Freddie Mac
We make home possible®

Frequently Asked Questions

1. What is CounselorMax™?

CounselorMax is a Web-based application designed specifically for housing counselors. Developed by EMT Applications (EMTA), it provides housing counselors with a variety of client and data management functions, enabling them to generate reports and manage the client education process. CounselorMax provides housing counselors greater time and cost efficiencies than ever before, making it possible for more of America's underserved populations to benefit from the counseling process.

2. What is CounselorMax Supported by Freddie Mac?

Freddie Mac provides enhanced support exclusively for nonprofit housing counseling agencies using CounselorMax in conjunction with Freddie Mac initiatives. This premier offering includes first-class customer service and training support at no additional cost.

If you have any questions, call the CounselorMax Supported by Freddie Mac dedicated support line at (866) 733-0446 between 8:00 a.m. – 9:00 p.m. (EST), Monday – Friday. You will be able to speak to a live customer support representative who will help you with your questions.

3. Why is Freddie Mac providing this support?

Freddie Mac's support of CounselorMax is one element in a broader effort to ensure equal access to homeownership for America's underserved populations. It fits well with Freddie Mac's goal to significantly accelerate the growth of low-to-moderate income and minority homeownership in the U.S.

4. How much will it cost?

Freddie Mac is paying your license fees and providing customer support and training to you free of charge. You only incur a charge if you sign up with First American CREDCO to receive credit reports.

5. How long will I receive CounselorMax Supported by Freddie Mac at no charge?

Your contract is paid for a 12-month period; however, it does not mean we will cancel your contract after the 12-month period ends. Freddie Mac has invested in full-time employees to provide customer support and training, and we may extend the license period if both parties agree the tool is being actively used by your organization.

6. What training is available?

Explore a variety of training offerings in the Community Outreach section of Freddie Mac's Learning Center Web page. Live training events, online self-studies, and easy-to-print references can be accessed at www.FreddieMac.com/learn/community.

7. Which web browser do I need for CounselorMax Supported by Freddie Mac?

You need to use Microsoft Internet Explorer. If you do not have this type of browser, you may download one for free here.

8. Why can't I access certain sections in Counselor Max Supported by Freddie Mac? Are there special settings I need to adjust?

If you can't access the CounselorMax Supported by Freddie Mac site, or experience navigational problems, we recommend you add CounselorMax as a trusted site in Internet Explorer. To do this:

1. Open Internet Explorer.
2. Go to the Tools menu.
3. Select Internet Options.
4. Click the Security tab.
5. Click the Trusted Sites icon.
6. Click the Sites button.
7. Type http://www.counselormax.net/freddiemac into the applicable field.
8. Make sure the "Require Server Verification (https:) for all sites in this zone" box is unchecked.
9. Click the Add button.

The Web site will appear in the field below and is now a trusted Web site. If problems persist, you can call the dedicated support line at (866) 733-0446 between 8:00 a.m. – 9:00 p.m. (EST), Monday – Friday.

9. How many users can access the system at the same time?

There is no limit to the number of users that can access your CounselorMax system. However, the standard license is limited to 5 users. If you need to add users, please speak to your Freddie Mac Expanding Markets Manager, or call the CounselorMax Supported by Freddie Mac dedicated support line at (866) 733-0446 between 8:00 a.m. – 9:00 p.m. (EST), Monday – Friday.

10. Where do I obtain a login ID and password?

When you are first set up with an account, the person specified as the Administrator (the person who completed the order form) is e-mailed a login ID and password. (The login ID and password are sent in separate e-mails for security purposes.) The Administrator can then go into CounselorMax and add up to four more users by going into the Admin section under the Counseling tab. If you have any questions, you can call the dedicated support line at (866) 733-0446 between 8:00 a.m. – 9:00 p.m. (EST), Monday – Friday.

11. What if I lose my username and password?

If you lose or forget your login ID or password, go to the login page www.counselormax.net/freddiemac and click on Lost Password. You will be asked to enter your corporate e-mail address. After you click OK, you will receive your login ID and password via e-mail within an hour. CounselorMax uses your e-mail address to identify you, so please submit the original e-mail address you used to sign up for CounselorMax Supported by Freddie Mac. If you are still unsuccessful, call the CounselorMax Supported by Freddie Mac dedicated support line at (866) 733-0446 between 8:00 a.m. – 9:00 p.m. (EST), Monday – Friday.

12. Is my data secure?

CounselorMax is an electronic environment that complies with industry standard security technology and practices to ensure the security and privacy of each transaction. This Web-based application provides the ability to send, receive, and store client files and other proprietary information in a centralized database. In order to ensure the security and privacy of the transactions conducted on CounselorMax, a combination of several widely accepted security methods are used. If you would like more information about these methods, please call the CounselorMax Supported by Freddie Mac dedicated support line at (866) 733-0446 between 8:00 a.m. – 9:00 p.m. (EST), Monday – Friday.

13. What is a HUD number?

If an agency receives funding from the U.S. Department of Housing and Urban Development (HUD), it must report the results of its work during the year. A HUD number provides client and course anonymity. When looking at data, the HUD department sees only generic numbers instead of personal information.

14. How do I assign a system-generated HUD number to a client?

A HUD number for a client is assigned at the user's discretion and may apply to all Service Paths. The number <u>may not</u> be assigned until the first one-on-one appointment is scheduled. The system provides the user with the <u>option</u> of assigning a system-generated HUD number under the following circumstances:

- Client does not already have a HUD number.
- Client has already attended an appointment.

System-generated HUD numbers will be:

- Six digits
- Numerically sequential (add one to the highest number for given Affiliate organization)
- Padded with leading zeros
- Unique within Affiliate organization

15. What is Global Mode?

You are automatically in Global Mode once you log in to CounselorMax. In this mode you will be able to manage your general counseling activities and pertinent information. Any information that refers to a specific client, on the other hand, is in Client Mode. If you are in Client Mode, you may click the Global Mode button on the bottom left hand corner to move into the Global Mode environment.

16. Why doesn't CounselorMax fit my screen?

You can adjust your Windows screen settings to minimize scrolling. Set your screen settings to the following:

- Desktop Area: 1025 x 768
- Color Palette: High Color 16 Bit (or higher)

To adjust your screen settings, right click on your desktop and select Properties from the menu. Make sure your color is at least 16 bit (High Color) and your resolution is set to 1024 x 768. Next, click Apply and then OK to save your changes. If you need additional help please call the CounselorMax Supported by Freddie Mac dedicated support line at (866) 733-0446 between 8:00 a.m. – 9:00 p.m. (EST), Monday – Friday.

17. We just moved. How do I update our agency's information?

Only your Administrator can update this information. If you are the Administrator, access the My Agency section through the Admin Menu. Otherwise, speak with your supervisor or call the CounselorMax Supported by Freddie Mac dedicated support line at (866) 733-0446 between 8:00 a.m. – 9:00 p.m. (EST), Monday – Friday.

18. I just started using CounselorMax. How do I input my data from the past?

Data from the past can be entered using the Legacy Clients link. You will find the Legacy Clients link on the lower left-hand corner of any CounselorMax Supported by Freddie Mac user page. Underneath the Legacy Clients link, you will see "Available for [##] days." **You have sixty (60) days from the day your organization is set up in the CounselorMax system to use the Legacy Clients feature before it expires.** During that time, you may enter past data that you would like to include in your reports from CounselorMax Supported by Freddie Mac.

If you need to edit this information:

1. Select Admin Menu.
2. Select Legacy Clients.
3. Select Legacy Case.

NOTE: You will need to enter the legacy client information before the legacy case information will appear.

19. Do I need to perform intake before I sign up a client for a class?

No. You may sign up a client as long as they have been entered in the Outreach section. You may perform intake after the client has attended the class.

20. How do I sign up to receive credit reports?

In order to sign up for credit report capabilities through CounselorMax, please visit First American CREDCO and fill out the online enrollment form. For questions regarding credit reports and/or the enrollment policy, please contact First American CREDCO at (800) 577-8787.

21. How much are individual credit reports? Are the fees for both applicant and co-applicant?

For questions regarding credit reports and/or the enrollment policy, please contact First American CREDCO at (800) 577-8787.

22. How do I view a sample report? How about a specific client's report?

To view a sample credit report:

1. Select the Loan tab.
2. Select Sample Credit Report.

To view an individual's report:

1. Select Credit Report (Show) checkbox.
2. Select Get Credit Report.

NOTE: If you do not see the buttons described above, then you need to sign up with First American CREDCO.

23. What is a HUD 9902?

A HUD 9902 form is the Housing Counseling Program data collection instrument for all HUD-approved housing counseling agencies. Its data provides a benchmark that HUD can analyze for future funding efforts. For more information, please visit HUD's Federal Housing Administration Web site at http://www.fha.gov/sf/hca/index.cfm.

24. Why doesn't my client appear on the HUD 9902?

If your client has gone through the intake process to become an active case (via the Intake tab), or received education services (documented on the Education tab), they should appear on your 9902. Clients from the previous reporting period must still be open and active and have material activity reported during the current fiscal period in order to appear on your 9902.

25. I don't think the 9902 has the right numbers. Where do they come from?

To find out where the 9902 numbers come from:

1. Select the Help link on the lower left of the main page and a separate Web browser will appear.
2. Click on the User Manuals and Training link.
3. Select Resolution Mapping for the applicable year (under the HUD 9902 Reporting section).

Now you will be able to see the 9902 data CounselorMax draws from.

26. How do I check the individual cases that make up the aggregate 9902 numbers?

From the Reporting tab, select one of the three reports and then click on Control Report. This will provide a list of all cases or clients that make up the aggregate number in that report.

27. Can clients appear twice on the 9902?

Yes, they can. Each case is counted on the 9902. A household receives exactly one count for each service they partake in. For example, a client can appear once for individual counseling (Section 7 of the 9902), and again if they receive education and outreach services (Section 6 of the 9902).

28. How do I print my 9902 so it fits to the page?

If your 9902 is not printing as a coherent four-page document, you need to adjust your printer settings in Internet Explorer. From Internet Explorer, go to the File menu and select Page Setup. Change all the margin settings to 0.5, and ensure the header and footer areas are zero. Click OK to save your changes.

29. What do I do when a suspended client comes back to resume the same service?

To reactivate a suspended client:

1. Select the client.
2. Go to the Counseling tab and check the Case Resolution box (this will give a brief resolution description).
3. Select the Reactivate this Case button.

30. What do I do when a suspended client wants to start a new and different service? (For example, they discontinued Home Purchase and now they need Rental Assistance.)

You need to change the service type for this client on the Intake tab. Select the Intake tab with the case data displaying. You will select the new service from the drop down menu under Service Type.

31. How do I change the HUD activity status of a client?

To change the HUD activity status of your client, go to the Case Management screen, which you can access through the Admin Menu. If the person is currently designated as a HUD activity client, click the HUD activity checkbox and the OK button. This will take you to a list of HUD activity clients. Then, click the Edit checkbox next to your client. In the editing screen, uncheck the HUD activity checkbox and click Save Changes.

32. How do I avoid duplicating clients in my database?

Before creating a new client, conduct a Quick Client Search by entering the last name. If the client exists, you will move to the first occurrence of that name.

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