



Foreclosure Mitigation Counseling Module Information and Guidelines

Welcome! Thank you for your continued support of the CounselorMax™ Client Management System. This document explains access and training resources available to your group as you begin to use the new **Foreclosure Mitigation feature in CounselorMax.**

Getting Started...

- **Sign-Up:** To become a **new** CounselorMax user, complete the CounselorMax Order Form to receive a login ID and password. Are you an **existing user** and have forgotten your login ID and password? Contact us at counselormax@nw.org.
- **Access:** To access CounselorMax, please go to <http://www.counselormax.net> and enter your login ID and password. Once you have selected a client with the service type as Mortgage Default/Early Delinquency, you will notice the *Guidance & Planning System button* under the Counseling tab. This is the gateway to the Foreclosure Module.
- **First American CREDCO:** If you need to sign up to pull credit through the CounselorMax application, you may do so with First American CREDCO at <https://www.credco.com/signup/cmax/Default.aspx>. For questions regarding CREDCO credit reports and/or the enrollment policy, please contact First American CREDCO at 1-800-577-8787.
- **Entering Prior Clients:** CounselorMax features functionality that enables you to enter clients you have seen prior to today. You may use these as long as your *Legacy Clients* icon on the lower left-hand corner of any CounselorMax user page has not expired. Detailed directions are posted on the <http://www.counselormax.com> web site in the Training section.
- **Additional Users:** If you need to add additional counselors to your system beyond the five you began with, send an email with your request to counselormax@nw.org and we will promptly accommodate you.
- **Training:** **You must request access to all training sessions via email or fax.** Please see the attached calendar for the full offering of overview and Foreclosure Module WebEx training sessions. Classes are also available at NeighborWorks® Training Institutes. *For new users, overview classes are highly recommended so that you can quickly and easily learn how to navigate the Foreclosure Module.* We also recommend visiting <http://www.counselormax.com>, where you will find helpful resources and tools for working with CounselorMax.
- **FAQs:** For frequently asked general and technical questions, please go to <http://www.counselormax.com> and look under Training Resources.



TRAINING SCHEDULE *(All times are Eastern Standard)*

NEW! Foreclosure Module (including NFMC) Training Sessions

This web conference session specifically covers the features of the new Foreclosure Module, including basic navigation, work planning, resolutions and NFMC levels of service. Note: *This session is most appropriate for users who have already participated in overview training sessions.*

- [May 21, 2008 – 11 a.m. – 12:30 p.m.](#)
- [June 4, 2008 – 11 a.m. – 12:30 p.m.](#)
- [May 28, 2008 – 11 a.m. – 12:30 p.m.](#)
- [June 11, 2008 – 11 a.m. – 12:30 p.m.](#)

CounselorMax™ New User WebEx Overview Training Sessions

New user training is designed to provide an overview and “how to” to utilize all general aspects of the CounselorMax software. This includes set up, navigating screens, various tools, tracking and reporting. These segments will not include the new Foreclosure Module.

General Overview: This session provides an overall introduction to the CounselorMax tool, including how to set up admin rights.

- [May 22, 2008 – 1:30 p.m. – 2:30 p.m.](#)

Set-Up and Customization Overview: This 90-minute web conference will benefit individuals responsible for setting up and customizing CounselorMax in order to support the various activities of their housing counseling agency. The training will give you the ability to set up CounselorMax to track information that is important to you, your agency, your community, and existing or potential funding sources. By successfully customizing CounselorMax, your agency will have ability to track and report on outreach efforts, programs, client demographics and educational activities.

- [May 27, 2008 – 1 p.m. – 2:30 p.m.](#)
- [June 24, 2008 – 1 p.m. – 2:30 p.m.](#)

Data Entry and Client Files Overview: This 90-minute web conference will help you create and manage client files. You'll learn basic data entry requirements and automated case management activities that ease the burden of file management.

- [May 28, 2008 – 1 p.m. – 2:30 p.m.](#)
- [June 25, 2008 – 1 p.m. – 2:30 p.m.](#)

Reporting Overview: This 90-minute web conference will cover CounselorMax reporting capabilities. You'll learn to collect client data in a manner that promotes consistent and accurate reporting, and you'll explore methods for using CounselorMax to ease your tracking needs by customizing reports.

- [May 29, 2008 – 1 p.m. – 2:30 p.m.](#)
- [June 26, 2008 – 1 p.m. – 2:30 p.m.](#)

CounselorMax User Training and Foreclosure Module (Including NFMC) Training Provided at NeighborWorks® Training Institutes

HO220 Data Management and Tracking with CounselorMax

This 2-day, live-lab course is for current and prospective CounselorMax users responsible for data management and tracking within a housing counseling agency. This session will show you how to harness the power of CounselorMax to support the unique needs of your agency. You will create and manage client files, learn basic data entry requirements and automated case management techniques, and use CounselorMax functions to ease your tracking needs and workflows to organize data. Through this course you will establish goals for success with CounselorMax; develop a plan for its implementation; and learn to use this tool in a way that supports your current housing counseling plan – both pre- and post-purchase activities.

- [August 21 - 22, 2008 – Live Classroom Lab in Chicago, IL](#)
- [December 11 – 12, 2008 – Live Classroom Lab in Washington, DC](#)

www.CounselorMax.com