



Tips for Developing an Effective Client Work Flow/Improving Data Integrity

Based on recent technical assistance activities conducted as part of the NeighborWorks and Citi technology pilot it came to light that there are certain fundamentals an agency can implement in order to develop an Effective Client Work Flow and Improve Data Integrity for Reporting Accuracy.

1. The ultimate key to having a consistent and effective work flow & improved data integrity is completing a comprehensive intake by inputting all available fields on the 'Outreach' tab.

Contact Information (show)

Saved Successfully!

First Name *	<input type="text" value="Data"/>	Last Name *	<input type="text" value="Integrity"/>
Middle Name	<input type="text"/>	Name Suffix	<input type="text" value="v"/>
Street Address *	<input type="text" value="1776 Accuracy Lane"/>		
Zip Code *	<input type="text" value="20020"/>	City *	<input type="text" value="Washington"/>
State *	<input type="text" value="DC"/>	Home Phone	<input type="text" value="(202) 555 - 1212"/>
Work Phone	<input type="text" value="(202) 555 - 8989"/>	Cell Phone	<input type="text" value="(202) 555 - 1212"/>
Preferred Language	<input type="text" value="English"/>	Sponsor	<input type="text" value="None"/>
E-Mail	<input type="text" value="good_reports@me.com"/>	Purpose	<input type="text" value="None"/>

Do Not Contact

IMPORTANT NOTE Once a client has been entered into the system at any point; they **should not** be re-created or duplicated in Outreach, even in the case that they are returning for additional services. To determine if a client already exists in the database, do a 'Quick Client Search' by the last name of the client or do an 'Advanced Search' to search by a variety of other categories.

Quick Client Search

Briggs, James
Fletcher, Bill

[Advanced Search](#)

Find a Client

Enter any one or more of the following pieces of information to perform your search.
NOTE: If no records match your search criteria, please try again using fewer filters.

Client Info:

First Name:

Last Name:

Client Id:

Street Address:

Co-Applicant:

First Name:

Last Name:

2. Additionally, on the 'Intake' tab, check or uncheck the 'Additional Fields' boxes to capture a greater depth of information from clients beyond the required fields. Areas such as 'Funding Sources' and drop down menus on 'Education' and 'Marital Status' are customizable by your System Administrator through the 'Admin Menu'.

The screenshot shows a form titled "Additional Fields" which is currently checked. It is divided into several sections:

- Funding Sources:** A multi-select dropdown menu with options: "AG Settlement", "AG Settlement", and "ADHS". Below the menu, it says "Press the 'Ctrl' button to select more than one source".
- Demographics:** A section containing several fields:
 - Race:** A dropdown menu with "Select One" selected.
 - Number in Household:** A dropdown menu.
 - Gender:** Radio buttons for "Male" and "Female".
 - Head of Household?:** A checkbox.
 - Veteran?:** A checkbox.
 - Foreign Born?:** A checkbox.
 - Housing Choice Voucher?:** A checkbox.
- Additional Fields (unchecked):** A section containing several fields:
 - Ethnicity:** A dropdown menu with "Select One" selected.
 - Age:** A text input field.
 - Birthdate (mm/dd/yyyy):** A text input field.
 - Disabled?:** A checkbox.
 - Disabled Dependent?:** A checkbox.
 - Education:** A dropdown menu with "Select One" selected.
 - Marital Status:** A dropdown menu with "Select One" selected.
 - Active Military:** A dropdown menu with "Select One" selected.

3. All of the steps that a client will follow from the time of initial client contact to case completion should be documented and distributed to all CounselorMax Users. It's strongly recommended to have work flow processes and procedures posted at each user's work station.
4. Evaluate the current services (ex. Home Purchase, Education, Mortgage Default/Early Delinquency, Homeowner Services, Rental Counseling, Homeless Services and any Custom Services) that your agency offers. Existing activities that are included in existing service types should **NOT** be created as a custom service type. For example, 'Rehab' does not need to be created as a service type as it is already captured in 'Homeowner Services'.

Having clarity and consistency in selecting the Service Type will avoid missing client activities or mislabeling a client.

For example: If a client will be attending Home Buyer Education prior to receiving pre-purchase counseling, will they be given an Education or Home Purchase service type? Either way can be acceptable, however, the organization needs to determine their policies and have everyone adhere to that policy to ensure accurate reporting of the agencies activities.

5. Based on the services being provided and each activity associated with the service, a detailed procedure document should outline the exact steps and actions in CounselorMax®.

For example:

1. Select the 'Counseling Tab'
2. Select 'Case Profile'
3. Enter Credit Score, select Repository from the drop down menu, press 'Save'

This level of detail should exist for each action a user will use to complete a task in CounselorMax.

6. Prior to resolving a case, each user should ensure that all of the steps in the selected or customized work plan have been completed. For some services, there may be additional steps that increase the quality and accuracy of your data.

Example: For home purchase clients, an effective practice is to return to the 'Outreach' tab to update the address to the newly purchased property address.

Contact Information (show)

Saved Successfully!

First Name *	<input type="text" value="Data"/>	Last Name *	<input type="text" value="Integrity"/>
Middle Name	<input type="text"/>	Name Suffix	<input type="text" value=""/>
Street Address *	<input type="text" value="2443 Good Info Blvd"/> ←		
Zip Code *	<input type="text" value="20020"/>	City *	<input type="text" value="Washington"/>
State *	<input type="text" value="DC"/>	Home Phone	<input type="text" value="(202) 555 - 1212"/>
Work Phone	<input type="text" value="(202) 555 - 8989"/>	Cell Phone	<input type="text" value="(202) 555 - 1212"/>
Preferred Language	<input type="text" value="English"/>	Sponsor	<input type="text" value="None"/>
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This will ensure that any reports using contact information from custom reports or outreach activities will have the most current address for the client.

7. Once all of the activities have been completed for a client based on their service type, all files require a 'Resolution' in order for it to appear as a completed case on any reports.

Case Resolution

Case Resolutions for "Home Purchase"

----- CHOOSE ONE ----- HUD Activity

Fulfilled (Purchased housing) _____

Suspended (Withdrew from counseling) _____ and partner assist the client?

Entered Lease Purchase Pgm _____

Decided Not to Purchase _____

(Resolve ONLY when you want to finalize this case)

8. After a case has been completed with a resolution and a resolution date, a case should **NOT** be re-activated, with very limited exceptions. Re-activating cases can change the resolution date and potentially cause cases to be reported in multiple quarters.

Case Resolution

Home Purchase: Saved Successfully!

This Home Purchase Case was Resolved on 8/13/2013 to 'Fulfilled (Purchased housing)'

To re-activate this case click the button below



9. All of the steps from a Client Work Flow Process and Procedures should be clear, concise and repeatable by all CounselorMax® users in the agency.