

# Housing Counselor's Management Systems – They're A Changing



AFFORDABLE HOUSING CONFERENCE  
HOME **MATTERS**  
IN FLORIDA



# INNOVATIVE CLIENT MANAGEMENT

FOR PRACTITIONERS BY PRACTITIONERS


# LAUNCHPAD



# HPN\_LAUNCHPAD CLIENT MANAGEMENT SYSTEM

Advanced business intelligence powered by *Salesforce*

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

- 
- 100% HUD Compliant
  - Certified HUD CMS
  - Verified Connection to HUD HCS
  - Verified Connection to DU

HUD COMPLIANCE



## Household Accounts

- All household members under one roof.



## Contacts

- Add as many household members as desired.



## Client Cases

- Add case files and funding sources.

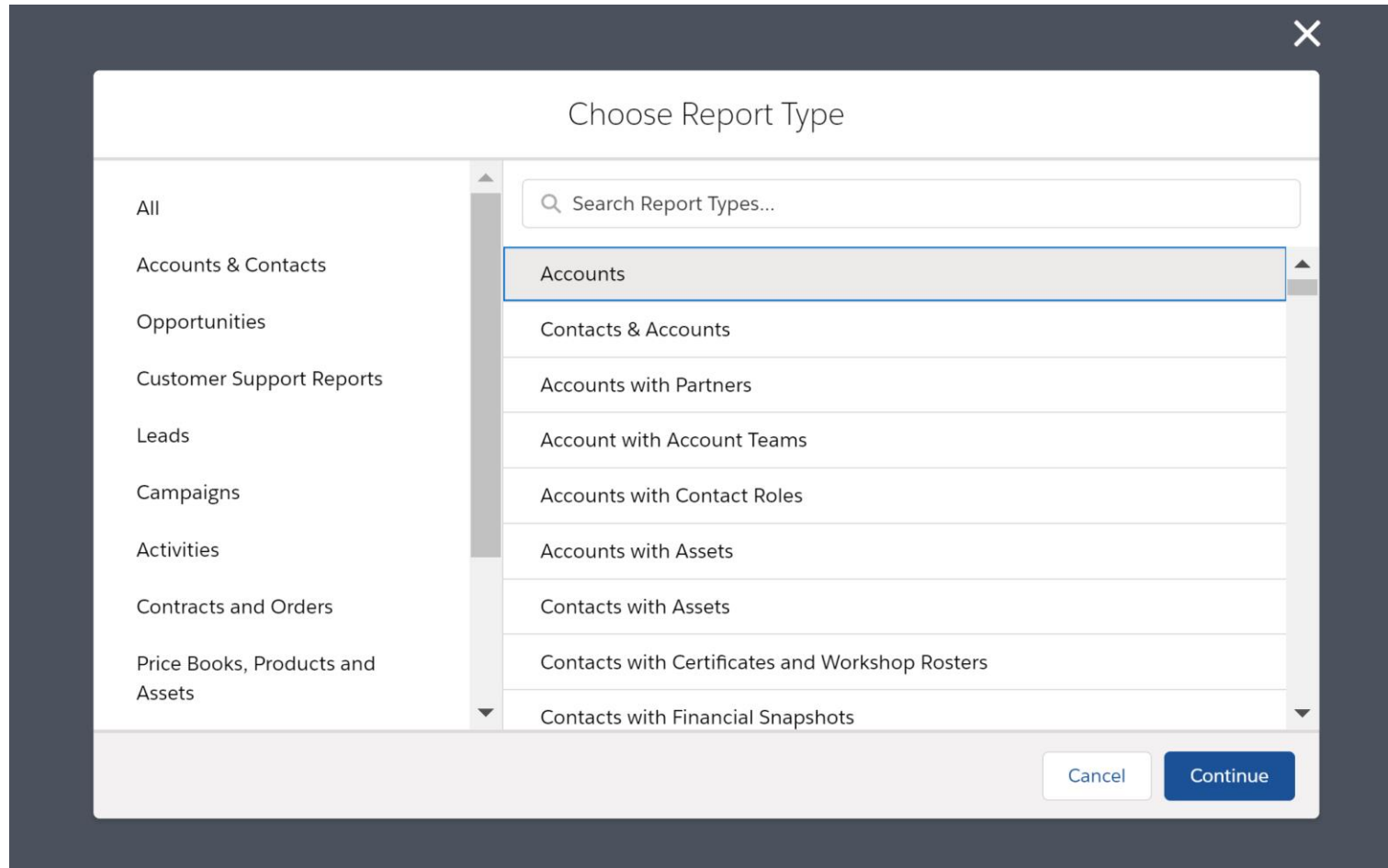


## Counseling Activities

- Document counseling activities and impacts.

# LAUNCHPAD ARCHITECTURE

Logical, intuitive account and client management structure.



## ADVANCE REPORTING FEATURES

Customizable reporting for program analysis, reflection and performance powered by [Salesforce](#)

9902 HUD-000037

Edit Delete Clone

Details Related Submission

SubmitHUDData

HUD Databags Submission HUD Submission

HUD Submission			
Agency Profile	<input checked="" type="checkbox"/>	Counselor Profile	<input checked="" type="checkbox"/>
Client Summary	<input checked="" type="checkbox"/>	9902 Summary	<input checked="" type="checkbox"/>

Re-Generate HUD Data Submit HUD 9902 Data

- 9902 Summary (3+)**
- [99-01030](#)  
Element Type: 9902  
Activity Type ID: NOFA 2018-1 COMP
  - [99-01031](#)  
Element Type: 9902  
Activity Type ID: Activities for All Counseling and Education
  - [99-01032](#)  
Element Type: Attendee  
Activity Type ID:
- [View All](#)

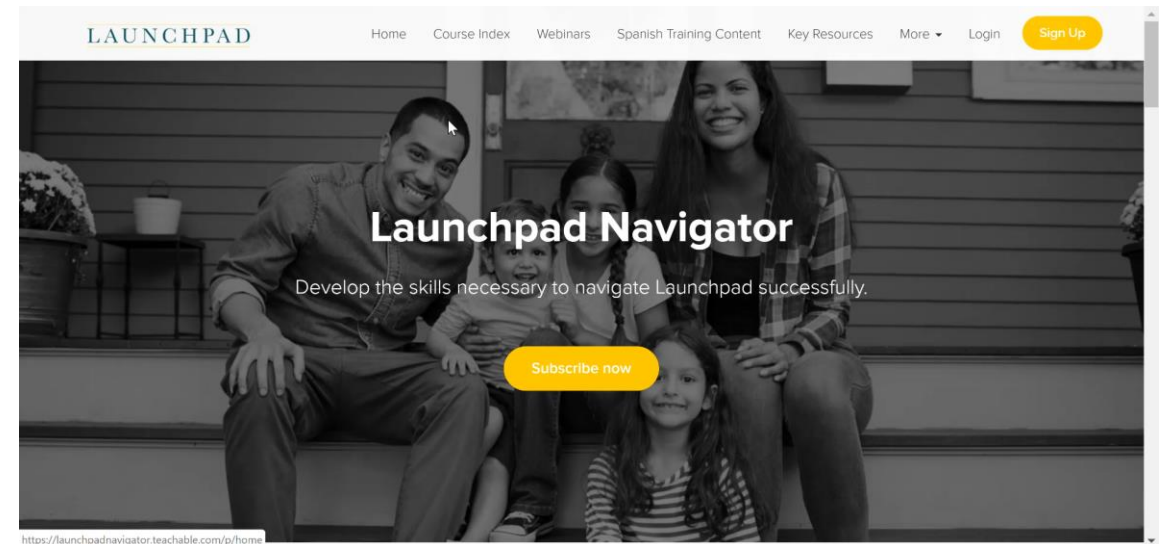
- 9902 Agency (3+)**
- [99-00232](#)  
Element Type: Profile  
Reported Month F... 3  
Contact First Name:
  - [99-00233](#)  
Element Type: Contact  
Reported Month F... 3  
Contact First Name: User3

LAUNCHPAD 9902 REPORTING


Introducing Streamlined 9902 Reporting

# DEDICATED MIGRATION, TECHNICAL & TRAINING SUPPORT

- Dedicated **Migration** & Technical Support
- 8 Launchpad Specific Course Topics
  - Over 34 Lessons
  - Over 344 Active Users
  - Spanish Training Content
- 24/7 **Salesforce** On-Demand Training







“Launchpad users will have the opportunity to achieve seamless migration to NeighborWorks Compass” – *NeighborWorks America*


HPN / NEIGHBORWORKS AMERICA LOI

NeighborWorks America and HPN have agreed to the acquisition of the Launchpad code and the transition of its customers, pending completion of due diligence.

The screenshot shows the CounselorMax Reporting interface. At the top, there is a navigation bar with tabs for Calendar, Outreach, Intake, Education, Counseling, Loan, Resources, and Reporting. The CounselorMax logo is on the left, and a globe icon is on the right. The main content area is titled 'Global Mode' and contains several report categories with checkboxes: Custom Reports, HUD-9902, NFMC, NW Quarterly, and Other Reports, Management Reports, and Letters, Reminders, & Logs. A red circle highlights the 'Global Mode' text, and a red arrow points to the 'Custom Reports' checkbox. On the left side, there is a 'Quick Client Search' section with a search box and a list of client names. Below that is an 'Advanced Search' link. Further down is an 'Identify Clients' section with radio buttons for All, In-Process, Closed, Prospect, and Suspended. At the bottom left, there is a 'New Client' section with a 'Global Mode' button, a 'Logout' link, and a 'Support Login' link.

CounselorMax is easy to use for HUD reporting and creating your own custom reports which can be exported to Excel to further refine the data.

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

CounselorMax<sup>®</sup> Global Mode 

**Quick Client Search**

[Advanced Search](#)

**Identify Clients**

All  
 In-Process  
 Closed  
 Prospect  
 Suspended

**New Client**















[Logout](#)  
[Support Login](#)


**Custom Reports**

Select the Source of Your Report

All Fields  
NFMC


**Saved Reports**

Report Name	Change Name	Delete
 <a href="#">Counselor Active Cases</a>	n/a	n/a
 <a href="#">Demographic Report</a>	<input type="checkbox"/>	<input type="checkbox"/>
 <a href="#">Employee WEEKLY Activity</a>	<input type="checkbox"/>	<input type="checkbox"/>
 <a href="#">FINAL NOFA Report -Client list</a>	<input type="checkbox"/>	<input type="checkbox"/>
 <a href="#">HUD Activities TYPE REPORT</a>	<input type="checkbox"/>	<input type="checkbox"/>
 <a href="#">HUD REPORT CLIENT LIST 2018</a>	<input type="checkbox"/>	<input type="checkbox"/>
 <a href="#">Log</a>	n/a	n/a
 <a href="#">Log(Correct)</a>	n/a	n/a
 <a href="#">modified</a>	n/a	n/a
 <a href="#">Monthly CMax Time</a>	n/a	n/a
 <a href="#">NFMC</a>	n/a	n/a
 <a href="#">NOFA CLIENT REPORT</a>	<input type="checkbox"/>	<input type="checkbox"/>
 <a href="#">SJC Grant Report Excel</a>	<input type="checkbox"/>	<input type="checkbox"/>
 <a href="#">St Johns Demo</a>	<input type="checkbox"/>	<input type="checkbox"/>



Custom reports can allow you to create reports that meet grant requirements, establish demographics served and further refine your billing and funder data.

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

**CounselorMax** Global Mode 

Quick Client Search

Advanced Search

Identify Clients

All  
 In-Process  
 Closed  
 Prospect  
 Suspended

New Client

Global Mode

[Logout](#)  
[Support Login](#)

Custom Reports


Select the Source of Your Report

All Fields  
 NFMC

OK


Saved Reports

Report Name	Change Name	Delete
<a href="#">Counselor Active Cases</a>	n/a	n/a
<a href="#">Demographic Report</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Employee WEEKLY Activity</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">FINAL NOFA Report -Client list</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">HUD Activities TYPE REPORT</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">HUD REPORT CLIENT LIST 2018</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Log</a>	n/a	n/a
<a href="#">Log(Correct)</a>	n/a	n/a
<a href="#">modified</a>	n/a	n/a
<a href="#">Monthly CMax Time</a>	n/a	n/a
<a href="#">NFMC</a>	n/a	n/a
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<a href="#">SJC Grant Report Excel</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">St Johns Demo</a>	<input type="checkbox"/>	<input type="checkbox"/>



Being able to make progress reports based on grant performance range, counties and AMI range lets us show our worth to funders with clear data to support stories of success.

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

**CounselorMax** Global Mode 

**Quick Client Search**

[Advanced Search](#)

**Identify Clients**

All  
 In-Process  
 Closed  
 Prospect  
 Suspended

**New Client**

[Logout](#)  
[Support Login](#)

**Custom Reports**  **(Note: Select Them in the Order You Want Them to Appear)**

- Clients
- Cases
- Demographics
- Co-Applicants
- Co-Applicants - Edu
- Education - Consolidated
- Education - Consolidated (new)
- Logs - Events - Classes
- Last Logs - Events - Classes
- Logs
- Time Spent - Clients
- Time Spent - Staff
- Workplans
- Credit
- Closing Loans/Programs
- Closings
- Subject Properties
- Assets
- Liabilities
- Dependents
- Employment
- Other Income
- Budgets
- Current Residences
- Financial Goals
- Financial Snapshots
- Client Action Plan

>>"/> <<"/>

**Very Limited Report Options**

However, in the current version on CounselorMax there are a limited number of data points to select from, and no ability for clients to interact. But there is good news...

NeighborWorks America is excited to announce that in Spring 2020, our new CMS, NeighborWorks Compass™, will be coming to the marketplace. This product will be available to NeighborWorks organizations, existing CounselorMax customers, and the entire housing counseling industry, and will be built on the world-class Salesforce platform. It will be available for purchase and download in the NeighborWorks store on the Salesforce App Exchange. **Timing for retiring CounselorMax has not yet been determined.**





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CONTACT



LAUNCHPAD