



## Feature Highlights

### **Robust Reporting—Pre-Built and Customizable**

NeighborWorks Compass features quick-entry screens with no redundant data entry required—and flags to quickly identify missing data. The system has a number of pre-built reports for managing housing counseling and education service delivery, production and outcomes, and the reports cover all levels within the organization:

- Staff-level reports for counselors to manage their customers and appointments
- Management reports to monitor production and quality assurance
- Audit reports to ensure compliance with HUD housing counseling rules
- Dashboards to quickly view key metrics of production

Importantly, the system is fully compliant with HUD's reporting requirements, and makes submitting reports to HUD much easier. To ensure accuracy, NeighborWorks Compass facilitates full data review prior to submission, and includes the ability to view a history of all submissions with full data detail.

Since data needs are as unique as each nonprofit organization, we've built in flexible custom reporting capabilities. You can query any and all data fields to create of custom reports that align with your organization's business needs.

### **Customizable Customer Portal with Virtual Account Creation and Intake**

NeighborWorks Compass comes complete with a customer portal which customers can use 24/7 to create an account with the organization. Organizations can customize the portal, making fields visible to the customer for entering data and incorporating their own branding and messaging. Customers then complete their own intake forms, saving the counselor significant time in collecting the initial information needed to start the counseling process. Fields populated by customers will auto-populate the fields in the backend of Compass—and more data entered by customers equals less data entry for counselors!

Counselors are in complete control of deciding what data will be required of the customer, at what point it will be required, and whether the customer or counselor enters it. The nonprofit can customize the customer experience, and customers can create a relationship with the nonprofit without leaving the comfort of their own home. They can use their individual accounts to engage with counselors and educators virtually so in-person engagement is not required. The entire counseling process, from intake through to achievement of goal, can be conducted via NeighborWorks Compass and any web conferencing system.

## **Online appointment scheduling and payments**

Customers have 24/7 access to the Training Center page, which allows them to create or modify their profile, and schedule appointments (both virtual and in-person) at a time that is most convenient for them. They can also schedule any type of education course made publicly available on the customer-facing portal and can pay for services and education virtually by credit card. This makes scheduling sessions and education completely "self-serve" so that the office doesn't have to be open, and an in-person session is not necessary for customers to progress toward their goals.

## **Task Assignment for Customers and Counselors**

Staff users can assign tasks to themselves or other staff within the organization. They can also assign tasks to customers on an ongoing basis, giving them two or three at a time that support their progress toward achieving their goal. Because NeighborWorks Compass is accessible via a smart phone, it's like having a counselor in their pocket!

## **Real-Time Two-Way Document Sharing**

Customers can upload documents to the nonprofit from their portal account or by using their smart phones. Staff can also upload documents to individual customer accounts and the customer is notified via email when a new document has been received. All customer documents are stored securely within the customer's account in Salesforce. Time to get rid of the file cabinets and the massive amount of paper, since NeighborWorks Compass can store all documents electronically.

## **Pre-defined customer milestones for standard service lines**

Counselors have the ability to see the status of customer at a glance as they move along the continuum from intake to goal completion for an individual service line. The workflows for foreclosure intervention and homebuyer counseling have 30-day check-in reminders to help counselors stay on top of their cases. The workflow for reverse mortgage counseling has milestones and customer portal questions tailored to specifically to reverse mortgage counseling.

## **Standard Service Lines and Custom Service Line Creation**

NeighborWorks Compass provides a comprehensive suite of out-of-the-box features and functionality to support housing counseling and education service lines and financial capability work (including homelessness, reverse mortgage, pre-purchase, post-purchase, foreclosure intervention, and rental). If the organization provides other types of counseling or education services, they can easily create custom service lines in NeighborWorks Compass.

## **Multiple Service Line Dashboard**

Our dashboards allow management and staff to see the status of customer milestones across multiple service lines related to housing counseling and education as well as other service lines in the organization. Staff never have to worry about the status of customers even if they are engaging in multiple services at the same time.

## **Course Administration and Tracking**

Customers can register for any course the nonprofit offers in their customer portal account, and staff can track attendance by customer and by course. If the nonprofit offers courses that are broken up over several sessions, this feature will allow tracking of attendance at each session of the course and will visually display the dates of each multi-session on the Training Center Page of each customer's account. This provides full transparency to the customer as to session scheduling and allows counseling organizations to format courses based on the needs of their customers and their strategic business objectives.

A class roster can be queried and printed by staff in real time. This allows customers to sign in when attending an in-person class and makes it possible for counselors to bulk-update customers' attendance, saving significant manual work and time.

## **Outsourced Services Tracking**

Referrals to other organizations can be tracked by customer, type of service and category of referral (for example, a foreclosure intervention customer referred to a partner organization for utility assistance). Outcomes of each referral can be captured, and counselors have insight into what referrals are creating the greatest impact on their clients. In turn, this information can be leveraged to strengthen partnerships.

## **Funding Management**

NeighborWorks Compass can capture information on an unlimited number of funders, including amounts and dates. Funding sources can be tracked per service to allow impact reporting, demonstrating to funders what their contributions are helping the organization to achieve. The impact of funding counseling time, courses and services can be seen in one view from each grant.