- Click on the highlighted name in the list box or **press [ENTER]** to open the file
- Click on **[Intake]** tab

- Because you already had a file in the system, you should be defaulted to the “case data” section;
- Fill in the following:

Service Type:	Home Purchase
Social Security:	type in any number you like (use this convention xxx-xx-xxxx)
Age:	41
Race:	Hispanic
Ethnicity:	Mexican
Household Num People:	3
Household annual income:	36000 (use no commas)
Borrower Monthly income:	3000
Female Head of Household:	leave unchecked
Disabled?:	leave unchecked
Education:	High School/GDE
Marital Status:	Married
Current Residence:	Rent
Referral Source:	mailer
Total co-apps	1
HUD Activity	Leave checked as Affirmative

- Click **[SAVE]** to save the record
- You should receive a message that says “**saved successfully**”

2. Intake Co-applicant – spouse will be used to qualify

Your spouse’s income will be needed to qualify for the loan. To enter spouse into the computer:

- Click on the “Co-App” tab within the intake module
- Enter the following information:

Co-applicant:	enter any name you choose
Address:	12386 Brimming Way, apt 102 Phoenix, AZ 85035
Preferred Language:	English
Monthly Income:	1000 (use no commas)
Social security:	leave blank
Relationship to Client:	(Husband / Wife)

- Click **[SAVE]** to save – this concludes intake, you will now be able to work on this file as an active client.

Click the Global Mode button to conclude this exercise

Accessing the Client File:

Calendar Part II. Client Mode

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

Please note: If the client did not attend any previously scheduled appointments please select the day on the calendar below and **cancel** immediately.

CounselorMax

Quick Client Search

Morton, William
Murray, Charlene
Newman, Ronald
Newton, Connor
Ontiveros, Winnie
Ontiveros, Winnie
Rome, Sam
Rose, Charlene
Rufford, Justin
Salinas, Panchito
Sanwald, Rosey
Smart, Stacy
SMITH, YVETTE
Smithens, John
Son, Ben

Identify Clients

☐ All
☐ In-Process
☐ Closed
☐ Prospect
☐ Suspended
☐ New Client

Global Mode

Logout

William M Morton
123 Main Street
Los Angeles, CA 99999
818 223-4455 (hm)
818 908-9801 (wk)
wmorton@yahoo.com
English
In-Process **Counselor: Eighteen Trainer**

Client #: 10863
Case #: 5929(6/15/2004)
HUD #:000010

Reminders ☒

☐ Add

Subject	Action	Details	Days	Edit	Delete	Done
Budget Meeting		budget meeting with Stacy Counselor (William Morton)	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Client Schedule: ☐ (show)
Client History: ☐ (show)
Client Log: ☐ (show)

Figure 4. Calendar (client mode) Default View

*Purpose: Adding a Reminder or Event in the client mode will allow you to track client specific events and reminders while linking to the appropriate counselor's calendar (no double entry required to manage the client and staff calendars). **All client related events will be entered in this view.** You can also see a clients historical benchmarks as well as keep a client log (both notes and time spent counseling).*

Exercise:

12. Access a file (from global mode)

Using search box

Type your new client name into the search box (last name first). Note that as you type the next letter of the name, the list box below searches for the closest match. When receiving a phone call from an existing client, you may use this function to quickly locate and access the client file. To open, just press **[ENTER]**.

13. Using scroll bar

If you prefer, you may locate a file by using the scroll bar (located on the right hand side of the list box containing the file names (listed alphabetically). Once you have located the target file, click on the file to highlight and open.

14. Reminder

Add a reminder for a Client (Choose any client from the database for this task)

*****Click on The Calendar Tab on the top Tab Frame to revert to the Calendar functions**

Checking (click) the “Add” box (located in upper left corner of reminders).

Enter the following information:

Date: Default today's date o.k.
Subject: Work Plan
Action: Phone
Staff : use default – no input necessary
Comments: Client called to discuss work plan. Please call to follow up on progress.
Number of Days: [7]

Save reminder by clicking the **[OK]** button.

Edit: By checking the edit box, you may edit the reminder that you have just created.

15. Record Reminder as “Done”

(Use the reminder created in the previous exercise, check the done box. Note that a pop-up will ask “how many minutes did you spend on this?”. Answer with the following:

20 (denote 20 minutes have been spent on the call)

The time will be accounted for in the file so that during reporting, the amount of time spent counseling this client will account for phone time as well. **YOU DO NOT HAVE TO ACCOUNT FOR TIME. IF YOUR CALL IS NOT WITHIN THE COUNSELING PARAMETER, ENTER 0.**

Cancel: You may cancel a reminder that you have created. (if you wish, you will input a new reminder to do this)

16. Client Schedule

View

To view a client schedule, check (click) the box that is located to the right of “*Client Schedule:*” (You should see a graphical calendar).

17. Event - Add

To add an event to the client schedule, simply follow the same procedure as the global calendar mode. First, click on the day of the month that you would like to schedule and event. If you will need to involve a staff member, make sure that he or she is available (open the all staff events by checking (click) the box “view all staff events for this day”). Once you have determined that a staff member is available, book the appointment. Please enter the following information:

File name:	Choose any file from the Quick Client Search
Type:	appt (appointment)
Staff:	choose your initials from the list box
Description:	initial counseling session
Location:	my office
Start Date:	default – no input necessary
Start Time:	4:00 PM
End Date:	default – no input necessary
End Time:	5:00 PM

Click OK to save.

At the new screen, click [return to the calendar](#)

Click on the Back to Calendar Button

* When scheduling an event in the client mode, the event will also be posted in the Calendar of the Staff member that is responsible for that event (i.e. an appointment made in client mode will notate the same appointment on the counselors schedule).

Edit: Make changes to the event that you have just created.

Cancel: Cancel the event that you have just created – you must fill in an explanation.

Undo Cancel: Click cancel a second time to UNDO the previously canceled reminder. This should result in removal of the strike through and notation of why the event was canceled.

HUD # : Click on “explain” to get help information about the HUD number
Click on HUD number button to assign a HUD number.

Client History: Click on Client History button to view the pertinent “bench marks” that client has achieved thus far. Note: try to sort the list by clicking on each heading.

Calendar Phone Log:

Add a record by clicking on the add button

Edit the same record that you just recorded

Cancel the record that you have just recorded

Undo Cancel by clicking on the cancel button a second time.

Print – by clicking the print box, you will see a new browser with a printable version of the phone log. Print from the printer icon in the new browser.

To end this exercise, press the Global Mode button located on the lower left hand corner of the screen

Education

Education Exercise

Education / Global Mode

Important: This test does not cover the “Administrative” tasks such as creating, editing, or deleting a class. It does not cover how to assign an instructor to a class.

The screenshot shows the CounselorMax Global Mode interface. The top navigation bar includes tabs for Calendar, Outreach, Intake, Education (selected), Counseling, Loan, Resources, and Reporting. The main header area displays the CounselorMax logo, the text 'Global Mode', and links for 'Upload Referrals' and 'Classes'. A 'Quick Client Search' dropdown menu is open on the left, showing a list of client names. Below it, the 'Identify Clients' section has radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', 'Suspended', and 'New Client'. The main content area is titled 'Filter Based on Service Types' and contains a table of classes. The table has columns for Title, Day, Date, Location, Seats, Lang, and a set of checkboxes for Roster, Notify, Enroll, and Print. The table lists several classes, including 'Orientation' and 'Series Test-Oct'.

Title	Day	Date	Location	Seats	Lang	Roster	Notify	Enroll	Print
Orientation	Wed	9/8/2004 (9:00AM-12:00AM)	Church Annex	Seats	English	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Series Test-Oct (entire series)									
Series Test-Oct	Fri	10/1/2004 (5:00AM-5:30AM)	Church Annex	Seats	English	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Series Test-Oct	Fri	10/8/2004 (8:00AM-1:00PM)	Church Annex	Seats	English	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Series Test-Oct	Tue	10/12/2004 (8:00AM-9:30AM)	Church Annex	Seats	English	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Series Test-Sept (entire series)									
Series Test-Sept	Fri	9/3/2004 (8:00AM-5:00PM)	Church Annex	Seats	English	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Series Test-Sept	Sat	9/4/2004 (9:00AM-3:00PM)	Church Annex	Seats	English	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 5. Education – Global Mode

1. Batch Notification – Click the [Education] tab

- Check the **[Notify]** box next to any class or class series available.
- You may select any number of clients (selecting multiple clients requires that you hold the Ctrl button on your keyboard while clicking to highlight each desired client)
- Click the **[Notify]** button below the list box containing the client names.
 - A browser will pop-up containing a mock mailer with the names and addresses of the clients you selected
 - You may resize or move this window
- Print Mailers
 - To print these mailers, from the menu bar select File / Print. For purposes of this demonstration, please choose File / Print Preview. To view each page, you may use the arrows on the Print Preview pop up to see the actual document.

- Close this window when you are done

Note:

- When you have sent the mailers, the system updates the client file.
-

2. Batch Enrollment

3.

- Check the **[enrollment]** box on any class or class series.
- You may select any number of clients.
- Click the **[Enroll]** button below the list box containing the client names.
 - A browser will pop-up containing a mock mailer with the names and addresses of the clients you selected
 - You may resize or move this pop-up window
- Print Mailers
 - To print these mailers, from the menu bar select File / Print. For purposes of this demonstration, please choose File / Print Preview. To view each page, you may use the arrows on the Print Preview pop up to see the actual document.
 - Close this window when you are done

Note:

When you have sent the mailers, the system updates the client file.

Note: Seats (next to the class name near the Enrollment check box) has changed to reflect the persons that you have just enrolled. "Seats" indicates the number of enrollees v. the total number of seats available for the training. To see the actual enrollees, click on the roster button.

4. Batch Attendance

- Check the "Attn" box next to any class or series of classes.
 - You will see new form that shows all clients who have been enrolled. Enrollment is a prerequisite of attendance.
 - Click the attended box next to each person who attended the class or series of classes.
-

5. View Roster

- Click the roster button on the same class or series of classes that you just used.
 - You may resize or move this window
 - You should see the clients you enrolled and marked as attended.
(important: you may see other clients as well. These clients may have been assigned by other affiliates participating in this exercise)
- Print the roster
To print the roster simply click on the roster icon, then from the menu bar, select File / Print. For purposes of this exercise, please choose File / Print Preview.

Figure 6. View of the Roster in Education Tab

The screenshot displays the CounselorMax Global Mode interface. At the top, a navigation bar includes tabs for Calendar, Outreach, Intake, Education (selected), Counseling, Loan, Resources, and Reporting. The main header area shows the CounselorMax logo, the text 'Global Mode', and links for 'Upload Referrals: (show)' and 'Classes: (show)'. A 'Quick Client Search' box on the left lists client names, and below it, an 'Identify Clients' section with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', 'Suspended', and 'New Client'. A 'Global Mode' button and a 'Logout' link are also present.

The main content area shows a table of classes. The first table has columns: Title, Day, Date, Location, Seats, Lang, and a set of icons. The second table shows details for the class 'Just the Facts'.

Title	Day	Date	Location	Seats	Lang	Icons
Just the Facts	Mon	7/26/2004 (7:00PM-8:00PM)	EMT Applications	Seats	English	[Icons]
Just the Facts	Thur	8/10/2004	Birmingham		English	[Icons]

Below the table, a browser window shows the URL: <http://www.counselormax.net/HCPDemo/Education/ClassRoster.asp?ICID=213>. The page content includes:

Just the Facts
DATE: 7/26/2004 7:00PM-8:00PM
LOCATION: EMT Applications
LANGUAGE: English
CAPACITY: 25
INSTRUCTOR: Trainer Eleven

SEATS TAKEN: 1

Name	Notes	Enrolled	Attended
Barron, Susan D		✓	✓

Part II. Education / Client Mode:

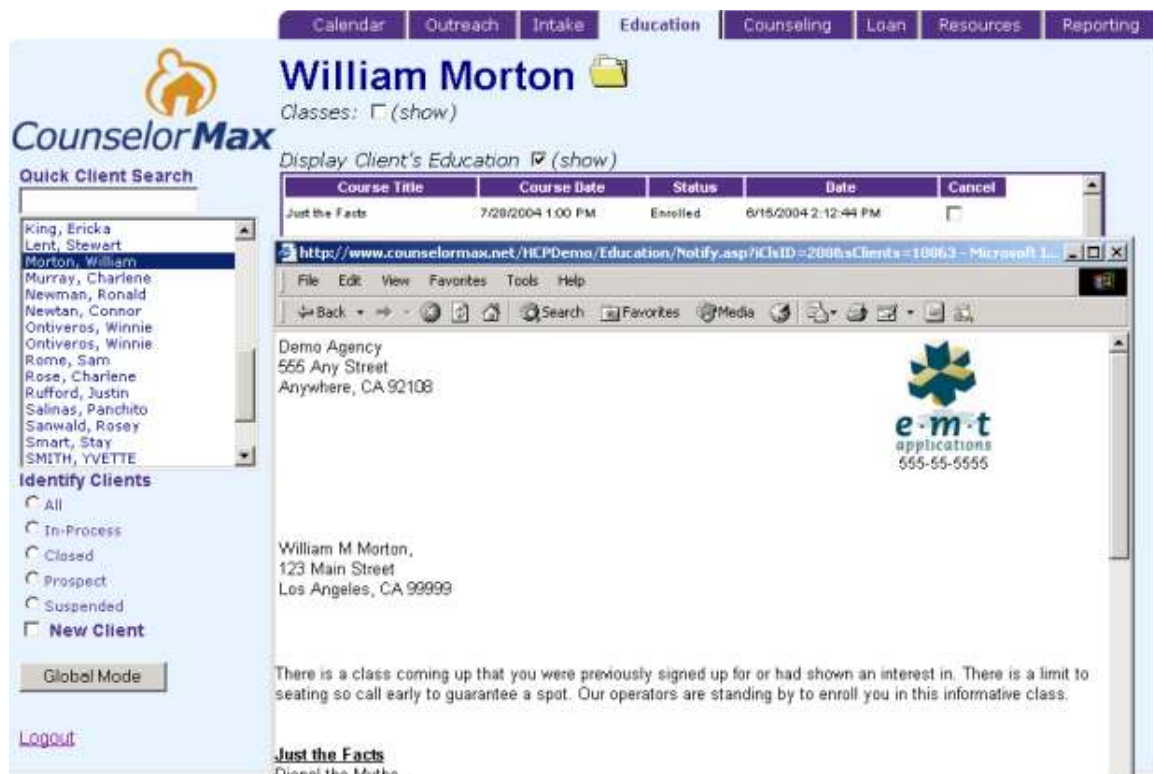


Figure 7. Client Notification

1. Client Notification
 - Choose your new client that you set up in previous exercises by typing last name and first name into the Quick Client Search box on the upper left hand portion of the screen.
 - Click the Education Tab
 - Check the **[Classes]** box
 - Pick a class or class series and click the “notify” check box next to it
Make a note of the class and start date
 - A browser will pop-up containing a mock mailer with the names and addresses of the clients you selected
 - Print Mailers
 - To print the notification, from the menu bar select File / Print. For purposes of this demonstration, please choose File / Print Preview. To view each page, you may use the arrows on the Print Preview pop up to see the actual document.
 - Close this window when you are done
 - The client’s history will be updated

2. Client Enrollment

- Check the “Classes” check box
 - Click the “enroll” check box next to the class or series of classes you selected earlier
 - A browser will pop-up containing a mock mailer with the names and addresses of the client
 - Print Mailers
 - To print these mailers, from the menu bar select File / Print. For purposes of this demonstration, please choose File / Print Preview. To view each page, you may use the arrows on the Print Preview pop up to see the actual document.
 - Close this window when you are done
 - The client’s history will be updated (note- status in default shows “enrolled”)
-

3. Client Attendance

- Check the “Classes” check box
- Click the “Attnd” check box next to the class or series of classes you selected earlier
 - Enrollment is not a pre-requisite in client mode
 - A box will pop up with client and co-applicant’s names. Check [record] that they attended.
 - The client’s history will be updated

Client History – check [*Display Client’s Education*] to see that the system has recorded the attendance.

Note: If you wish, you may cancel history by clicking on the “cancel “ box in the history display.

Click the Global Mode button to conclude this exercise

Counseling Exercise

Counseling / Client Mode:

Household Monthly Income

Base Income	\$25,000.00		
Overtime	\$1,000.00		
Interest/Dividends	\$0.00		
Gross Monthly Rent Income	\$0.00		
Other	\$550.00		
Total Household Monthly Income	\$26,550.00		

FIXED EXPENSES:

Gifts/Donations

Other Gift/Donation	\$1,200.00		
Total Gifts/Donations	\$1,200.00		

Personal

Barber/Beauty Shop	\$0.00		
TOTAL MONTHLY FIXED EXPENSES	\$1,200.00		

FLEXIBLE EXPENSES:

Personal

Alcoholic Beverages	\$500.00		
---------------------	----------	--	--

Figure 8. Printable Weekly Budget Worksheet

Budget:

1. Establishing a Budget for the First Time; open the client file that you have been using during the previous exercises.

Begin by checking the box marked "Budget"

Check (Click) the "Create New" box.

A display will show all of the "default" fields that you can set for the budget template. The default setting will allow you to use all fields. If you uncheck (de-activate) a box, the category will be eliminated from the budget worksheet. Try this by un-checking the following fields:

- "mad" money
- Alcoholic Beverages
- Birthday Gifts
- Lawn Care

Hint – Once you have turned off a budget item, you will be able to turn it back on if necessary.

Click on the button marked **[Create NEW Budget]**

In the display, enter the monthly budget figures as expressed by the client (enter any numbers you like).

Once you have completed the budget figures, click **[save budget]**

You can print this document using the File / Print command like the other exercises.

Client Log:

CounselorMax

William Morton

Client Log ☒

Date	Duration	Subject	Staff	Summary	Cancel	Edit
6/16/2004 10 (1:00PM)		Appt	SPC	Call to schedule appointment for review of income documentation.	<input type="checkbox"/>	<input type="checkbox"/>
6/15/2004 15 (1:00PM)		Appt	SPC	Call to discuss credit issues.	<input type="checkbox"/>	<input type="checkbox"/>
6/12/2004 60 (1:00PM)		Appt	SPC	Call - to remind client to bring in all income documentation to next meeting.	<input type="checkbox"/>	<input type="checkbox"/>

Quick Client Search

King, Ericka
Lent, Stewart
Morton, William
Murray, Charlene
Newman, Ronald
Newton, Connor
Ontiveros, Winnie
Ontiveros, Winnie
Rame, Sam
Rose, Charlene
Rufford, Justin
Salinas, Panchito
Sanwald, Rosey
Smart, Stacy
SMITH, YVETTE

Identify Clients

☐ All
☐ In-Process
☐ Closed
☐ Prospect
☐ Suspended
☒ **New Client**

[Logout](#)

☐ Case Profile
☐ Budget
☐ Assign Counselor
☐ Tools
[Last Analysis](#)
☐ Pre-Qualify
☐ Work Plan
☐ Case Resolution

Figure 9. Client Logs

Use the Client Log to display walk-in events and non-appointment counseling events.

2. View Client Log
 - Click on the **[Client Log]** box.
2. Add a new Log Item
 - Click on the **[Client Log]** box.
 - Click on [Add] box in upper left hand corner
 - Complete the information as follows:
 - i. Date / Time – auto populated
 - ii. Subject – Misc.
 - iii. Staff – auto populates to name of User
 - iv. Action – Phone
 - v. Comments – client reached the FMCC loan Company and will get verification that the balance is paid off.
 - vi. Duration – 5.0

- Click “OK” to save

Client Log Functions:

Add a record by clicking on the add button

Edit an existing record

Cancel will strike through an existing log (will not delete it)

Undo Cancel by clicking on the cancel button a second time.

Print – by clicking the print box, you will see a new browser with a printable version of the phone log. Print from the printer icon in the new browser.

Assign to Counselor

3. Assign Counselor

Check the box marked “Assign Counselor”.

Select a new counselor (select yourself) from the list box.

Click the “Assign to Counselor” Button

Tools

There are three functions in the tools section. To view the different tools, **click on the “Tools” box.**

4. Mortgage Calculator

In the calculator, enter the following:

- \$100,000 loan amount;
- 30 year term (tab to the list box and choose 30 years);
- Enter 7.0 into the interest rate box;
- Calculate the payment by clicking the “calculate” box
- Close by clicking the Tools box;

5. Amortization Schedule

Activate the amortization schedule by clicking the box marked “Amort”. Schedule”. Use the following to compare;

- \$100,000 loan amount
- Current Rent = 550
- Prepayment (try without prepayment, then with an extra \$50 per month)
- Mortgage Term = 30 years
- Interest Rate = 7.0 %
- Click < OK >
 - i. Check to make sure that you can compare the benefit of Own v Rent using this tool (i.e. tax advantage of write off interest, difference in payments, rent paid over time that does not build equity)

You can print the amortization schedule using the File / Print command.

6. Home affordability Calculator

This tool will help you determine the top end of loan and associated purchase price for a client based on some general information. This is not intended as a pre-qualification, but a starting point from which you will pare down the opportunity using the pre-qualification function.

- Enter monthly income
- Enter monthly debt (minimum payments)
- Enter Max back end debt ratio (i.e. 36)
- Choose the down payment (increments 3%, 5, 10, 15, etc.)
- Choose the mortgage term
- Choose the interest rate
 - Using today's average will result in the current national average interest rate for a 30 year fixed rate mortgage (as published on the Internet) OR,
 - Choose a rate in the list box (in increments of 1/8 %)

Press the **[Go To Results]** button and review.

Case Profile

The screenshot shows the CounselorMax software interface. At the top, there are navigation tabs: Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header displays the client's name, "William Morton", and a "Client Log" link. On the left side, there is a "Quick Client Search" dropdown menu with a list of names, including King, Ericka; Lent, Stewart; Morton, William (which is highlighted); Murray, Charlene; Newman, Ronald; Newton, Connor; Ontiveros, Winnie; Ontiveros, Winnie; Rome, Sam; Rose, Charlene; Rufford, Justin; Salinas, Panchito; Sanwald, Rosey; Smart, Stax; and SMITH, YVETTE. Below the search menu are radio buttons for "Identify Clients" with options: All, In-Process, Closed, Prospect, Suspended, and a checkbox for "New Client". There is also a "Global Mode" button and a "Logout" link. The main content area is titled "Case Profile" and features a "Summary" tab. The form is divided into sections: "Liabilities" (Credit), "Dependents" (Subj Prop), "Income" (Residence), and "Other" (Assets). The "Credit" section includes fields for "Number of Accounts" (1), "30 Days Late" (0), "60 Days" (1), "90 Days" (0), "Perm Res Alien" (checkbox), "Divorce" (checkbox), "Credit Score" (660), "Last Foreclosure Date", "Last Bankrupt Date", and "Judgments - Balance \$". A "Save Changes" button is located at the bottom of the form.

Figure 10. Case Profile in Client Mode

7. Enter client's information prior to running pre-qualification analysis;
To enter client data, click on the "Case Profile" box. The display will allow you to tab through 8 different sections. In order to run a pre-qualification, you must complete a minimum of the following 5 sections (for valid findings):

- Credit – late payments and derog credit that may bar client from getting financed
- Liabilities – credit card debt, installment loans, other revolving and fixed monthly obligations
- Employers – employment info including monthly income
- Income – bonus, commissions, interest / dividends, Overtime, other
- Assets
 - Liquid Assets – Checking, savings, investment accounts
 - Down payment given to escrow or closing agent
 - Real Estate – rental property owned by client

NOTE: Credit reports can be pulled within the system. When doing so, you may elect to upload the credit information into the case profile to avoid data entry.

In your test case, choose the client that you have created in previous exercises and enter the following information:

Applicant:

Credit: 1x30, 1x60 click **[save]**

Liabilities:	FMCC	\$500 per month, 15,000 bal	State of AZ	click [save]
	Visa	\$100 min per month 5,000 bal	State of AZ	click [save]
	M/C	\$150 min per month 3,000 bal	State of AZ	click [save]
	Student Loan	\$50 per month 10,000 bal	State of AZ	click [save]

Employers:

Click **[Add New]**

KD Installment Sales

Start Date: 01/01/99

End Date: leave this space blank (tells system that you still work at this position)

Years in Profession: 5

Self-employed: leave blank

Title: Office Manager

Bus Type: Furniture Sales / Financing

Monthly Income: \$ 2,500

Phone: 777-777-7777

Address: leave blank

City: leave blank

State: AZ

Zip: leave blank

click **[save]**

Income:	Click [Add New]	Bonus \$150	click [save]
	Click [Add New]	Commissions: \$350	click [save]

Assets:

Click < Liquid Assets > Checking \$3000 (make up address) click <save>

Click < Add New > Savings \$1500 (make up address) click <save>

Click < Back To All Assets >

Click < Down Payment > Amount \$500 held by ABC Escrow click
<save>

Click < Back to all assets >

(you do not need to enter anything in the Real Estate section)

Co-Applicant

Employers:

Click < Add New >

XYZ Trading Company

Start Date: 01/01/99

End Date: leave this space blank (tells system that you still work at this position)

Years in Profession: 5

Self-employed: leave blank

Title: Clerk

Bus Type: Retail Sales

Monthly Income: 1000

Phone: 999-999-5555

Address: leave blank

City: leave blank

State: AZ

Zip: leave blank

click <save>

Check your Work: Click on the summary link (left of the display). This will pop up a browser with all of the information that you just listed. Print this view by clicking on the printer icon on the standard menu bar above, or from the drop down menu under File/ Print.

*** Note:** To close a Pop-Up browser window, click on the box with the "x" (in the upper right hand corner).

Uncheck the < Case Profile >.

Pre-Qualify

The screenshot shows the CounselorMax software interface. At the top is a navigation bar with tabs: Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The main header area displays the CounselorMax logo and the client's name, William Morton, with a folder icon. Below the header, there are several links: Client Log, Case Profile, Budget, Assign Counselor, Tools, Last Analysis, and Pre-Qualify (which is checked). On the left side, there is a 'Quick Client Search' dropdown menu showing a list of clients, with 'Morton, William' selected. Below this is an 'Identify Clients' section with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended', and a checkbox for 'New Client'. A 'Global Mode' button is also present. The main content area is a form for pre-qualification input. It includes fields for '1st Mortgage \$' (200000), '2nd Mortgage \$' (20000), '3rd Mortgage \$' (0), and '4th Mortgage \$' (0). Each mortgage field has a 'Term' dropdown menu set to 'GRANT'. There is a 'Down Payment (Buyer Funds)\$' field with the value 6000, a 'DP Grant' field with the value 0, and a 'Closing Grant' field with the value 1500. The 'Total Value: (excludes Closing Grant)' is calculated as \$226000. An 'OK' button is located at the bottom right of the form. At the bottom of the interface, there is a 'Logout' link and a 'Work Plan' checkbox.

Figure 11. Pre-Qualification Input – client mode

- Open the pre-qualification interface by clicking on the box marked “Pre-Qualify”. This will open the interface. **Input the following:**

1st Trust Deed \$80,000
2nd Trust Deed \$10,000 --- Grant --

Down Payment: \$5,000
(buyer's funds)

DP Grant: \$5,000
Closing Cost
Grant: \$ 500

Click < OK >.

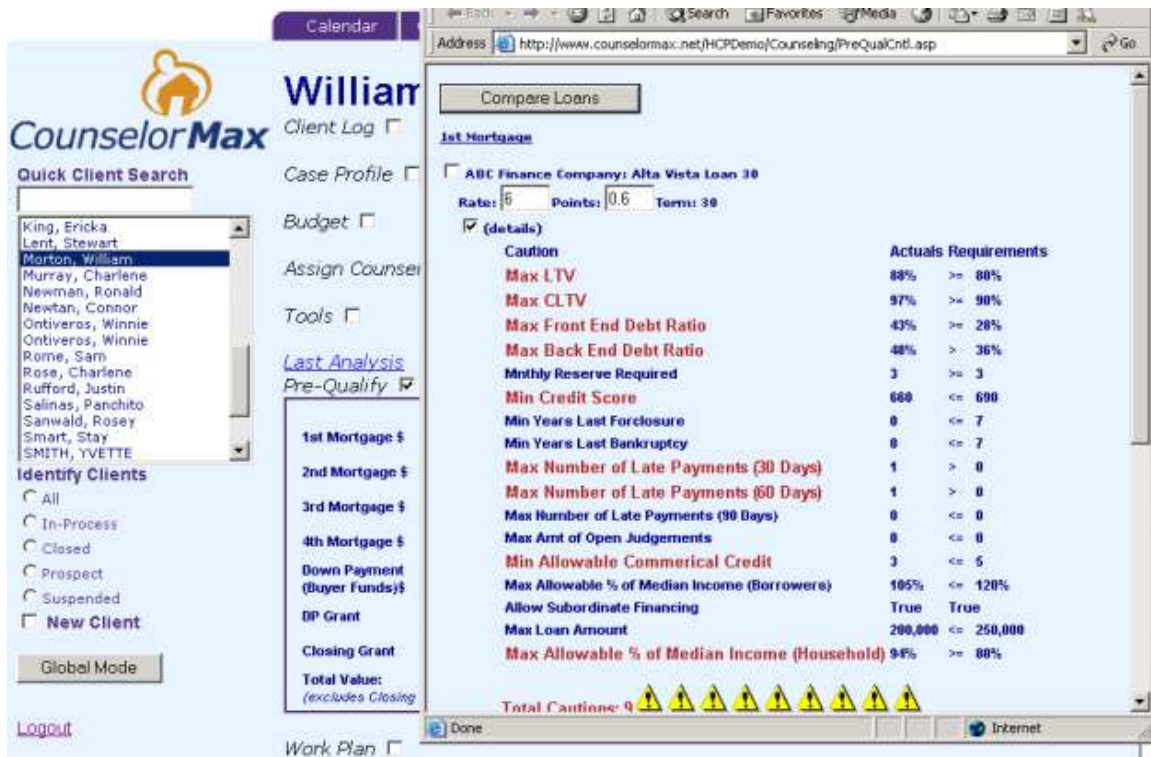


Figure 12. Loan Listing pop-up and Detail review

A pop-up screen will appear. This will allow you to:

- Choose loans to compare against each other
- Input actual rates for the day (default is the national average rate and associated fee)
- Look at details (whether or not the client complies with mortgage parameters)
- Choose a 2nd, 3rd, or 4th Deed against the property (2nd, 3rd, and 4th position liens can also be grants or subsidies)

For this exercise, please enter the following:

By checking the box to the left of the product description, choose these three 1st Trust Deed loan programs:

Program 1 Freddie Mac AG 97 *- enter a rate of 7.0 with 1 point

Program 2 Freddie Mac AG Alt 97 *- enter a rate of 6.5 with 2 points

Program 3 B of A 30 y fix* – enter a rate of 8.0 with –1 point

Choose one grant (anyone will do)

*** These loan programs have been entered into the application for test purposes only.**

Click < Compare Loans >

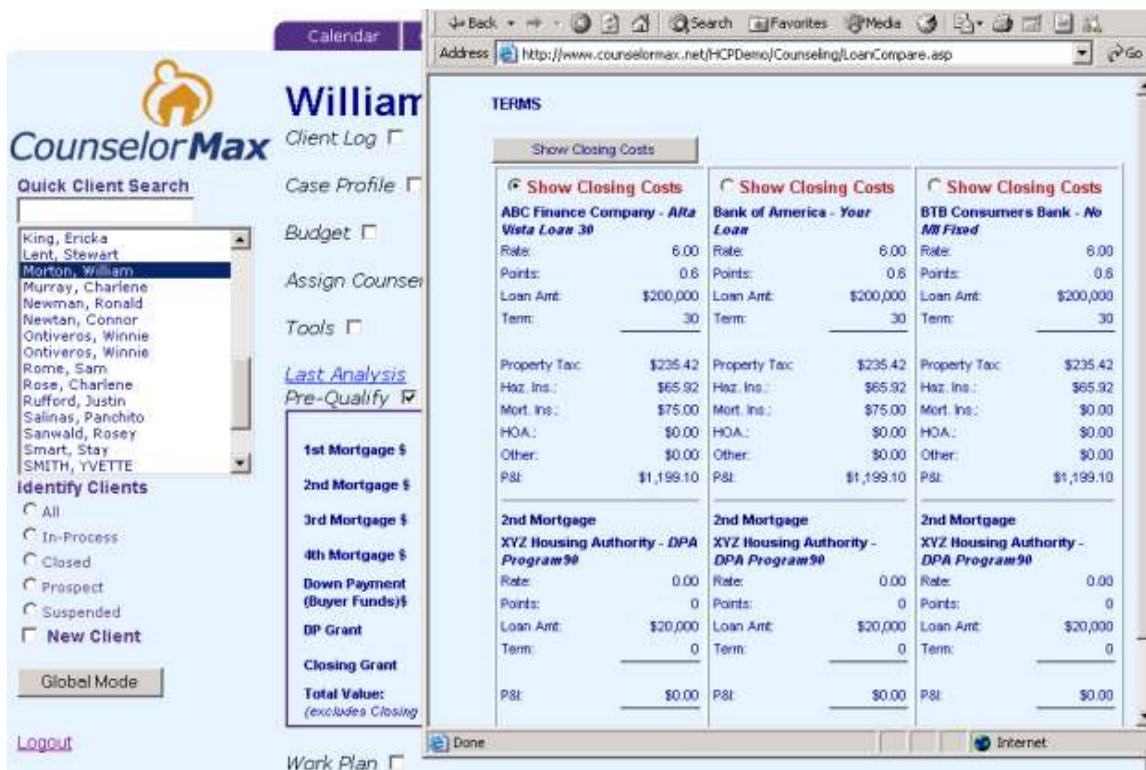


Figure 13. Pop-up with program combinations

You should be looking at a screen that displays the three loan combinations (figure 13), with their associated rate and fee. To view the estimated closing costs and analytical data, pick the program choice by clicking on the “**Show Closing Costs**” button. Pick the first program option before you continue *:

* NOTE: To view previous screen options, use the back button on tool bar.

A new display will give you pertinent data about the client. Note the following:

Housing Expense and Other Ratios

- Total Housing Expense (includes 1st 2nd tax, insurance, mortgage insurance, HOA [home owners association dues] and other monthly housing expense)
- Actual Ratios front end and back end ratios computed on combined information (all clients) as input into the case profile
- Target Ratios expressed from program guidelines (entered via admin access)
- MSA Median Income = (monthly median income for MSA)
- % of MI = Clients combined income divided by MSA Median Income
- LTV = 1st mortgage loan to value
- CLTV = Combined loan to value of 1st and 2nd
- Estimated Closing Costs
- Borrowers funds required at closing (est.)
- Comparison of required funds and funds available

There are two different functions that you can perform with this data,

(1) You may save the data by pressing the “save this analysis” button. If you do this, your data will be saved and accessible from the Last Analysis link on the tab frame / counseling view.

(2) Create Work Plan

You can transfer the loan cautions to the work plan by clicking the “Create Work Plan” button.
(note the details box at the bottom of the page- click on this to see the cautions for each loan in the analysis). You may need to use the scroll bar to view the entire sheet of information.

Click <Create Work Plan>

Work Plan

The screenshot shows the CounselorMax web application interface. On the left, there is a 'Quick Client Search' dropdown menu with a list of names including King, Ericka, Lent, Stewart, Morton, William, Murray, Charlene, Newman, Ronald, Newton, Connor, Ontiveros, Winnie, Ontiveros, Winnie, Rome, Sam, Rose, Charlene, Rufford, Justin, Salinas, Panchito, Sanwald, Rosey, Smart, Stay, and SMITH, YVETTE. Below this is an 'Identify Clients' section with radio buttons for 'All', 'In-Process', 'Closed', 'Prospect', and 'Suspended', and a checkbox for 'New Client'. There is also a 'Global Mode' button and links for 'Logout', 'Legacy Clients', 'Admin Menu', and 'User Manual'. The main content area is titled 'William Morton' and '8/11/200'. It features a table with columns 'Action', 'Reason', and 'Date'. The table contains three rows of data: 'Provide Cancelled checks for car loan that you co-signed for.' with reason 'Back-end ratio exceeds the recommended "target" for this program', 'Need complete 2003 1040 (Federal Tax Return)' with reason 'Prepare to submit loan docs', and 'Need last two pay stubs reflecting gross amount of \$3,500 per month of income.' with reason 'Prepare to submit loan docs'. At the bottom, there is a 'Case Resolution' section.

Action	Reason	Date
Provide Cancelled checks for car loan that you co-signed for.	Back-end ratio exceeds the recommended "target" for this program	
Need complete 2003 1040 (Federal Tax Return)	Prepare to submit loan docs	
Need last two pay stubs reflecting gross amount of \$3,500 per month of income.	Prepare to submit loan docs	

Figure 14. Work Plan – printable version for Client use.

Cautions will be auto populated in the work plan. When you open the work plan (by clicking on the box marked “Work Plan”) you will see the caution items populated under the “rationale” category. The rationale is the issue that need be handled prior to obtaining financing (i.e. the back end debt ratio exceeds program guidelines). To illustrate, our case profile has resulted in a number of “cautions” that require action. Perform the following to complete the work plan for the client:

Edit Caution (auto-populated) items in Work Plan

- Click on the “edit” box for the caution item
- In action text area, type the action the client needs to take (rationale).
- Click the OK button
- Check your work – the action item that you entered should be viewable in the work plan display.

Add an item to the Work Plan

- Click the “Add” box (upper left hand corner of the Work Plan display)
- Type the action in the text box
- Select a rationale that the action item addresses
- Click OK to save
- Check your work – the additional action item should be viewable in the work plan display.

Cancel an Action Item

- Click the “cancel” box next to the action item. This will eliminate (strike through) the action item.

Complete an Action Item

- Click on Edit next to the action item
- Fill in date completed (mm/dd/yy)
- Click OK

Print Action Item

- Click on the “Print” box
- A new window will pop up with the printer friendly format
- From the pop-up browser window, click on the Printer Icon
- Check your work – did the work plan print properly?

Undo Cancel – simply by clicking the cancel box next to the previously cancelled item.

Loan

The screenshot shows the CounselorMax web application interface. At the top, there is a navigation bar with tabs: Calendar, Outreach, Intake, Education, Counseling, Loan (selected), Resources, and Reporting. On the left side, there is a sidebar with the CounselorMax logo, a 'Quick Client Search' dropdown menu showing a list of names (Abdelseed, Vivian; Abdullah, Tina; Abrams, Charles; Adam, Rishia; Adams, April; Adams, DeMonica; Adams, Dianne; Adams, Dwayne; Adams, Kevins; Adams, Tammi; Adams-Bell, Erica; Adkins, Donnie; Adkins, Priscilla; Afrah, Ibrahim; Agonva, Leon), and radio buttons for 'Identify Clients' (All, In-Process, Closed, Prospect, Suspended, New Client) and a 'Global Mode' button. The main content area is titled 'Credit Report (show)' and contains a form for 'Rishia Adam' and 'Donald Gentry'. The form includes a table with columns: Last Rpt, Rpt Type, Re-Issue (Free), Bureaus, Add Bureau (\$), and Client Paid. The table shows a report from 5/27/2003, Individual, with a Re-Issue (Free) checkbox, Bureaus TU EX, Add Bureau (\$) checkbox, and Client Paid radio buttons (no, yes). Below the table, there is a legend: TU = Trans Union, EQ = Equifax, EX = Experian, and a 'Request New Credit Report' button.

Last Rpt	Rpt Type	Re-Issue (Free)	Bureaus	Add Bureau (\$)	Client Paid
5/27/2003	Individual	<input type="checkbox"/> (show)	TU EX	<input type="checkbox"/>	<input type="radio"/> no <input checked="" type="radio"/> yes

TU = Trans Union, EQ = Equifax, EX = Experian

Request New Credit Report

Figure 15. Loan Tab with Credit Report expanded.

This module allows for credit reports to be pulled within the system, the recordation of closing data (including real estate agency and mortgage loan info). This is the future module where the 1003 will be viewable (and printable).

Credit Reporting

You may order a single, dual or tri-merge credit report with credit scores. To do so, follow these steps:

- Click on [Loan] tab to open page (in client mode)
- Complete application (where fields are null). The applicant and co-applicant data will be auto-populated in the appropriate fields.

Warning

- **DO NOT ORDER A REPORT** AS THE RESULT WILL COME BACK AS "NO MATCH". This is a result of using fictitious persons in the test database. If you were ready to order the report, you would press the **[Get Credit Report]** button – note: you may pull an individual or joint report.
- Once the report is complete, you will see the interface that allows you to view a credit report (see figure 15.)
- To view the credit report, simply check the [Show] box. (see Figure 16.)

CounselorMax

Quick Client Search

Abdelseed, Vivian
Abdullah, Tina
Abrams, Charles
Adam, Rishea
Adams, April
Adams, DeMonica
Adams, Dianne
Adams, Dwayne
Adams, Kevin
Adams, Tammi
Adams-Bell, Erica
Adkins, Donnie
Adkins, Priscilla
Afray, Ibrahim
Agonva, Leon

Identify Clients

☐ All
☐ In-Process
☐ Closed
☐ Prospect
☐ Suspended
☐ New Client

Global Mode

Logout
Admin Menu

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

☒ Credit Report (show)

☐ Rishea Adam
☐ Donald Gentry

Print Update Case Profile

FDC CREDIT **BUREAU** Residential Merged Credit Report

FDC CREDIT, 521 ALEXIS COURT NAPA, CA 94558 (877)521-1431 (800)788-8389

HOUSING PARTNERSHIP INC.
333 GUTHRIE GREEN STE.404
LOUISVILLE, KY 40202
(502)585-5451 (502)585-5568

Client Tracking
0

Requested by
The Housing Partnership, Inc. - 325

Report ID
30512BX00036870

FD client code
0512-CM0015

Date requested
05/27/2003

Time requested
07:46:14

Identification (as requested)

Applicant's last name	First name	Middle	Suffix	DOB	Social Security
Adam	Rishea				313-98-2356

Residence Information (as requested)

Present	94 University Woods Dr	New Albany	IN	47150	Telephone
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File Variations

Trans Union	BU1	313-98-2356	ADAM, RISHEA D	05/27/03 07:36
**Equifax	BQ1	000-00-0000	Adam, Rishea NO HIT/NO RECORD FOUND	05/27/03 07:36
Experian	BXL	313-98-2356	ADAM, RISHEA	05/27/03 07:36

Database Residence Information

4130 PRESTWICK SQ	NEW ALBANY	IN	471506568	11/01	11/01	BX1
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Figure 16. Results of credit inquiry (printable)

To Update the Case Profile – simply click the button marked **[Update Case profile]**.

For purposes of this exercise, you may view a credit report by

- Choosing the client Andrew Testcase
- Go to the **[Loan]** tab
- Click **[Credit Report]**
- On the 4/23/2002 entry, click the [show] box – you should see a three-bureau report with all pertinent information.
- To populate the Case Profile, simply click the button marked [Update Case Profile] (you may do this then go view the case profile for Andrew).

Case Resolution

- Closing Info.
 - Complete details of transaction (for future reporting purposes)
- Closing Loan Programs
 - Complete details of transaction (for future reporting purposes)

Find a property:

Choose Search for Properties

Pick a State click “search Properties” button

Fill out basic information on the screen, click “search now” button

You should see a list of properties that met your criteria

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. Below this, a sidebar on the left contains the CounselorMax logo, a 'Quick Client Search' dropdown menu with a list of names (King, Ericka; Lent, Stewart; Morton, William; Murray, Charlene; Newman, Ronald; Newton, Connor; Ontiveros, Winnie; Ontiveros, Winnie; Rome, Sam; Rose, Charlene; Rufford, Justin; Salinas, Panchito; Sanwald, Rosey; Smart, Stay; SMITH, YVETTE), and a section for 'Identify Clients' with radio buttons for All, In-Process, Closed, Prospect, and Suspended, along with a checkbox for 'New Client' and a 'Global Mode' button. The main content area is titled 'Find a Home' and features a 'State' dropdown menu set to 'CALIFORNIA' and a 'Search Properties' button. Above the search area, there are links for 'CounselorMax Manuals and Resources', 'Search for Properties', and 'Search for a HomeSteps home!'.

Figure 17. Search for Listed Properties

Reporting

Reporting

Show All of your Reminders – click to see a printable list of reminder letters

Print Batch Letters – click to see and print all batch letters

View All of your client logs – click to see all of your client logs

CounselorMax Custom Report

Quick Client Search

King, Ericka
Lent, Stewart
Morton, William
Murray, Charlene
Newman, Ronald
Newton, Connor
Ontiveros, Winnie
Ontiveros, Winnie
Rome, Sam
Rose, Charlene
Rufford, Justin
Salinas, Panchito
Sanwald, Rosey
Smart, Stay
SMITH, YVETTE

Identify Clients

☐ All
☐ In-Process
☐ Closed
☐ Prospect
☐ Suspended
☒ New Client

Global Mode

Logout

Select State
HUD-9902

Select One:
☒ HUD 990

Year 2004

Run Ann

Top 10 Rea

Letters, Re

Down Load

Housing Counseling Agency Activity Report

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

OMB Approval No. 25 (exp. 04/)

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

1. Counseling agency name and address/telephone/fax/contact person/e-mail
Demo Agency
555 Any Street
Anywhere, CA 92108

2. Reporting Year (yyyy)
from Oct 1, 2003
to Sep 30, 2004

Check here if any of this information is incorrect ☐

Freddie Mac: 555-55-5555 testemail@CounselorMax.com

	All Counseling Activities	HUD C Activ
3. Ethnicity of Clients (select only one)		
a. Hispanic	23	
b. Not Hispanic	13	
4. Race of Clients		
Single Race		
a. American Indian/Alaskan Native		
b. Asian	1	
c. Black or African American	13	
d. Native Hawaiian or Other Pacific Islander		
e. White	13	
Multi-Race		
f. American Indian or Alaska Native and White	2	
g. Asian and White	2	
h. Black or African American and White	5	
i. American Indian or Alaska Native and Black or African American		
j. Other multiple race		
5. Income Levels		

Done

Internet

Figure 18. HUD 9902

Standard Reports:

HUD 9902

HUD report (annual)

- Choose the year that you would like to report
- Click the HUD button

Click "run annual report"

(new browser view should show reporting doc completely filled out – see figure 18.)

- Click on the control report to see the breakdown of the figures within the 9902.

HUD – Interim report (reports cases that became active within the period defined by the User)

- Click the YTD 9902 button
- Choose the end date
- Click run report button.

(new browser view should show reporting doc completely filled out)

- Click on the control report to see the breakdown of the figures within the 9902.

Custom Reporting

Calendar Outreach Intake Education Counseling Loan Resources Reporting

CounselorMax Global Mode

Custom Reports ☒

Title: Average Percent of AMI

☒ Portrait ☐ Landscape

Column	Label	Sort	Group	Filter	Tabulate
Last Name	Last Name		<input type="checkbox"/>	<input type="checkbox"/>	n/a
First Name	First Name		<input type="checkbox"/>	<input type="checkbox"/>	n/a
City	City		<input type="checkbox"/>	<input type="checkbox"/>	n/a
Zip Code	Zip Code		<input type="checkbox"/>	<input type="checkbox"/>	n/a
Service Type	Service Type		<input checked="" type="checkbox"/>	<input type="checkbox"/>	n/a
Date Case Created	Date Case Created		<input type="checkbox"/>	<input checked="" type="checkbox"/>	n/a
				Oct 1 2003 to Mar 31 2004	n/a
Counselor	Counselor		<input type="checkbox"/>	<input type="checkbox"/>	n/a
Race	Race		<input type="checkbox"/>	<input type="checkbox"/>	n/a
HH Annual Income	HH Annual Income		<input type="checkbox"/>	<input type="checkbox"/>	
% AMI 2004	% AMI 2004		<input type="checkbox"/>	<input type="checkbox"/>	AVG

☒ Display Totals/Sub Totals ☐ Save this Report

<< Back Show Report Export To Excel

Figure 18. Custom Reporting – setting the logical equations

Setting up and saving a custom report:

For the purpose of this exercise, custom reporting has been simplified. In a normal environment, you can report on any data that has been captured through the entire process. The data fields are grouped into rational groupings, which we call Data Sources. The data sources are a simplified way of handling groups of data. From these groups you can choose to use all or individual fields, set in any order, filtered by any field.

For example;

1. In Global Mode, click on the [Custom Reports] box
2. Choose the data source OHCD – this was a mock report similar to the CDBG client report by clicking on OHCD (it should be highlighted) then clicking on **[OK]**
3. In this next view, you can see all of the individual fields that make up the data source OHCD. This view will allow you to build a report (first field choice begins the headings across the top of the spread sheet);
4. Choose the individual fields that you would like to report or click >> to move all fields;
5. Click **[Submit Query]**
6. You should see a grid with all of the fields on the left and logical functions to the right (see figure 18.)
7. Group by a relevant field (i.e. service type, race, etc.);
8. You may filter by date:
 - a. Case creation > 10/01/2001 (check more)
 - b. And
 - c. <= 12/31/2001

This will set the file criteria for all that fall between these dates.

Press [submit query] to view the result

Note: you can save a report by checking the [save report] box prior to running the query. Also, you can download the data to you desktop by clicking the [Export To Excel] button.

This is a very powerful tool that will allow you to prepare reports from any field in the system. You will learn more about this and other functions during the 8-hour training course.

We hope you enjoyed this exercise. We appreciate your input. If you have any question, suggestions, or concerns about the CounselorMax system, please call our customer service line (888) 244-5570.

Remember to Delete yourself as a client when you are finished (go to the Outreach Tab in Client Mode and click on the delete button).