*Counselor**Max***

Foreclosure Mitigation
Instruction for Managing Legacy Cases

Vers 1.0
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Foreclosure Mitigation Clients and NFMC / GPS
Purpose of this Document

During the initial deployment of the foreclosure mitigation module, you may need to adjust or add certain records to CounselorMax so that they are reported properly. For purposes of this document, we are addressing cases that are identified as **mortgage default / early delinquency** (service type in Intake). This document will instruct you on how to deal with the following types of legacy cases:

1. Clients that do not exist in CounselorMax, and need to be "back dated" so that they report in the proper period(s);
2. Clients that do exist in CounselorMax, and;
    a. Have an open and active case that needs to be updated to comply with NFMC guidelines; and,
    b. Have a closed case and need to be updated to comply with the NFMC guidelines;

Legacy Type 1a

Clients that do not exist in CounselorMax*, *are closed cases, and need to be "back dated" so that they report in the proper period(s)

Steps to entering a new legacy client:
(Note: you may need to have legacy link turned on by CMAX personnel)

Step 1 – Create a new file with back dated file create date:

1. On lower left hand corner of tab frame, click on the Legacy Clients link.
2. To create a new "legacy client" click on the Legacy Clients link;
3. Complete required information
4. Complete file "Create Date" back dating to the correct date of first contact;
5. <save>

Step 2 – Create a new mortgage default / early delinquency case:

1. From main Legacy menu, click on Legacy Cases.
2. Find your new client in the list box, highlight and enter to open client.
3. Enter service type of "Mortgage Default / early delinquency
4. Enter all required field information;
5. NOTE: enter case create date (Date Case was Started) at bottom of page;
6. enter the case resolution date (date case was completed);
7. <save>

* Now you should see the new case in the default view.

Step 3 – Create NFMC work plan / GPS items to properly report this case.

1. Close down legacy browser view (pop up from previous steps);
2. Click the Admin link (if logged in as an Administrator)
3. Click 'Case Management'
4. Select the desired 'Client Status'
5. Select 'Service Type' = 'Mortgage Default/Early Delinquency'
6. Check the edit check box next to the desired case
7. Click the 'Guidance & Planning System (GPS)' link near the top of the page
8. Click "auto generate work plan" – click "save work plan" button;
9. Go through each action item and edit the outcome of each (pertinent) line item;

Legacy Type 1b

Clients that do not exist in CounselorMax*, *are open and active cases, and need to be "back dated" so that they report in the proper period(s)

Steps to entering a new legacy client:
(Note: you may need to have legacy link turned on by CMAX personnel)

Step 1 – Create a new file with back dated file create date:

6. On lower left hand corner of tab frame, click on the Legacy Clients link.
7. To create a new "legacy client" click on the Legacy Clients link;
8. Complete required information
9. Complete file "Create Date" back dating to the correct date of first contact;
10. <save>

Step 2 – Create a new mortgage default / early delinquency case:

8. From main Legacy menu, click on Legacy Cases.
9. Find your new client in the list box, highlight and enter to open client.
10. Enter service type of "Mortgage Default / early delinquency
11. Enter all required field information;
12. NOTE: enter case create date (Date Case was Started) at bottom of page;
13. <save>

* Now you should see the new case in the default view.

Step 3 – Create NFMC work plan / GPS items to properly report this case.

1. Open clients file / case;
2. Go to Counseling Tab
3. click on GPS check box
4. Click "auto generate work plan" – click "save work plan" button;
5. Go through each action item and edit the outcome of each (pertinent) line item;

Legacy Type 2a

Clients that do exist in CounselorMax and have an open and active case that needs to be updated to comply with NFMC guidelines.

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6. Open clients file / case;
7. Go to Counseling Tab
8. click on GPS check box
9. Click "auto generate work plan" – click "save work plan" button;
10. Go through each action item and edit the outcome of each (pertinent) line item;

Legacy Type 2b

Clients that do exist in CounselorMax, have a closed case, and need to be updated to comply with the NFMC guidelines.

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1. Click the Admin link (if logged in as an Administrator)
2. Click 'Case Management'
3. Select the desired 'Client Status'
4. Select 'Service Type' = 'Mortgage Default/Early Delinquency'
5. Check the box next to the desired case
6. Click the 'Guidance & Planning System (GPS)' link near the top of the page
7. Click "auto generate work plan" – click "save work plan" button;
8. Go through each action item and edit the outcome of each (pertinent) line item;