



Final Transcript

HUD-US DEPT OF HOUSING AND URBAN DEVELOPMENT: Counselor Max Training

June 22, 2016/2:00 p.m. EDT

SPEAKERS

Jane
Lorraine Griscavage-Frisbee
Ashley McCaskill
Kevin Prophet

PRESENTATION

Moderator Ladies and gentlemen, thank you for standing by. Welcome to the Counselor Max and the HUD-9902 conference call. At this time, all participants are in a listen-only mode. Later we will conduct a question and answer session. (Operator instructions.) As a reminder, this conference is being recorded.

I would now like to turn the conference over to our host, Ms. Jane [indiscernible]. Please go ahead.

Jane Thank you, Vicky, and hello, everyone, and welcome to our webinar today on Counselor Max and the HUD-9902. I just wanted to mention that our audio is being recorded today and we will provide information on accessing that recording in a couple of days via Listserv. We are also going to have a transcript available for you as well.

If you have any questions or comments, we have a pretty big crowd today, so we're going to hold questions via the phone until the end of the

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presentation and we'll open up the lines at that point. But if you do want to write in questions, there is that panel to the right of your screen where you can pull up in the question box and then type in your question and we will do our best to get back with you. Unfortunately we may not be able to get to everyone today. We'll do our best, so we encourage you to send any extra questions or comments you have to our housing.counseling@hud.gov mailbox and just put Counselor Max and the HUD-9902 into the subject line.

As we mentioned the phones are mute. If for some reason you are getting some kind of feedback, just double check that your line is on mute and you can use the *6 function.

We will be sending a brief survey at the end of the session, so we really look forward to getting your comments. You will get a certificate of training and it'll come to you via GoToWebinar, just like your registration link did. And this will be the only certificate of training that you get from us, so please make sure to save it for your records.

I'd now like to turn over the presentation to Lorraine Griscavage-Frisbee, Deputy Director for the Office for Outreach and Capacity Building who will provide some opening remarks. Lorraine.

Lorraine

Alright, thank you very much, Jane, and welcome, everyone. We really appreciate you taking time out of your busy day to join us today. We're very excited to be able to collaborate with NeighborWorks and provide this training on using Counselor Max and completing your 9902 reports accurately.

I just want to give you a little bit of feedback and let you know that having this training is the result of what information you provided to us last September when we originally conducted training on the new 9902 and we had asked some polling questions what further information or training would you like to see. And this was one of the topics, training on Counselor Max, so we're very excited today to be able to partner with NeighborWorks and offer you this training. We have an absolutely wonderful stellar expert on Counselor Max to provide the training.

But before we turn it over to him, I'd like to introduce Ashley McCaskill. She is with our Office of Policy and Grant Administration and she has a couple of reminders on accurate 9902 reporting. Ashley, I'd like to turn it over to you.

Ashley

Thanks, Lorraine. Hello, everyone, and welcome to the webinar. Like Lorraine said my name is Ashley McCaskill and I'm here to represent OHC's Office of Policy and Grant Administration. We're really pleased that you all have attended this webinar today and we hope it will assist you all with developing accurate 9902 reports in Counselor Max, because the 9902 reports that you all submit each quarter are critical to the success of HUD's Housing Counseling Program.

I know that to you all it must seem like just another report to complete, but for us the report provides key data that we use to justify the program to Congress and other stakeholders. The reports you submit allow us to measure the reach and impact of the program both in terms of how many families it's able to serve as well as the outcomes they achieve.

We use that data in our budget justifications when we request grant funding from Congress each year. We also use it to publicly track and report a few key indicators in HUD's strategic plans and the data also gets coverage in various HUD reports and used in speeches highlighting the valuable work of housing counselors. So the more accurate and timely reports we receive from all of you, the stronger and more compelling case we can make for the counseling program and the important that you all do every day. We thank you all for your attention to these reports and we encourage you to continue making them a priority moving forward and we hope today's webinar makes the task of completing the reports a little easier for you.

And with that, I will turn the presentation back over to Lorraine.

Lorraine

Alright, thank you very much, Ashley. Ashley made some very important key points of just how necessary these reports are for us, especially when we're requesting funding from Congress. Thank you very much, Ashley.

Okay, I will now have the opportunity to introduce our guest speaker, Kevin Prophet, Sr. And just to give you a little bit of a background about Kevin, he is a manager in the Homeownership Business Applications at NeighborWorks Center for Housing Education and Counseling. That's the training institute arm of NeighborWorks and he comes to us with over 20 years of experience, and he has an extensive background in mortgage lending, in business and financial analysis and risk management fields.

A little bit about his background before he joined NeighborWorks, he was a senior business analyst with Freddie Mac and there he was responsible for credit analysis, data quality, loan performance and operational risk on over a billion dollar portfolio, quite impressive there, Kevin. Now currently with NeighborWorks he's the manager for business applications and he's responsible for research, development and implementation of strategies and action plans that are related to homeownership business applications, of course Counselor Max being one of those critical business applications for our Housing Counseling Program.

He is the lead instructor for the Counselor Max client management system and he's developed the curriculum and authored many training manuals and attended and provided live training sessions across the United States. He travels the country extensively providing technical assistance to a variety of organizations seeking to upgrade their technology, as well as those that need to gain a better understanding of the systems they use and how to become more effective and efficient with those. He is the lead representative on behalf of NeighborWorks regarding Counselor Max, so he is our expert for today.

And with that, I am going to turn it over to Kevin.

- Kevin Thank you very much, Lorraine. If I can be made the presenter, Jane.
- Jane It is in the works. I think we jinxed ourselves. There we go.
- Kevin Okay.
- Jane Okay, we didn't jinx ourselves. Yay.
- Kevin Yay, there we go, alright, so you can see my screen.
- Lorraine Yes, yes, we can.
- Jane Very good.
- Kevin Okay, alright. There we go, alright. Welcome, everybody. Thank you for joining us as we take a little trip through Counselor Max and we look at the HUD-9902 in relation to the data that you're actually entering into Counselor Max. We were first approached by HUD as they were having issues in what they were actually receiving in the areas of the impact and scope. And as HUD has undergone two changes of the 9902 over the last

two fiscal years, certainly all client management systems have had to undergo those changes to remain compliant, and certainly Counselor Max is one of those.

There may be specific functions that you aren't as clear on as to how you should report that information and then how that information funnels up into the HUD-9902. So we wanted to take this time to make sure that everybody understood the process and hopefully we cleared up some areas for you that you may have some questions on.

Speaking of questions, I'm not going to take questions through the session simply because we're going to do a combination of things that will be in the PowerPoint that of course you'll have access to. And then I'm also going to do things via live in Counselor Max because I think you'll get a better understanding of actually looking at the screens in Counselor Max and the steps that are necessary there. At the end we'll save time to be able to go over any questions that you may have. And certainly, as Jane said earlier, utilizing the chat feature, the question box, we'll try to get back to as many of those questions as possible at the end of the session.

So with that being said, we'll go ahead and get started. What exactly are we going to cover in this session? From, as she said, September you all had a number of questions and so I went over those questions and tried to formulate what I thought were important issues to you. One of those is number one how you create the HUD case in Counselor Max in the first place, and two, how Counselor Max is going to treat your data. Three, I use different, which is really customized subjects, I use different subjects and the impacts don't show, what should I do; so we're going to cover that. And then lastly we'll talk about how do I know what impacts I've selected for a particular client, where do I go in Counselor Max to be able to see them. So we're going to touch on all of those and hopefully again answer the questions that you had in a prior session that you had with HUD.

So let's take a look at what the HUD-9902 lists for impact and scopes in the one-on-one counseling and hopefully you can see this on your screen. I do realize that it's small and it's taken directly from the 9902. But you'll notice the main thing about all the impact and scopes is that they're all past tense, which means that something had to have actually occurred before you can select an impact and scope.

And one of the things that was different about how the old 9902 operated and the new impact and scope and purpose was that prior you only had one service. You could only select one reportable service during a reporting period. With the new changes that went into the 9902, it allows you to select multiple services, which are now called purposes, so HUD moved away from resolutions and they moved away from services. Now you're only making a selection on the purpose, which could be multiple and you're making a selection on impact and scope.

Now how that works in Counselor Max is that the purposes are required that is what actually drives your client to the 9902, and impact and scopes are optional. I suspect that is where the numbers are dropping off because with it being optional, some of you are not going back and actually selecting an impact and scope from the list as you've completed part of that counseling.

And so with things like the household received one-on-one counseling, but they also received group education, so remember that in some of the impact and scopes, it's not an either or, it's a and and so both of those things will have to have occurred in order for you to be able to select that impact and scope. Certainly the rules in Counselor Max as they exist will figure that out, so if you haven't met part of the requirement, then it's also not going to allow you to be able to report that because you haven't the full rule with that particular impact and scope.

You can receive information on fair housing, fair lending, accessibility. You developed a sustainable household budget. You improved their financial capacity. They gained access to resources to help them improve their housing situation. They gained access to non-housing resources or it was homeless or potentially homeless households. They received rental counseling and avoided an eviction. They improved their living conditions through rental. They received a pre-purchase. They received a reverse mortgage or HECM, the home equity conversion mortgages there. They received non-delinquency post-purchase counseling, improved their home conditions there or they prevented or resolved a mortgage default path to receiving the housing counseling services. So, those are the impact and scopes that we would be looking at.

So what has HUD defined that Section 10 about in regards to the 9902, so impact and scope of the counseling services there, this section is going to report the impact and scope of the counseling that you have purposed. So again if you have multiple purposes that would have occurred in Section 9

of the 9902, then it's reasonable to expect multiple impact and scopes if they have been done, again, remembering that they're optional. You could have a purpose that does not have an impact and scope associated with it, because the client has not completed whatever that particular impact is going to be. And with that—yes.

Jane I'm so sorry, this is Jane. I don't mean to interrupt. We've had a few requests for you to maximize your screen. The slides are coming out kind of small.

Kevin Okay.

Jane Is that possible?

Kevin That would be on your—that's going to be on the go to controls, so where exactly would I find—

Jane On your actual presentation on your slide show.

Kevin Alright, let's see here.

Jane Sorry to mess up your flow.

Kevin That's okay.

Jane But I just want to remind everyone that you should have received hand-outs and they're also attached in your viewing pane, so you can pull those up if you need to. It's on your display settings.

Kevin Yes, they're going to have to on ours it doesn't allow me to make it any larger than it is because I am full screen.

Jane Thank you, Kevin. We'll just follow with the hand-outs, too, then. Thank you.

Kevin I was trying to see if it's something in the go to, in your go to settings that might allow it to make it larger.

Jane In the viewers you may be able to enlarge it on your own screen as well. There was a suggestion for you to hit F5.

Kevin Okay.

Jane I'm sorry. The joys of live presentations, sorry.

Kevin Yes, no, F5 isn't going to work because again I'm going through the GoToWebinar, but I was looking to see if GoTo had another set of places that we could enlarge the screen and I don't see any controls for that.

Jane Okay. Thank you so much.

Kevin No problem. Okay, where was I? So number two, select as many impacts that would apply to a household. What's important about that is the household, so I've heard a number of questions we get asked about in regards to education and a lot of people say there was a husband and wife or brother and sister. But there were multiple people that went to a class and they wanted to get credit for all the people and again the rules stipulate the household, so they're coming from the same household. The household is counted one time not the number of people that actually went to a class. So, you could have as many impacts as you would like, but again, it pertains just to the household there.

And then the impact is reported here; they will not add up to the totals of any other section on your 9902, so again remember that you could have multiple purposes. You could have multiple impacts, but the impacts may not have occurred for the purposes that you selected, so if you're used to the old version of the 9902 where everything matched, the new 9902 does not have to match because it is really based on the amount of services that you provided.

Again, it's not expected our required that every household that is reported will have a related reportable impact, so you have to make sure that the services have actually occurred for you there, and again, select as many impacts as you'd like. Counselor Max certainly allows you to do that and then we don't want to record impacts for clients that have not had one-on-one counseling. If you're an education-only client, then you want to make sure that you're not selecting any impact and scope for them.

So how are we going to create a HUD case in Counselor Max? There are a couple of views that you're used to seeing in Counselor Max, so I'm going to show it from both sides of that. What I'm not going to cover for you is the basics of putting a client in the system because I think you all pretty much have the gist of how to get your client into Counselor Max, creating a service and then you begin that path of counseling.

But what I'm focusing specifically on Counselor Max and how it relates to the HUD-9902, so from the calendar view if we were to go in and add an event, you know that in the type section it says appointment. And with the appointment you'll also have the HUD purposes that will show up here below the HUD activity button and the HUD impact and scopes, those appear just below that.

While we're on this particular page, let me talk about the HUD activity. HUD activity you're only making that selection if you have in fact actually received HUD dollars that you are drawing down against. You've actually received the grant and you are showing your activity against that grant. If you have not received actual dollars from HUD, but you are obviously a HUD certified agency, you don't have to worry about selecting HUD activity.

The HUD purpose is what's going to allow you to be counted when it's time to your report and you don't have to do anything else. You do your HUD purposes; you make your HUD impact and scope selections and that information will filter into your 9902. You don't have any issues there. You're only using HUD activity if you've actually received dollars from HUD and you're drawing down against that grant and so you're applying a specific client to whatever the NOFA was that you had applied for them.

But we must select a HUD purpose homeowner's assistance, rental topics, pre-purchase home buying, non-delinquency post purchase, reverse mortgage or resulting mortgage delinquency, any one of those are any combination of those. Certainly I could have a client come in. They were homeless. I started working on that and realized that we could get them into a rental property through our homeless program. I just start talking about rental topics and realize that this person has a 850 credit score and we start talking about pre-purchase home buying. All three of those purposes could have occurred during the course of my counseling and certainly I could make a selection of all three of those and be able to report those services.

But then as I completed specific things, I also need to make sure that I am picking the corresponding impact and scope that relates to the services that I provided. Now this is for those of you that may go into your calendar and you create an appointment by their calendar. The rest of you are probably going into your log and you're creating the same appointment, but you're doing it inside the log. With that, you also will make sure that

the subject is appointment and that you then will appear the HUD purposes and the impact and scope.

So in Counselor Max it's an either or proposition. You can do it either in the calendar. You could do it in the log. What you don't want to do is do it in both places because then you are actually doubling up what's occurring. If I create an appointment in my calendar and say I met from 9 to 10 a.m. and then I go into the log and create the same exact appointment for 60 minutes, I said that I met with a client for 2 hours and that is not what actually occurred. So you want to be careful in that regard as to how you are tracking those particular activities.

If I have something that's already documented in the calendar, then when I go into my log, I'm really just tracking the activity, the notes of that, and so that's not an appointment; and I want to make another selection for something else. I don't want it to be an appointment because then Counselor Max adds those together for the purposes of your 9902 and we don't want to do that.

So how does Counselor Max going to treat your data? It's going to report the impact and scopes, again, your one-on-one counseling services only, so your education has no impact whatsoever on it. A case does not have to have an impact and a scope and you may select as many impacts that apply to a particular household.

The thing to always remember about that is that Counselor Max is going to report each distinct impact or scope per period and you may have selected the same impact and scope multiple times while you were going through different appointments and different activities with your client, but only one is going to be reported because the system again is looking for a distinct impact and scope.

And with that, hopefully you all should be able to still see the screen here, correct?

Lorraine Yes, we still see your screen.

Jane Yes.

Kevin Okay. So we're going to jump into Counselor Max real quick and we'll take a look at one of our clients here, so you'll see what we're talking about. So again, the client is in the system. The normal processes that

you would normally go through getting the client into the system, but as I need to make a HUD appointment, I'm simply going to click into the calendar and again, I'll show both views.

I'm clicking on my appointment and I simply go to add that event. When I go to add that event, it defaults to my appointment because I'm adding a calendar event. You'll notice as always I could have a number of different events in there and we'll talk a little bit about that as that was one of the questions that they wanted to cover, but for my appointment, I have my HUD activity. I don't have any HUD activity with this particular client, because I did not receive any dollars from HUD in regard to this. So here I'm simply selecting my purpose, so I would go in on today's date and my start time and end time, a description of what it was and I'll just use follow-up that occurred in my office. So I would come down and I make, let's say I discuss pre-purchase borrowing.

In the scenario I talked about a moment ago, let's say I did have all three of those scenarios. Using the control button, select homeless assistance and rental topics; that's all three purposes there and not have to select an impact or scope because perhaps I did not create an impact at this moment. We just began a discussion and by saying, okay, I think I've selected it for this client. We're just going to go ahead and say that and now on my calendar, that event will show as a little dot there but it's going to show as this is a HUD reportable event because I made a selection on the system of purposes.

Likewise, I could do the same thing if I went into the log and just add it in to the log. Now you see here, my log defaults to log notes but if in fact, I wanted to report for something for the 9902, if I change it to appointment you'll notice it now selected HUD purposes and impact and scope. Just like I did a moment ago while we were in the calendar, I could make selections here of the purposes that are involved and then certainly if I had done an impact and scope, I can make an impact and scope.

The great thing about what it defaulted to when we first came on was that the log is really designed to capture those notes. If I change it from anything other than an appointment, you'll notice that my HUD purposes and the impact and scopes, they disappear because this isn't considered one-on-one counseling.

I know that some of you are thrown by the word appointment because in your mind, the word appointment means this had to occur face-to-face and

that is not what that means. It could have been a scenario where you did it over the telephone or you did video conferencing or whatever the case may be but that was considered your counseling activity. Even though you did another activity, you could still say that that was, in fact, an appointment in Counselor Max and that will allow you to make the selection of your HUD purposes and then certainly when you're ready you will have an impact and scope.

I could make this appointment for another day and still select the same served purposes that I'd selected prior but this time I'll select an impact and scope. They receive one-on-one counseling. You have to fill in comments but I'm not going to type that in there. We'll say okay. I don't know why it's not taking the purposes. There we go. Remember, I did it in two separate places.

So now, all those purposes have been logged in two separate places but when Counselor Max goes to report, it is not going to double up the fact that I made a selection of three purposes in the log and I also made a selection of three purposes in the calendar. It is only going to report a distinct purpose. Likewise, it is only going to report a distinct impact and scope.

If I go back in the log, I actually selected receive one-on-one counseling but in this calendar I'm going to say they improved their financial capacity. Now I have two separate types of impact and scopes in two separate places in Counselor Max, but even if I'd made the same selection of the impact and scope in this particular section and held down the control button, receive one-on-one counseling, so we see there are two impact and scopes here in my calendar event but this impact and scope had already been selected in my log. Counselor Max is only going to report it one time.

It doesn't matter how many times you've selected the same impact and scope for your client during that reporting period, it is only going to report a distinct impact and scope. If they're all the same, it will report you one time in that column for that impact and scope. For everything that differs, it will then report each individual instance that differs from the very first selection you've made.

Likewise, it is going to report each distinct purpose. It won't continue to show it six times. If you had six different services, it will only show your client that one time in each one of those.

Now, something else that differs from how the 9902 used to operate and again, one service, you saw your client one time per the reporting period. Now the 9902 will show your client as many times as purposes you have selected. In my example here on the screen, I have selected the client three times for three separate purposes. That means my client will show up in three separate columns in the 9902 because he has three distinct purposes, and so each one of those purposes will need to be counted.

Now it helps you understand why the columns aren't going to add up because it really all depends on the activity that you are providing with your client. We'll jump back to the PowerPoint.

That was the calendar view, the log view and we saw live how Counselor Max is actually going to treat that data. So, you use different, which was the question; I use different subjects and impacts don't show, what should I do? When I went and looked at some of that, that really defines—and Counselor Max is customized.

A number of you have customized your own events, your own different types of subjects in the log and so when you do that you don't have a list of the impact and scopes. Remember, I showed a moment ago, when I went to a regular log event, the HUD choices automatically disappeared. If you have created your own customized subjects then I'll show you real quick how you can go in and fix that.

Again, this is in my calendar, something that's a non-appointment. You'll notice the lack of impact and scopes for the calendar event is not designated as HUD one-on-one counseling, and likewise, if we went into the log, and again we've created our own customized subjects here, we add the lack of the impact and scopes for the log notes because again, it's not designated as any HUD one-on-one counseling.

To rectify that, we're going to have to jump into the administration menu. The administration menu is only going to appear for anyone who has admin rights to the system. If you're looking at your [indiscernible] of Counselor Max and you don't see that admin menu, it's because you don't have those kind of rights to Counselor Max. And so somebody in your office, however, does have the rights to the system, whoever has that, they need to be able to go in and click your admin link so that we can get to fixing the subjects, the customized ones that you've created in the system.

After we click the admin menu, the screen's going to look like this. We're on the administration page; it's divided up into two sections. One is managing our data, the other is customizing Counselor Max. That's where we're going to live down in the customizing Counselor Max section. You'll see there, we can click on the calendar. The calendar contains both the log subjects as well as the calendar event subjects. The key thing to remember if at any time you see the word event in Counselor Max, that is specific to the calendar and then of course, the client log has its own set of subjects, it's got its own actions so you can make corrections there for anything that you have in the system.

We're going to look at both of those because we want to be able to correct our calendar as well as our client log. This entire section, when you first click into the event types, you'll see the entire top section is filled with events that have been customized into Counselor Max. Those events can be edited and that's what you're going to want to do in your office.

If you're calling whatever your counseling is, even if you've made a distinction that this is video conferencing or perhaps this is phone counseling and it should be counted as counseling, then you've created that customize in Counselor Max, we're going to show you how you can go back and edit that so that it then will show you the impact and scopes. That's going to be the entire top section when you begin to customize items into the system.

The bottom section down there in the green, the appointment call [indiscernible], financial capability meeting and training, those are hard coded into Counselor Max and therefore cannot be edited. You cannot make changes to that and so for HUD purposes, those things that are hard coded, they're going to occur under appointment. It defaults to you being able to report to HUD for appointment in regards to one-on-one counseling.

You simply make the selection of whatever yours is in that list up there. You click the edit button and when you go back in to edit, you'll notice that there is a line that says, event master type. You must select that for whatever you just created to be 9902 reportable. There's a list of choices there and your choices are certainly face-to-face, group, internet, or over the phone.

You're simply telling Counselor Max that I'm creating a customized event, whatever I've decided to call this type of event but I needed to

report because there is counseling activity that is going to occur. So I'm telling Counselor Max which category to put that in and that is with the face-to-face, the group, the internet or the phone is. It's going to put it in the proper selection.

For those items that you have created already that are in Counselor Max and you're saying you don't get the impact and scope or the purposes for the selection for your items, this is where you go into Counselor Max to fix those because those are not specific to Counselor Max. Those are not designed with the system. Those are things that you've created in your office and therefore you must go in and make the edits to this information so that you can have it reportable on the 9902.

You can go in and make that change, making a selection. Of course, because there's no auto save in Counselor Max, we're always saving our changes there. Once we've done that, the next time we go back into Counselor Max and so we see this was test custom event for HUD which didn't have an impact and scope prior. Now that I've tied it to a particular way of counseling, now when I go in to that calendar event that I've customized, I will now have my HUD purposes and my impact and scope will appear.

Again, for any of those activities that you're saying, well nothing is showing up, it's because you've not told Counselor Max where you want that information to be tied into. You need to go back, you need to make the edit and say that this is a HUD reportable activity and the HUD purposes and the impact and scopes will then appear on the screen for you.

Likewise, if we were doing the log, again, the subject log. We're going in the same exact way that we just did it in the calendar. We come in, whatever that client log subject is, something we've customized in; you'll see under log type. Again, you have to make a selection there if you want it to be 9902 reportable.

The choices that we're making here are exactly the same from our calendar. Again, we're going to see face-to-face, group, internet or over the phone. This, again, is letting Counselor Max know exactly where you want this information to be reported.

Once we've made that change and saved it, the next time we log into our log, that subject, the customized version of that Counselor Max will allow

you to make the selections of your HUD purposes and your impact and scope.

Again, we could do multiple selections in and out of this. I'm showing you both versions of where you can do it, either in the calendar or in the log but the main thing to remember is we don't want to do it in both places again because Counselor Max will determine that as counseling has occurred in both the calendar and the log and instead of picking one or the other, it is in reality going to add those two together. You really have to make a distinction as to where you want to use it and certainly some organizations are more comfortable in the calendar, other organizations are more comfortable in the log.

We're not telling you how your work flow process should be, we're just telling you what to look out for in regards to doubling up that information there.

Another question we got was, how do I know what impacts I've selected for a client? That really deals with the reporting end of Counselor Max there. If we were to look into the reporting tab of Counselor Max, of course obviously you've made the selection of 9902 reporting and you can make the selection of the HUD year-to-date report. When you get down to report type and certainly you can period for the report is up to you. I left it at the current quarter that's in the system.

Certainly you can pull out a particular quarter that you're looking for, whatever the case may be. I will say to all of you, however, always remember that the HUD-9902 is a cumulative report. That means that it always goes back to October 1, which is the beginning of the fiscal year and of course it comes current to wherever you are as you're beginning to pull the report.

At any time, even now, if you were to go back and make edits and certainly we want you to go back and edit the customized subject types that you might have placed in or event types you've placed in the calendar and certainly in the log, the minute you correct those and you enter in the information that could be HUD reportable and certainly the focus of this was, how do we get to reporting the impact and scopes. As you enter that information into Counselor Max, the 9902 will automatically pick up the corrections because it always goes back to October 1 and it comes current. Your information would automatically be fixed.

Certainly, it is a manual process for you to go back and to make selections and purposes, you of course, have to edit the customization that you had so that your HUD choices even become visible to you in the first place. Once those steps are done and you've already made the selection in your purposes and any impact and scopes that you may have missed prior, then Counselor Max will pick all that information up for your report for you.

If we go into the control report, not the HUD-9902 form summary report which is what most people will do, we select the HUD control report and we run that. That report is designed and I know that's really small so we're going to look at it inside Counselor Max in a moment. I just want to show this slide.

The control report is designed based off of the regular HUD-9902. We all know that the HUD-9902 was an aggregate report, right? It gives us sections and it begins to count up the clients for those particular sections. The reason that Counselor Max created the control report was, it gives you the underlying client level data that's aggregated for your 9902. While you're looking at numbers in your 9902, the control report says, alright here are your numbers based on sections. So you can see still here, total per Section 10 impact had 32 impacts in the system but it tells me what client is in the system under a particular impact and you can see those impacts on the side.

You'll see in big red letters there, run this report first. Please, do not run your 9902 prior to looking at your control report. The control report is going to let you know who is appearing in your count and it will also let you know who's missing in your count. As a best practice, we recommend that you review this control report every two weeks to help you stay on top of your data certainly. This is a guideline for us. The control report goes a long way and you being able to keep track of our 9902 data.

If we go back live into Counselor Max, all of that is going to occur in the reporting section here and of course, we need to be in global mode and we pick our 9902. If we were to just run the regular 9902, and it's coming, I promise.

I don't know why my 9902 is not populating here. There we go. We're all used to seeing this version of the 9902, right? It populates our information at the top.

This particular form is divided up into three sections, that's the main thing to remember. In the very first column when we're looking at this, this deals with all our counseling activity. Everybody that is a HUD certified agency is filling in this column. We will always have the ethnicities, the races, the income levels, limited English proficiency, group education and certainly Section 9 is our purposes and again, remember that your clients can be counted multiple times for multiple purposes. Then we have impact and scope and in the impact and scope, your client's going to be counted for each distinct impact and scope that we may have. All of this information is great but I don't actually know who's in this particular count because I'm only looking at the numbers.

The second column on the 9902 deals specifically, and remember we talked about HUD activity a moment ago, it deals specifically with grant dollars that I've received from HUD. If I've not received any dollars from HUD, there should be no numbers whatsoever in this second column. These numbers are tied specifically to my notebook and I'm saying I've received a grant of x amount of dollars and these are the clients that I've applied to that particular grant. This should only be filled in if you have received actual dollars from HUD.

With that report, I don't really know who's there. If I go to my control report and I run that same report, we saw that the 9902 was broken up into specific sections. The control report's going to run the same exact way with one distinction. It's not going to give you the columns side by side in the control report. They're actually broken up into two separate sections.

One, we're going to look at which is the very first part of the report, is going to be all of the HUD cases or things it considers HUD activity. When you see HUD cases, it simply means those things that are tied to your grant. Again, if you don't have any grant dollars, this section should be completely blank. We see across the top, HUD cases, in that. It's broken up just like the 9902 so we deal with ethnicity, we deal with race, and we have income, rural status, and English proficiency.

We have our purposes and again, with that, your client can show up in three separate items there and then we come down to our impact and scope. It's going to break it out per the impact and scope. If I'm looking to see what client is under which impact and scope, when I come to Section 10 of my control report, it's going to give me my client. It tells me when we did whatever the intake or perhaps there's a class with that and it lets me know what impact and scope I had selected for the client.

We've got counseling, group education, we have some fair housing information and we have finance. That was our scope there.

Just below the HUD section, remember that's where I said it differs in the two columns, just below that section, is going to be my all cases. This is for everybody else. You are a HUD reporting agency. You did not receive money from the NOFA but you do need to report your activity. Here in this bottom section is where all your clients are going to appear. Again, it's divided up in the ethnicity, the race, income levels, dollars, the whole nine rule status and then we'll come down to the purposes and the impact and scope.

You have your Section 10 here. You can see I did quite a bit more activity in my all cases activity as opposed to my HUD cases activity. Again, here, I can come into the system and I can see exactly which impact I have selected for my client here.

That is the way that you're able to determine which impact and scope you have selected for your client and that's a relatively easy report to pull, you saw I clicked two buttons and you just have to wait. It depends on how much data is in your report as how long it takes. It's real simple. I can easily see my impact and scope on the client.

Something else, I can go right back to Counselor Max right from this report. I don't have to switch from the report and go back into Counselor Max to look at something. Right from the report, if I said well I need to look at this HUD activity because I don't believe that that impact is right, I can just click on the case and it will take me right back to—if it's closed case, I want to do that, it will take me right to case management for the client or I can click right on the clients number and it automatically drops me back into Counselor Max on that client. So I don't have to go search. I don't have to do any hunting to go back and find this specific client. All of this can be done right from the reporting section in Counselor Max.

Here's the thing that was part of discussion from notes that I've gotten from our friends at HUD that there was a question in regards to I may have forgotten that I needed to select an impact and scope and how do I go back and do that?

It doesn't really matter when you do that. You don't actually have to create a new impact and scope if you've not met the client. You don't want to create a new appointment to say that in fact I met the client when

you didn't meet the client just because you wanted to record the impact and scope. Certainly you can go back to the calendar on whatever day you did meet them and certainly all the appointments are there and if you don't know when you met with the client, you can always—the client history is there for that exact purpose. That entire list will tell you everything you've ever done with the client.

You simply look for the time you did meet with the client and let's say I met on April 14th but I had one it's currently already here. You pick out that appointment, you simply go back, you edit it and you make a selection of whatever that impact and scope was, you say okay, and Counselor Max has recorded that for you already. You don't create a new appointment because you didn't have a new appointment with the client. You simply go back to the appointment that's already there because that counseling time is already being counted for the purposes of the 9902.

What we want to capture, what HUD needs you to capture, are the impacts that have followed from that. We don't create a new appointment; we simply go back to the appointment that was already there and we let Counselor Max know that, in fact there was an activity, a new impact and scope that occurred.

Likewise, anytime that you click into the log, you automatically see all the appointments that are already there. You go back, you just pick one of those and we edit that, and this doesn't have my impacts, but you make the edit there. I'll pick the one we made today. You select the impact and scope that goes along with it and you tell Counselor Max, okay. It will automatically record those things for the purposes of your HUD-9902. That is going to be the way that you go back and capture those things that are there.

Again, we want to make sure that you are running that control report and stay on top of your data and make sure that you are, in fact, compliant with all the things that you should have as far as your reporting requirements for your 9902 as well as your reporting requirements as they exist inside Counselor Max.

How do you contact us, Counselor Max, with questions? You want to be able to contact the Counselor Max team. You can shoot us an email anytime with questions regarding this at CounselorMax@nw.org and certainly you have a Counselor Max question in subject line and we will certainly get back to you as you're trying to navigate your way through

this. If you need to do customization and that's not necessarily clear for you, we can certainly help you through that process as well.

I'll have some training resources that are available. If you go out to CounselorMax.webex.com, you click on the training center link that's there, there are two sets of training that are available. There are live sessions. Live sessions are sessions that I do every month. I do them once a month on the usage and navigation of Counselor Max, and of course, there are recorded sessions that are available that you can play back at your leisure. Obviously the difference between the recorded session and the live session is, you actually have me there to answer a question. The recorded sessions, you don't have that luxury. You'll just be able to play it out.

Certainly, if you have a question from that, you can simply shoot us an email at the Counselor Max mailbox and we will get back to you as soon as possible.

With that, looking at the time and trying to leave time for questions, I will go ahead and open the floor up and I'll give it back to you, Jane, as to how we're going to answer questions.

Jane Actually, I'd ask for our operator, Vicky, to open up the lines and explain how it works please.

Vicky (Operator instructions.) One moment for our first question.

Jane Thank you. While we're waiting for our callers, Kevin, we do have several write-in questions. We have one person who would appreciate if you'd talk a little bit about how selecting different NOFAs affect how the clients show up on the 9902.

Kevin Sure. It's an excellent question. Again, the NOFAs are driven by you. We have no idea whatsoever which NOFA you've made a selection on. What it does at the moment on your 9902, we just saw the 9902 a moment ago. HUD has not actually caught up with its own changes, so this 9902 form does not have a section for the NOFA but the transmittal does have a section for the NOFA information. And so that was the change that HUD made so Counselor Max is actually ahead of the game in that regard because we were already making changes and so we wanted to establish the pathway that HUD is moving to in the first place.

All this simply means is, when you log into HCS, which is the HUD system. When you look at your information about your grant, it's going to tell you which NOFA you applied to and it will actually tell you the dollar amounts. In Counselor Max, based on the reporting that HUD is moving to, they want to be able to determine the client assigned to a particular grant. Not only can you assign a client to a particular grant, you can assign specific activities.

We saw earlier as I tried to create a calendar event, or I was creating something in the log, it also told me I needed to select a NOFA. That is going to appear every time that this check box, HUD activity, is selected. If I uncheck that, Counselor Max does not ask you for any information as required for the NOFA because it determines that you didn't have any grant dollars. Again, remember the main distinction is if I have actually have received actual dollars from HUD, that I am saying that this client is applying to that grant, it is HUD activity and that I am making a selection of the NOFA.

Now the NOFA Comprehensive 2015 I, was the original 18-month grant. After that, HUD did a supplemental and that is the NOFA Comprehensive 2015 II. HUD is in the process of divvying out 2016.

So in Counselor Max, what we did was we simply created a place holder, so the NOFA 2016 TBD is just a place holder in the system until HUD has actually released the dollars and then we will change that name to whatever the grant actually is. The thing to remember about that is that that doesn't require any activity on your part. When we change that, it's going to automatically change it if you've made the selection to NOFA 2016, so there's nothing for you to go back and make a correction to.

In regards to the Comprehensive I, in regards to Comprehensive II, that is based on your grant so Counselor Max doesn't know it is only selecting whatever you've made a selection for. The thing to remember is once I've selected a NOFA and I've made that save for my client, then it's going to ask me about that in any of the other activities that I provide my client.

So if I go to my calendar, as we saw earlier, and I were to do something on the calendar, creating a new event, then it's going to automatically mirror the NOFA that I've selected. I don't have to make a selection of the NOFA there because my client's NOFA is actually going to follow me throughout the activities that are a part of the system.

And it's also going to do that in relation to education as well. So you could have a class that is created as a HUD class that you are saying that you've used HUD dollars for and so when I go in to attend the class, I am making a selection—I had to put somebody else in that class. I have to make a selection of multiple people and whether or not this is a HUD class—I'm just going to go ahead and enroll everybody, and then real quick, just a little tidbit in case you didn't know, you're going to enroll multiple people globally, not clicking into everybody's record.

But if I'm global and I go to attend, you'll see here I have all of my clients' names but I have them selected as HUD activity. So I control that, I can go through and unselect those who should not be billed to my HUD-NOFA and go ahead and say that they all attended the class. What that's going to do is it's going to divvy up my clients who should be HUD billable, who's not HUD billable but will still appear in my all counseling.

The main thing to remember is that everybody should appear in your all counseling because you are a HUD certified agency, you need to be selective about your grant for your HUD activity clients that would appear there. Alright? Hopefully that cleared them up for that.

Jane Thank you, Kevin. Operator, do we have any calls?

Moderator You have no questions on the phone lines.

Jane Oh, okay. We do have a couple more written in questions, Kevin. Is there any way to edit impacts through the admin menu?

Kevin No, once the case is closed, you do not have access to your purposes or your impact and scopes anymore.

Jane Okay. Again, we encourage you all to call in. You don't have to identify yourself or anything, just please feel free to call in with your questions or comments.

Kevin Well, since that person went on that particular, down that vein anyway, I might as well show where case management is. Case management is where you actually have access to your clients when the case is closed. So here we can edit our cases. This is by the admin menu, we can go back and look at additional information and maybe information we missed but this is the kind of information that can then be updated. It's going to be

things related to the case, not so much your appointments. You won't have access to your appointment information there.

You can even update things like closing information, closing program, if you had done something, the subject property that they were buying. That's the kind of information that can be updated by the admin menu. Once you have released the client out of Counselor Max in the—then you've closed it, then you lose access to any appointments that were already there. Obviously, that is a security feature because we don't want you changing information that you said you had an appointment with a client.

Moderator

(Operator instructions.)

Jane

While we're waiting, we do have a question about what purpose would you select for a client that received counseling for credit issues.

Kevin

Wow, that's a great question and so I'm going to defer to you at HUD simply because I'm not sure what category that will fall into in regards to our purposes.

Ashley

This is Ashley, I can take that one. Just remember that housing counseling focuses on a housing issue so it would depend on what they came in for. If they were a renter and they needed help with credit issues, maybe to qualify for a better rental unit that would be classified as rental topics. If they needed help with credit issues in preparation for home ownership that would be in pre-purchase. So, really, that kind of financial counseling could fall into a number of our categories but it really depends on what their core housing issue is that their seeking assistance with.

Moderator

We do have a question on the phone line. Brenda Thurston, your line is open.

Brenda

Can you hear me?

Moderator

Yes, we can hear you. Go ahead.

Brenda

The question I wanted to ask in reference to the customized [audio disruption] so everything that goes into with them [indiscernible]. If there's any changes we can't edit that, we can just add the changes to the [indiscernible].

Kevin It was a little bit hard to hear you—I'm sorry but I believe you asked about if we edited something that you had customized in, would it change everyone like that, I believe is the question?

Brenda [Audio disruption] so, anything that we have already scheduled and if the client needs to cancel that, we can't edit it because it's already scheduled, it's customized. We just add the changes to the customized event?

Kevin Yes. The minute you go in, anything that's customized, the minute you go in admin menu and tie it to the 9902, it's going to change every other event that's in your system that way. What you will have to do is, remember, that's why I said that manual process, you're going to have to go back to all those other events that have already occurred and you're going to have to select the purposes and the impact and scopes on that because prior to that, you didn't have the ability to make that selection for your customized events.

Anything that you customize, once you go in and edit it to tie it into your HUD purposes and impact and scopes, then you'll have to go back to those events and update them so you that you can make a selection of the purpose and you can make a selection of the impact and scope.

Brenda Okay, okay. I understand.

Kevin Okay. Next question.

Moderator Our next question comes from the line of Jessica Brevard. Please go ahead.

Jessica Hi there. Going back to what you were just talking about how you can have a client go into a group session and uncheck the HUD box. We had something that happened a little bit backwards from that and I don't know how we can help fix it. We had a client that was here for individual counseling billed to the HUD grant, and while they were open as a mortgage delinquency client, they attended a group session that actually wasn't billed to the HUD grant. They still showed on our group line on the 9902. The group session itself wasn't assigned a HUD number and it wasn't, like I said, it wasn't even listed as a HUD group but now their showing up on that line so I just have to manually remove them.

Is there a way that—are we doing something wrong there?

Kevin

I'm not sure. What you're talking about is something that occurred in your session so it's probably something that we'd have to take offline to actually look at your system to find out what occurred. I'm glad you brought that point up as we can talk about how the classes are created. So as we go in and we created a class, you certainly can determine that a class is something that should be HUD reportable. If I go to create whatever the class is, down here at the bottom, if I make the selection of HUD activity type that puts it in the second column of the 9902. So I'm guessing that's where your saying you have somebody that's showing up that should not have been HUD activity type. Certainly, we would love to look at that if that is what occurring.

For any class to just show in the—so all classes should be showing on the first column of the HUD-9902 so your clients should always be counted in that and the way you get to that is simply by giving every class a HUD resolution. For the educational component, it still relies on a HUD resolution which would be completed financial literacy, some other kind of workshop, home buyer workshop, so forth and so on. In order to get your client to appear in the 9902 period for your education, you have to have one of those selected.

Now, what we're talking about in the second column, which is the grant dollars, then yes, you should have selected a NOFA for that. It's not driven by the fact that you have the HUD number so that is not what is driving you in that section. We will have to double check on yours and we'll double back and look at that because that is not the behavior that should be occurring. But without me looking at your system, I can't tell you that Counselor Max did that or somebody in your office did that.

Jessica

Okay, okay, fair enough. Thank you.

Kevin

Okay, thank you.

Moderator

Now we have a question from the line 253. Please go ahead.

W

Yes, this is [indiscernible]. I have a question regarding the educational classes. Do you put a purpose when for each individual client because some of the, like, the first time home buyers, some will have one-on-ones and some will go to 12 hours of just group counseling?

Kevin That is a partial Ashley and me. I'll tell you how Counselor Max is going to treat that. If you go in and you're creating that event certainly if the reason they came to you was for pre-purchase home buying, you can make the selection of pre-purchased home buying as a purpose and create that event. If it is just education only, then you don't have to select a purpose because then again, remember, the purpose and the impact and scopes here are that you have one-on-one counseling and you have the group education.

If there was ever a split where it was just education but there was no one-on-one counseling then you don't have a purpose, you don't have an impact and scope. The education will be reported as whatever the HUD resolution you selected but you don't have to worry about this type of information filling out the report.

Now, how Ashley thinks you should do it, I'll defer back to HUD in that regard but I just wanted how Counselor Max is going to treat it.

Jessica Okay.

Ashley Yes, and I think the way you outlined it, Kevin, is how we expect it as well. Every attendee in that class would get reported in Section 8 for your group education activity, and then those who came back for a one-on-one would also be counted, again, in Section 9 for that one-on-one counseling activity. If you add both of them, they would show up in Section 10 as receiving both one-on-one and group education and then whatever other outcomes they achieved through that one-on-one counseling would also be reported in Section 10. If during their one-on-one, you developed a budget with them, it should also show up down there as well.

Jessica When they come back to do—I wouldn't fill it out at all with any of my classes but not until they come back to a one-on-one for their budget or their credit report review, then I would mark in that we went through the fair lending, the budget, the credit, the down payment assistance because that was all covered with the education.

Ashley Yes, that would be acceptable as long as they received that one-on-one counseling then you could record it that way as far as we're concerned.

Jessica Okay. Thank you.

Moderator (Operator instructions.) Okay, we do have another question; we have several questions coming in now, one moment.

(Operator instructions.) Okay, Brenda Thurston, your line is open. Brenda, please go ahead.

Brenda Yes, I'm here, can you hear me?

Moderator Yes, go ahead.

Brenda [Audio disruption] we are in a situation with a delinquency [audio disruption].

Moderator Okay, Brenda, we can't hear you. You might want to just write your question in because you're breaking up so badly we cannot hear you.

Okay, our next question comes from the line of Virginia Leary. Please go ahead.

Virginia I'm a little confused about—you were saying, okay, if you haven't received HUD money, you're not using the HUD activity, and so, to interpret that, okay, so we get our HUD money say, in July and then we start using the HUD activity and as soon as that money is gone, we stop using HUD activity? I'm just confused as to how people are doing that.

Kevin No. It only applies to your NOFA and certainly if you want to make the selection of the NOFA, it is being driven by you. The main thing that this has to match up with what is actually in HCS under your grant so if you have received dollars that you are drawing down against, your clients can be billable then you're making the selection of HUD activity and HUD activity then requires that you select the NOFA that you are applying the client to or the activity to. Counselor Max is capturing always all your activity for HUD reporting.

So remember I showed the HUD-9902 a moment ago, there are two separate columns to the 9902. One is, all your counseling and education activity and the second column is just that education and counseling activity applied to your grant. The HUD activity only applies to that second column.

The system by itself will automatically gather all your counseling and education activity on its own. So certainly, if you find that you now have

a HUD grant in the case of our 2016 to be determined, and you have received you grant and you want to start going back and counting clients, you can absolutely do that. This HUD activity is turned on and off by you. It is not a function in Counselor Max.

So anytime you have a client that was not HUD activity just by simply going back to their intake form and selecting that they are HUD activity, will turn that NOFA selection on and you can make the NOFA selection for that grant. Likewise, you can also turn somebody off. If you had made the mistake that that client was being counted as HUD activity and shouldn't then you simply click the "off" and resave the client and it will take the information away.

You're driving when you're making the selection of the particular NOFA but again, it has to tie into whatever is already in your HCS system. That is the authority on what NOFA grant you're actually applying the information to and then you can make that selection in Counselor Max.

I don't know if Ashley, you want to apply something, if you have something else to add in that.

Ashley No, I don't have anything else to add. Did that answer your question? Do you have any follow-up questions?

Moderator I'm sorry, she's gone.

Ashley Okay.

Moderator (Operator instructions.) Our next question is from the line of Sherry Payton. Please go ahead.

Sherry Hi. Quick question I guess. I have several classes that I have throughout the year. Usually, I have at least one class a month, different topics. If I have a client that decides they want to come to, let's say, the financial literacy class and then the next month over, they may come to the class about different housing opportunities in our area and then another class of whatever other topic. Even on the 9902, they only report as one. It's not as though—I mean are they supposed to report—isn't it supposed to count them each time they have a different service or is it something that, it doesn't matter how many classes they come to they only would report as one, it only counts one time during a quarter?

- Kevin A couple of things are in play there. Number one, remember HUD doesn't care about services anymore, it's completely removed from the service methodology. And so right now it's just education and so the system will put that on your 9902 and just the education component. The main thing to remember about that, though, is remember as we were looking at how we created our classes, if we go back into education and we look at our 9902 course resolutions, we'll see that financial education has completed financial literacy, [indiscernible] financial fitness also has completed financial literacy.
- If I put my client in both of these and they have the same resolution, it's reporting it as one time because that is one distinct resolution. If I have other resolutions, then it will report those other resolutions as well. So if I'm reporting the same thing over and over again then yes, it's going to count the household for that one particular resolution that you placed in the system.
- Sherry Okay, okay. Alright, thank you so much.
- Kevin No problem.
- Moderator Next question comes from the line of Gerry M. Please go ahead.
- Gerry Yes, my question is regarding the section in Counselor Max the client search or the list of clients when you first go in.
- Kevin This one?
- Gerry Yes. So a lot of times, well, several times, we have clients that, maybe a particular client, withdrew from counseling say in 2012. Then they came back to us two years later. Is it right that—and then we've already, like, did a resolution for them in 2012 so they're back in 2016. Is it correct that we're putting them in as a new client with a new service or do we revive their case from back in 2012?
- Kevin That is an excellent question. The main thing and this is for everybody on the line, we never ever, ever add the client back into Counselor Max again. Once a client is in Counselor Max, they are there until you've stopped using Counselor Max. They never have to be put back into the system, but if I were to go look at a case that's already closed, and that will take back to ten.

What happens here is you'll notice that in counseling there's nothing there to do there because this client's closed. This is my client from 2012 but now they're back for something else. If I click into the intake, all of my client's information is there minus one thing, minus the service. So if I am giving this client a new case in 2016, I don't put the client back into the system, I review the information that's here in his intake. He could have gotten married, he could have gotten divorced, they had kids, addresses change. So what I want to do is update that information then by selecting a new service in the system, I just go down and save that and now he is an active client all over again.

Now I simply go to whatever my next steps for counseling, and you'll see if I click on counseling, now I have a whole host of selections that did not appear there before. So I did not add Mr. Baxter back into the system because what happens? If I add him back into the system, I lose the benefit of all the data that already existed prior to that. Remember I showed you in the beginning, the client history is the bible to this client. It's everything I've ever done with this client, and so I want access to this information because there might be something pertinent in here that I want to know prior to me dealing with the client.

It also has another benefit, I don't have to go searching for some paper file in a file cabinet back in the 2012 files to remember what we have already done with the client. Counselor Max has already maintained all of that data and it doesn't matter if you wanted to go back to 2007, the last time you saw this client, you can always create a new case. It's a single client to many relationships with your agency, so you never ever put the client back into the system but you can create new cases.

You'll notice at the top that there is a client number assigned to every client and that is his address; that's where he's going to live inside the Counselor Max database forever.

You'll notice they also get assigned a case number and the case numbers don't match the client numbers and that's on purpose because each case can be its own distinct case but it always ties back into the client with the same client number. When you have a client that comes back in from the time you closed them out, you simply click on the client like I just did, you go back into the intake, you create whatever that new case is after you validated that the rest of their information is correct, and then you go ahead and save and that will activate a new case in Counselor Max.

Gerry How do we correct the client that we, maybe we did one client like that, where now there's two of him in there?

Kevin It depends on what you've done with this second client. If it was, you just did it and you realize, wow, this client is already in the system, then you can simply delete that second client out. If you have already applied notes, counseling appointments, education to the client, there's nothing you can do about it because you need to be able to report that data. You're just going to have to leave it that way.

Counselor Max actually gives you, anytime that you go put in a new client, it actually asks you, are you sure you want to do this? So, that tells me somebody in the office is actually ignoring the prompts from Counselor Max. And of course, you know you put the zip codes and it automatically populates city and state, but if I go to save, Counselor Max gives me a great big warning, you're adding somebody that's already in the database.

It says, do you want to proceed and create this client? Because certainly, it is possible to have two clients that have the exact same name, and of course, we can say cancel, I don't want to save this guy because it's already in the system and Counselor Max is even showing me I can click on the link and go to this client. This is the information that's already in the system for that client. I want to cancel, I don't want to save this client, I just want to find the client that's already in Counselor Max. From here, I certainly can move on to create a new case.

Gerry Okay, thank you.

Kevin You're welcome.

Jane Thank you, Kevin, and thank you, everyone, for your wonderful questions. Unfortunately, we need to wrap up today's session since we're close to our end time. Again, if you think of something at a later date or you need more explanation, please feel free to send your questions to our housing.counseling@hud.gov email both and just put Counselor Max and the HUD-9902 in the subject line.

We really appreciate your participation today and please look for a Listserv announcement in a few days with the recorded presentation. Thank you, Kevin, for everything. We really appreciate it.

Kevin Thank you for the opportunity.

Jane Thank you. Bye-bye.

Moderator That does conclude our conference for today. Thank you for your participation using AT&T. You may now disconnect.