

Demonstrate Impact with New CounselorMax[®] Management Reports



Monitor your organizations' business activities and strategically plan according to your pipeline with the new CounselorMax[®] Management Reports. The ability to easily generate reports covering any date range you select **increases your productivity and efficiency. START TODAY.**

Executive Summary Report

Analyze critical business statistics within the selected date range.

View:

- number of new clients created
- cases created
- cases resolved
- attendance and completion
- one-on-one counseling appointments
- counseling hours

Executive Summary Report From 1/1/2013 to 12/31/2014	
Activity Type	Total
# of New Clients in period	22
Cases Created in period	27
Cases Resolved/Closed	12
All Active Cases (date range does not apply)	1026
Total Education Attendance	12
# of Clients Completing Edu. Req.	10
# of One-on-One Counseling Appts.	45
Total One-on-One Counseling Hours	169

New formatting and display for all custom reports

Case Activity Report by Service Type

View cases according to service type (e.g., pre-purchase, foreclosure) for a given period.

Last Activity Over 60 Days

Monitor client touchpoints. For example, generate a report of clients who have not been contacted within a specified period. Choose any number of days to review (e.g., 5, 10, 60, 90).

over →



Case Activity Report by Counselor

See each counselor's activity and status for a selected time period.



Counselor Activity Report (No Education)

Get a glance at counselors' appointments, activities and counseling hours/minutes according to service.



Education Outcome Report

See every case in which an education outcome has been completed (e.g., attended a one-day class or completed a series workshop).



Education Activity Report (all courses)

View clients that have attended a educational class provided by your organization. You'll get a complete listing within the specified reporting range.




Outcomes Report by Counselor

Are counselors at your organization achieving desired outcomes? See cases with set outcomes within a specified reporting range.




Outcomes Report by Service

Learn your resolution rate or achieved outcomes according to service type/line of business.



LEARN MORE. SIGN-UP for upcoming 1-hour webinars on New CounselorMax[®] Management Reports. View the schedule and register at CounselorMax.com/training.html.



Need more info? Check out the Job Aids in the RESOURCES Tab in CounselorMax[®] or email us at CounselorMax@nw.org.