



NEIGHBORWORKS® NETWORK TRAINING SCHEDULE

Learn how to get the most out of your investment in CounselorMax™, and how to effectively harness the power of this valuable tool!

In-Person, Hands-On: CounselorMax User and Foreclosure Module Training (including NFMC compliance)

Cost: \$410 or usage of NW slot

Location: NeighborWorks® Training Institutes

- March 1 – 5, 2010 (New Orleans, LA)
- May 3 – 7, 2010 (Phoenix, AZ)
- August 16 – 20, 2010 (Philadelphia, PA)
- December 6-10, 2010 (Washington, DC)

To register: www.nw.org/training

Cost: Scholarship only

Location: place-based (regional) training events

- January 27– 28, 2010 (Orlando, FL)
- February 1 – 2, 2010 (Albany, NY)
- February 2– 3 & 4– 5, 2010 (Phoenix, AZ – 2 sessions)
- April 12–13, 2010 (Richmond, VA)
- June 14–15, 2010 (New Jersey)
- July 19– 20, 2010 (Las Vegas, NV)
- September 20– 21, 2010 (Minnesota or Milwaukee)

To register: www.nw.org/scholarships

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. The session will show you how to harness the system's functionality 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 system 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 the tool in a way that supports your current housing counseling plan – both pre- and post-purchase activities as well as mortgage default/early delinquency.



WebEx Online Training: CounselorMax New User Overview Sessions

Cost: FREE

Time: 2:00-3:30pm EST

- February 17, 18 & 19, 2010
- March 16, 17 & 18, 2010
- April 6, 7 & 8, 2010
- May 11, 12 & 13, 2010
- June 8, 9 & 10, 2010
- July 6, 7 & 8, 2010
- August 10, 11 & 12, 2010
- September 7, 8 & 9, 2010
- October 12, 13 & 14, 2010
- December 14, 15 & 16, 2010
- November 9, 10 & 11, 2010

This session is most appropriate for users who are either new to CounselorMax or need a refresher. Please email the counselormax@nw.org mailbox to request the date you would like to participate.

General Overview: An overall introduction to CounselorMax. For those who are responsible for setting up the system and customizing it in order to support your unique counseling activities, this training covers how to configure CounselorMax to track the information needed by your agency, your community, and existing/potential funders. By successfully customizing CounselorMax, your agency will have ability to track and report on outreach efforts, programs, client demographics and educational activities.

Using CounselorMax - Data Entry, Client Files & Reporting Overview: This session enables you to create and manage client files. You'll learn basic data entry requirements and automated case management activities to ease the burden of file management. You'll learn to collect client data in a way that promotes consistent and accurate reporting, and you'll explore methods for meeting your tracking needs through customized reports.

WebEx Online Training: Foreclosure Module Sessions (including NFMC compliance)

Cost: FREE

Time: 2:00-3:30pm EST

- February 24, 2010
- February 25, 2010
- March 1, 2010
- March 31, 2010
- April 21, 2010
- May 26, 2010
- June 7, 2010
- June 23, 2010
- July 28, 2010
- August 25, 2010
- September 22, 2010
- October 27, 2010
- November 24, 2010

This session is appropriate for users who have already participated in overview training sessions. Please email the counselormax@nw.org mailbox to request the date you would like to participate.

This web-based session specifically covers the features of the new Foreclosure Module, including basic navigation, work planning, resolutions and NFMC levels of service.

WebEx Online Training: Special Topic Sessions

Cost: FREE

Time: 2:00-3:30pm EST

- February 1, 2010 (Education Only Homebuyer GPS)
- February 15, 2010 (New Homebuyer Full Info GPS)
- February 18, 2010 (Customized Reporting)
- March 15, 2010 (Rehab Services GPS)
- April 5, 2010 (Reverse Mortgage/HECM)
- April 19, 2010 (Reporting to NeighborWorks®)
- May 3, 2010 (Education Only Homebuyer GPS)
- May 17, 2010 (New Homebuyer Full Info GPS)
- June 21, 2010 (Rehab Services GPS)

To register for one of these WebEx training sessions, e-mail Jose Fernandez (jfernandez@nw.org).



CounselorMax@nw.org

