

HSCP Program Features and Functions in CounselorMax

Version 1.1

10 November 2021

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Introduction

The HSCP or Housing Counseling Stability Program is a newly created program administered by NeighborWorks(r) America to help families in need keep their housing. For details on the program’s design and requirements please consult your HSCP program literature provided and funding requirements.

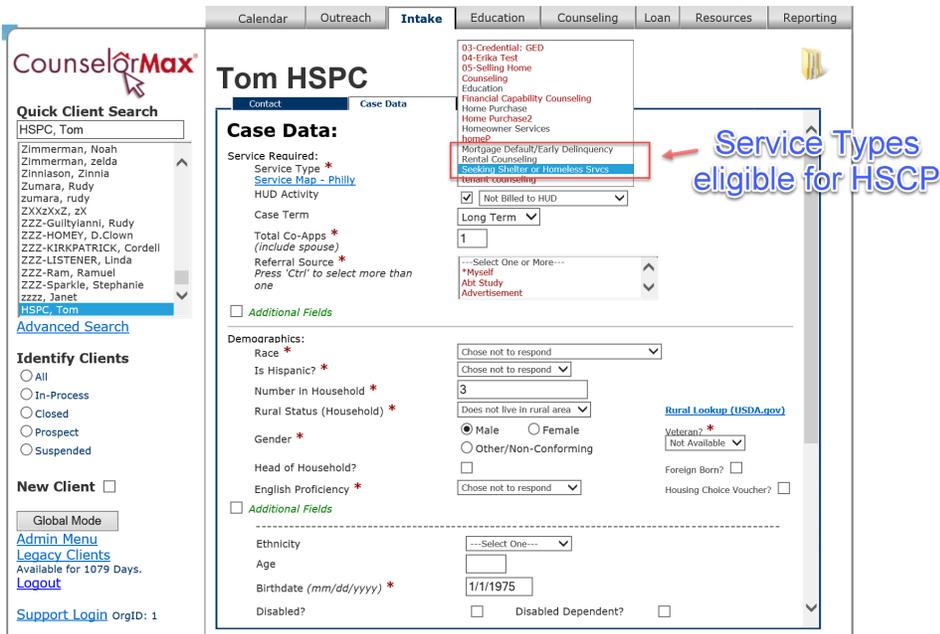
CounselorMax allows you to collect all required HSCP data and report that data to the HSCP data collection system.

Collecting the Data

Case Types Eligible

The HSCP program applies to homeowners at risk of losing their homes, renters at risk of eviction, or homeless families and individuals who recently lost their homes and are trying to regain housing. Therefore, to be able to collect the required data in Cmax you must first create or have an active client case of the following three types:

1. Mortgage Default/Early Delinquency
2. Rental Counseling
3. Seeking Shelter of Homeless Services



The HSCP program modules in Cmax are not active for any other service type, as they are not eligible for HSCP funding.

Creating an HSCP GPS

As soon as you create a new case with one of these service types you will be prompted to create a new HSCP GPS to collect the requisite data:

Please Select a Work Plan Template for Seeking Shelter or Homeless Svcs

Homeless Servicing
 Housing Stability Counseling Program (HSCP) **NEW**

OK

Select it and click "OK" to create the GPS. This will show you the GPS outline and allow you to save the GPS:

Housing Stability Counseling Program (HSCP)

Save Work Plan

Include	Action	Rationale	Days to Complete
yes	Intake for HSCP	HSCP Level 1	
yes	Obtain Authorization	HSCP Level 1	
yes	Provide Disclosure	HSCP Level 1	
yes	Provide Privacy Policy	HSCP Level 1	
yes	Verify credit	HSCP Level 1	
yes	Provide Triage Counseling	HSCP Level 1	
yes	Develop Budget	HSCP Level 1	
yes	Develop Action Plan	HSCP Level 1	
yes	HSCP Level 1 Completed	HSCP Level 1	
yes	Provide HSCP L2 Counseling	HSCP Level 2	
yes	HSCP Level 2 Completed	HSCP Level 2	
yes	Provide HSCP F/U Counseling	HSCP Follow-up	
yes	HSCP Follow-up Completed	HSCP Follow-up	

Using and completing the HSCP GPS

Once generated the HSCP GPS looks as follows:






X

Gregory HSCP

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Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info		Pending			
Obtain Authorization	HSCP Level 1	Authorization		Pending			
Provide Disclosure	HSCP Level 1			Pending			
Provide Privacy Policy	HSCP Level 1			Pending			
Verify credit	HSCP Level 1	Credit Report		Pending			
Provide Triage Counseling	HSCP Level 1			Pending			
Develop Budget	HSCP Level 1	Budget		Pending			
Develop Action Plan	HSCP Level 1			Pending			
HSCP Level 1 Completed	HSCP Level 1	Outcomes		Pending			
Provide HSCP L2 Counseling	HSCP Level 2			Pending			
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates		Pending			
Provide HSCP F/U Counseling	HSCP Follow-up			Pending			
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up		Pending			

The HSCP Program requires you to collect data over-and-above what is normally required for a HUD case in CounselorMax. The HSCP GPS allows you to collect this data easily and in a work-flow type manner that is easy to follow.

The HSCP GPS works much the same as any other GPS in CounselorMax. You must collect any underlying data and mark each GPS action item as complete before you can report that case.

The HSCP GPS can be used in combination with other GPSs for the same client case, if needed.

The GPS is broken down into three basic sections as per the program guidelines and design:

1. Intake and Level 1 counseling
2. Level 2 counseling
3. Follow-up

Collecting the Intake and Level 1 Data

The Intake and level 1 data section of the GPS is outlined below:

Iom HSPC							
<input type="checkbox"/> Add Auto Generate Work Plan							
Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info		Pending			
Obtain Authorization	HSCP Level 1	Authorization		Pending			
Provide Disclosure	HSCP Level 1			Pending			
Provide Privacy Policy	HSCP Level 1			Pending			
Provide Triage Counseling	HSCP Level 1			Pending			
Develop Budget	HSCP Level 1	Budget		Pending			
Develop Action Plan	HSCP Level 1			Pending			
HSCP Level 1 Completed	HSCP Level 1	Outcomes		Pending			
Provide HSCP L2 Counseling	HSCP Level 2			Pending			
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates		Pending			
Provide HSCP F/U Counseling	HSCP Follow-up			Pending			
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up		Pending			

Intake
section

Intake

The first action item is “Intake for HSCP.” This action item has an underlying data collection form. Click on the “HSCP Client Info” link to go to the form. Note that if the client case is “Homeless Services” then the form will be slightly different:

Homeless Services Intake Form:

Tom HSPC Homeless

wk plan class appt log print

HSCP Client Information

SAVE

* Required Fields Must Be Filled-in

Is this a crisis situation? * y n

If the client is homeless at the time of intake, please indicate their housing status immediately prior to being homeless. * Owned Rented

Primary reason for housing instability? * ---Select One---

Secondary reason for housing instability? (if applicable) ---Select One---

Does household spend more than 30% income on housing (rent or mortgage)? * y n

Client referred to and/or assisted with access to financial resources for housing stability. (leave blank if N/A) ---Select One---

Did client benefit from eviction or foreclosure moratoria during COVID-19 pandemic?? * No Yes Unknown

Monthly rent amount (excluding utilities)? *

Total amount of rent arrears? *

Total number of months' rent due? *

Homeless Services Client form has additional "rent or own" question.

If the client owned prior to becoming homeless then you will select "owned" and be presented with the Mortgage Delinquency questions:

Tom HSPC Homeless

wk plan class appt log print

HSCP Client Information

SAVE

* Required Fields Must Be Filled-in

Is this a crisis situation? * y n

If the client is homeless at the time of intake, please indicate their housing status immediately prior to being homeless. * Owned Rented

Primary reason for housing instability? * ---Select One---

Secondary reason for housing instability? (if applicable) ---Select One---

Does household spend more than 30% income on housing (rent or mortgage)? * y n

Client referred to and/or assisted with access to financial resources for housing stability. (leave blank if N/A) ---Select One---

Did client benefit from eviction or foreclosure moratoria during COVID-19 pandemic?? * No Yes Unknown

Did client enter into forbearance agreement during COVID-19 pandemic? * No Yes Unknown

Client Mortgage Loan Type * ---Select One---

Homeowner's PITI *

Mortgage Delinquency * ---Select One---

Delinquency questions

Rental Questions:

Tom HSPC Homeless







HSCP Client Information

SAVE

** Required Fields Must Be Filled-in*

Is this a crisis situation? * y n

If the client is homeless at the time of intake, please indicate their housing status immediately prior to being homeless. *

Owned Rented

Primary reason for housing instability? *

Secondary reason for housing instability? (if applicable)

Does household spend more than 30% income on housing (rent or mortgage)? * y n

Client referred to and/or assisted with access to financial resources for housing stability. (leave blank if N/A)

Did client benefit from eviction or foreclosure moratoria during COVID-19 pandemic?? * No Yes Unknown

Monthly rent amount (excluding utilities)? *

Total amount of rent arrears? *

Total number of months' rent due? *

Rental questions

Rental Services or Mortgage Delinquency Services cases will simply see the appropriate rental or delinquency intake questions without the need to select "owned" or "rented" first:

Rental Intake form:

Frank HSCP Rental







HSCP Client Information

SAVE

** Required Fields Must Be Filled-in*

Is this a crisis situation? * y n

Primary reason for housing instability? *

Secondary reason for housing instability? (if applicable)

Does household spend more than 30% income on housing (rent or mortgage)? * y n

Client referred to and/or assisted with access to financial resources for housing stability. (leave blank if N/A)

Did client benefit from eviction or foreclosure moratoria during COVID-19 pandemic?? * No Yes Unknown

Monthly rent amount (excluding utilities)? *

Total amount of rent arrears? *

Total number of months' rent due? *

Rental Services Form

Delinquency Intake form:

Ed HSCP Mortgage







HSCP Client Information

SAVE

** Required Fields Must Be Filled-in*

Is this a crisis situation? * y n

Primary reason for housing instability? *

Secondary reason for housing instability? (if applicable)

Does household spend more than 30% income on housing (rent or mortgage)? * y n

Client referred to and/or assisted with access to financial resources for housing stability. (leave blank if N/A)

Did client benefit from eviction or foreclosure moratoria during COVID-19 pandemic?? * No Yes Unknown

Did client enter into forbearance agreement during COVID-19 pandemic? * No Yes Unknown

Client Mortgage Loan Type *

Homeowner's PITI *

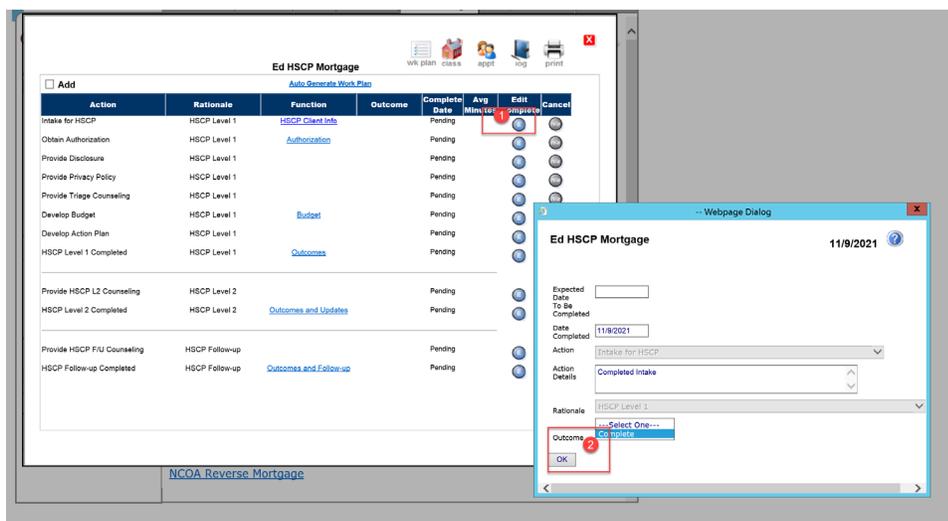
Mortgage Delinquency *

Mortgage Delinquency Form

To complete the form, answer all required fields and click the “save” button.

This will return you to the GPS.

Click on the “Edit/Complete” button to the right of the HSCP action item and fill out the subform and save:



The screenshot shows the 'Ed HSCP Mortgage' interface with a table of action items and a 'Webpage Dialog' form. The table has columns for Action, Rationale, Function, Outcome, Complete Date, Avg Minutes, Edit, and Cancel. The 'Edit' column contains a red box with a white 'E' icon. The 'Webpage Dialog' form is titled 'Ed HSCP Mortgage' and shows the date '11/9/2021'. It has fields for 'Expected Date To Be Completed' (11/9/2021), 'Date Completed', 'Action' (Intake for HSCP), 'Action Details' (Completed Intake), 'Rationale' (HSCP Level 1), and 'Outcome' (Completed). A red box with a white '2' is over the 'Outcome' dropdown menu.

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Clean Info	Pending				
Obtain Authorization	HSCP Level 1	Authorization	Pending				
Provide Disclosure	HSCP Level 1		Pending				
Provide Privacy Policy	HSCP Level 1		Pending				
Provide Triage Counseling	HSCP Level 1		Pending				
Develop Budget	HSCP Level 1	Budget	Pending				
Develop Action Plan	HSCP Level 1		Pending				
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Pending				
Provide HSCP L2 Counseling	HSCP Level 2		Pending				
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Pending				
Provide HSCP F/U Counseling	HSCP Follow-up		Pending				
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up	Pending				

This will save the action item as completed and mark is as such on the GPS “Outcome” column:

Calendar Outreach Intake Education **Counseling** Loan Resources Reporting

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Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Pending				
Provide Disclosure	HSCP Level 1		Pending				
Provide Privacy Policy	HSCP Level 1		Pending				
Provide Triage Counseling	HSCP Level 1		Pending				
Develop Budget	HSCP Level 1	Budget	Pending				
Develop Action Plan	HSCP Level 1		Pending				
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Pending				
Provide HSCP L2 Counseling	HSCP Level 2		Pending				
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Pending				
Provide HSCP F/U Counseling	HSCP Follow-up		Pending				
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up	Pending				

Obtain Authorization

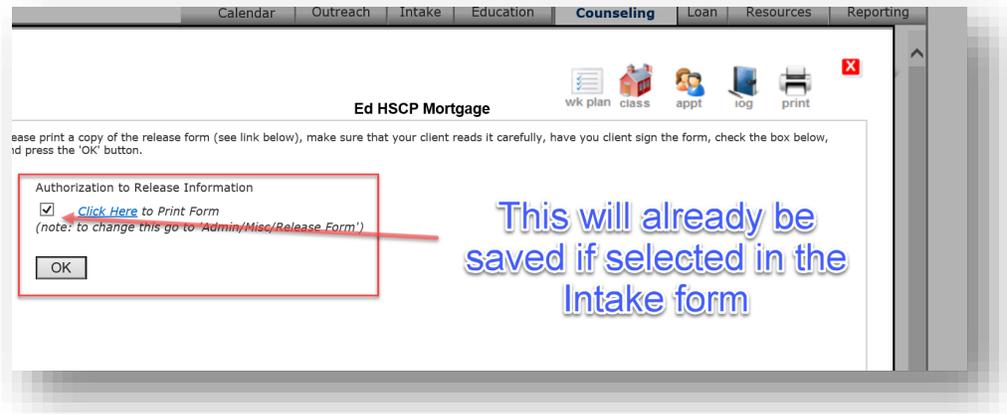
Next click on the "Authorization" GPS action item to complete the sub-form. If you have already marked the client case as authorized to release information on the Intake form you can skip the sub form and simply mark the action item as completed:

Calendar Outreach Intake Education **Counseling** Loan Resources Reporting

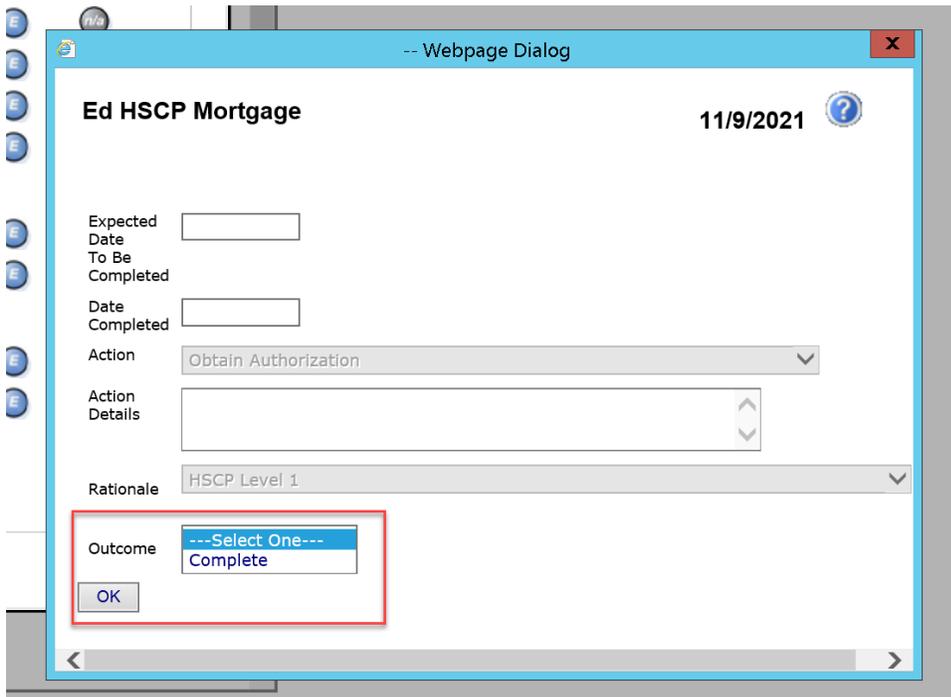
Ed HSCP Mortgage wk plan class appt log print

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Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Pending				
Provide Disclosure	HSCP Level 1		Pending				
Provide Privacy Policy	HSCP Level 1		Pending				
Provide Triage Counseling	HSCP Level 1		Pending				
Develop Budget	HSCP Level 1	Budget	Pending				



Mark the GPS action item as completed when done:



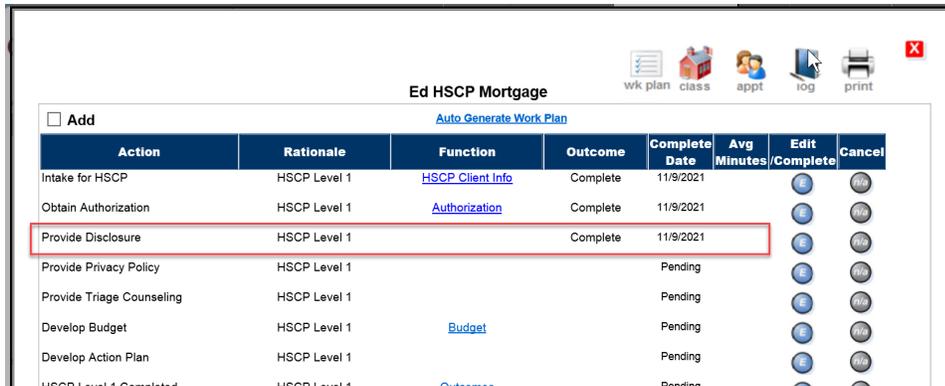
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Auto Generate Work Plan

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			
Provide Disclosure	HSCP Level 1		Pending				
Provide Privacy Policy	HSCP Level 1		Pending				
Provide Triage Counseling	HSCP Level 1		Pending				

Provide Disclosure Action Item

The next GPS action item is “Provide Disclosure.” There is no subform for this step. You must provide your own disclosure form. However, you must click “Edit/Complete” and mark the step as completed to be able to successfully record the step and report the case.



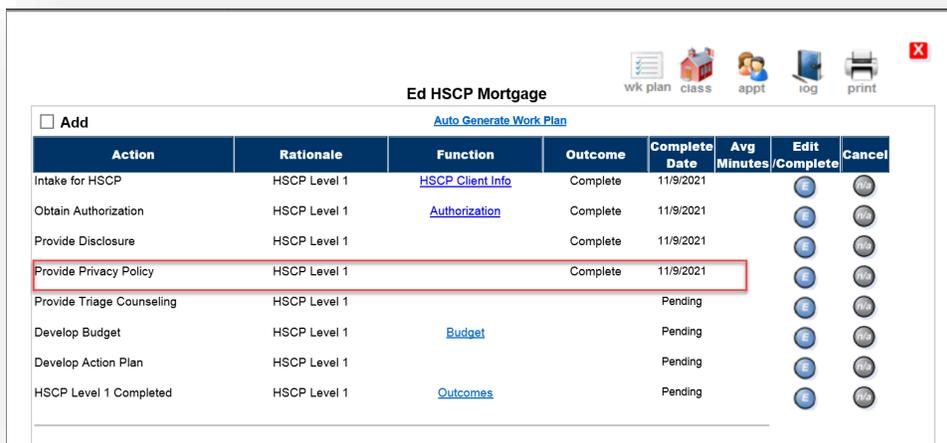
Ed HSCP Mortgage

Auto Generate Work Plan

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			
Provide Disclosure	HSCP Level 1		Complete	11/9/2021			
Provide Privacy Policy	HSCP Level 1		Pending				
Provide Triage Counseling	HSCP Level 1		Pending				
Develop Budget	HSCP Level 1	Budget	Pending				
Develop Action Plan	HSCP Level 1		Pending				
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Pending				

Provide Privacy Policy

The same applies to the “Provide Privacy Policy” GPS. There is no sub form but you must provide a privacy policy to the client and record the step as completed in the GPS:



Ed HSCP Mortgage

Auto Generate Work Plan

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			
Provide Disclosure	HSCP Level 1		Complete	11/9/2021			
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021			
Provide Triage Counseling	HSCP Level 1		Pending				
Develop Budget	HSCP Level 1	Budget	Pending				
Develop Action Plan	HSCP Level 1		Pending				
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Pending				

Review Credit

You are not required to provide a credit score to report a client case to HSCP. However, if you have a current score for the case, it is an optional data point that can be reported. This action item is here to remind you to review the client's credit report as part of your HSCP counseling process and to document their score, if available.

The HSCP GPS provides you with the link to the CounselorMax Credit function so that you can easily pull a report or manually enter credit score information. To do so:

1. Click on the “Credit Report” link:








Gregory HSCP

[Auto Generate Work Plan](#)

Add

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info		Pending			
Obtain Authorization	HSCP Level 1	Authorization		Pending			
Provide Disclosure	HSCP Level 1			Pending			
Provide Privacy Policy	HSCP Level 1			Pending			
Verify credit	HSCP Level 1	Credit Report		Pending			
Provide Triage Counseling	HSCP Level 1			Pending			
Develop Budget	HSCP Level 1	Budget		Pending			
Develop Action Plan	HSCP Level 1			Pending			
HSCP Level 1 Completed	HSCP Level 1	Outcomes		Pending			
Provide HSCP L2 Counseling	HSCP Level 2			Pending			
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates		Pending			
Provide HSCP F/U Counseling	HSCP Follow-up			Pending			
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up		Pending			

- This will open the Credit reporting form where you can either pull the report as normal in CounselorMax or enter it manually, as you normally would using CounselorMax. Please note that if you do not pull credit, or have a current score to enter, you can use the manual entry feature to enter "999" and "other repository" in the system. This will signify that you have not pulled a report for the case:








Gregory HSCP

Credit
 Saved Successfully!
 * Required Fields Must Be Filled-in

Number of Accounts 30 Days Late 60 Days 90 Days
 Perm Res Alien Divorce
 Credit Score * Repository *
(If two, select one w/ lowest score - if three, select one w/ middle score)
 Last Foreclosure Date Last Bankrupt Date Judgments - Balance \$

Client Log: Ed HSCP Mortgage

Date/Time: 11/9/2021 11:30 AM

Subject: HSCP Level 1

Staff: Jif

Action: *APPT (Non-HUD)

Comments: Met with Mr. HSCP to provide Level 1 counseling.
1802 characters remaining

Duration (minutes): 60

Fee: 0 Include in NeighborWorks® hours counseled

OK

To successfully report Level 1 counseling to HSCP, you must have at least one HSCP Level 1 counseling appointment saved for the client case between the Case creation date and the case resolution date. You may have more than one Level 1 counseling appointment recorded for the case.

Once you have completed all Level 1 counseling make sure to mark the GPS action item as completed:

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Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			
Provide Disclosure	HSCP Level 1		Complete	11/9/2021			
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021			
Provide Triage Counseling	HSCP Level 1		Face-to-face	11/9/2021			
Develop Budget	HSCP Level 1	Budget	Pending				
Develop Action Plan	HSCP Level 1		Pending				
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Pending				
Provide HSCP L2 Counseling	HSCP Level 2		Pending				

Develop Budget action item

HSCP requires that you help a client develop a sustainable household budget. You can record this service in the GPS using the “Develop Budget” action item. If you click on the “Budget” link on the GPS it will take you to the standard CounselorMax budget tool. You are not required to use this tool

develop the budget. However, regardless of what budget tool you use you must mark the action item as complete to successfully report Level 1 services.

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Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			
Provide Disclosure	HSCP Level 1		Complete	11/9/2021			
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021			
Provide Triage Counseling	HSCP Level 1		Face-to-face	11/9/2021			
Develop Budget	HSCP Level 1	Budget	Complete	11/9/2021			
Develop Action Plan	HSCP Level 1		Pending				
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Pending				
<hr/>							
Provide HSCP L2 Counseling	HSCP Level 2		Pending				
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Pending				
<hr/>							
Provide HSCP F/U Counseling	HSCP Follow-up		Pending				
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up	Pending				

Develop Action Plan

The Develop Action Plan action item must be marked as completed to successfully report Level 1 counseling. There is no separate sub form available to document the action plan. Users should use their own action plan work forms and document the completion in the GPS using the edit/complete button.








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Add [Auto Generate Work Plan](#)

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			
Provide Disclosure	HSCP Level 1		Complete	11/9/2021			
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021			
Provide Triage Counseling	HSCP Level 1		Face-to-face	11/9/2021			
Develop Budget	HSCP Level 1	Budget	Complete	11/9/2021			
Develop Action Plan	HSCP Level 1		Complete	11/9/2021			
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Pending				
Provide HSCP L2 Counseling	HSCP Level 2		Pending				
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Pending				
Provide HSCP F/U Counseling	HSCP Follow-up		Pending				
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up	Pending				

HSCP Level 1 Completed

Upon completing and Intake, providing initial Level 1 triage counseling, providing a privacy policy and disclosures, assisting in developing a sustainable budget and developing a housing stability action plan you have met the requirements to complete HSCP Level 1 requirements and report on the client. To do so you will need to complete the HSCP Level 1 Outcomes sub form and mark the GPS action item as completed. To do this, click on the "Outcomes" link on the GPS and select a primary outcome. Optionally you may select a secondary outcome.

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Housing Stability (HSCP) Outcomes Level 1

SAVE

** Required Fields Must Be Filled-in*

Primary Outcome*

Secondary Outcome

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Housing Stability (HSCP) Outcomes Level 1

SAVE

** Required Fields Must Be Filled-in*

Primary Outcome*

Secondary Outcome

Next mark the GPS action item as complete. Note that the action item “outcome” options are different than the usual “complete.” They include language related counseling responses.

Ed HSCP Mortgage 11/9/2021

Expected Date To Be Completed

Date Completed

Action HSCP Level 1 Completed

Action Details

Rationale HSCP Level 1

Outcome ---Select One---
Could not counsel in primary language
Counseled in the primary language of client

You have now completed the data collection requirements for a Level 1 case and may report on this activity. For detailed information on how to report, go to the reporting section of this guide [here](#).

Collecting Level 2 Counseling Data Points

To collect the required data for Level 2 counseling activities you will complete the two Level 2 GPS action items on the GPS.

Provide HSCP L2 Counseling

HSCP allows you to provide Level 2 counseling to the client and receive appropriate reimbursement for the services. For details on what Level 2 counseling entails refer to the HSCP program requirement literature provided with your grant award. To capture the counseling in CounselorMax you will again record the counseling activity in the client Log. Click on the Log icon at the top right of the GPS:

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Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			
Provide Disclosure	HSCP Level 1		Complete	11/9/2021			
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021			
Provide Triage Counseling	HSCP Level 1		Face-to-face	11/9/2021			
Develop Budget	HSCP Level 1	Budget	Complete	11/9/2021			
Develop Action Plan	HSCP Level 1		Complete	11/9/2021			
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Counseled in the primary language of client	11/9/2021			
Provide HSCP L2 Counseling	HSCP Level 2		Pending				
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Pending				
Provide HSCP F/U Counseling	HSCP Follow-up		Pending				
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up	Pending				

Click the add button and select HSCP Level 2 counseling for the subject:

Ed HSCP Mortgage

Add Print

Date	Duration	Subject	Staff	Summary
11/9/2021 (11:30AM)	60	HSCP Level 1	jif	Met with Mr. HSCP to provide Level 1 counseling.

Client Log: Ed HSCP Mortgage

Date/Time: 11/9/2021 2:45 PM

Subject: **HSCP Level 2**

Staff: jif

Action: *APPT (Non-HUD)

Comments: Test note

Duration (minutes): 60

Fee: 0

Include in NeighborWorks® hours counseled

Next mark the action item as completed.








Ed HSCP Mortgage

Add [Auto Generate Work Plan](#)

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			
Provide Disclosure	HSCP Level 1		Complete	11/9/2021			
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021			
Provide Triage Counseling	HSCP Level 1		Face-to-face	11/9/2021			
Develop Budget	HSCP Level 1	Budget	Complete	11/9/2021			
Develop Action Plan	HSCP Level 1		Complete	11/9/2021			
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Counseled in the primary language of client	11/9/2021			
Provide HSCP L2 Counseling	HSCP Level 2		Face-to-face	11/9/2021			
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Pending				
Provide HSCP F/U Counseling	HSCP Follow-up		Pending				
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up	Pending				

HSCP Level 2 Completed

Once all HSCP Level 2 counseling is completed click on the “Outcomes and Updates” link to enter the relevant data points. You must provide a primary outcome for Level 2 counseling. Other fields are optional.








Ed HSCP Mortgage

Housing Stability (HSCP) Outcomes Level 2

* Required Fields Must Be Filled-in

Client referred to and/or assisted with access to financial resources for housing stability. (leave blank if N/A)

Primary Outcome*

Secondary Outcome

Next mark the action item as completed.

Ed HSCP Mortgage







Add [Auto Generate Work Plan](#)

Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			
Provide Disclosure	HSCP Level 1		Complete	11/9/2021			
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021			
Provide Triage Counseling	HSCP Level 1		Face-to-face	11/9/2021			
Develop Budget	HSCP Level 1	Budget	Complete	11/9/2021			
Develop Action Plan	HSCP Level 1		Complete	11/9/2021			
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Counseled in the primary language of client	11/9/2021			
Provide HSCP L2 Counseling	HSCP Level 2		Face-to-face	11/9/2021			
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Counseled in the primary language of client	11/9/2021			
Provide HSCP F/U Counseling	HSCP Follow-up			Pending			
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up		Pending			

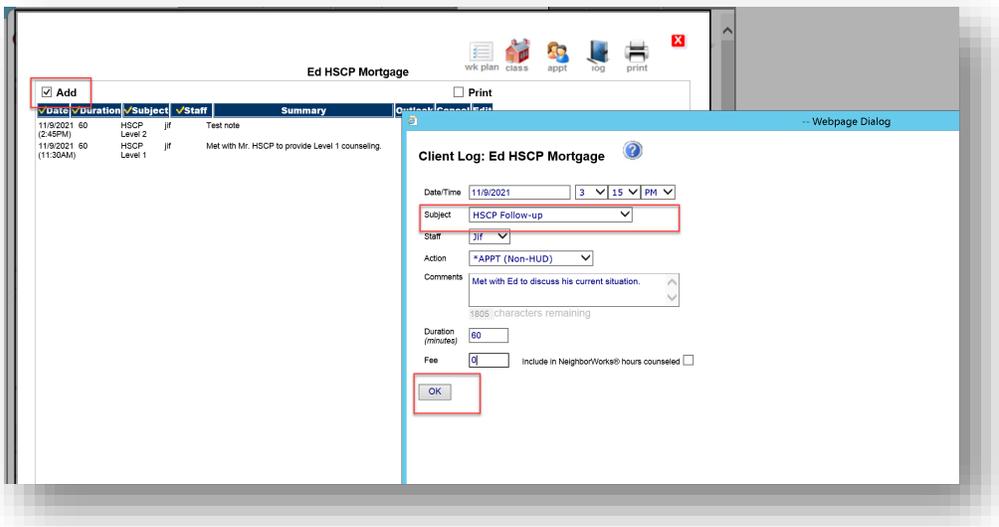
You may now report on the Level 2 counseling activity.

HSCP Follow-up Counseling

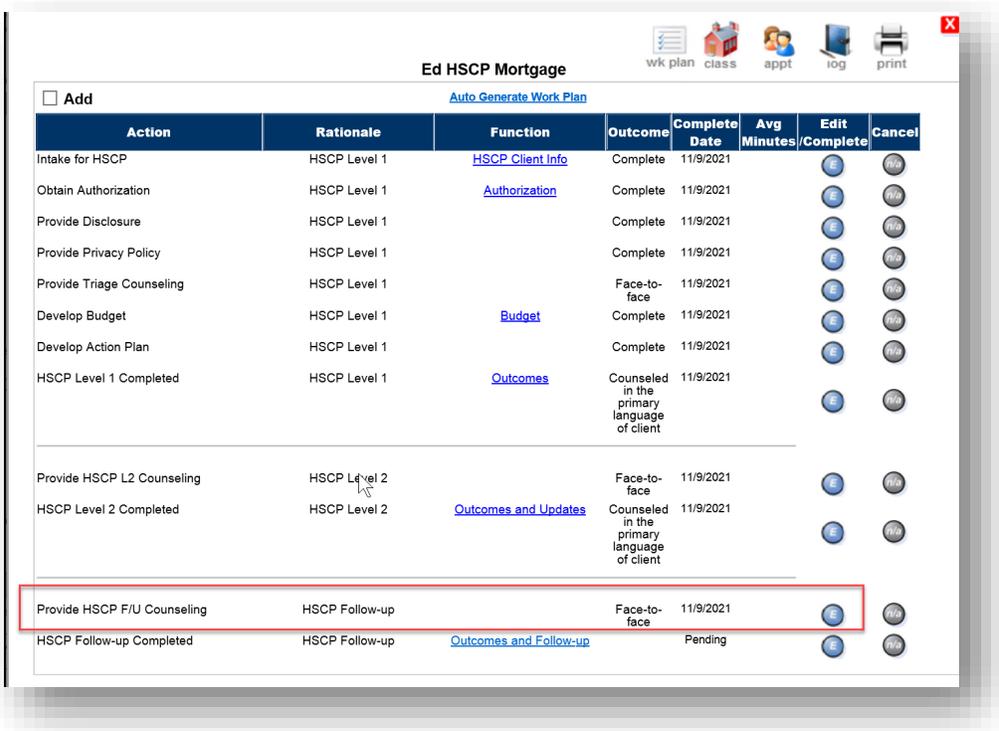
HSCP will reimburse you for follow-up counseling if counseling is provided and recorded and the required data points are collected. You will use the HSCP Follow-up section to complete this work.

Provide HSCP F/U Counseling

Using the client log record an HSCP follow-up counseling appointment by selecting HSCP Follow-up from the "subject" field:



Mark the action item as complete:



HSCP Follow-up Completed

You will complete this last step by clicking on the "Outcome and Follow-up" link, completing the form and marking the GPS action item as completed.

Ed HSCP Mortgage

Housing Stability (HSCP) Outcomes and Updates Follow-up

SAVE

*** Required Fields Must Be Filled-in**

Client referred to and/or assisted with access to financial resources for housing stability. (leave blank if N/A) State/Local Resources

Homeowner's PITI *

Mortgage Delinquency *

Follow-up session *

Primary Outcome *

Secondary Outcome

Last, mark the HSCP Follow-up Completed action item as completed:

Ed HSCP Mortgage

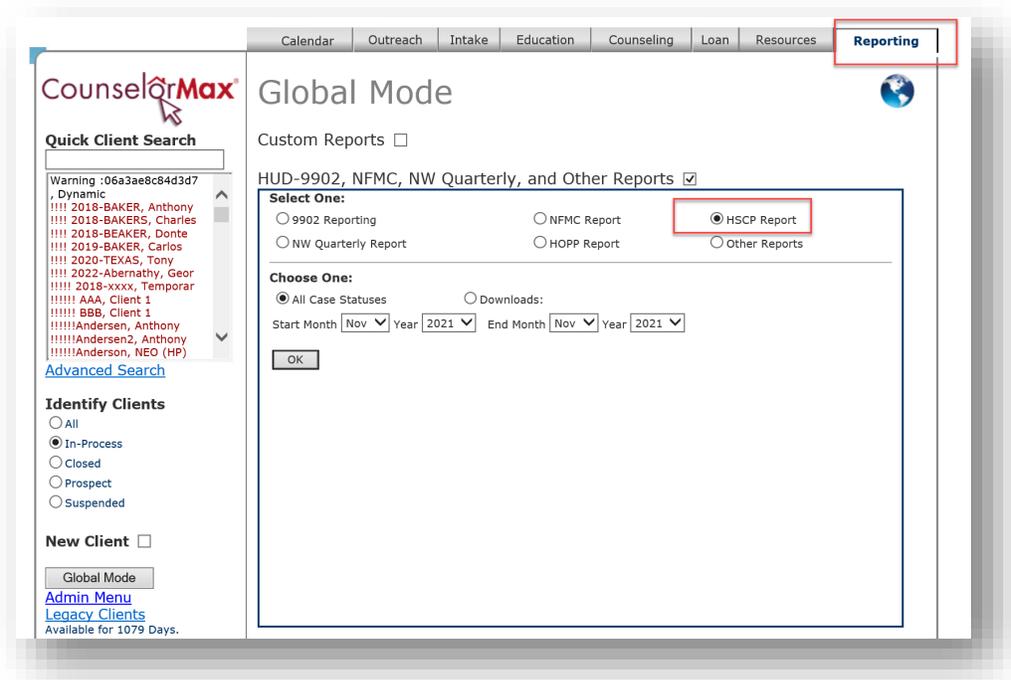
Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/Complete	Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			
Provide Disclosure	HSCP Level 1		Complete	11/9/2021			
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021			
Provide Triage Counseling	HSCP Level 1		Face-to-face	11/9/2021			
Develop Budget	HSCP Level 1	Budget	Complete	11/9/2021			
Develop Action Plan	HSCP Level 1		Complete	11/9/2021			
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Counseled in the primary language of client	11/9/2021			
Provide HSCP L2 Counseling	HSCP Level 2		Face-to-face	11/9/2021			
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Counseled in the primary language of client	11/9/2021			
Provide HSCP F/U Counseling	HSCP Follow-up		Face-to-face	11/9/2021			
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up	Counseled in the primary language of client	11/9/2021			

You may now report the follow-up level.

Reporting HSCP Data

You may report any completed HSCP data to HSCP at any time. There are no set reporting periods to adhere to. For convenience you may want to establish a weekly or monthly reporting cycle, however. CounselorMax has designed the reporting module to capture all reportable activity for period ranges of one or more months, as often as necessary.

To access the HSCP data reporting module click on the “Reporting” tab and then click on the “HSCP Report” radio button:



This will expose the HSCP reporting module. The module is designed so that you select a reporting period, run an audit/exception report to make sure all expected activity is complete and reportable, and finally, once all data is complete, run an export report that you can upload to the HSCP program website to get credit and eventual reimbursement.

Selecting the Reporting period

You may select a reporting period based on month and year intervals. Any cases in the system with at least one GPS action item completed will show up on the “All case Statuses” report (audit/exception) report. Only cases that meet all of the report requirements for each relevant level will show up on the “downloads” report.

All Case Statuses Report

The All Case Statuses report is the HSCP audit report that will allow you to flag all potentially reportable cases. It is designed to cast a “wide net” so that you do not lose any potentially reportable data.

Regardless of the date ranges selected, any case with at least one GPS action item completed will show on the report. For example, if you run the report for a period of November 2021 to November 2021 (November 1 through 30, 2021) and you have a case with one or more action items completed in October 2021, they will still show on the report with a status of “date out of range” in the report’s “last action” column. This is so that you can see that there’s a case in a prior period that may be reportable but you have not yet inputted the updated data.

The audit report looks as follows:

HSCP Audit Report: Candidates for Download

For customer receiving housing stability counseling between 10/1/2021 - 11/30/2021

Action	Case Id	Last Name	First Name	1st Action	Last Action	Actions Left	Level	Counselor	Exceptions	In Download?
Modify	4698075	III 2020-TEXAS	Tony	10/18/2021	10/18/2021	8 completed	Level 1	Baker, Carlos	none	yes
Modify	4698075	III 2020-TEXAS	Tony	10/18/2021	10/18/2021	2 completed	Level 2	Baker, Carlos	Primary outcome - missing	no
Modify	4698075	III 2020-TEXAS	Tony	10/18/2021	10/18/2021	2 completed	Follow-up	Baker, Carlos	Level Completion Date error - Counseling at this level not provided	no
Modify	45962	Hopper	Bob	11/8/2021	11/8/2021	4 actions remaining	Level 1	Andrews, Janet	n/a	no
Modify	4745166	HSCP Mortgage	Ed	11/9/2021	11/9/2021	8 completed	Level 1	Fernandez, Jose	none	yes
Modify	4745166	HSCP Mortgage	Ed	11/9/2021	11/9/2021	2 completed	Level 2	Fernandez, Jose	none	yes
Modify	4745166	HSCP Mortgage	Ed	11/9/2021	11/9/2021	2 completed	Follow-up	Fernandez, Jose	none	yes
Modify	4745164	HSCP Homeless	Tom	10/9/2021	10/9/2021	8 completed	Level 1	Fernandez, Jose	none	yes
Modify	4527687	ZZZ-HOMEY	D.Clown	9/27/2021	date out of range 9/27/2021	8 completed	Level 1	Baker, Carlos	Household Income - missing Primary_Housing_Instability - Invalid instability reason Primary outcome - missing Level Completion Date error - Counseling at this level not provided	no
Modify	4527687	ZZZ-HOMEY	D.Clown	10/3/2021	10/3/2021	1 actions remaining	Level 2	Baker, Carlos	n/a	no
Modify	4527687	ZZZ-HOMEY	D.Clown	10/27/2021	10/27/2021	1 actions remaining	Follow-up	Baker, Carlos	n/a	no

The columns on the report are:

1. Action: this is a link to the client’s GPS for easy access if you need to view or update data.
2. Case ID: the case ID for the client case. Not to be confused with the client ID.
3. Last Name: last name of the client
4. First Name: first name of the client
5. 1st Action: the date of the earliest GPS action item on the client’s GPS.
6. Last Action: the date of the most recent (latest) GPS action item on the GPS.
7. Actions Left: The number of GPS action items not yet completed (if any).
8. Level: The Level of service being analyzed on the row.
9. CZZ counselor: the assigned counselor for the client case.
10. Exceptions: the red (prevents case from being reported) and yellow (does not prevent the case from being reported but highlights a potential missing or unusual data point).
11. In Download?: If the case will or will not be included in the download. If red flag exceptions exist for the case, or action items are not completed the case will be excluded.

Criteria for Inclusion on the All Case Statuses report

For a case to show on the All Case Statuses report the client case must meet the following criteria:

1. Have an HSCP GPS attached to the case.
2. Have at least one GPS action item completed.

Exceptions and how to clear them

The following are all possible red and yellow flag exceptions and how to clear them so that the case is included in the download (data export):

1. Intake Date is before grant period:

2. Red flag: Crisis situation – missing: “Is this a crisis situation?” Question not answered on HSCP Client Information form.
3. Red flag: Over 30 Percent income on Housing missing: Does household spend more than 30% income on housing (rent or mortgage)? Question on the HSCP Client Info form not answered. Fill out the form and save responses to clear.
4. Red flag: Primary Housing Instability Missing: “Client referred to and/or assisted with access to financial resources for housing stability. (leave blank if N/A)” question not answered on the HSCP Client Information form.
5. Red flag: Eviction or Moratoria Missing: “Did client benefit from eviction or foreclosure moratoria during COVID-19 pandemic?” question not answered on the HSCP Client Information form.
6. Red Flag: Monthly rent – missing: “Monthly rent amount (excluding utilities)?” question not answered on the HSCP Client Information form.
7. Red Flag: Rent Arrears – missing: “Total amount of rent arrears?” question not answered on the HSCP Client Information form.
8. Red flag: Primary outcome – missing: “Primary Outcome” field on Outcomes form not filled out.
9. Red flag: Level Completion Date error – Counseling at this Level not provided: no HSCP counseling appointments saved in system for the level of counseling reported. To clear add the appropriate counseling appointment in the Client log.
10. Red flag: Primary Housing instability – invalid instability reason: the response to the “Primary reason for housing instability?” question on the HSCP Client Information form is incompatible with the type of service selected. For example, a rental services case has a primary reason of “default” which is only appropriate to mortgage delinquency cases. To clear the flag you must change the response to something compatible.
11. Red flag: Follow-up Session – missing: no HSCP Follow-up appointment recorded in system when trying to report at Follow-up level. To clear the flag add the follow-up appointment to the client log.
12. Yellow Flag: PITI - Total PITI is < \$100. Please review. If this is correct leave it. If not, go back to form and correct it.
13. Yellow flag: Household Income – missing: income of \$0 saved for the client case. If this is correct leave it. If incorrect update income in Intake form.
14. Yellow flag: PITI - Total PITI is > \$3000. Please review: If this is correct leave it. If not, go back to form and correct it.
15. Yellow flag: Monthly rent - Please confirm rent > 3000: if this is correct leave it. If not, go back to form and correct it.

Once you have reviewed all of your data and cleared any red flags you are ready to export your data to upload to the HSCP data collection system.

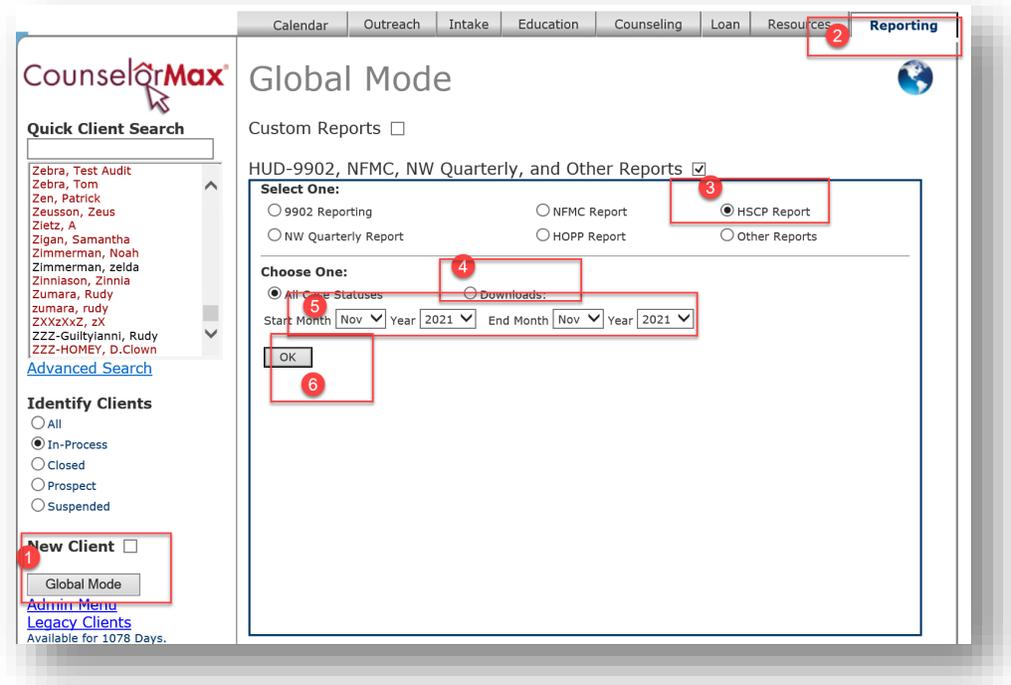
Exporting Data and Uploading to the HSCP System

Exporting Data

To export your data file, follow these steps:

1. Go to Global Mode.
2. Select the “Reporting” tab

3. Select HSCP Report.
4. Select the "Downloads" radio button.
5. Enter a reporting date range.
6. Click "OK" to begin the download.



You will see a download message from your browser prompting you to save the file.

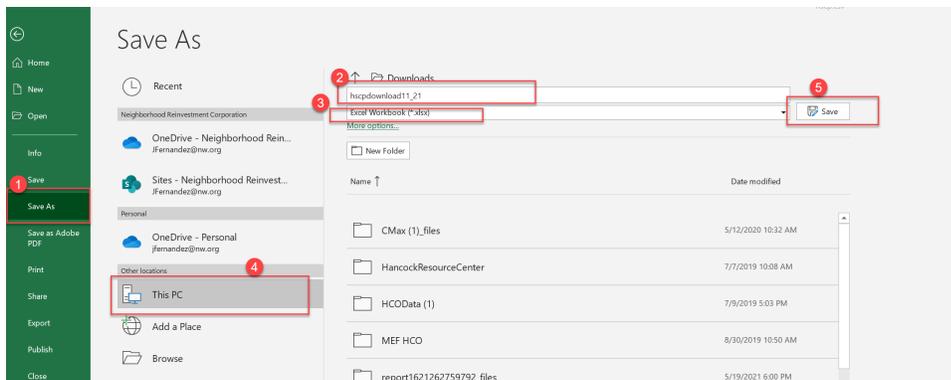


Save the file to a local drive on your computer.

You may open the file to review it and ensure all expected data is in the download.

You must also save it as an Excel spreadsheet. The download is a .csv file and cannot be uploaded until you save it as an Excel format. Follow these steps:

1. Open the downloaded .csv file in MS Excel (Google docs, etc. Will work too).
2. Name the file something meaningful based on date ranges etc.
3. Save the file in .xlsx format.
4. Save it to a local or cloud drive you can securely access.

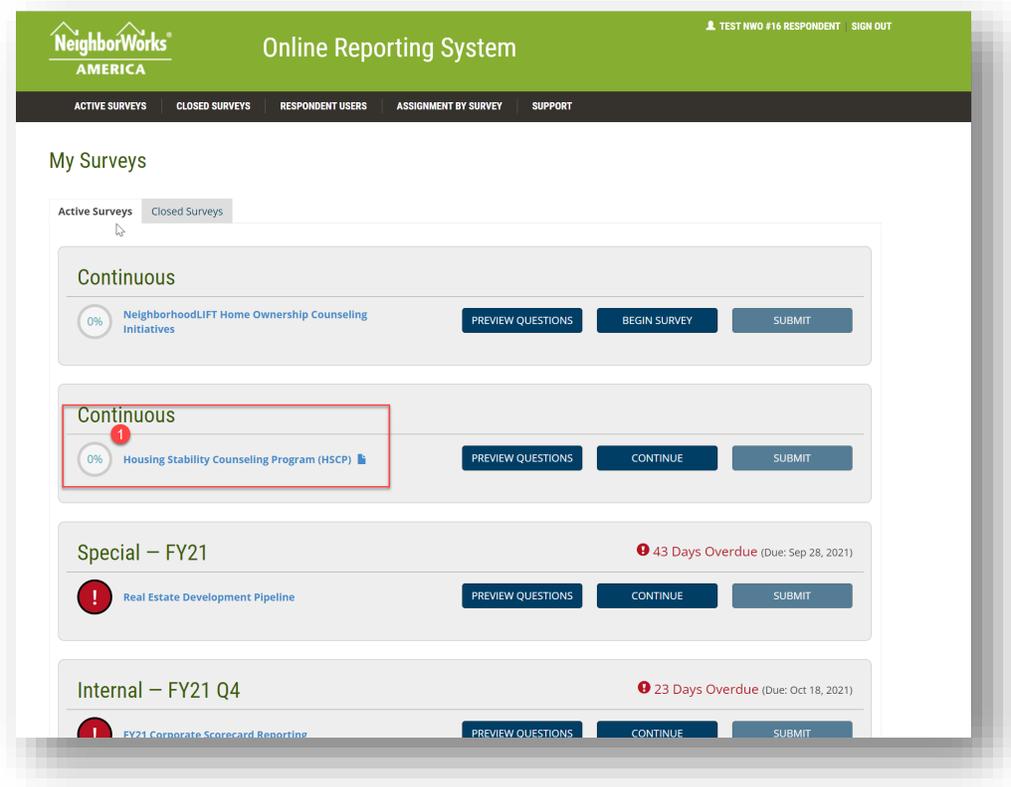


Uploading data to the HSCP data collection system

You must have an HSCP data reporting account to upload data into the system. If you do not have one or are not aware of it contact your HSCP contact to obtain that. CounselorMax cannot provide you with these accounts.

To access your upload account go to <https://report.nw.org/login> . Log in with your credentials.

Once you log in you will see the HSCP survey section:



Click on the link to go to the survey.

Once in the HSCP survey page click on the “start” button to the right of “Client Counseling Data”

NeighborWorks AMERICA

Online Reporting System

TEST NWO #16 RESPONDENT SIGN OUT

ACTIVE SURVEYS CLOSED SURVEYS RESPONDENT USERS ASSIGNMENT BY SURVEY SUPPORT

Housing Stability Counseling Program (HSCP)

0% complete

--- HIDE INSTRUCTIONS ---

Survey Instructions

About the Housing Stability Counseling Program (HSCP)
The American Rescue Plan Act of 2021 was signed into law by President Biden on March 11, 2021, in order to address these issues and stabilize our homes and communities. The legislation charges NeighborWorks America with designing and administering a national, \$100 million housing counseling program that will provide grants to support housing counseling for households facing housing instability, such as eviction, default, foreclosure, loss of income or homelessness.

We have designed the Housing Stability Counseling Program, with the help of a diverse set of stakeholders, to meet the needs of residents facing housing instability and ensure funds are released to housing counseling agencies throughout the nation as quickly as possible.

If you have questions about this program, please contact counseling@nw.org.

For program resources and FAQs, please visit <https://www.stablecommunities.org/HSCP/Resources>.

Survey Process

This survey will remain open for the duration of the program. Once a customer has been reviewed, the customer's counseling level record will either be accepted or re-opened for additional review and/or edits. Please add completed counseling records at regular intervals. Disbursements are based on production and production is determined by what is reported, so it is encouraged to update the data as frequently as possible for more timely disbursement.

CounselorMax and NW Compass Users

Please upload new counseling records using the export tool in CounselorMax and/or NW Compass.

--- HIDE INSTRUCTIONS ---

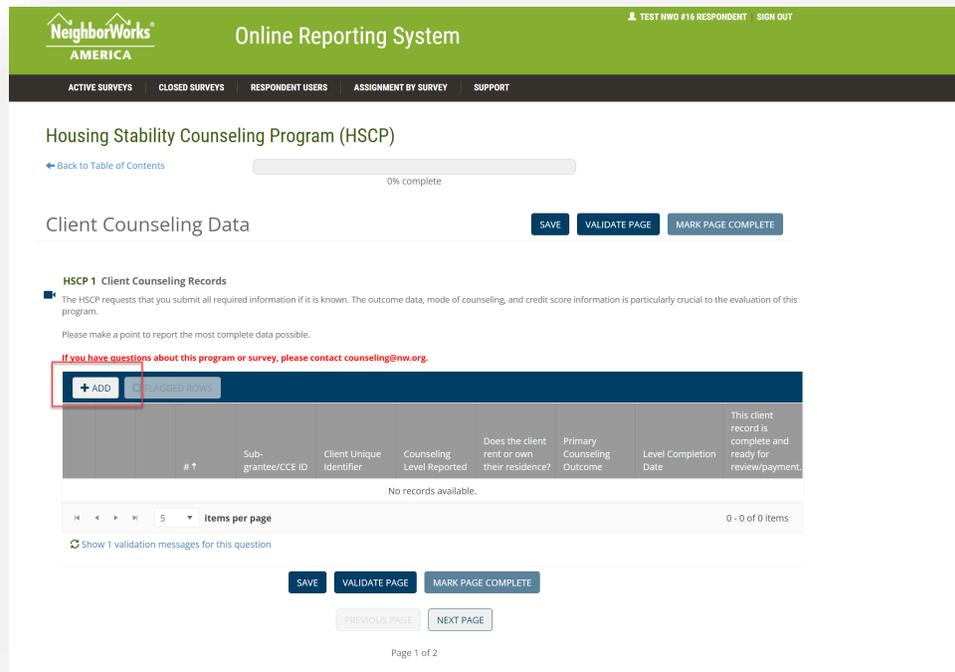
Survey Table of Contents

Client Counseling Data	START
Client Management System & Contact Information	START

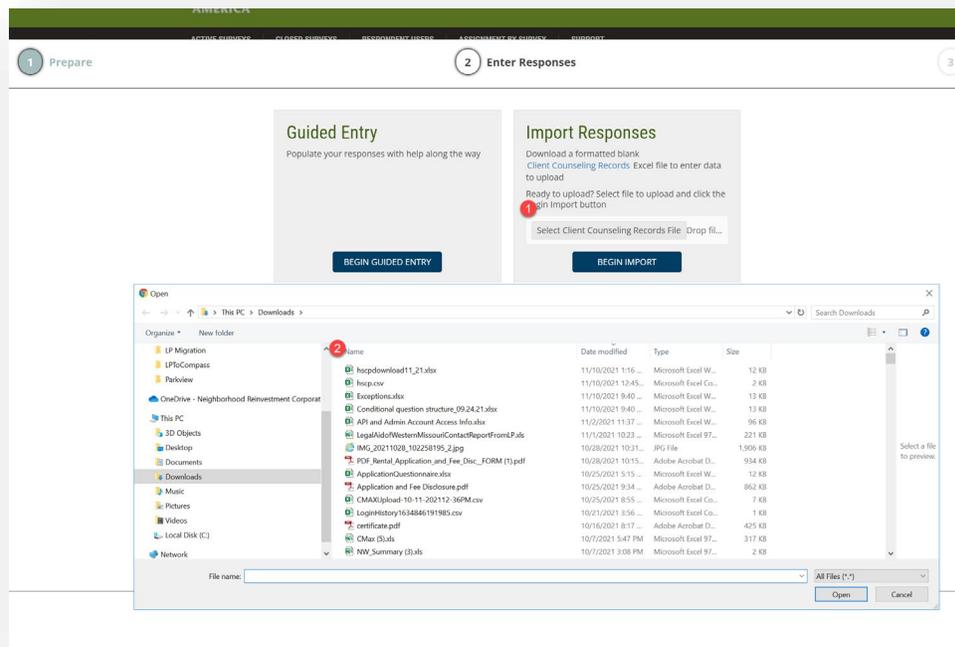
DATA DICTIONARY VALIDATE RESPONSES REVIEW SURVEY

SUBMIT SURVEY

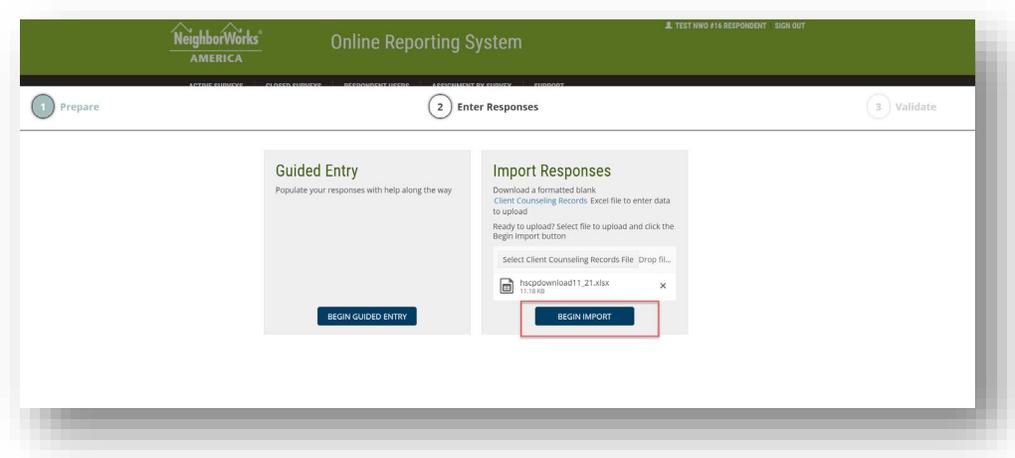
Click the “Add” button on the Client Counseling Data page:



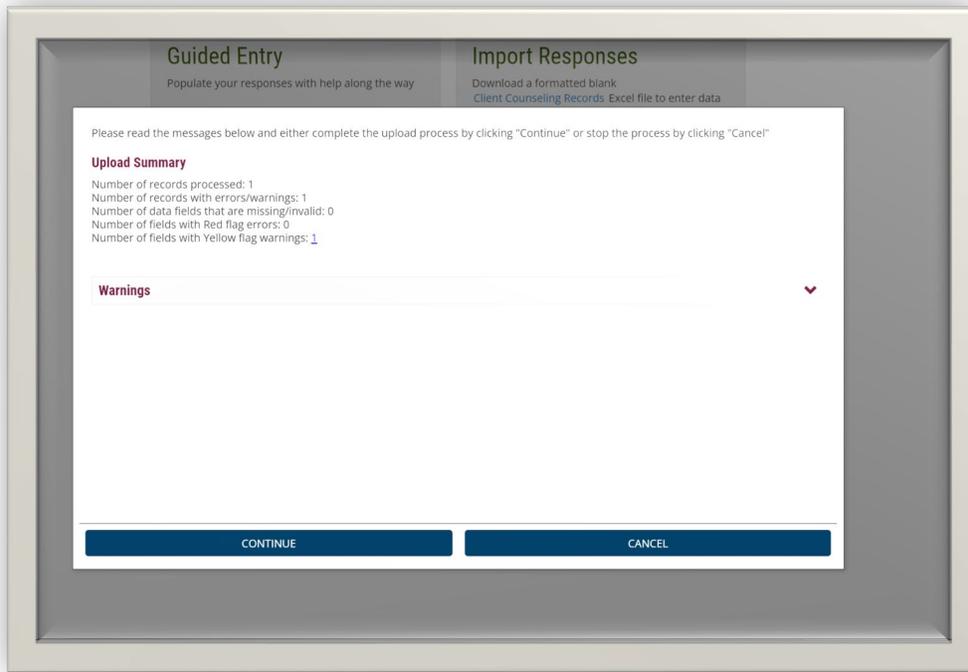
1. Click in the “Import Responses” file upload field.
2. This will open your system file explorer. Navigate to the location of your export file and click “OK.”



Click “begin import”:



You will see a message detailing the results of your upload and showing any errors or exceptions that may exist. Since most of these are caught by CounselorMax you should have few if any.



Click “Continue” to view your data in the system.

Guided Entry

Populate your responses with help along the way

Import Responses

Download a formatted blank
[Client Counseling Records Excel](#) file to enter data

Please read the messages below and either complete the upload process by clicking "Continue" or stop the process by clicking "Cancel"

Upload Summary

Number of records processed: 1
Number of records with errors/warnings: 1
Number of data fields that are missing/invalid: 0
Number of fields with Red flag errors: 0
Number of fields with Yellow flag warnings: [1](#)

Warnings

CONTINUE

CANCEL

Your upload is now complete.