OFFICE OF HOUSING COUNSELING

CMS Updates

"Open Doors with Housing Counseling"

August 08, 2019

Meeting Agenda

TIME (approx.)	SPEAKER, ORGANIZATION, SYSTEM
10:35 – 10:45am	Bruce Marks, NACA-Lynx
10:45 – 10:55am	Donna Tally, NeighborWorks America, CounselorMax
11:00 – 11:10am	Paul Downing, HPN, Launchpad
11:10 – 11:20am	Tiffany Eng, Grounded Solutions, HomeKeeper

Note from HUD

The Client Management System (CMS) developers presenting today are all non-profit vendors that provide CMS systems. HUD does not endorse any particular Client Management System (CMS) vendor and does not endorse the views they express or the products and services they or their partner organization's offer. HUD encourages Housing Counseling Agencies to shop around and make an informed decision to select the best option for their agency.

For more information, including a complete list of CMS compliant vendors, please visit the HUD Exchange at: https://www.hudexchange.info/programs/housing-counseling/cms/#overview

NACA-Lynx

NACA

NACA-Lynx

NACA-Lynx is a comprehensive CMS with built-in workflow designed for Purchase counseling

- Web-based software hosted in a secure, isolated Microsoft Azure cloud environment
- Paperless process with attached document scanner/upload capability
- Credit report integration with ability to collect payment
- HUD Integration built-in – 9902, Billing, etc.
- Action Plan auto generated and emailed
- Comprehensive budget with affordability analysis + PITI calculation
- Online client portal: document upload/download, data entry, real-time status and updates, appointments, more
- Narrative logs
- Operational reporting – appointments, pipeline, and more

NACA-Lynx (cont)

NACA IS PROVIDING LYNX FOR FREE

- NACA will facilitate HCO and other CMS migrations
- Trainings and ongoing customer support will be provided
- HCAs will own their data
- NACA follows all regulatory requirements and modern best practices to protect data and secure access
- Full data archive and document retention policy

NACA is setting the standard in counseling and fulfilling its mission of neighborhood stabilization by partnering with organizations that share the same vision of educating LMI borrowers on becoming successful homeowners and improving their financial management

NACA-Lynx (cont)

NACA-LYNX
10 Steps to Qualification / Pre-approval

1 Information
- Household Members
- Dependents
- Demographic Data

2 Counseling
- Financial Questionnaire
- Eligibility
- Counseling Questionnaire
- Stated Budget

3 Pay History
- Credit Reporting
- Payments Data
- Alternative Credit
- Delinquencies
- Bankruptcy

4 Debts
- Credit Cards + Active Debts
- Charge-Offs
- Liens / Judgments
- Inquiries

5 Rental
- Landlord
- Verification (VOR)
- Residence History

6 Income
- Employer
- Self-Employment
- Pay Stubs, W-2
- Tax Documents
- Other Income
- Verification

7 Funds
- Bank Accounts
- Statements
- Savings Pattern
- 401-K + Retirement
- Other Sources

8 Affordabilities
- Max PITI Calculation
- Single Family / Condo
- Multi-Family

9 Budget
- Income
- Liabilities
- Expenses
- Debt + Housing Ratio
- Payment Shock
- Current vs Goal

10 Qualification
- Pre-Approval Checklist
- File Submission + Review
- Conditions
- Explanations
- HUD Submission

NACA-Lynx (cont)

NACA-Lynx has many automated built-in capabilities to make the counseling process more efficient

- Time tracking and scheduling facilitate session planning and reporting
- Narratives capture all counselor – client interactions
- Action Plans give clients their next steps
- Budgets and Savings Patterns are created automatically based on client information
- Qualification Forms provide clients with automated official verification containing their qualified financial information
- Pre-built reports track client progress and counselor pipeline
- The NACA-Lynx Client Portal (Web-File) provides one place for all client access to their status, data entry, document upload / download, and more

NACA-Lynx (cont)

NACA-Lynx – Next Steps and Updates

- Cloud configuration and release to participating agencies
- Data migrations for HCO, CounselorMax and others
- Training webinars and customer service assistance for those getting started
- Test environment to help onboard agencies and enable system demos
- Ongoing enhancements to the client portal – dynamic budgeting, intake workflow
- Additional enhancements to the operational reports

CounselorMax

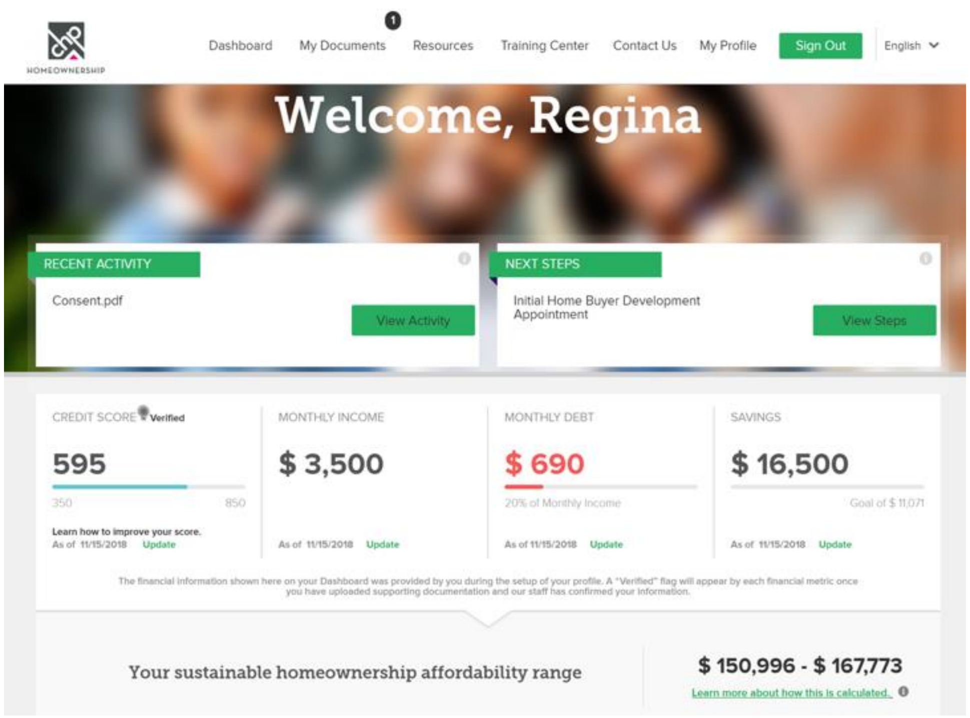
NeighborWorks America

CounselorMax

- Building Modern CMS Tool on Salesforce Platform
  - Trademarked as NeighborWorks Compass™
  - Product Launch on Salesforce App Exchange March 2020
  - Built on 4th Gen product—SBI Tech (Sustainable Business Initiative)
  - SBI Tech already includes end-customer portal adding more housing counselor-centric features now
  - Robust design focused on efficiency, scale, sustainability, impact
  - Will eventually replace CounselorMax® (biggest market share in the industry) but investment in it continues
  - We continue to take new CounselorMax® customers that will be seamlessly converted to NeighborWorks Compass™

CounselorMax

NeighborWorks Compass™



Instagram

We're With You

CounselorMax

CounselorMax® to NeighborWorks Compass™

- Conversion to New Product
  - 12 months notice for sunsetting CounselorMax®
  - Seamless migration of legacy data
  - Technical support throughout conversion journey
  - Configuration support for maximizing customization of new CMS
  - State of the art support system; current customer satisfaction rate of 93% percent; Salesforce based
  - Multi-modality training for onboarding, beginner, intermediate, and advanced learners; utilizing Salesforce Trailhead, webinar-based learning, and NeighborWorks Training Institute

CounselorMax

NeighborWorks Compass™ Features

- Interactive Customer Portal
  - The customer creates an account with the nonprofit; credit card payment for services, appointment scheduling and classes; two-way document upload
- Customizable Service Lines And Dynamic Dispatch
  - Customize all types of counseling and education services
  - Dispatch to appropriate service lines based on customer's selection in customer portal
- Comprehensive Reporting Capability
- Dynamic Budgeting and Action Plan Tools
- Integrations With Other Counselor-friendly Tools

CounselorMax

Roll-out for NeighborWorks Compass™

- Announcement to the industry in August 2019
- Pilot groups begin testing in October 2019
- Product Launch in March 2020 to the entire industry
- Purchasable and downloadable at the NeighborWorks store on the Salesforce App Exchange
- One tool, one price (Salesforce user license bundled with purchase of the tool)
- Pricing model not yet finalized; affordable pricing based on size and volume of the user organization
- Visit our booth for more information
- Stay tuned for more information coming soon!

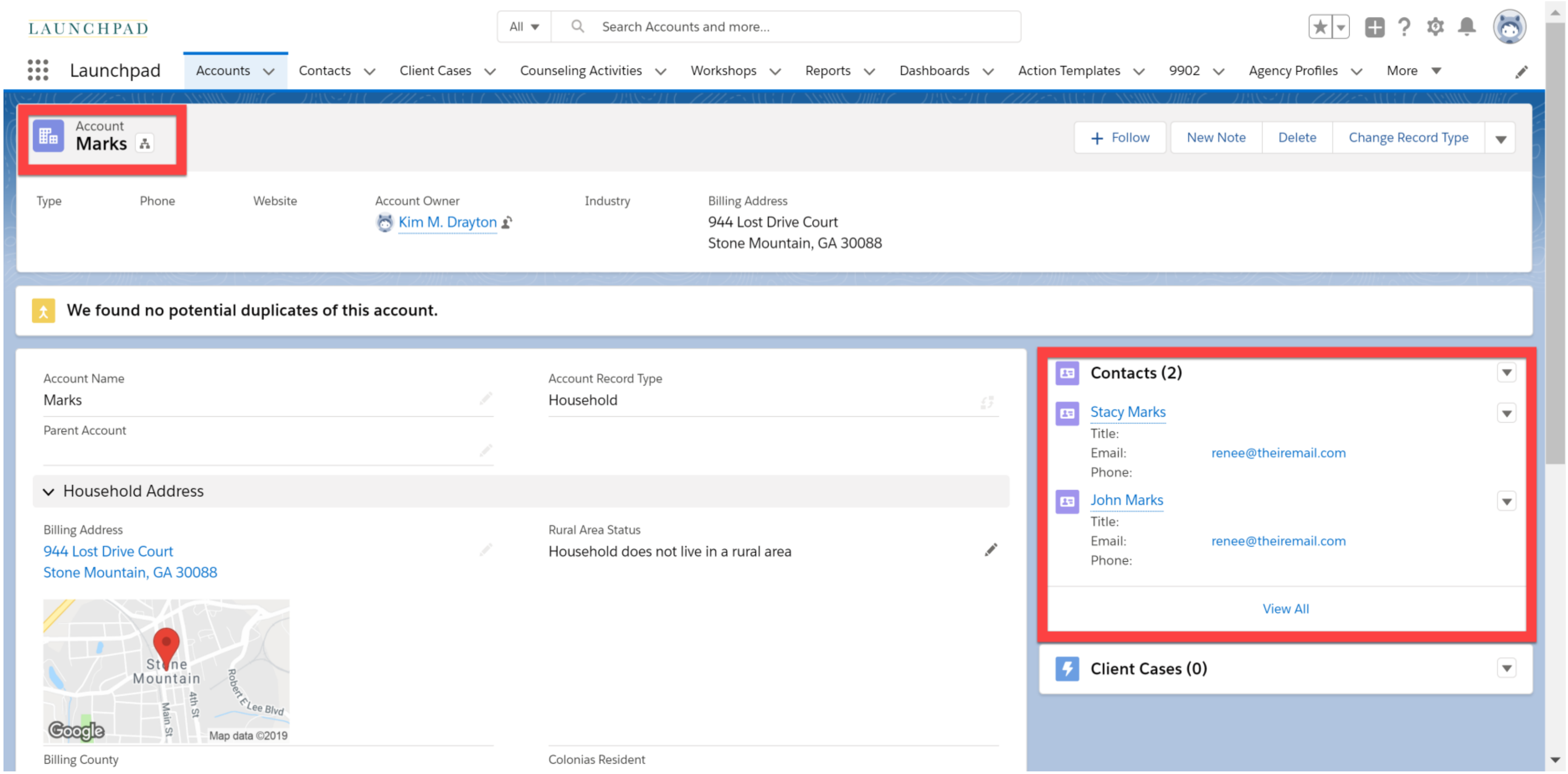
Launchpad

HPN

Launchpad

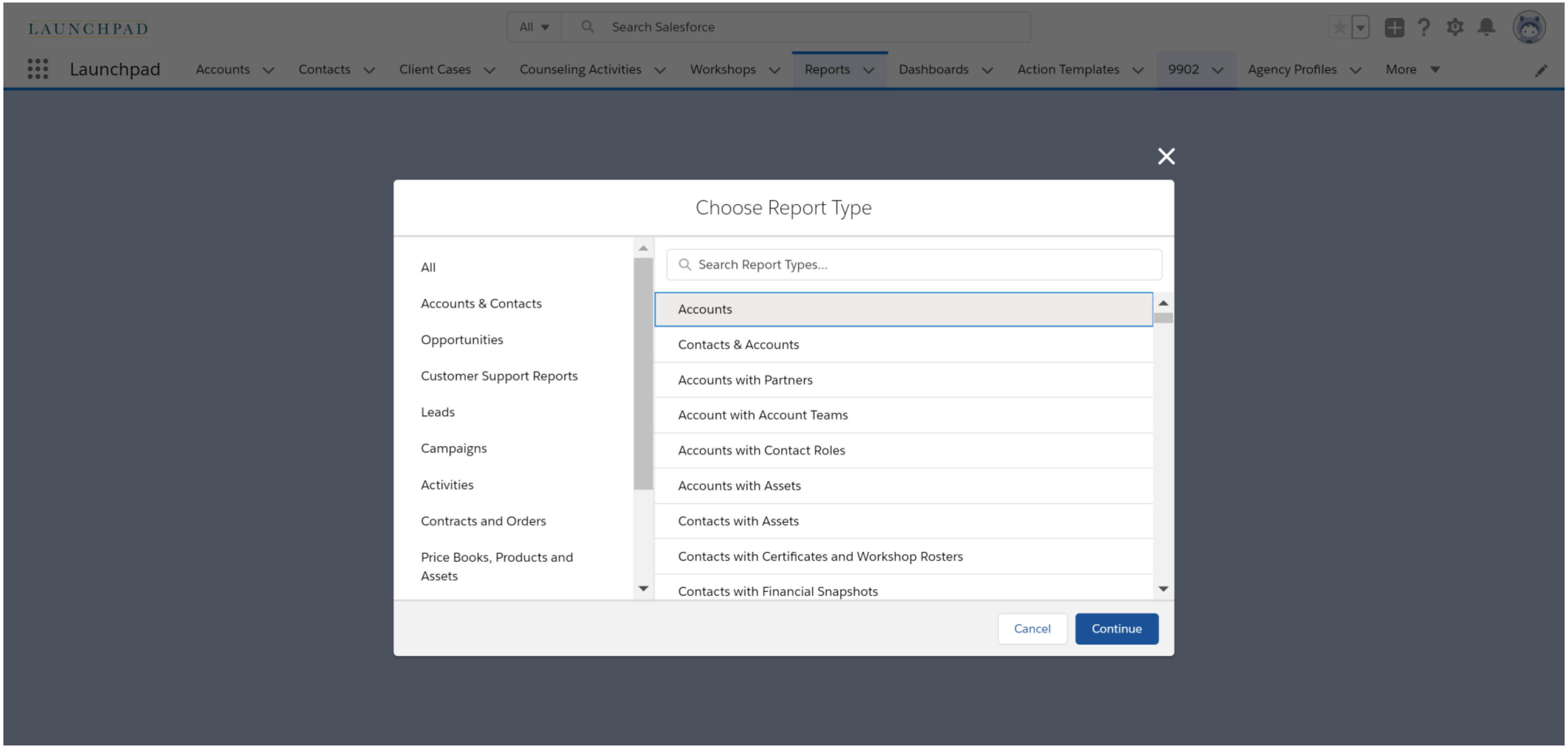
- Advanced business intelligence powered by *Salesforce*
  - Collaboratively developed with national counseling sector partners.
  - Flexibility to adapt system to organizational needs and new strategic partnerships.
  - Customizable reporting for program analysis, reflection and performance.
  - Highest data security standards trusted by 150,000 customers spanning nearly every industry.

Launchpad (cont)



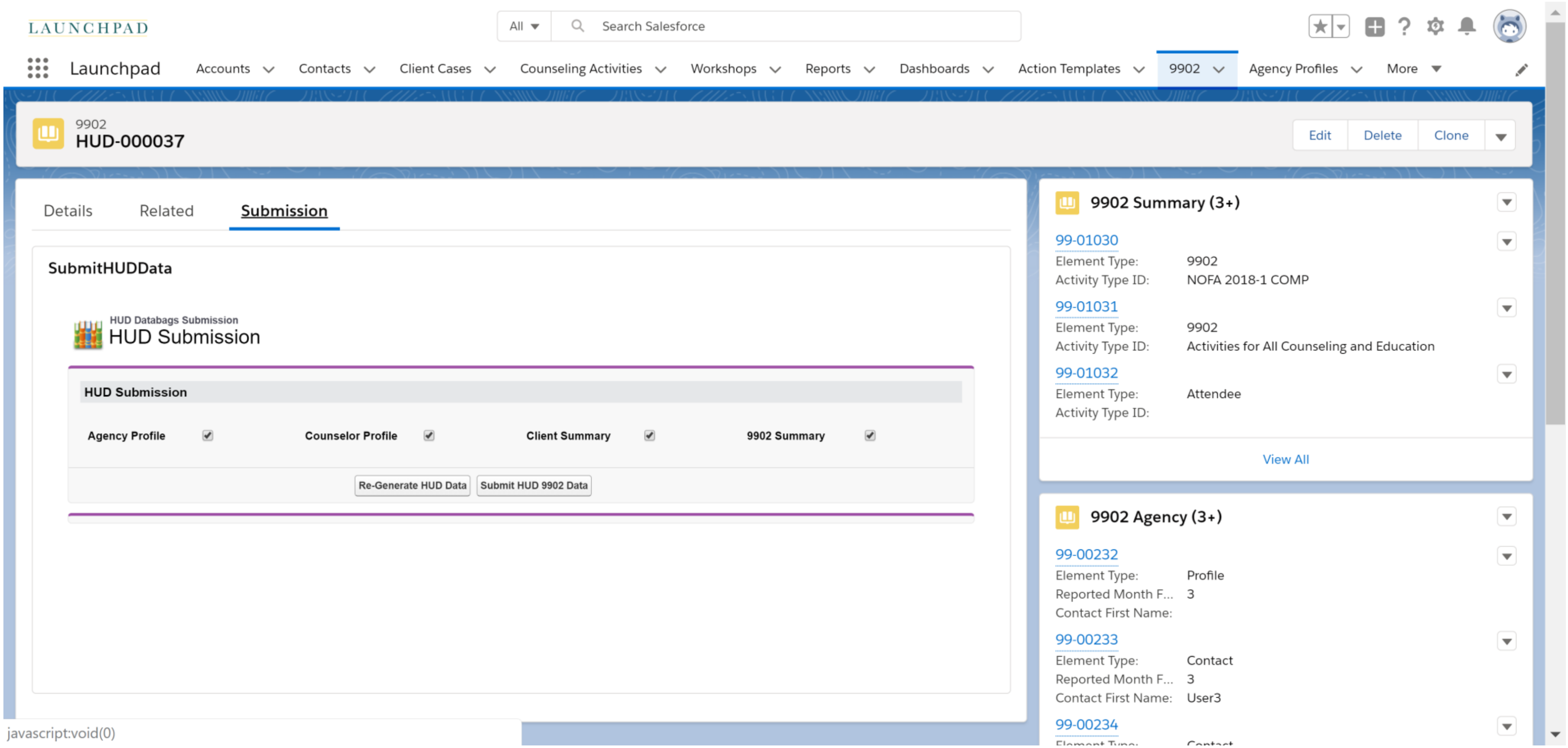
Logical, intuitive account and client management structure.

Launchpad (cont)



Customizable reporting for program analysis, reflection and performance.

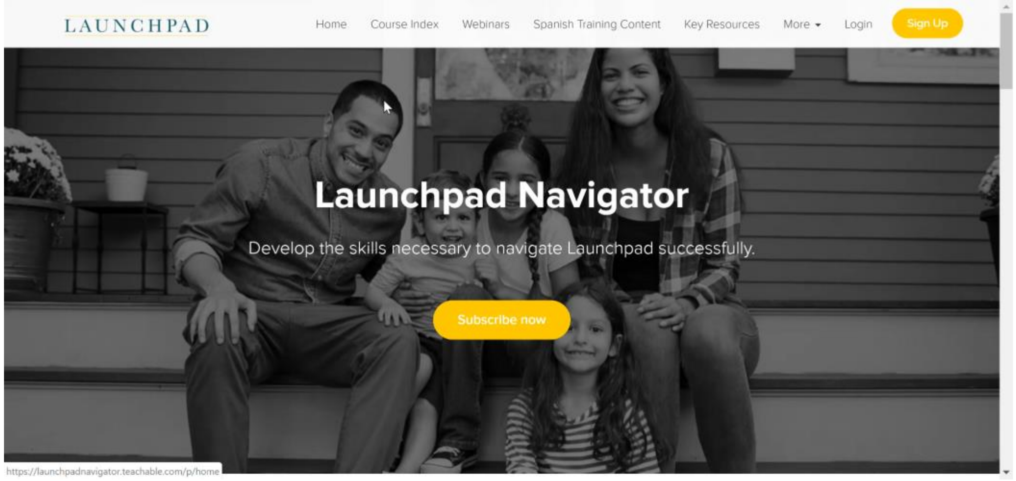
Launchpad (cont)



Streamlined 9902 reporting features.

Launchpad (cont)

- 8 Course Topics
- Over 34 Lessons with Narrated Video Demonstrations*
- Over 344 Active Users*
- Spanish Training Content
- Dedicated Support



* As of July 10, 2019

HomeKeeper

Grounded Solutions

HomeKeeper


HomeKeeper
Homeownership
Housing Counseling
The Homeownership and Housing Counseling Program Manager
salesforce appexchange
GROUNDED SOLUTIONS NETWORK
MyHomeKeeper.org

HomeKeeper (cont)

HomeKeeper Today

Over 95+ Organizations:

- Housing Counseling Agencies
- Community Land Trusts
- Habitat for Humanity Affiliates
- Downpayment Assistance Programs
- Inclusionary Housing Programs
- Community Development Corporations
- and More...

HomeKeeper (cont)

Selected Features

- **Manage multiple housing programs**: Track eligibility and certify income, monitor for for program compliance.
- **Counselor Tracking:** Centralize trainings and certifications, view caseloads, and manage follow-up tasks.
- **Customizable:** Add custom fields, edit page layouts, create dynamic reports and dashboards
- **Coordinated with Strategic Partners**: For advanced customizations, whole data migration and add-on features such as: credit reporting and online intake forms.
- **User-driven Roadmap**: Based on best practices, user requests

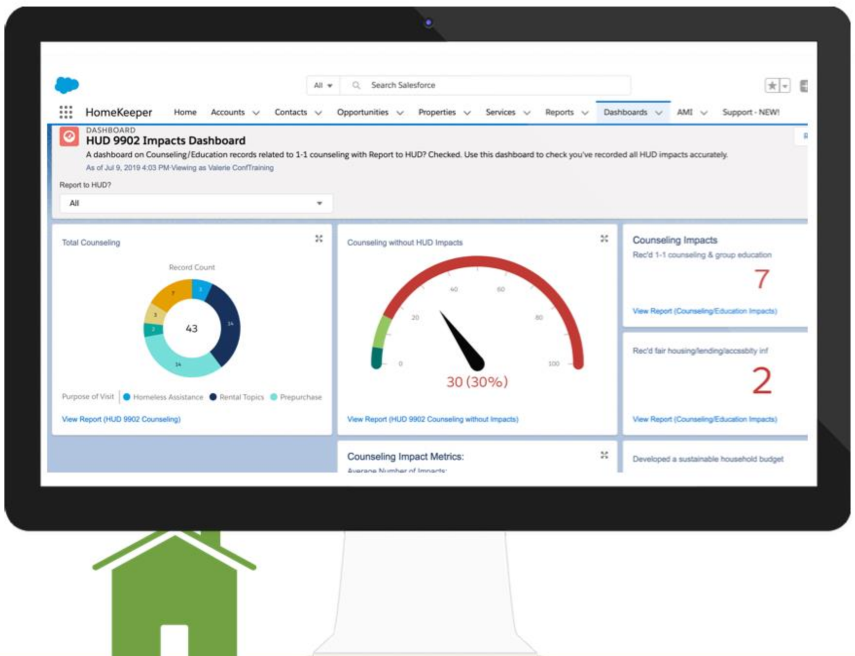
HomeKeeper (cont)

Stress-free 9902 Reporting

- **Submission Support:** Personalized, responsive support, monthly office hours and priority response times for submission questions.
- **Flexibility:** Decide which classes and cases are eligible for reporting and mass update with related HUD grants as needed.
- **Transparency**: Ensure completeness and correctness by easily seeing what fields are missing. Control reports to assist with ongoing review. Preview 9902 report prior to sending.
- **Submission made easy**: Send reports and data directly to HCS. Reduce overall time spent on quarterly reporting.

HomeKeeper (cont)

Powerful Reports by Salesforce.com



- **Quick Report Queries:** Find and review files, make mass-updates across records.
- **Pre-configured Reports and Dashboards**: Control reports, impact tracking and client demographics
- **Fully customizable:** Report what you want, how you want.
- **Exportable**: to Excel, CSV or printable views