# HSCP Program Features and Functions in CounselorMax

Version 1.1

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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 Srvcs

Homeless Servicing
O 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:

	<b>5</b>		<b>S</b>		
Tony !!!! 2020-TEXAS	wk plan	class	appt	iog	print

#### 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:

DbA 🗌		Auto Generate Work Plan				
Action	Rationale	Function	Outcome Complete Avg	Edit	Cancel	
Intake for HSCP	HSCP Level 1	HSCP Client Info	Pending		n/a	
Obtain Authorization	HSCP Level 1	Authorization	Pending	ă	(n/a)	
Provide Disclosure	HSCP Level 1		Pending	ă	<b>a</b>	
Provide Privacy Policy	HSCP Level 1		Pending	ĕ	(n/a)	
Verify credit	HSCP Level 1	Credit Report	Pending	ŏ	60	
Provide Triage Counseling	HSCP Level 1		Pending	ŏ		
Develop Budget	HSCP Level 1	Budget	Pending	ŏ	60	
Develop Action Plan	HSCP Level 1		Pending	ŏ	(n/a)	
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Pending	ē	ŏ	l
Provide HSCP L2 Counseling	HSCP Level 2		Pending		610	l
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Pending	ē	ŏ	l
Provide HSCP F/U Counseling	HSCP Follow-up		Pending		60	l
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up	Pending	Õ	ŏ	l
						l
						l

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:

		TOM HSPC			abbe	.09	b
□ Add		Auto Generate Worl	<u> Plan</u>				
Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit /Complete	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info		Pending			60
Obtain Authorization	HSCP Level 1	Authorization		Pending			
Provide Disclosure	HSCP Level 1			Pending			<b>(10)</b>
Provide Privacy Policy	HSCP Level 1	In	take	Pending			60
Provide Triage Counseling	HSCP Level 1	SP	etion	Pending			<b>n</b> /a
Develop Budget	HSCP Level 1	Budget		Pending			
Develop Action Plan	HSCP Level 1			Pending			<b>(</b> 10
HSCP Level 1 Completed	HSCP Level 1	Outcomes		Pending			60
Provide HSCP L2 Counseling	HSCP Level 2			Pending		(	60
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates		Pending			<b>(10)</b>
Provide HSCP F/U Counseling	HSCP Follow-up			Pending			<b>60</b>
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up		Pending			

#### 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:

'n
Select One V
select One V Client form has
oy on additional "rent or
abilityselect One
at

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

Tom HSPC Homeless	📻 💕 🥵 📕 🛱	nt
HSCP Client Information	SAVE	
* Required Fields Must Be Filled-in		
Is this a crisis situation? * $\bigcirc$ y $\bigcirc$ 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) $% \left( \frac{1}{2}\right) =0$	Select One V	
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 * Deinquency		
Mortgage Delinquency *	Select One 🗸	

Rental Questions:

Tom HSPC Homeless	🐖 🚧 🥵 📕 🛱 wk plan class appt 🛛 log print
HSCP Client Informatio	n SAVE
* Required Fields Must Be Filled-in	
Is this a crisis situation? $ ightharpoonup O y$ O 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 Y
Secondary reason for housing instability? (if applicable)	Select One 🗸
Does household spend more than 30% income on housing (rent or mortgage)? $^{igstarrow}$	⊖y ⊖n
Client referred to and/or assisted with access to financial resources for housing stability. (leave blank if N/A)	Select One V
Did client benefit from eviction or foreclosure moratoria during COVID-19 pandemic?? $^{\star}$	○No ○Yes ○Unknown
Monthly rent amount (excluding utilities)? * Total amount of rent arrears? * Total number of months' rent due? * 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	wk plan class appt jog print
HSCP Client Information	on Save
* Required Fields Must Be Filled-in	
Is this a crisis situation? * $\bigcirc$ y $\bigcirc$ n	
Primary reason for housing instability? *	Select One V
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 number of months' rent due? *	
Rental Service	es Form

Delinquency Intake form:

Ed HSCP Mortgage	wk plan class appt log print
HSCP Client Information	SAVE
* Required Fields Must Be Filled-in	
Is this a crisis situation? * $\bigcirc$ y $\bigcirc$ n	
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) $% \left( 1-\frac{1}{2}\right) =0$	Select One V
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 V
Mortgage Delinqu	uency 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:

Add		Auto Generate Work	Plan			-		
Action	Rationale	Function	Outcome	Complete	Avg Edit	Cancel		
Intake for HSCP	HSCP Level 1	HSCP Client Info		Pending				
Obtain Authorization	HSCP Level 1	Authorization		Pending		0		
Provide Disclosure	HSCP Level 1			Pending	ŏ	õ		
Provide Privacy Policy	HSCP Level 1			Pending	ŏ	õ		
Provide Triage Counseling	HSCP Level 1			Pending	õ.	à		
Develop Budget	HSCP Level 1	Budget		Pending	ŏ	Ø	Webpage D	ialog
Develop Action Plan	HSCP Level 1			Pending	ŏ	Ed HSCI	P Mortgage	
HSCP Level 1 Completed	HSCP Level 1	Outcomes		Pending	ŏ	Luniou	mongage	11/9/2021 🤍
Provide HSCP L2 Counseling	HSCP Level 2			Pending		Expected		
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates		Pending	ŏ	To Be Completed		
						Date Completed	11/8/2021	
Provide HSCP F/U Counseling	HSCP Follow-up			Pending		Action	Intake for HSCP	~
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up		Pending	ŏ	Action Details	Completed Intake	0
						Rationale	HSCP Level 1	
						Outcome	Complete	
						OK		

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

			w	k plan class		print
		Ed HSCP Mortgag	Plan		app: 103	p
Action	Rationale	Function	Outcome	Complete	Avg Edit	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021	linutes/Complet	
Obtain Authorization	HSCP Level 1	Authorization		Pending		<b>n</b> /a
Provide Disclosure	HSCP Level 1			Pending	õ	60
Provide Privacy Policy	HSCP Level 1			Pending	<u> </u>	60
Provide Triage Counseling	HSCP Level 1			Pending	<u> </u>	00
Develop Budget	HSCP Level 1	Budget		Pending	<u> </u>	
Develop Action Plan	HSCP Level 1			Pending	<u> </u>	<b>n</b> /a
HSCP Level 1 Completed	HSCP Level 1	<u>Outcomes</u>		Pending		
Provide HSCP L2 Counseling	HSCP Level 2			Pending		<b>(1</b> )
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates		Pending		
Provide HSCP F/U Counseling	HSCP Follow-up			Pending		<b>6</b> /2
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 O	utreach Intake Ec	lucation	Counseling	Loai	n Res	ources	Report
			w	plan class	appt		print	X
Add		Auto Generate Work	<u>Plan</u>					
Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/	Edit Complete	Cancel	
ntake 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		õ		
Provide Triage Counseling	HSCP Level 1			Pending		õ		
Develop Budget	HSCP Level 1	Budget		Pending				

	ndar Outre	each Intake	Education	Counseling	Loan	Resources	Reporting
		Ed HSCP Mor	tgage	wk plan class	appt 8	jog Frint	
print a copy of the release form (see I ess the 'OK' button. Authorization to Release Informatic Click <u>Here</u> to Print Form (note: to change this go to 'Admin/ OK	nk below), make s n Misc/Release For	m')	reads it carefully, Thi save	s will a dif sele	rea cte	dy be d in th	». Ie

Mark the GPS action item as completed when done:

	(n/a)	
E)	<u> </u>	Webpage Dialog
	Ed HSCF	P Mortgage 11/9/2021 🧭
	Expected Date To Be Completed	
	Date Completed	
	Action	Obtain Authorization
	Action Details	$\sim$
	Rationale	HSCP Level 1
	Outcome OK	Select One Complete
	<	>

		Ed HSCP Mortgag	e wł	plan class	appt	Jog	print	X
☐ Add		Auto Generate Work	Plan					
Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit /Complete	Cancel	
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021	_		00	
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			00	
Provide Disclosure	HSCP Level 1		-	Pending			<b>(/0</b> )	
Provide Privacy Policy	HSCP Level 1			Pending			<b>0</b> / <b>0</b>	
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 Mortgag	e W	k plan class	appt 8	log	print	X
Action	Rationale	Function	Outcome	Complete Date	Avg Minutes	Edit /Complete	Cancel	
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021				
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			00	
Provide Disclosure	HSCP Level 1		Complete	11/9/2021		Ō	60	
Provide Privacy Policy	HSCP Level 1			Pending			nia	
Provide Triage Counseling	HSCP Level 1			Pending			00	
Develop Budget	HSCP Level 1	Budget		Pending			00	
Develop Action Plan	HSCP Level 1			Pending				
HSCP Level 1 Completed	HSCP   aval 1	Outcomes		Pendina				

#### 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:

Add		Ed HSCP Mortgag	e wi	k plan class	appt log	print
Action	Rationale	Function	Outcome	Complete Date	Avg Edit Winutes/Complete	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021		600
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021		
Provide Disclosure	HSCP Level 1		Complete	11/9/2021		<b>n</b> /a
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021		<b>6</b>
Provide Triage Counseling	HSCP Level 1			Pending	(	<b>a</b>
Develop Budget	HSCP Level 1	Budget		Pending		<b>a</b>
Develop Action Plan	HSCP Level 1			Pending		
HSCP Level 1 Completed	HSCP Level 1	Outcomes		Pending		<b>6</b> /2

#### **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:

Add		Auto Generate Work Plan			
Action	Rationale	Function	Outcome Complete Avg	Edit s /Complete	
Intake for HSCP	HSCP Level 1	HSCP Client Info	Pending	(i)	
Obtain Authorization	HSCP Level 1	Authorization	Pending	<u> </u>	
Provide Disclosure	HSCP Level 1		Pending	ĕ ŏ	
Provide Privacy Policy	HSCP Level 1		Pending	ē õ	
Verify credit	HSCP Level 1	Credit Report	Pending	õ õ	
Provide Triage Counseling	HSCP Level 1	L	Pending	ă ă	
Develop Budget	HSCP Level 1	Budget	Pending	ă ă	
Develop Action Plan	HSCP Level 1		Pending	ă ă	
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Pending	ŏ ŏ	
Provide HSCP L2 Counseling	HSCP Level 2		Pending		
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Pending	ŏ ŏ	
Provide HSCP F/U Counseling	HSCP Follow-up		Pending		
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up	Pending	ŏ ŏ	

2. 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:

	Cre Saved Su * Required Fields	e <b>dit</b> ccessfully! 5 Must Be Fille	ed-in		
Number of Accounts 30 Days Late	60 Days		90 Days		
Perm Res Alien	Divorce				
Credit Score *	999 Repository *	Other Repos	itory 🗸		
(If two, select one w/	lowest score - if three, select or	ne w/ middle score	)		
Last Foreclosure Date	Last Bankrupt Da	ate	Judgments - Baland	ce \$	
	Save C	Changes			
		Jildingoo			

#### Provide Triage (Level 1) Counseling

The HSCP program requires that you provide counseling to the client. The "Provide Triage Counseling" action item allows you to record when you have completed this step. See the program requirements for details on the nature and type of counseling required. You will collect the specific details of the triage counseling using the CounselorMax "Log" function. Click on the "Log" icon from the GPS or access it from the standard CounselorMax forms.

	Calendar		ducation	counsening	LUai	i Keso	urces	Report
		Ed HSCP Mortgag	je w	k plan class	appt	Jog	print	X
🗌 Add		Auto Generate Wor	k Plan					
Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/	Edit Complete	Cancel	
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021				
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021			60	
Provide Disclosure	HSCP Level 1		Complete	11/9/2021				
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021			60	
Provide Triage Counseling	HSCP Level 1			Pending		õ	õ	

- 1. From the "Log" form click "add."
- 2. You must select "HSCP Level 1" to record that you have provided the triage Level 1 counseling.



This will not be a HUD reportable activity as the counseling is paid fully by HSCP:

k Consol Edit	Mohnage Dieler
	webpage Dialog
lient Log: Ed HSCP Mortgage 🧿	
Date/Time 11/9/2021 11 V 30 V AM V	
ubject HSCP Level 1	
Jif V	
xction *APPT (Non-HUD)	
omments Met with Mr. HSCP to provide Level 1	
inutes) 60	
e 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:

		Ed HSCP Mortgag	le wk	plan class app	it log	print
Add Action	Rationale	Function	Outcome	Complete Avg Date Minute	Edit s/Complete	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021		
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021		(1)
Provide Disclosure	HSCP Level 1		Complete	11/9/2021		60
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021	õ	<b>a</b>
Provide Triage Counseling	HSCP Level 1		Face-to-face	11/9/2021		
Develop Budget	HSCP Level 1	Budget		Pending		<b>6</b>
Develop Action Plan	HSCP Level 1			Pending		<b>6</b>
HSCP Level 1 Completed	HSCP Level 1	<u>Outcomes</u>		Pending		60
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 to

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.

		Ed HSCP Mortgage	WF	plan class	appr	log	print
Add		Auto Generate Work	Plan				
Action	Rationale	Function	Outcome	Complete Date	Avg Minutes/	Edit Complete	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			00
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			00
Develop Action Plan	HSCP Level 1			Pending			00
HSCP Level 1 Completed	HSCP Level 1	Outcomes		Pending			
Provide HSCP L2 Counseling	HSCP Level 2			Pending			60
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates		Pending		Ō	
Provide HSCP F/U Counseling	HSCP Follow-up			Pending			60
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up		Pending		Õ	

#### 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.

		Ed HSCP Mortgage	W	cpian class	appt iog	print	
Add		Auto Generate Work	Plan				
Action	Rationale	Function	Outcome	Complete A Date Mir	vg Edit utes/Complet	Cancel	
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021			
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021		nia	
Provide Disclosure	HSCP Level 1		Complete	11/9/2021		00	
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021	ē	60	
Provide Triage Counseling	HSCP Level 1		Face-to-face	11/9/2021		60	
Develop Budget	HSCP Level 1	Budget	Complete	11/9/2021		<i>nia</i>	
Develop Action Plan	HSCP Level 1		Complete	11/9/2021		60	
HSCP Level 1 Completed	HSCP Level 1	<u>Outcomes</u>		Pending			
Provide HSCP L2 Counseling	HSCP Level 2			Pending		ma	
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates		Pending	C		
Provide HSCP F/U Counseling	HSCP Follow-up			Pending		<i>ma</i>	
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up		Pending	Ő	00	

#### 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.

	Housing Stability (HSCP) Outcomes
	Level
Required Fiel	lds Must Be Filled-in
Primary	-
Outcome* Secondary	Outcome not yet achieved Referred client to servicer with action plan and no further counseling activity
Outcome	Currently in negotiation with servicer Brought mortgage current (w/o rescue funds)
	Brought mortgage current with rescue funds (private/public) Arrearage cancelled or waived
	Refinanced Forbearance
	Repayment plan Modification
	Partial claim Deed-in-Lieu
	Short sale Foreclosed
	Homeowner(s) sold property (not short sale) Bankruptcy
	Iransition to rental Counseled and gained access to non housing resources (Social or legal services; public benefits; Social Security; Medicaid)
	Withdrew from counseling
	Ed HSCP Mortgage
	Ed HSCP Mortgage Housing Stability (HSCP) Outcomes
	Ed HSCP Mortgage Housing Stability (HSCP) Outcomes Level 1
* Required Fie	Ed HSCP Mortgage Housing Stability (HSCP) Outcomes Level 1
* Required Fie	Ed HSCP Mortgage Ed HSCP Mortgage Housing Stability (HSCP) Outcomes Level 1
* Required Fie	Ed HSCP Mortgage Ed HSCP Mortgage Housing Stability (HSCP) Outcomes Level 1
* Required Fie	Ed HSCP Mortgage Ed HSCP Mortgage Housing Stability (HSCP) Outcomes Level 1
* Required Fie Primary Outcome *	Ed HSCP Mortgage Ed HSCP Mortgage Housing Stability (HSCP) Outcomes Level 1 Kes Must Be Filled-in Kes Must Be Filled-in
* Required Fie Primary Outcome * Secondary Outcome	Ed HSCP Mortgage       Image: Im
* Required Fie Primary Outcome * Secondary Outcome	Ed HSCP Mortgage       Image Class       Image
* Required Fie Primary Outcome * Secondary Outcome	Ed HSCP Mortgage
* Required Fie Primary Outcome * Secondary Outcome	Ed HSCP Mortgage     Ed HSCP Mortgage     Housing Stability (HSCP) Outcomes   Level 1     kds Must Be Filed-in     Currently In negotilation with servicer
* Required Fie Primary Outcome * Secondary Outcome	Ed HSCP Mortgage
* Required Fie Primary Outcome * Secondary Outcome	Ed HSCP Mortgage     Housing Stability (HSCP) Outcomes   Level 1     Idea Must Be Filed-in     Currently In negotilation with servicer
* Required Fie Primary Outcome * Secondary Outcome	Ed HSCP Mortgage     Housing Stability (HSCP) Outcomes   Level 1     kds Must Be Filed-in     Currently In negotilation with servicer
* Required Fie Primary Outcome * Secondary Outcome	Ed HSCP Mortgage     Housing Stability (HSCP) Outcomes   Level 1     Koust Be Filed-in     Currently In negotilation with servicer

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.

Ø	Webpage Dialog	x
Ed HSCI	P 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:

		Ed HSCP Mortgage	wk plan class ap	p log	print
Add	1	Auto Generate Work Plan			
Action	Rationale	Function	Outcome Date Minut	Edit es/Complete	Cancel
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete 11/9/2021		60
Obtain Authorization	HSCP Level 1	Authorization	Complete 11/9/2021		(1)
Provide Disclosure	HSCP Level 1		Complete 11/9/2021		
Provide Privacy Policy	HSCP Level 1		Complete 11/9/2021	ă	
Provide Triage Counseling	HSCP Level 1		Face-to- 11/9/2021	Ğ	
Develop Budget	HSCP Level 1	Budget	Complete 11/9/2021	Ğ	
Develop Action Plan	HSCP Level 1		Complete 11/9/2021	Ğ	
HSCP Level 1 Completed	HSCP Level 1	Outcomes	Counseled 11/9/2021	$\mathbf{}$	•
			in the primary language of client	٢	
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	õ	

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

7	1	Eu Hot	
✓ Add		ett Cumment	
1/9/2021 60	HSCP jif	Met with Mr. HSCP to provide Level 1 c	cunseling Webpage Dialog
11:30AM)	Level 1		Client Log: Ed HSCP Mortgage 🛛 🞯
			Dete/Time 11/9/2021 2 V 45 V PM V
			Subject HSCP Level 2
			Staff Jif 🗸
			Action *APPT (Non-HUD)
			Comments Test note
			~
			1841 characters remaining
			(minutes) 60
			Fee O Include in Neighbor/Works/8 hours counseled
			ОК

Next mark the action item as completed.

Add		Ed HSCP Mortgage	in p	Cluss	appr log	print	
Action	Rationale	Function	Outcome	Complete Date	Avg Edit Minutes/Comp	t cancel	
ntake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021	(8)	60	
Obtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021		60	
Provide Disclosure	HSCP Level 1		Complete	11/9/2021		60	
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021	(	60	
Provide Triage Counseling	HSCP Level 1		Face-to- face	11/9/2021	(2)	60	
Develop Budget	HSCP Level 1	Budget	Complete	11/9/2021		<b>n</b> /a	
Develop Action Plan	HSCP Level 1		Complete	11/9/2021		<b>n</b> /a	
ISCP Level 1 Completed	HSCP Level 1	<u>Outcomes</u>	Counseled in the primary language of client	11/9/2021	(		
Provide HSCP L2 Counseling	HSCP Level 2		Face-to- face	11/9/2021	(		
ISCP Level 2 Completed	HSCP Level 2	Outcomes and Updates		Pending	e		
Provide HSCP F/U Counseling	HSCP Follow-up			Pending	(	<i>n/a</i>	
ISCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up		Pending	0		

#### 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
Required Fiel	ds Must Be Filled-in
Client referre	d to and/or assisted with access to financial resources for housing stability.  State/Local Resources
	Brought mortgage current (w/o rescue funds)
Outcome*	
Dutcome* Secondary Dutcome	Counseled and gained access to non housing resources (Social or legal services; public benefits; Social Security; Medicaid) 🗸
Dutcome* Secondary Dutcome	Counseled and gained access to non housing resources (Social or legal services; public benefits; Social Security; Medicaid) $oldsymbol{ u}$
Outcome* Secondary Outcome	Counseled and gained access to non housing resources (Social or legal services; public benefits; Social Security; Medicaid) $oldsymbol{ u}$
Outcome* Secondary Outcome	Counseled and gained access to non housing resources (Social or legal services; public benefits; Social Security; Medicaid) 💙

Next mark the action item as completed.

		Ed HSCP Mortgage	wk plan	class appt	lõg	print	_
Add		Auto Generate Work Plan					
Action	Rationale	Function	Outcome D	nplete Avg ate Minutes	Edit /Complete	Cancel	
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete 11/5	9/2021		<b>6</b> 0	
Obtain Authorization	HSCP Level 1	Authorization	Complete 11/5	9/2021		<b>600</b>	
Provide Disclosure	HSCP Level 1		Complete 11/5	9/2021		<b>(1)</b>	
Provide Privacy Policy	HSCP Level 1		Complete 11/5	9/2021		<b>6</b> 00	
Provide Triage Counseling	HSCP Level 1		Face-to- 11/s	9/2021		<b>(1)</b>	
Develop Budget	HSCP Level 1	Budget	Complete 11/5	9/2021		<b>6</b> 0	
Develop Action Plan	HSCP Level 1		Complete 11/5	9/2021		<b>(1)</b>	
HSCP Level 1 Completed	HSCP Level 1	<u>Outcomes</u>	Counseled 11/9 in the primary language of client	9/2021	(	60	
Provide HSCP L2 Counseling	HSCP Level 2		Face-to- 11/5	9/2021		<b>a</b>	
HSCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Counseled 11/9 in the primary language of client	9/2021	٢	<b>(10)</b>	
Provide HSCP F/U Counseling	HSCP Follow-up		Pe	nding		<b>60</b>	
HSCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up	Pe	nding		<b>(1)</b>	

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:

✓ Add		Ed HSCP Mortga	ige wk plan class appt iog print
2016 0 2017	ion (Subject VS) HSCP    f Leve 2    f HSCP    f Leve 1    f	<b>Summary</b> Test note Met with Mr. HSCP to provide Level 1 counseling.	Client Log: Ed HSCP Mortgage  DeterTime [1162021 3 15 V PH V Subject HSCP Follow-up V Subject H

Mark the action item as complete:

Add		Auto Generate Work Plan				
Action	Rationale	Function	Outcome	Complete Date I	Avg Edit Minutes/Complete	Cancel
ntake for HSCP	HSCP Level 1	HSCP Client Info	Complete	11/9/2021		
Dbtain Authorization	HSCP Level 1	Authorization	Complete	11/9/2021		<b>n</b> /a
Provide Disclosure	HSCP Level 1		Complete	11/9/2021		60
Provide Privacy Policy	HSCP Level 1		Complete	11/9/2021		60
Provide Triage Counseling	HSCP Level 1		Face-to- face	11/9/2021	ē	<b>60</b>
evelop Budget	HSCP Level 1	Budget	Complete	11/9/2021		<b>1</b>
Develop Action Plan	HSCP Level 1		Complete	11/9/2021		
ISCP Level 1 Completed	HSCP Level 1	<u>Outcomes</u>	Counseled in the primary language of client	11/9/2021	٢	
Provide HSCP L2 Counseling	HSCP Level 2		Face-to-	11/9/2021		<b>6</b> 0
ISCP Level 2 Completed	HSCP Level 2	Outcomes and Updates	Counseled in the primary language of client	11/9/2021	٩	
Provide HSCP F/U Counseling	HSCP Follow-up		Face-to- face	11/9/2021	٥	
ISCP Follow-up Completed	HSCP Follow-up	Outcomes and Follow-up		Pending		n/a

#### 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.

Housin	ng Stability (HSCP) Outcome Follow-up	es and Updates	SAVE	
Required Fields Must Be Filled-in				
Client referred to and/or assisted with access (leave blank if N/A)	to financial resources for housing stability.	State/Local Resources	×	
Homeowner's PITI *	1800			
Mortgage Delinquency *	Current 🗸			
Follow-up session* Yes; follow-up session	conducted with client	~		
Primary Outcome <sup>*</sup> Brought mortgage current w	ith rescue funds (private/public)			~
Secondary Outcome Modification				~

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

			ý wk p	an class	appt		print	
Action	Rationale	Function	Outcome	Complete	Avg	Edit	Cancel	
Intake for HSCP	HSCP Level 1	HSCP Client Info	Complete	Date 11/9/2021	Minutes/	Complete	6/3	
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-	11/9/2021				
Develop Budget	HSCP Level 1	Budget	tace Complete	11/9/2021				
Develop Action Plan	HSCP Level 1		Complete	11/9/2021				
HSCP Level 1 Completed	HSCP Level 1	<u>Outcomes</u>	Counseled in the primary language of client	11/9/2021		0	0	
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:

Counsel <mark>ộ</mark> r <b>Max</b>	Global Mode	2		<b>(</b>
Warning:06a3ae8c84d3d7 ,Dynamic III 2018-BAKER, Anthony III 2018-BAKER, Charles IIII 2018-BAKER, Carlos IIII 2019-BAKER, Carlos IIII 2019-BAKER, Carlos IIII 2020-TEXAS, Tony IIII 2020-TEXAS, Tony	Custom Reports HUD-9902, NFMC, NW C Select One: O 9902 Reporting NW Quarterly Report Choose One:	Quarterly, and Other Report ONFMC Report OHOPP Report	B S V HSCP Report	
IIIII 2018-XXXX, Temporar IIIIII AAA, Clent 1 IIIIII ABB, Clent 1 IIIIIIAndersen, Anthony IIIIIIAndersen, Anthony IIIIIIAndersen, NEO (HP) Advanced Search Identify Clents	All Case Statuses     Start Month Nov      Year 202     OK	O Downloads:	V	
In-Process     Closed     Prospect				
U Suspended				
Admin Menu Legacy Clients				

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 case 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:

UCOD Audit Dan arts Can didates for Downland

Action	Case Id	Last Name	First Name	1st Action	Last Action	Actions Left	Level	Counselor	Exceptions	In Download?
Modify	4698075	!!!! 2020-TEXAS	Tony	10/18/2021	10/18/2021	8 completed	Level 1	Baker, Carlos	none	yes
Modify	4698075	IIII 2020-TEXAS	Tony	10/18/2021	10/18/2021	2 completed	Level 2	Baker, Carlos	OPrimary outcome - missing	no
Modify	4698075	IIII 2020-TEXAS	Tony	10/18/2021	10/18/2021	2 completed	Follow-up	Baker, Carlos	OLevel 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	HSPC 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	OHousehold Income - missing OPrimary_Housing_Instability - Invalid instability reason OPrimary outcome - missing OLevel 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. 1<sup>st</sup> 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. 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.
- 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.
- 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.
- 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.

Quick Client Search	Global Mode			<b>\$</b>
Zebra, Test Audit Zehra, Tom Zen, Patrick Zeusson, Zeus Zietz, A Zigan, Samantha Zimmerman, Noah Zimnaz, Zida Zinnazon, Zinnia Zumara, Rudy zumara, rudy Zimara,	HUD-9902, NFMC, NW Qu Select One: 9902 Reporting NW Quarterly Report Choose One: All Constraints Nov Year 2021	Arterly, and Other Reports	3 ₪ HSCP Report Other Reports	

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 .xlxs format.
- 4. Save it to a local or cloud drive you can securely access.

©	Save As		rangeour.
Mome Mome Mome	L Recent	2 ↑ ▷ Downloads 3 hcpdownload11_21	<u>(</u>
Den Open	Neighborhood Reinvestment Corporation OneDrive - Neighborhood Rein JFernandez@nw.org	Excet Workbook (* stag)     More options.     Inver Folder	- Gr Save
<b>1</b> Save Save As	Sites - Neighborhood Reinvest JFernandez@nw.org	Name Î	Date modified
Save as Adobe PDF	OneDrive - Personal ifernandez@nw.org	CMax (1)_files	≤5/12/2020 10:32 AM
Print Share	Other locations 4	HancockResourceCenter	7/7/2019 10:08 AM 7/9/2019 5:03 PM
Export Publish	Add a Place	MEF HCO	8/30/2019 10:50 AM
Close	/ Browse	report1621262759792 files	5/19/2021 6:00 PM

#### 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 <u>https://report.nw.org/login</u>. Log in with your credentials.

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

eighborWorks"	Online Reporti	ing System	▲ TEST NWO #16 RESPONDENT   SIGN OUT
AMERICA ACTIVE SURVEYS CLOSED SL	IRVEYS RESPONDENT USERS AS	SSIGNMENT BY SURVEY SUPPORT	
Y Surveys tive Surveys Closed Surveys			
⊳ Continuous			
0% NeighborhoodLIFT Initiatives	Home Ownership Counseling	PREVIEW QUESTIONS	BEGIN SURVEY SUBMIT
Continuous			
0% Housing Stability Co	ounseling Program (HSCP) 🖺	PREVIEW QUESTIONS	CONTINUE SUBMIT
Special – FY21			<b>8</b> 43 Days Overdue (Due: Sep 28, 2021)
Real Estate Develop	oment Pipeline	PREVIEW QUESTIONS	CONTINUE
Internal – FY21 (	24		23 Days Overdue (Due: Oct 18, 2021)

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"	Online Reporting System
ACTIVE SURVEYS CLOSED SURV	VEYS   RESPONDENT USERS   ASSIGNMENT BY SURVEY   SUPPORT
Housing Stability Cou	unseling Program (HSCP)
HIDE INSTRUCTIONS	0% complete ₽
Survey Instruction	IS
About the Housing Stability Counsel The American Rescue Plan Act of 2021 The legislation charges NeighborWork housing counseling for households fac	<u>ling Program (HSCP)</u> was signed into law by President Biden on March 11, 2021, in order to address these issues and stabilize our homes and communities. s America with designing and administering a national, \$100 million housing counseling program that will provide grants to support ing housing instability, such as eviction, default, foreclosure, loss of income or homelessness.
We have designed the Housing Stabilit ensure funds are released to housing (	y Counseling Program, with the help of a diverse set of stakeholders, to meet the needs of residents facing housing instability and counseling agencies throughout the nation as quickly as possible.
If you have questions about this pro	ogram, please contact <u>counseling@nw.org</u> .
For program resources and FAQs, plea	ise visit https://www.stablecommunities.org/HSCP/Resources.
Survey Process This survey will remain open for the du for additional review and/or edits. Plea what is reported, so it is encouraged to	uration of the program. Once a customer has been reviewed, the customer's counseling level record will either be accepted or re-opened ase add completed counseling records at regular intervals. Disbursements are based on production and production is determined by o update the data as frequently as possible for more timely disbursement.
CounselorMax and NW Compass Use	ers : using the export tool in CounselorMax and/or NW Compass.
HIDE INSTRUCTIONS	
Survey Table of Co	ontents
Client Counseling Data	START
Client Management System & Con	stact Information START
	DATA DICTIONARY VALIDATE RESPONSES REVIEW SURVEY

Click the "Add" button on the Client Counseling Data page:

ACTIVE SURVEYS	CLOSED SURVEYS	RESPONDENT USE	ERS ASSIGNMENT	BY SURVEY	SUPPORT				
lousing Stabi	ility Counse	eling Progra	am (HSCP)						
Back to Table of Conter	ints		0% c	omplete					
Client Couns	seling Da	ta			SAV	VALIDATE	PAGE MARK PAG	E COMPLETE	
HSCP 1 Client Cour	nseling Records								
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- 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."

	Guided Entry	Import Response	20		
	Populate your responses with help along the way	Download a formatted blank Client Counseling Records Exe	cel file to enter data		
		Ready to upload? Select file to	upload and click the		
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Click "begin import":

Guided Entry Populate your responses with help along the way Download a formatted bala Constraining Records File Coll file to enter data to upload Records File Drop file. In the Records File Drop file. In the Record State Drop file.	Prepare	2 Ent	ter Responses	3 Validate
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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.

Guided Entry	Import Responses
Populate your responses with help along the way	Download a formatted blank Client Counseling Records Excel file to enter data
Please read the messages below and either complete the upload proc	ess 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: <u>1</u>	
Warnings	· ·
CONTINUE	CANCEL

Click "Continue" to view your data in the system.



Your upload is now complete.