

Counselor Max® and the HUD 9902

Presented by Kevin Prophet Manager, HomeOwnership Business Applications NeighborWorks® America









What are we going to cover in this session?

- How to create a HUD case in CounselorMax.
- How CounselorMax treats your data.
- "I use different (Customized) subjects and impacts don't show, what should I do?"
- "How do I know what Impacts I've selected for a client?"









Let's look at the HUD 9902 list of Impact and Scope of One-on-One Counseling Services

	Impact and Scope of One-on-One Counseling Services Households that received one-on-one counseling that also			
a.	received group education services.	6	2	
b.	Households that received information on fair housing, fair lending and/or accessibility rights.	3	1	
c.	Households for whom counselor developed a sustainable household budget through the provision of financial management and/or budget services.	1	·	
d.	Households that improved their financial capacity (e.g. increased discretionary income, decreased debt load, increased savings, increased credit score) after receiving Housing Counseling Services.	3	2	
e.	Households that gained access to resources to help them improve their housing situation (e.g. down payment assistance, rental assistance, utility assistance, etc.) after receiving Housing Counseling Services.	2		
f.	Households that gained access to non-housing resources (e.g. social service programs, legal services, public benefits such as Social Security or Medicaid, etc) after receiving Housing Counseling Services.	1		
q.	Homeless or potentially homeless households that obtained temporary or permanent housing after receiving Housing Counseling Services.	2		
h.	Households that received rental counseling and avoided eviction after receiving Housing Counseling Services.	1		
i.	Households that received rental counseling and improved living conditions after receiving Housing Counseling Services.	1		
j.	Households that received prepurchase/homebuying counseling and purchased housing after receiving Housing Counseling Services.	8	6	
ζ.	Households that received reverse mortgage counseling and obtained a Home Equity Conversion Mortgage (HECM after receiving Housing Counseling Services.			
	Households that received non-delinquency post-purchase counseling that were able to improve home conditions or home affordability after receiving Housing Counseling Services.	3	2	

Previous editions are obsolete.

Page 2 of 9 ref. Handbook 7610.1 form HUD-9902 (09/13)

	Households that prevented or resolved a mortgage default		
m.	after receiving Housing Counseling Services.	1	







HUD Form 9902 Section 10. Impact and Scope of Counseling Services

- 1. This section is used to report the impact and scope of counseling you have purposed in section 9.
- 2. Select as many impacts that would apply to a household
- 3. The impacts reported here don't need to add up to the totals of any other section on your 9902.
- It is not expected or required that every household that is reported will have a related reportable impact.
- 5. You may select as many impacts that apply to the household.
- 6. Do not record impacts for clients with no one on one counseling.







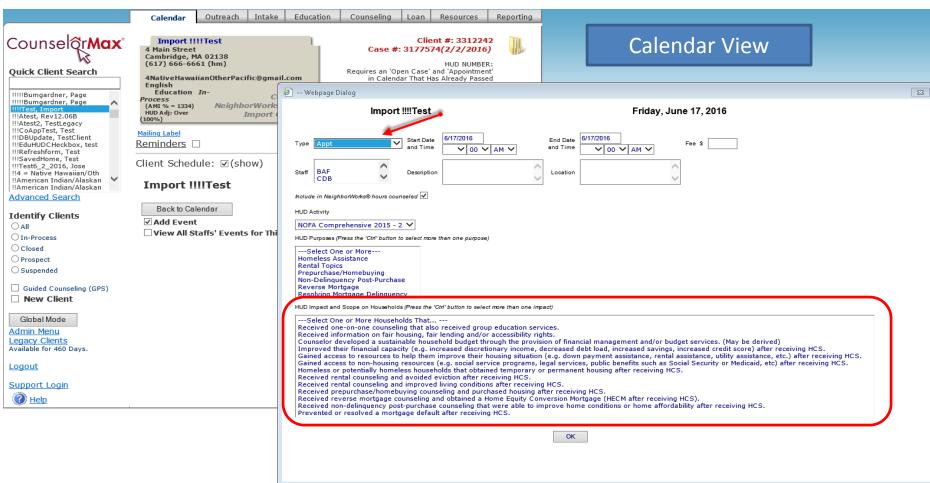
How to create a HUD case in CounselorMax.









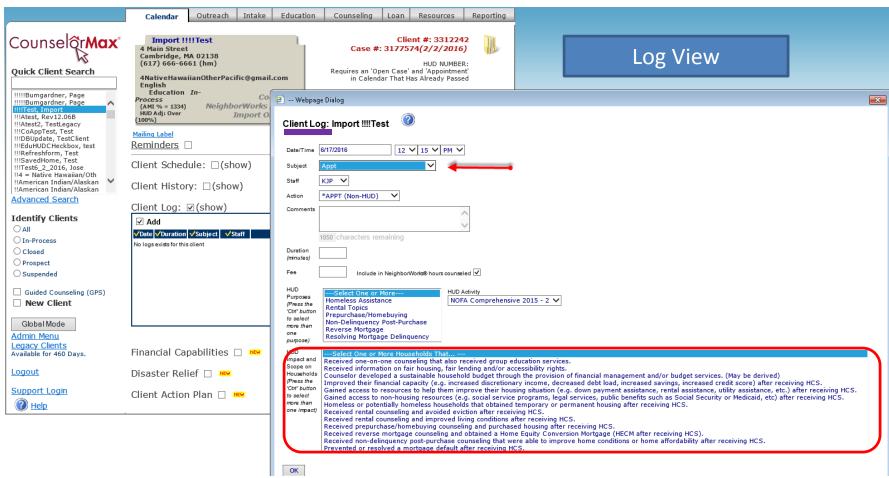




















How CounselorMax treats your data

- 1. Reports the impacts and scopes of the one on one counseling services.
- 2. A case does not have to have an impact or scope.
- 3. You may select as many impacts that apply to the household.
- 4. CounselorMax will report each distinct impact or scope per case per period. You may have selected the same impact and scope multiple times on different appointments but only one of each will be reported.









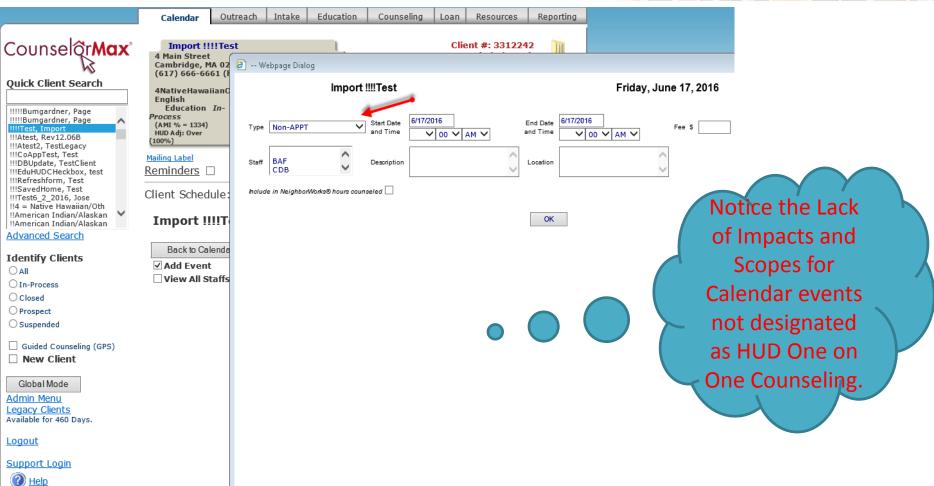
"I use different (Customized) subjects and impacts don't show, what should I do?"









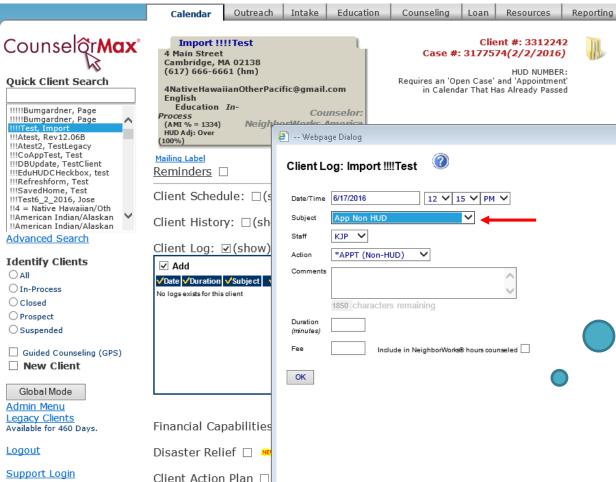












Notice the Lack
of Impacts and
Scopes for Log
notes not
designated as
HUD One on One
Counseling.



Help

Working Together for Strong Communities





Intake

Education





Quick Client Search

!!!!!Bumgardner, Page !!!!!Bumgardner, Page !!!!Test, Import !!!Atest, Rev12.06B !!!Atest2, TestLegacy !!!CoAppTest, Test !!!DBUpdate, TestClient !!!EduHUDCHeckbox, test !!!Refreshform, Test !!!SavedHome, Test !!!Test6_2_2016, Jose !!4 = Native Hawaiian/Oth !!American Indian/Alaskan !!American Indian/Alaskan

Advanced Search

Identify Clients

O All

O In-Process

O Closed

OProspect O Suspended

Guided Counseling (GPS)

■ New Client

Global Mode

Admin Menu Legacy Clients

Available for 460 Days.

Logout

Support Login





4 Main Street Cambridge, MA 02138 (617) 666-6661 (hm)

4NativeHawaiianOtherPacific@gmail.com English Education In-

Outreach

Process (AMI % = 1334)HUD Adj: Over (100%)

Calendar

Counselor: NeighborWorks America Import Org ID: 1

Mailing Label

Reminders

Client Schedule:

✓ (show)

Import !!!!Test

Back to Calendar

Add Event

☐ View All Staffs' Events for This Day

This Admin link will only show up on the counselor who has this level of access.

Client #: 3312242 Case #: 3177574(2/2/2016)



HUD NUMBER:

Friday, June 17, 2016

Requires an 'Open Case' and 'Appointment' in Calendar That Has Already Passed





eighborWorks[®]







Administration Page Menu

FPP Menu

Manage My Data:

My Agency

ARM profile

Case Management

Import Data

ABT Study Export

Counselors & Staff

Review and Sign-Off on Records To-Date

Sign-up to Pull Credit Reports

NFMC Grantors

NOTE: The items below in this section are for HPN. HPN Reports

Partner Agencies

Legacy Clients

Available for 460 Days.

NOTE: The items below in this section are for INHP.

DownLoad Data

Update MISMO String

Customize CounselorMax:

Calendar ____

Counseling

Education

<u>Intake</u>

Loans & Funders

<u>Outreach</u>

Client Purpose

Misc.

Renew Account / Add Seats











Calendar Administration Page

Event Types

Client Log Subjects

Client Log Actions

Reminder Actions

Custom Reminder Letters

Reminder Letters

Reminder Types

[Main Menu]







It	Items in green are default values that an not be edited Event Type Edit Delete							
-			Edit	Delete				
	*APPT2 (Non HUD)							
	-4	7						
	-Appdate	1						
	-appt	T						
	-Appt	T						
	Appt [2]	Г						
	-B'Day	Г						
	-CLASS	Г						
	Dept. mt	Г						
	-DIA							
	-Fair	Г						
	-FRED							
	Intake							
	JDB							
	-jkjkl							
	Jose Counseling							
	Jose's Appt.							
	Jose11.27TestAppt				\neg			
	Junk				V			
	-lunchon							
	Non-APPT							
	-Other							
	-Person	Г						
	-policy							
	-prepurch	Г						
	-Referral							
	Rev. 4.3	Г						
	RVtest1							
	SMeet	Г						
	-staff mt	T						
	Test	T						
	-Test-tt	T						
	Test Custom Event for HU	10						
	-test3	1						
-	-v/kshop				\vdash			
_	-XYZ		V					
	Appt		n/a	n/a				
	Call		n/a n/a	n/a n/a				
	Financial Capability		n/a	n/a				
	Mtg		n/a	n/a				
_	Training		n/a	n/a				

This entire upper section is filled with the Calendar events that you have customized into CounselorMax.
These can be edited.

These are hardcoded into CounselorMax and cannot be edited.

Add New









Event Types * Required Fields Must Be Filled-in

Event Type *	Test Custom Event for HUD
Group Flag	
Event Master Type (Must Select for 9902 Reportable)	Face to Face 🗸

Save Changes

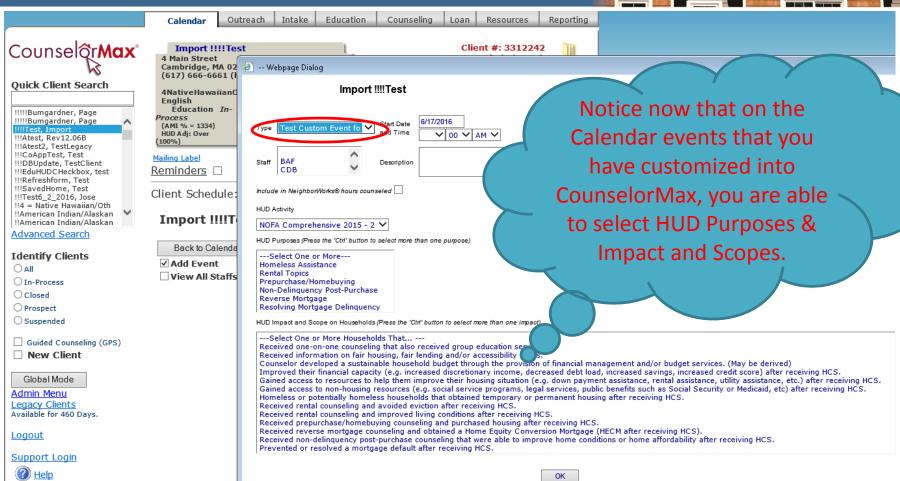
Your choices are:
Face to Face
Group
Internet
Phone



















Log Subjects * Required Fields Must Be Filled-in

Client Log Subject *	Appt [2]	
Log Type (Must Select for 9902 Reportable)	Face to Face 🗸	-

Save Changes

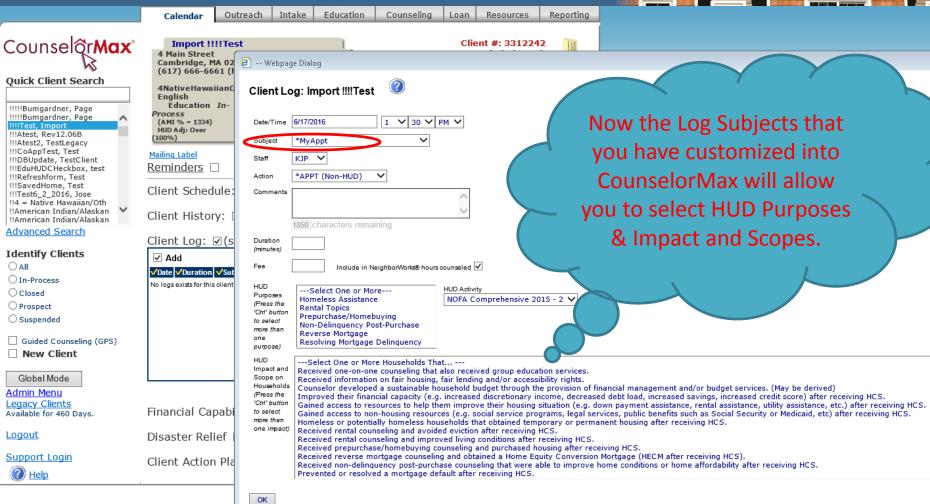
Your choices are:
Face to Face
Group
Internet
Phone

















How do I know what Impacts I've selected for a client?









	Calendar	Outreach	Intake	Education	Counseling	Loan	Resources	Reporting
Counselor Max °	Global Mode							
Quick Client Search	HUD-0002 NEMC NW Quarterly, and Other Penerts W							
!!!!!Bumgardner, Page	Select One:	VI PIC, IVV	Quarter	iy, and Oth	iei Reports B			
!!!!Test, Import !!!Atest, Rev12.06B	9902 Repo	rting	>	O NFMC R	eport			
!!!Atest2, TestLegacy !!!CoAppTest, Test	○ NW Quarte	rly Report		○ HOPP R	eport	Oth	er Reports	
CoAppleate, Test Client III BUpdate, Test Client III EduHUDC Heckbox, test III Refreshform, Test III SavedHome, Test III Test6	Data For Report: Other Report Other Reports Data For Report: HUD YTD Report Submit To HUD Electronically Show Status of HUD Submissions New Activity For Quarter Period For Report: Quarter: Current Quarter Period For Report: HUD 9902 Form / Summary Report Other Reports Submit To HUD Electronically Show Status of HUD Submissions HUD Submissions HUD Period For Report Other Reports							
□ New Client □ Run Report □ Changes for 2013 □ When is a case included? □ Other FAQs (Dated) New Reporting Service New Reporting Service								
Support Login Help	Letters, Rer	ninders, &	Logs 🗆					









HUD 9902 Control Report

10/01/2015 to 06/30/2016

The Control Report contains all the client level data that is aggregated on the 9902 that you transmit. Any client that is counted on your 9902 will appear here. RUN THIS REPORT FIRST. You will see any clients missing an Impact.

We recommend that you review this control report every 2 weeks to stay on top of your data.

All Cases - Section 10: Impact

Client#	Cace #	Name	Intake or Class Date	Impaot
3107682	2980021	Jensen, Jack	10/2/2015	Scope/Impact - Avoided Eviction
		Count of 8cope/impact - Avoided Eviction		1
3164125	3034747	!!White, Test20164	12/8/2015	Scope/Impact - Budget
		Count of Scope/Impact - Budget		1
3284721	3151353	!!!DBUpdate, TestClient	4/17/2016	Scope/Impact - Counselling And Group Education
3164470	3035065	!!American Indian(Alaskan Native and Black, Test20169	12/8/2015	Scope/Impact - Counselling And Group Education
		!!Black/African American and White, Test20168		Scope/Impact - Counselling And Group Education
		!!NativeHawallan/OtherPacificIslanderHisp, Test201613		Scope/Impact - Counselling And Group Education
		Couger, Iggy		Scope/Impact - Counselling And Group Education
2253352	2622433	daniels, erika	9/10/2014	Scope/Impact - Counselling And Group Education
		Count of 8cope/Impact - Counselling And Group Education		8
		!!4 = Native Hawaiian/Other Pacific Islander, Test20163	12/8/2015	Scope/impact - Fair Housing Information
		!!American Indian(Alaskan Native and Black, Test20169	12/8/2015	Scope/impact - Fair Housing Information
3184259	3054833	!!Asian2, Test	1/7/2016	8cope/impact - Fair Housing Information
		Count of Scope/Impact - Fair Housing Information		\$
3164090	3034718	!!Black or African American, Test20162	12/8/2015	Scope/impact - Finances
		!!Black/African American and White, Test20168	12/8/2015	Scope/Impact - Finances
3113986	2985988	White, NonHisp	10/8/2015	8cope/impact - Finances
		Count of 8cope/impact - Finances		3
2929216	2809455	!!Americanindian/AlaskanNativeWhiteHisp, Test201615	4/2/2015	Scope/impact - Homeless Obtained Housing
3168547	3039030	!!NativeHawalianOtherPacificIslanderCNR, 2016Test28	4/2/2015	Scope/Impact - Homeless Obtained Housing
		Count of Scope/Impact - Homeless Obtained Housing		2
3165822	3036366	!!BlackAfricanAmericanHisp, 2016Test18	4/1/2015	Scope/Impact - Improved Living Conditions
		Count of 8cope/Impact - Improved Living Conditions		1
		!!AmericanindianAlaskanNative, 2016Test	12/7/2015	Scope/impact - Non Delinquency Post Purchase
		;;American Indian(Alaskan Native, RaceEthTest	10/27/2015	Scope/Impact - Non Delinquency Post Purchase
3107682	2980021	Jensen, Jack	10/2/2015	Scope/impact - Non Delinquency Post Purchase
		Count of Scope/Impact - Non Delinquency Post Purchase		\$
3165825	3036369	!!Black/AfricanAmericanWhiteHisp, 2016Test22	4/1/2015	Scope/Impact - Non Housing Resources
,		Count of Scope/Impact - Non Housing Resources		1
3164532	3035118	!! Other Not Listed, 2016Test10	12/8/2015	Scope/Impact - Prevented Mortgage Default
		Count of Scope/Impact - Prevented Mortgage Default		1
	2427440	III Atest, Rev12.068	4/1/2016	Scope/impact - Purchased Housing
		American Indian/Alaskan Native and Black, Test20169		Scope/Impact - Purchased Housing
		!!NotAvallable, 2016Test11	12/8/2015	Scope/impact - Purchased Housing
	3001732	;;AmericNatAlaskNatBlack, RaceEthnTest ;;AmerindAlaskNatIvBlackHispanic, RaceEthTest	10/27/2015 10/27/2015	Scope/impact - Purchased Housing Scope/impact - Purchased Housing
130194		::AmNatAlaskNatHisp. RaceEthTest		Scope/impact - Purchased Housing
		;;AsianHisp, RaceEthTest		Scope/impact - Purchased Housing
		;;BlackAfAmerHisp, RaceEthTest		Scope/impact - Purchased Housing
		Count of 8cope/Impact - Purchased Housing		8
100024	2026260	!!AsianandWhiteHisp, 2016Test20	4/1/2015	Scope/Impact - Resources
		!!NotAvallable, 2016Test11	12/8/2015	Scope/Impact - Resources Scope/Impact - Resources
2104300			0.2013	
		Count of Scope/Impact - Resources		2

Total for Section 10: Impact: 32









Contact us with questions

CounselorMax Team at CounselorMax@nw.org

Training Resources

Go to CounselorMax.webex.com and click on the Training Center link

There are both Live Sessions as well as Recorded Sessions available







Questions?



