

# CounselorMax™ Frequently Asked Questions

Updated April 9, 2010

The CounselorMax™ client management system is available to both not-for-profit organizations as well as for-profit organizations.

## ***Registration Questions***

### **1. What Does CounselorMax Cost?**

CounselorMax™ is currently available for \$495 per year, which includes five user seats (five distinct staff can access the site). Additional seats can be added for \$150 per seat per year.

### **2. How can I purchase CounselorMax™?**

If you are paying by credit card, CounselorMax™ can be purchased through the website at [www.counselormax.com](http://www.counselormax.com). If you prefer to pay by check, please email [CounselorMax@nw.org](mailto:CounselorMax@nw.org) with the pertinent company information and request an invoice to be sent to you in the mail.

### **3. How will my license be renewed?**

Approximately 60s day prior to your annual anniversary date, the system will generate an invoice via email from NeighborWorks® America. You can pay online using a credit card [www.counselormax.com](http://www.counselormax.com) or mail payment with the provided invoice.

### **4. What if I received a license sponsorship from Freddie Mac?**

Freddie Mac stopped sponsoring licenses effective January 1, 2010. Within 60 days of your licensing anniversary date, you will receive an invoice via email from NeighborWorks® America for your CounselorMax™ renewal.

## ***Training & Support Questions***

### **1. What training is available for CounselorMax users?**

Multiple training opportunities are available. NeighborWorks® Training Institutes offer classes four times a year. Also CounselorMax™ training is offered regionally at place-based trainings and a variety of WebEx sessions are offered online free of charge.

Please refer to the most current training schedule for more details:

<http://www.counselormax.com/Training/TrainingSchedule.pdf>

### **2. Are there software updates?**

CounselorMax™ is a web-based tool; automatic software updates are distributed through the Internet.

### **3. What will happen when reporting requirements change?**

NeighborWorks® America is committed to making system changes in support of regulatory requirements as they occur (i.e. HUD, NFMC, and any NeighborWorks reporting requirements).

### **4. How do I get technical support?**

CounselorMax™ support line at (866) 720-1807 Option 1 or email [CounselorMaxHelp@nw.org](mailto:CounselorMaxHelp@nw.org). Support office is open between 9:00am – 5:00pm, Monday-Friday (EST) except for Federal Holidays.

NeighborWorks® America is the provider for CounselorMax™ technical support.

## ***Login issues***

### **1. Cannot login, what should I do?**

Check with your CounselorMax Administrator to confirm your account information; spelling, organizational email and security settings. Adding, updating, and removing users are the responsibility of your organization's CounselorMax Administrator(s).

Only the CounselorMax Administrator(s), with the function ADMIN MENU visible on their screens can do these functions.

### **2. I forgot my password, how do I get it back?**

Please use the "Lost Password" function located on the home page using your organizational email. If this does not work, please confirm your account information with your organization's CounselorMax Administrator.

## ***Custom Reports***

### **1. What are the basic steps to create a Custom Report?**

Prior to building a Custom report, you must have a clear idea of the information needed.

- What does your report need to state?
- What is the Title?
- What information does the report have to include?
  - Think in reference to "Fields"
  - Client#, date, etc.

Write down on paper a rough draft of what needs to be included

- Basic Layout.
  - what goes on left side of page to right
  - What needs to be Grouped, filtered (dates)
- Do not Overwhelm
  - Too many fields and especially filters

- These can adversely affect the data generated on the report
- Experiment within Custom Reporting until it looks the way you want it.
  - Save report with a logical title for future use
  - Delete rough drafts

If a pivot table will suit your needs better:

- Download all fields needed
- Compile in EXCEL