



We have homeownership counselors covered. Online.

## Updates and Enhancements

Last updated: December 2011. Most recent enhancements listed first.

### **Client Level Reporting (ARM):**

Client Level Reporting (ARM Reporting) for HUD will be required at the end of 1st quarter FY2012 (i.e., in January 2012). At that time HUD will require client level details as well as additional information about agency staff and counselors to be reported. In support of this new requirement, new data points are being added to CounselorMax now so that they can be collected during first quarter and be available for reporting in January, 2012. More details about the report itself and how to run it will be provided before January. (Oct. 2011)

**New Data Dictionary Available to Support Custom Reporting:** We are excited to provide a new tool to help make Custom Reporting easier. A Data Dictionary explains all the available data points within the categories of custom reporting and maps them to their locations within the application. The new Data Dictionary can be found in the CounselorMax application under the CounselorMax Manuals and Resources tab. (Oct. 2011)

### **Introducing the CounselorMax Listserv:**

In an effort to encourage idea sharing and to foster discussions among CounselorMax users, NeighborWorks America is creating a CounselorMax listserv. A listserv is an electronic medium for discussions and idea exchange where messages are transmitted as email to members of the group. This forum will allow participants to bring up topics of interest or ask questions about CounselorMax for discussion. It will be a moderated forum, so there will be a little delay between comments being posted and appearing in email to the other members. We believe this will be a good way to share CounselorMax knowledge and ideas as well as to discuss other issues pertaining to CounselorMax, and we trust that you will benefit from the use of this tool. Please limit discussions to CounselorMax-related issues. (June 2011)

**The "Log Notes" field** has recently been enhanced to accept input and display of special characters such as % and "quotation marks". (June 2011)

**Custom Reporting** has been enhanced to include the "Rehab/Const Cost" field for reporting purposes. (June 2011)

### **Hope LoanPort:**

CounselorMax<sup>®</sup> can now upload loan modifications, including relevant documents, to the **Hope LoanPort** for consideration by connected Servicers. W2 forms, paystubs and a variety of documents can be scanned into your computer or converted to PDFs and then can be simply attached to your client's case to be included in the transmission. You will find a job aid to

explain how to do this under the Training/Help Desk link at [www.counselormax.com](http://www.counselormax.com). (Mar. 2011)

**New look:**

The CounselorMax application now has a **fresh look and feel**. (Mar. 2011)

**New search capability:**

It is now possible to search for a file by its case number. (Mar. 2011)

**Uploading the HUD 9902 report:**

CounselorMax now provides the capability to electronically transmit the HUD 9902 report to the HUD HCS system. If you are a CounselorMax user with a HUD HCS account, you no longer need to manually enter your HUD 9902 numbers in the HCS. Instead you can send it with the click of a button. A detailed job aid with instructions can be found in the CounselorMax application by clicking on the "Resources" tab and then clicking on the "CounselorMax Manuals and Resources" button. (Mar. 2011)

**Reverse Mortgage Counseling Toolkit:**

Reverse Mortgage or HECM Counselors can now link directly to the National Council on Aging (NCOA) **Reverse Mortgage Counseling Toolkit** website to access the FIT (Financial Interview Tool) and the Benefits checkup tool. This link is found under the Counseling tab. (Oct. 2010)

**New CounselorMax User Guide:**

Published and available for download or viewing from the CounselorMax application under the Resources tab. This new guide consolidates and replaces much of the older documentation on the site. With the new guide there is also a new user guide change log document. As changes are made to the user guide, they will be summarized in the change log. Users will be directed to which pages/sections of the user guide have changed. (Sept. 2010)

**Budget and Income functionality changes:** In addition to the standard income data auto populating in the client budget, income items added through the custom feature will flow to the budget. Custom income items show up as "other income." In addition, "Unemployment" has now been added to the standardized "other income" category. (Sept. 2010)