COMPREHENSIVE REVIEW

Housing Action Illinois

A stronger Illinois begins at home

IN PARTNERSHIP WITH

NEIGHBORHOOD HOUSING SERVICES OF CHICAGO

HUD-APPROVED CLIENT MANAGEMENT SYSTEMS

FUNDED BY THE ILLINOIS ATTORNEY GENERAL

NATIONAL FORECLOSURE SETTLEMENT PROGRAM

LISA MADIGAN, ATTORNEY GENERAL

Foreword

Nonprofit housing counseling agencies and the educational services they provide are essential to households seeking to make informed home purchase or rental decisions, repair credit, or budget for the future. To provide the highest quality services, nonprofit housing counseling agencies rely on Client Management Systems (CMSs) to manage and document their work with clients and to track organizational outcomes and effectiveness. Before CMSs, organizations kept handwritten ledgers and rudimentary databases to track this information. Technological advances have enabled the creation of much more sophisticated applications to support the more complicated issues facing housing counseling agencies and their clients.

The first internet-based CMS widely available for counseling agency use was released in 2000. The U.S. Department of Housing and Urban Development (HUD), which administers the federal funding for most nonprofit housing counseling agencies, developed its own Housing Counseling System (HCS) for high level data reporting just 10 years ago, in 2006, and began requiring HUD-approved housing counseling agencies to use a publicly available HUD-approved CMS for data reporting only 5 years ago, in 2011.

The mortgage crisis that began in 2008, which resulted in a wave of defaults and foreclosures nationwide, necessitated that many nonprofit housing counseling agencies quickly adopt a greater focus on providing foreclosure and default mitigation services. CMSs, which were generally designed for pre-purchase counseling, not default activities, also had to be adapted so that organizations could effectively manage and track the critical services they were providing to clients at risk of losing their homes. The need for accurate tracking and up-to-date outcome data was particularly critical as government and private dollars focused on foreclosure mitigation initiatives that relied on nonprofit housing counseling agencies for implementation.

As CMSs have become by necessity more sophisticated, the cost to develop and maintain these systems has generally also increased. CMSs now allow users to schedule appointments, keep client notes, import important documents, track services, and report to funders, among other functionalities. Some CMSs can also interface with mobile apps, allowing clients to book appointments and submit documents online.

The number of choices and options available may prove daunting to a housing counseling organization looking to invest in a system, particularly since many agencies do not have internal IT departments to assist in the evaluation, implementation and upkeep of a CMS. Any counseling organization seeking to invest in a system for the first time, or to change systems, must be sure that the system will be a long-term benefit to the organization.

To help organizations answer this question, Housing Action Illinois, in partnership with Neighborhood Housing Services of Chicago (NHS of Chicago), has developed this resource guide, which evaluates all of the HUD-approved CMSs available to housing counseling organizations as of December 1, 2015.

To develop this resource guide, Housing Action Illinois first reviewed HUD's list of approved Client Management Systems that allow direct reporting to the HUD HCS. After eliminating from review all proprietary systems that are not publicly available, Housing Action and NHS of Chicago contacted each of the software developers and/or owners to make sure the system was currently available for use and had been updated to meet HUD's mandated ARM 5.0 reporting standards. From an initial list of 50 CMSs on HUD's list, we determined that 17 systems met these criteria.

Each of the 17 developers/owners was interviewed and product demonstrations held. We developed a set of interview questions to ensure consistency and to focus our inquiry on nonprofit housing counseling agency needs. Once the interviews and demonstrations were complete, we evaluated each product, with an emphasis on the approach each system has to meeting the needs of nonprofit housing counseling organizations.

In this resource guide, each CMS is evaluated separately and listed in the table of contents for easy reference. Evaluations begin with a description of the product developer, its history, and a brief explanation of why the CMS was developed. A chart details the product features, such as the ability to create custom reports, how/where data is stored, and the look of the interface.

Another chart (entitled "Product Cost") explains the CMS costs, if any, including the cost to purchase the system and whether this is a one-time or ongoing expense. The chart also shows other costs, including the costs to migrate data from another system and the cost of training staff to use the product. Some CMSs have different pricing based on the size of the organization or the number of users. The chart also shows the cost of CMS technical support, with some CMSs having tier one and tier two support, for example, and charging different prices depending on the tier.

Separate paragraphs further explain Product Highlights, including security and frequency of product updates. Any information not provided by the developer is indicated as "No data."

The goal of this resource guide is not to determine the best CMS or to criticize the various products currently available. Our goal with this evaluation is to provide nonprofit housing counseling organizations a tool to make a more informed choice of what system is the best fit, given each organization's unique needs and budget. We also believe that this resource guide can help organizations engage in more substantive conversations with developers regarding needs and the ability of the CMS to meet those organizational expectations, even for those without extensive technology backgrounds.

For funders, this resource guide will increase understanding of how technology can assist with tracking service delivery and outcomes. More efficient and effective reporting requirements can then be developed with this more in-depth understanding of the capabilities of CMSs currently available to nonprofit housing counseling agencies.

This CMS resource guide was made possible through a National Foreclosure Settlement Award, made by Illinois Attorney General Lisa Madigan to Housing Action Illinois and Neighborhood Housing Services of Chicago. The interview team included Heather Hoover and Karen Woods from Neighborhood Housing Services of Chicago, and Bibian Guevara and David Young from Housing Action Illinois. Nay Petrucelli, a Stevenson Fellow from Illinois State University, working with Housing Action, managed the initial research, coordination with HUD, and compilation of reviews. Ryan Hebert, another Stevenson Fellow, contributed to finalization of this guide.

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AES

Adsystech

Adsystech provides software solutions for a number of corporations, nonprofits and government agencies. Adsystech's client management system, AES (Adaptive Enterprise Solutions), is designed for agencies that are large and technically sophisticated enough to have their own IT staff manage the day-to-day operations of the application.

Custom Reports	Yes	
Custom Fields	Yes	
Export Capabilities	Yes	Most fields in a variety of formats
Data Storage	Cloud-based	
Parent Agency Data Aggregation	Yes	
Look of Interface	Windows 7 or 8 feel. Gray color scheme, left hand navigation bar	
Compatability	Needs a browser that will run Microsoft Silverlight effectively	
Special Features	Online client portal; capacity for advanced security features, such as biometrics scanning	
Best Suited For	Very large agencies or groups of agencies with their own IT team	

Product Highlights

Agencies have a lot of flexibility in customizing the way AES functions for them. A large variety of available modules allow data from many different programs to be managed in one system. Modules are designed to manage programs for: Head Start, housing, weatherization and energy, transit, seniors, and microbusinesses. In addition to being able to customize fields and reports, security can be managed at the level of individual fields. The product also has fully integrated outcome management that allows agencies to design their own outcome metrics. AES can also track responses to questions over time to provide counselors with a historical record of a client's information. The online client portal is a place where clients can access some information about their account and schedule appointments.

Other features:
Internal housing of client documents and document-level security controls, basic graph generator, optical character recognition (OCR) and intelligent character recognition (ICR), internal calendaring system that links to Outlook and phones, client photo field, email and text messaging services, text to voice services, interactive voice response (IVR), swipe cards, and biometrics security capacity.

Product Costs

Setup Fee	*See Note	
Monthly Subscription		
Each Additional User (per mo.)		
Support		
Training		
Data Storage		
Data Migration		
Other Costs to Organization		
Estimated Cost 5 users/year		
Estimated Cost 25 users/year		

*Note:
This product is designed for very large agencies or networks of agencies that have their own technical support staff. Interested agencies should reach out to Adsystech directly regarding what the product costs would be for their needs. Agencies who use AES for other programs already have the housing module available to them at no additional cost.

Support and Training

Tier 1 and tier 2 support are provided by the agency, not Adsystech.

Different training options are available both in person and remotely depending on the needs of the client. Product can also be operated in novice mode, which will guide users through the system as they are using it.

Technical support is available for advanced problems that cannot be resolved in-house by the agency. Adsystech technical support can be reached by phone, email, or from within the application's technical support page.

Updates

Product is updated monthly.

For More Information

For a list of the AES modules and a sampling of agencies that use the system, visit:
http://www.adsystech.com/web/guest/nonprofit

NFMC reporting	No data
Pop-up warnings/reminders/ticklers	N
Contacts management	No data
Employee time management/ Time tracking/time spent per case	No data
Client document storage in system	Y
Survey generator/results tracking in system	No data
Referral system	No data
Calendar System	Y
Calendar system links with other calendar systems	Y
Client emailing/messaging from the system	Y
Client online portal - can view and/or enter data	Y
Export to Hope LoanPort	N
Employee payroll	No data
Client data tracking over time/client history	Y
Credit report interface	No data
Mobile app	N
Security - customizable by field	Y
Security - customizable by user	Y
Security - customizable by location	Y

COMS *CIL Orlando*

COMS is a data management system that is designed for Centers for Independent Living (CILs) that also contains a housing counseling component. The product was developed approximately seven years ago, and it is currently used primarily by CILs in a few different states throughout the country. While it is a public product, it hasn't been actively recruiting new users.

Custom Reports	Yes	Limited custom report building capacity
Custom Fields	Yes	Each agency can add their own custom fields
Export Capabilities	Yes	.xls and sometimes .docx, depending on data
Data Storage	Cloud-based	
Parent Agency Data Aggregation	No*	
Look of Interface	White and blue. Clean, easy to navigate. Tab navigation along top.	
Compatability	No hardware/software needs. No known browser compliance issues.	
Special Features	CIL data management, employee payroll management	
Best Suited For	CILs, small agencies	

Product Highlights

This product contains many features designed specifically for Centers for Independent Living, such as a way to manage the distribution of disability accomodations. In addition, there are many tools to manage agency and employee data from within COMS. For example, employees can use the system to clock in and out, make office supply requests, and manage contacts. Employee work hours can be tied to particular funding sources to expedite personnel activity report (PAR) compliance.

*There isn't a module to handle parent data aggregation, but an agency with a few branches can have one database and assign cases to a particular location. The location field can be used as a filter when running site-specific reports.

Other features:
Referral system, volunteer and equipment donation management, payroll, alert/reminder system, survey tool.

Product Costs

Setup Fee	$50/hr
Subscription	$500/year
Each Additional User (per mo.)	No additional cost
Support	$50/hr for large additions, free for basic support
Training	Depends on agency needs
Data Storage	Unlimited at no additional cost
Data Migration	Yes, no additional cost
Other Costs to Organization	No additional cost
Estimated Cost 5 users/year	$500
Estimated Cost 25 users/year	$500

Support and Training

The company is small and approachable. Helpdesk tickets are resolved as they come in and due to small numbers of requests, are resolved quickly.

In addition to helpdesk support, there is a tab from within the site that provides information on every function in COMS. Agencies could elect to do in-person training, and custom work is available at $50 per hour.

Updates

Updates are done on an as-needed basis. Small changes are generally made weekly and larger updates are completed monthly.

For More Information

Information on COMS is not available online, but to learn more about Center for Independent Living (CIL) Orlando, visit:
www.cilorlando.org

NFMC reporting	Y
Pop-up warnings/reminders/ticklers	Y
Contacts management	Y
Employee time management/ Time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	Y
Referral system (send out referrals)	Y
Calendar system	N
Calendar system links with other calendar systems	N
Client emailing/messaging from the system	N
Client online portal - can view and/or enter data	Y
Export to Hope LoanPort	N
Employee payroll	Y
Client data tracking over time/client history	Y
Credit report interface	N
Mobile app	N
Security - customizable by field	N
Security - customizable by user	N
Security - customizable by location	N

Counseling Navigator *Alliance Credit Counseling*

Counseling Navigator has been a HUD-approved product for approximately eight years. The product has been in development since 2000. Counseling Navigator is a CMS with a very strong mission of improving the consistency of data provided to clients regardless of which counselor they see.

Custom Reports	Yes	
Custom Fields	No	Alliance will add custom fields
Export Capabilities	Yes	Any field in a variety of formats
Data Storage	Variable	Can be stored on cloud or on agency's own servers
Parent Agency Data Aggregation	Yes	
Look of Interface	Similar to an older version of Mac OS X. Grey color scheme.	
Compatability	Mac or Windows systems. Application does not require internet connection.	
Special Features	Scripts for counselors, tools that provide calculations and customized recommendations based on client data, can be integrated with a phone system	
Best Suited For	Agencies who want a very structured counseling program, agencies with high staff turnover, agencies without a reliable internet connection	

Product Highlights

This product was uniquely designed with a very targeted philosophy: increasing the consistency of the information clients receive from housing counselors. Counseling Navigator provides a step-by-step blueprint for counselors to give customized strategies to clients based on the data input into the budget/expense form. Counselors can use their discretion to add or remove certain strategies to be used with clients, which can be quickly documented in the system.

While Counseling Navigator's focus is credit counseling, the product can be set up to default to housing counseling for agencies that only provide housing counseling services. Users are unable to add additional fields to the system on their own, but they can build their own follow-up surveys.

If agency elects to host its own data, it needs to be payment card industry (PCI) compliant.

Other features:
NFMC Reporting, pop-up warnings and reminders, contacts management, employee time management and tracking, client document tracker, potential for integration with phone system, potential to create barcodes to automatically assign documents to clients, built-in follow-up survey tool, referral tracking, calendar system, and dashboards.

Counseling Navigator *Alliance Credit Counseling*

Product Costs

Setup Fee	$1,500	*See note for other options
Monthly Subscription	$1,000	Up to 5 users
Each Additional User (per mo.)	$100	
Support		
Training		
Data Storage		
Data Migration		
Other Costs to Organization		
Estimated Cost 5 users/year	$12,000	
Estimated Cost 25 users/year		

*Note:
There are several pricing options, ranging from free with the purchase of their back-office services, to perpetual license packages. The website provides some further information on these alternate pricing plans.

Support and Training

The system has online trainings, a PDF manual, and a large Q&A list for counselors to troubleshoot some of their own issues. In addition, there is a helpdesk portal where users can input problems or submit feature requests. Agencies that are facing an urgent problem are encouraged to call so that it can be resolved quickly. The trainings are designed by a professional educator.

Updates

Counseling Navigator makes minor updates often, but not according to a fixed schedule. The last major update made was in the latter part of January 2015 to comply with HUD reporting changes.

For More Information

For additional information about this system, visit:
http://www.counselingnavigator.org

NFMC reporting	Y
Pop-up warnings/reminders/ticklers	Y
Contacts Management	Y
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	Y
Referral system	Y
Calendar system	Y
Calendar system links with other calendar systems	No data
Client emailing/messaging from the system	Y
Client online portal - can view and/or enter data	Y
Export to Hope LoanPort	N
Employee payroll	No data
Client data tracking over time/client history	No data
Credit report interface	Y
Mobile app	No data
Security - customizable by field	Y
Security - customizable by user	Y
Security - customizable by location	Y

CounselorMax
NeighborWorks America

CounselorMax was purchased by NeighborWorks America in 2007. It is currently the second most utilized CMS, following Home Counselor Online. This system is commonly used by NeighborWorks organizations.

Custom Reports	Yes	
Custom Fields	No	Can only add to picklists
Export Capabilities	Yes	.csv (comma separated values format); can also directly export into most lending software
Data Storage	Cloud-based	
Parent Agency Data Aggregation	Yes	
Look of Interface	Database with white and blue color scheme, tab navigation along the top	
Compatability	Needs Windows XP or higher and Internet Explorer 5 or higher.	
Special Features	NeighborWorks reporting, links to Hope LoanPort	

Product Highlights

Although the product is built on older architecture, it contains many of the features one would expect from a CMS, such as a calendar system, data tracking over time, and the ability to connect with credit reporting agencies. In addition, this system allows for the creation of client 'prospects,' which allows users to save information about an individual without completing the entire intake process. Fields cannot be generated by the agency, but reports and budget templates can be customized. Reporting functions for NeighborWorks and integration with Hope LoanPort are two of the most distinct features of CounselorMax. Some of the tools available in the product are outdated and are for informational purposes only.

Other features:
Exportable loan application data, industry specific reporting, basic graphing feature.

Product Costs

Setup Fee	N/A (except for parent agencies who do aggregate reporting)
Subscription	$595/year for 5 or fewer users
Each Additional User (per mo.)	$150/year per additional user
Support	Helpdesk included at no additional cost
Training	Training and user guide section available within the system. Optional training packages available for purchase.
Data Storage	N/A
Data Migration	Determined on a case-by case basis
Other Costs to Organization	None
Estimated Cost 5 users/year	$595
Estimated Cost 25 users/year	$3595

*Note: CounselorMax has a straightforward pricing plan, which is based on an annual subscription fee based on the number of users.

Note: Agencies that are responsible for a network of affiliates or branches can purchase ReportMax to aggregate reporting. The setup fee for this product is approximately $2,000. CounselorMax is planning to introduce an annual maintenance fee as well. The purpose of ReportMax is for parent agencies to be able to aggregate reporting for its network, and it doesn't have a lot of additional functionality.

Support and Training
Helpdesk support is included in the annual subscription. The average turnaround time for tier 1 support is 24 hours.

Updates
CounselorMax was last updated in 2015 for the new HUD 9902 reporting form.

For More Information
For an overview of the product, visit:
http://www.counselormax.com/overview.html

NFMC reporting	Y
Pop-up warnings/reminders/ticklers	Y
Contacts management	No data
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	No data
Referral system (send out referrals)	No data
Calendar system	Y
Calendar system links with other calendar systems	Y
Client emailing/messaging from the system	Y
Client online portal - can view andor enter data	N
Export to Hope LoanPort	Y
Employee payroll	N
Client data tracking over time/client history	Y
Credit report interface	Y
Mobile app	N
Security - customizable by field	No data
Security - customizable by user	No data
Security - customizable by location	No data

eHomeAgency

Community Ventures Corporation

Founded in 1982, Community Ventures Corporation has grown to become one of the nation's largest small business lenders. CVC offers a range of products and services, from financial counseling to large scale neighborhood revitalization. CVC designed eHomeAgency to create efficiency in a Client Management System. eHomeAgency has been in development for over three years and CVC began a five-agency pilot run on August 1, 2015. CVC released eHomeAgency to the public on October 1, 2015.

Custom Reports	Yes	Can build custom reports upon request from user
Custom Fields	Yes	Can build custom reports upon request from user
Export Capabilities	Yes	.csv (comma separated values format)
Data Storage	Cloud-Based	Hosted by Rackspace
Parent Agency Data Aggregation	No	Planned for future development
Look of Interface	Gray/white color scheme	
Compatability	Web-based/Linux design, best with Google Chrome or Mozilla Firefox browsers but will work with others, integrates with eHomeAmerica and eSignature	
Special Features	Client-facing abilities; client participates in creation of their file	

Product Highlights

Consumer facing – Clients can participate in the creation of their file, including filling out online intake forms, viewing disclosure, and electronic signing of documents. Clients create a "My eHome" account and can interact with the housing counselor via messages from their home page or email.

Seamless integration with eHomeAmerica, the nation's premier online homebuyer education course. Clients can move from education to full intake to counseling session seamlessly.

Full reporting capability with HUD, NeighborWorks and NFMC.

Other features:
All history captured in the client file, every touch by a customer or counselor. All client information resides on one easy to read screen, eliminating the need to jump between pages.

Product Costs

Setup Fee	TBD
Monthly Subscription	TBD
Each Additional User (per mo.)	TBD
Support	Phone/online at no additional cost
Training	Online/in-person, cost TBD
Data Storage	Unlimited storage at no additional cost
Data Migration	No additional cost
Other Costs to Organization	None
Estimated Cost 5 users/year	TBD
Estimated Cost 25 users/year	TBD

Support and Training

eHomeAgency will have full support via phone, email and chat, at least 12 hours per weekday, as well as some weekend hour support.

Updates

A regular update schedule is still being determined.

Ongoing enhancements to come include: automated credit report pulls; updated agency and performance reporting capabilities; and import tools for client information.

HUD Compliance:

eHomeAgency will be fully HUD compliant.

For More Information

For contact information about eHomeAgency and CVC's other products and services, visit: http://www.cvky.org/about

NFMC reporting	Y
Pop-up warnings/reminders/ticklers	Y
Contacts management	Y
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	Y
Referral system (send out referrals)	Y*
Calendar system	Y
Calendar system links with other calendar systems	N
Client emailing/messaging from the system	Y
Client online portal - can view and/or enter data	Y
Export to Hope LoanPort	N
Employee payroll	N
Client data tracking over time/client history	Y
Credit report interface	N**
Mobile app	N
Security - customizable by field	N
Security - customizable by user	Y
Security - customizable by location	N

*Internal referral capabilities

**Planned for future development

FACSPro

DBA Technologies

DBA Technologies has been creating custom software solutions since 1991. FACSPro was originally created with the help of the State of West Virginia and the Community Action Partnership of North Alabama. It is currently being utilized by over 10,000 users in 5 states.

Custom Reports	Yes	
Custom Fields	Yes	Can be created upon request
Export Capabilities	Yes	
Data Storage	Hosted on DBA servers	
Parent Agency Data Aggregation	Yes	
Look of Interface	Clean, organized interface; blue color scheme	
Compatability	Works with any device that can support Windows XP or higher	
Special Features	HMIS & Head Start modules	
Best Suited For	Agencies whose housing work focuses on weatherization and energy efficiency programs, agencies with a need for intersystem communication, agencies looking to manage administrative and grant data	

Product Highlights

FACSPro is a desktop application that is primarily used for facilitating federal dollar administration, reporting for Community Action Agencies, and client intake. Its most common uses in housing are in areas such as weatherization, energy efficiency, and homeless services. Although it has been used in the past for 9902 reporting, it does not have a separate housing module. The system has the ability to manage other types of non-programatic data, such as board of director functions, as well as agency information like yearly work plans, budgets, and logic models. DBA has the ability to build bridges between FACSPro and other systems. Special functionality for client data management includes the ability to create program eligibility criteria and identify eligible clients, as well as an interface to create client surveys and manage results.

Other features:
Track funding at the client level, track in-kind donations and volunteer history, some tracking of facilities maintenance requests, tickler/reminder system.

Product Costs

Setup Fee	*See note
Monthly Subscription	
Each Additional User (per mo.)	
Support	
Training	
Data Storage	
Data Migration	Depends on needs of agency
Other Costs to Organization	
Estimated Cost 5 users/year	
Estimated Cost 25 users/year	

*Note: This product follows a slightly different pricing scheme. The first year costs an agency $25,000. This includes use of the product, set-up, and training. Subsequent years are $8,000 annually, which includes support services. The vendor is willing to work with smaller agencies at a lower cost.

Support and Training

Each agency should have a system administrator to manage the daily operations of FACSPro. The system administrator should email the help desk at DBA when issues outside of the administrator's purview occur. Email requests for help go directly to programmers who can address all levels of support.

Trainings can be conducted via webinar or in person.

If FACSPro is purchased for statewide use, there is a Super User at the state level and System Administrators at each agency. Each administrator would attend initial trainings, after which the Super User or System Administrators could conduct trainings. Additional trainings can be provided by DBA at an additional cost.

Updates

Updates are not done according to a set schedule. The vendor stated they are done frequently and at user request.

For More Information

For more information about DBA Technologies and FACSPro, visit:
http://dbatec.com

NFMC reporting	N
Pop-up warnings/reminders/ticklers	Y
Contacts management	Y
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	Y
Referral system (send out referrals)	Y
Calendar system	Y*
Calendar system links with other calendar systems	N
Client emailing/messaging from the system	N
Client online portal - can view and/or enter data	N
Export to Hope LoanPort	N
Employee payroll	N
Client data tracking over time/client history	Y
Credit report interface	N
Mobile app	N
Security - customizable by field	Y
Security - customizable by user	Y
Security - customizable by location	Y

* Calendar/scheduler available through SchedulePro, which is a free add-on to FACSPro

HCO (Home Counselor Online)

Home Counselor Online has been in existence for approximately 15 years. Despite the large costs associated with maintaining the product, HCO has always been available at no cost to agencies. Since the downturn in the housing market, fewer resources have been invested into HCO. Fannie Mae has stated that it recognizes the value and importance HCO plays in the market; however, the future of the product is uncertain.

Custom Reports	Yes	
Custom Fields	No	
Export Capabilities	Yes	pdf, 9902 as .xls or .csv
Data Storage	Cloud-based	
Parent Agency Data Aggregation	No	
Look of Interface	Database is a light brown color with white field boxes	
Compatability	Browser needed. No known browser compliance issues	
Special Features	Can input intake data while offline and upload it later	
Best Suited For	Organizations who will primarily be using data input into a CMS for a housing counseling program; organizations who do not have advanced or particular product needs; organizations without consistent access to an internet connection	

Product Highlights

Home Counselor Online contains all of the basic features needed from a client management system and even contains some perks and flexibilities that aren't offered in other fee-based products. Examples include: custom report generation and a built-in feature designed to show missing data prior to HUD 9902 submission.

While HCO contains many elements that make it a valueable product, inexperienced users without sufficient training may find the platform difficult to navigate.

HCO (Home Counselor Online)

Fannie Mae

Product Costs

Setup Fee	No costs
Monthly Subscription	$0
Each Additional User (per mo.)	$0
Support	$0
Training	$0
Data Storage	$0
Data Migration	No data migration
Other Costs to Organization	$0
Estimated Cost 5 users/year	$0
Estimated Cost 25 users/year	$0

Support and Training

Helpdesk support is available, but isn't always able to answer user problems on demand. There are counselor and administrator user guides available, as well as a few video tutorials. Although formal support is not entirely comprehensive, HCO has a large market presence, and it is likely that an agency can find informal support from peers who are experienced HCO users.

Updates

Product is updated on a regular basis.

For More Information

For an overview of the product, user guides, and tutorials, visit:
https://www.fanniemae.com/singlefamily/home-counselor-online

NFMC reporting	Y
Pop-up warnings/reminders/ticklers	Y
Contacts management	N
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	N
Referral system (send out referrals)	Y
Calendar system	N
Calendar system links with other calendar systems	N
Client emailing/messaging from the system	N
Client online portal - can view and/or enter data	N
Export to Hope LoanPort	N
Employee payroll	N
Client data tracking over time/client history	N
Credit report interface	Y
Mobile app	N
Security - customizable by field	N
Security - customizable by user	N
Security - customizable by location	N

Homedge

Acutedge

Acutedge started in 2007 with the goal of reducing inefficiency and redundancy in nonprofit data management. It has focused on this mission through creating exclusive solutions or providing support directly to affordable housing clients. Homedge is the second line of products Acutedge is developing for a public market.

Custom Reports	Yes	
Custom Fields	Yes	
Export Capabilities	Yes	.xls
Data Storage	Cloud-based	Through Salesforce
Parent Agency Data Aggregation	No	Not currently, but can be built
Look of Interface	Built on Salesforce	
Compatability	Each user needs a Salesforce license	
Special Features	All of Salesforce's functionality	
Best Suited For	Multi-service agencies, organizations who already use Salesforce will find those skills transfer easily to Homedge	

Product Highlights

Agencies familiar with Salesforce will find the product intuitive, but less savvy computer users or users familiar with other systems may find the system overwhelming at first. This can be softened by the security settings, which allow administrators at the agency to customize the functionality available to each user separately to a level that is comfortable and appropriate to each.

A range of features are available to support the work of the counselor, including a portal for clients to input data, the ability to send client follow-up surveys from within the product, outcome and milestone tracking over time, dashboards, and graphing functionality. Agencies who have data management needs that aren't met by Salesforce's database or Homedge can obtain additional apps from the Salesforce App Exchange. Additionally, Acutedge has the ability to build customizations for Homedge to meet the specific needs of agencies.

Other features:
NeighborWorks reporting, services can be attached to a funding source.

Homedge

Acutedge

Product Costs

Setup Fee	$5,000
Monthly Subscription	Anticipates $60/month per user
Each Additional User (per mo.)	N/A
Support	Helpdesk is included
Training	No additional cost
Data Storage	No additional cost
Data Migration	No additional cost
Other Costs to Organization	If the agency has more than 10 users, it will need to purchase additional Salesforce licenses
Estimated Cost 5 users/year	$3,600 at anticipated rate
Estimated Cost 25 users/year	$23,400 at anticipated rate and with purchase of additional 15 Salesforce licenses

*Note: Salesforce provides 10 licenses to nonprofit organizations at no cost. Additional licenses cost $360 per year, per user.

Support and Training

Helpdesk support will be offered through telephone and email. Additional support services and expected costs are unknown at this time.

Training will be included in the cost of the set-up fee, along with initial agency-specific customizations. The specific format of the training is unknown at this time.

Updates

There is currently no information on product updates, as this is a new product.

HUD Compliance

Homedge is a new CMS currently being developed in accordance with HUD's standards. Acutedge hopes to release the product by the end of Q1 2016.

For More Information

To learn a little more about each of the Salesforce add-ons being developed by Acutedge, visit:
http://www.acutedge.com/our-solutions/

Agencies unfamiliar with Salesforce should first learn about this platform here:
https://www.salesforce.com/industries/nonprofit/overview/

NFMC reporting	N
Pop-up warnings/reminders/ticklers	Y
Contacts management	Y
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	Y
Referral system (send out referrals)	TBD
Calendar system	Y
Calendar system links with other calendar systems	Y
Client emailing/messaging from the system	Y
Client online portal - can view and/or enter data	Y
Export to Hope LoanPort	N
Employee payroll	N
Client data tracking over time/client history	Y
Credit report interface	Y*
Mobile app	Y
Security - customizable by field	Y
Security - customizable by user	Y
Security - customizable by location	Y

*Planned for future development

LegalServer *PS Technologies*

LegalServer was developed in 2001 as a program that would focus on managing the data needs of nonprofit legal aid agencies. While its focus remains on meeting the data needs of legal aid agencies, there is a lot of additional functionality including housing data management.

Custom Reports	Yes	
Custom Fields	No Data	Vendor did not supply this information
Export Capabilities	Yes	.xml, .csv, .xls
Data Storage	Cloud Based	Servers owned by PS Technologies
Parent Agency Data Aggregation	No data	Vendor did not supply this information
Look of Interface	No data	
Compatability	Compliance with most browsers/ operating systems	
Special Features	GIS reporting capabilities, HMIS	
Best Suited For	Legal aid agencies with a housing component	

Product Highlights

LegalServer is a web-based application built with open source tools. While it is not tailored to the housing counseling community, it contains modules designed to capture both housing counseling and HMIS data. This product is designed to meet the data needs of agencies providing legal services, including: legal aid, pro bono attorneys, law schools, and immigration clinics.

Other features:
Electronic case transfer, manage client trust accounts and expenses, contacts management, client program eligibility and conflict of interest checker, internal messaging system.

LegalServer

PS Technologies

Product Costs

Setup Fee	$3,000
Monthly Subscription	$600/ mo. for up to 5 users
Each Additional User (per mo.)	No data
Support	No additional cost
Training	No additional cost
Data Storage	Remote backup $100/ month
Data Migration	No additional cost
Other Costs to Organization	No data
Estimated Cost 5 users/year	$10,200
Estimated Cost 25 users/year	No data

Support and Training

New users are required to take two 90-minute trainings. LegalServer also contains a help page and frequent webinar trainings to support users on an ongoing basis.

Agencies are required to have a site administrator for tech questions. If there are problems that the site administrator cannot solve, the administrator can get support through screen sharing with PS Technologies. Software bugs can be reported through a phone call.

Updates

Product is updated weekly.

HUD Compliance

LegalServer has been a HUD compliant product in the past, but the vendor did not provide updated information regarding HUD ARM5 compliance. Legal service agencies interested in this product should contact the vendor directly.

For More Information

For additional information about features, training and support services, and more, visit:
http://legalserver.org

NFMC reporting	N
Pop-up warnings/reminders/ticklers	No data
Contacts management	Y
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	No data
Referral system (send out referrals)	Y
Calendar system	Y
Calendar system links with other calendar systems	Y
Client emailing/messaging from the system	Y
Client online portal - can view and/or enter data	No data
Export to Hope LoanPort	Y
Employee payroll	Y
Client data tracking over time/client history	Y
Credit report interface	Y
Mobile app	N
Security - customizable by field	No data
Security - customizable by user	No data
Security - customizable by location	Y

MSDCCMS

Mustard Seed Development Corporation

Mustard Seed Development Corporation Client Management System was developed in 2004 in order to integrate and manage all of the services provided by the agency. Although it is a public product, it is currently only used by Mustard Seed. MSDC focuses primarily on housing counseling services in Akron, Ohio.

Custom Reports	Yes	
Custom Fields	No	Can be added by the agency
Export Capabilities	Yes	.xls and .csv (comma separated values format)
Data Storage		Agency server
Parent Agency Data Aggregation	No*	Currently not in place, but possible in the future
Look of Interface	Web platform in development	
Compatability	Microsoft	
Special Features	Funding Management	
Best Suited For		

Product Highlights

MSDCCMS is a system specifically focused on housing data management.

Product Costs

Setup Fee	*See note
Monthly Subscription	
Each Additional User (per mo.)	
Support	
Training	
Data Storage	
Data Migration	
Other Costs to Organization	
Estimated Cost 5 users/year	
Estimated Cost 25 users/year	

*Note: A pricing schedule has not yet been developed for MSDC's web-based product.

Support and Training

MSDC anticipates that a manual will be made available to agencies using the product. In addition, web-based trainings will be offered at onboarding. The format and costs of these trainings are still being determined.

For ongoing support, MSDC expects to be able to offer 24-7 helpdesk support. As with the training process, details have not been finalized regarding costs.

Updates

An update schedule for MSDCCMS is not currently available for its web-based platform, as the platform is still being developed.

As it transitions to a web-based system, certain features may be added or removed.

For More Information

Information regarding Mustard Seed Development Corporation's CMS is not available online, but to learn more about the work MSDC does, visit:
http://www.mustardseedcdc.com

NFMC reporting	Y
Pop-up warnings/reminders/ticklers	Y
Contacts management	Y
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y*
Survey generator/results tracking in system	Y**
Referral system (send out referrals)	Y***
Calendar system	Y
Calendar system links with other calendar systems	Y
Client emailing/messaging from the system	N
Client online portal - can view and/or enter data	N
Export to Hope LoanPort	N
Employee payroll	Y
Client data tracking over time/client history	Y
Credit report interface	N
Mobile app	N
Security - customizable by field	Y
Security - customizable by user	Y
Security - customizable by location	Y

*Web-based storage in development.
**Can generate surveys, but not results. Can utilize Google Forms to attach to database.
***Referrals can be generated only for rental assistance.

NACA Lynx

Neighborhood Assistance Corporation of America

First implemented in 2004, this dual-purpose system is used throughout the network of NACA branches. Although this product is currently only being used by affiliated branches, NACA is encouraging other agencies to consider the Lynx system.

Custom Reports	Yes	
Custom Fields	No	
Export Capabilities	Yes	.xls and .doc
Data Storage	Mixed	NACA servers and off-site backup
Parent Agency Data Aggregation		No specific interface built to manage parent data, but clients can be assigned to a particular branch location and filtered for reporting
Look of Interface	Database with tabs along the top, various colors	
Compatability	Needs Windows OS and access to a printer/scanner to upload documents into system	
Special Features	Mortgage underwriting capability, optical character recognition (OCR), client-submitted documents automatically stored in client's file	
Best Suited For	Agencies also involved in mortgage proccessing and underwriting	

Product Highlights

In addition to managing counseling data, Lynx has the capacity to process and underwrite mortgages. Originally developed by and for NACA, the product is designed to guide users through a structured counseling process. The product has a particular focus on helping clients obtain mortgages through a process NACA calls character-based lending. All of the related documents can be housed internally by the system. Clients can email or fax pertinent documents which are automatically transmitted to their electronic file. Once the entire loan file has been completed it can be sent electronically to the lender.

Other features:
Tools such as debt-to-income calculator and loan comparision.

Product Costs

Setup Fee	*See note
Monthly Subscription	
Each Additional User (per mo.)	
Support	
Training	
Data Storage	
Data Migration	
Other Costs to Organization	
Estimated Cost 5 users/year	
Estimated Cost 25 users/year	

*Note: Costs are decided on a case-by-case basis. As of publication, there is no established pricing policy.

Support and Training

NACA expects that its external training would be similar to its internal training process: branch agency staff attend a week long training on how to use the system. A trainer is available for 60 days post-training for follow-up.

For ongoing support, there are user manuals and a helpdesk.

Updates

No data available.

For More Information

For more information about NACA's Lynx system, visit:
https://www.naca.com/nacaweb/about_naca/nacaTechnology.aspx

NFMC reporting	No data
Pop-up warnings/reminders	No data
Contacts management	No data
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	No data
Referral system	No data
Calendar system	No data
Calendar system links with other calendar systems	No data
Client emailing/messaging from the system	No data
Client online portal - can view and/or enter data	Y
Export to Hope LoanPort	N
Employee payroll	Y
Client data tracking over time/client history	Y
Credit report interface	Y
Mobile app	No data
Security - customizable by field	No data
Security - customizable by user	No data
Security - customizable by location	No data

NewOrg Management System

NewOrg

NewOrg was founded in 2004 to provide nonprofit organizations with a central and comprehensive data repository for all aspects of operations. With a simple-to-use interface and fast and flexible customization and reporting, NewOrg allows agencies to curb data management issues while improving productivity, communication, fundraising efforts, and reporting accuracy and efficiency.

Custom Reports	Yes	
Custom Fields	Yes	
Export Capabilities	Yes	.csv (comma separated values format), flat file, tab separated, .xml and to Constant Contact
Data Storage	Cloud-Based	
Parent Agency Data Aggregation	Yes	
Look of Interface	Modern/Intuitive	
Compatability	Optimized for Mozilla Firefox and Google Chrome	
Special Features	Multiple back-up facilities in Boston, Toronto, and Buenos Aires for increased data security	
Best Suited For	Any type of non-profit organization program delivery	

Product Highlights

HIPAA compliant for data security, client management, staff time management, volunteer management, donor and development campaign tracking, integrated mass email dissemination or labels for traditional mailings, survey tool, events management with payment processing, public facing website with a lot of functionality.

NewOrg Management System

NewOrg

Product Costs

Setup Fee	One-time implementation and configuration fee varies $8,500 to $12,000
Monthly Subscription	$380 for 5 users
Each Additional User (per mo.)	Cost for additional users decreases in brackets
Support	Unlimited incidents up to 1 hour each included in monthly fee. Advanced support for an incident requiring more than 1 hour will incur an hourly rate of $120
Training	Initial Implementation includes staff training. Supplemented with online training videos at no additional cost
Data Storage	No additional cost
Data Migration	No additional cost
Other Costs to Organization	No additional costs
Estimated Cost 5 users/year	$4,560
Estimated Cost 25 users/year	$8,900

Support and Training

An initial product orientation is given for new agencies. Unlimited support requests up to one hour each of support time is included in the monthly fee. There is also a large library of web-training videos available for no extra charge on the NewOrg website.

Updates

All clients are maintained on the same version of NewOrg. Updates occur on approximately a monthly basis at no additional cost to clients. NewOrg is constantly enhancing its system based on client suggestions.

HUD Compliance

NewOrg has been compliant with previous HUD requirements. It is currently not ARM5 compliant because this is not a need for their current clients. NewOrg is ready to make the updates needed upon request.

For More Information

For a wealth of information about the product, training videos, a list of customers, and to schedule a demonstration or access to a demonstration system,visit:
http://www.neworg.com

NFMC reporting	Y
Pop-up warnings/reminders/ticklers	Y
Contacts management	Y
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	Y
Referral system (send out referrals)	Y
Calendar system	Y
Calendar system links with other calendar systems	Y
Client emailing/messaging from the system	Y
Client online portal - can view and/or enter data	Y
Export to Hope LoanPort	Y
Employee payroll	Y
Client data tracking over time/client history	Y
Credit report interface	N
Mobile app	Y
Security - customizable by field	Y
Security - customizable by user	Y
Security - customizable by location	Y

Octopia

Octopia was first created in the mid 1990s in response to a need to report unduplicated client records across different services. Currently, the product is being used in agencies throughout Massachusetts that serve anywhere from 2,000 to 50,000 clients a year.

Custom Reports	Yes	
Custom Fields	Yes	Some fields must be modified by Octopia, some can be created by user
Export Capabilities	Yes	.xml
Data Storage	Cloud-based	Amazon Cloud
Parent Agency Data Aggregation	No	
Look of Interface	Uncluttered looking database, logical flow, variable color/ formatting scheme	
Compatability	Internet Explorer, Chrome, Firefox, and Safari. A .pdf reader is needed	
Special Features	HMIS add-on as well; Good intra-agency referral system for multi-service agencies; designed to input and integrate data from other systems	
Best Suited For	Multi-service agencies who want to use one system across different service types or have a need to integrate systems	

Product Highlights

With a focus on reducing inefficiencies, duplicate data entry, and inaccurate reporting in multi-service agencies using multiple databases, this product was designed to provide seamless integration with third-party software. Agencies who have clients utilizing multiple services in different program areas or locations will be able to use Octopia's internal referral system to quickly and securely transmit client data.

While the core data-entry fields built by Octopia cannot be edited by the agency, agency administrators can add their own programs, services, and questions/responses. The agencies have the flexibility to easily configure their programs to specify required data fields in order to capture relevant data and set program-specific requirements. When adding new programs, agencies can add specific services and format relevant question and answer combinations for collecting client data. Queries can be built to capture data about services, programs and the agency. Both the housing counseling ARM5 and HMIS modules are considered add-ons with additional associated costs.

Other modules available for Octopia include a business development module (counseling for clients who are small business owners) and an emergency food pantry module. Additionally, custom modules can be created by Octopia if an agency has a need. There is currently no budget form within Octopia.

Other features:
Ability to track client data over time, batch editing of records for family members, document upload into system, ability to change security permissions at the user level, as well as a querying and reporting system. A set of data visualizations were added in 2015.

Product Costs

Setup Fee	$1,000
Monthly Subscription	Two tiers: Up to 16 users $472.67; 16-25 users $638.33
Each Additional User (per mo.)	Quoted by vendor upon request
Support	No additional cost
Training	$1,440 for up to 16 hours of remote training
Data Storage	No additional cost
Data Migration	Cost dependent upon need
Other Costs to Organization	HUD ARM5 annual $1,500 HUD HMIS annual (up to 10 programs) $2,200
Estimated Cost 5 users/year	Octopia and ARM5: $7,160 Octopia, ARM5, HMIS: $9,360
Estimated Cost 25 users/year	Octopia and ARM5: $9,160; Octopia, ARM5, HMIS: $11,360

Support and Training

A user guide is provided to agencies that use Octopia. Additionally, a series of webinars can be created by Octopia at the level needed by the users for training purposes.

During business hours, problems received by the helpdesk can usually be resolved quickly. Emails sent to customer support are automatically sent to multiple employees to ensure a quick response, and there are multiple phone numbers an agency can call for customer support. For agencies that have more complex needs (requiring a developer or programmer), Octopia will provide the agency with an estimate of time it will take and cost.

Updates

Product is updated regularly with new features highlighted for users. Updates are generally performed overnight to minimize impact to an agency. Agencies are given notice prior to an update.

For More Information

For an overview of Octopia, visit:
http://communitysoftwaregroup.com/octopia.php

NFMC reporting	N
Pop-up warnings/reminders/ticklers	N
Contacts management	N
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	N
Referral system (send out referrals)	Y
Calendar system	N
Calendar system links with other calendar systems	N
Client emailing/messaging from the system	N
Client online portal - can view and/or enter data	N
Export to Hope LoanPort	N
Employee payroll	N
Client data tracking over time/client history	Y
Credit report interface	N
Mobile app	N
Security - customizable by field	N*
Security - customizable by user	Y
Security - customizable by location	Y

* Can mark certain clients or programs as 'extra sensitive' and limit access to sensitive data in this way

Outcome Tracker

VistaShare

Outcome Tracker was originally developed in 2001 as a tool to manage economic development and micro-enterprise data. Since that time, the product has grown to include many different program types. Outcome Tracker's housing counseling component can be used in conjunction with other data management needs for an agency.

Custom Reports	Yes	
Custom Fields	Yes	
Export Capabilities	Yes	Almost any field can be exported as .csv
Data Storage		Servers owned and managed by VistaShare
Parent Agency Data Aggregation	Yes	
Look of Interface	Looks like a webpage; blue and white color scheme	
Compatability	Only needs an internet connection. No known browser compliance issues. Tested against Firefox, Chrome, and Internet Explorer.	
Special Features	Clients have their own online portal and Mobile App where they can complete forms, access resources (documents and videos), securely upload documents, and take surveys. Detailed outcome tracking and strong, flexible graphing features.	

Product Highlights

As its name suggests, Outcome Tracker is designed to track and display data with a wide range of flexibility and functionality to agencies. Client data is tracked over time and can be input by counselors or by the clients themselves through the client online portal or the mobile app. To track agency level data, any field can be pulled through a query and displayed in a report or graphically. Agencies can create their own fields, forms, tabs, reports, charts, graphs and surveys without writing code. Outcome Tracker is also used to manage data for mediation, community action agencies, women's business centers, women's shelters, match savings accounts (Individual Development Accounts), and child savings accounts.

Other features:
Reminders function for clients and staff, Android & iPhone apps with messaging feature, interagency communication tool through the forums feature, .csv data can be imported into and out of the system, and aggregate reporting for networks of agencies.

Product Costs

	Basic	Full
Setup Fee	Starter package for HUD Housing Counseling programs: $50 setup fee (normally $4,000-5,500)	Starter package for HUD Housing Counseling programs: $50 setup fee (normally $6,000-8,000)
Monthly Subscription	$240/mo for up to 3 users. Discounts available to networks.	$300/mo for up to 5 users. Discounts available to networks.
Each Additional User	$10/mo	$10/mo
Support	Included in the monthly fee	Included in the monthly fee
Training	Self-paced training videos plus 5 hours of training/consulting is included in the setup fee. Additional services available on an hourly basis ($100/hour)	Self-paced training videos plus 5 hours of training/consulting is included in the setup fee. Additional services available on an hourly basis ($100/hour)
Data Storage	No additional cost	No additional cost
Data Migration	Varies depending on need	Varies depending on need
Other Costs to Organization	None	None
Estimated Cost 5 users/yr	$3,120	$3,600
Estimated Cost 25 users/yr	$5,520	$6,000

Organizations interested in using Outcome Tracker should speak directly with VistaShare about what the costs would be for their agency's needs. The above figures represent some general cost information. Agencies can elect to have a basic or full package. The basic package does not include the client self-service pieces.

Support and Training

Helpdesk support is offered through a webportal form. Tickets are responded to via email or can be resolved through the phone as well. Outcome Tracker collects specific data regarding its helpdesk turnaround time. All requests are responded to within a day and 80 percent of all helpdesk concerns are resolved within two days. In addition to an extensive help page and online tutorials, there are approximately four free customer training webinars per month. Between 10 and 15 hours of training are included in the set-up fee. Additional hours of training are available at a base price of $100 an hour.

Updates

Product is updated approximately every three weeks. Each update usually contains three or four enhancements and any bug fixes, if needed.

For More Information

A very comprehensive product overview is available at the website below. Scroll to the bottom of the page to access links to additional information about Outcome Tracker.
http://www1.vistashare.com/?page_id=75

NFMC reporting	Y
Pop-up warnings/reminders/ticklers	Y
Contacts management	Y
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	Y
Referral system (send out referrals)	N
Calendar system	Y
Calendar system links with other calendar systems	Y
Client emailing/messaging from the system	Y
Client online portal - can view and/or enter data	Y
Export to Hope LoanPort	N
Employee payroll	N
Client data tracking over time/client history	Y
Credit report interface	Y
Mobile app	Y
Security - customizable by field	Y
Security - customizable by user	Y
Security - customizable by location	Y

Paragon DMS

Paragon, Money Management International

Originally designed for credit counseling agencies, the product has developed to include a housing counseling component. In 2003, Paragon merged with Money Management International. Today, 45 small and medium sized agencies use Paragon. These agencies are mostly multi-service nonprofits with a credit counseling focus.

Custom Reports	Yes	
Custom Fields	Yes	
Export Capabilities	Yes	.csv, .xls and .docx
Data Storage	Cloud-based	Internally owned and managed servers
Parent Agency Data Aggregation	No	Paragon does not have a specific platform for aggregate reporting, but authorized users can be given access to multiple databases.
Look of Interface	Windows 98 feel	
Compatability	Mac or Windows systems	
Special Features	Credit and debt counseling focus	
Best Suited For	Agencies with a credit counseling focus; smaller agencies that want a no-frills, reliable system	

Product Highlights

Described by Paragon program as a simple, reliable system, the product was designed to meet the needs of credit and debt counseling agencies. Paragon was not designed for user customizability, and the company doesn't have the capacity for a lot of agency-level customization. However, agencies get one hour per month of free custom report generation. Reports are generated, encrypted, and emailed to the agency. In addition, there are regular user group meetings where users and Paragon staff talk together about the product.

Other features:
NFMC Reporting, basic counselor calendaring system, credit counseling components, mobile app.

Paragon DMS

Product Costs

Setup Fee	$600 per user (one time fee, negotiable)
Monthly Subscription	$450/mo for up to 6 concurrent users
Each Additional User (per mo.)	$75/mo for each additional concurrent users
Support	1 hour of helpdesk support is included in monthly fee
Training	Additional training beyond 1 hr/mo of heldpesk support is $45/hr. On site training comes at the cost of travel expenses.
Data Storage	No additional cost
Data Migration	Estimate can be provided upon request
Other Costs to Organization	None
Estimated Cost 5 users/year	$5,400*
Estimated Cost 25 users/year	$22,500*

*Note: These costs have been calculated assuming all users are concurrent users. Agencies may have lower costs if they have a smaller number of concurrent users.

Support and Training

Helpdesk support is provided as part of the monthly subscription. The turn around time on a tier 1 problem is 24 hours.

Paragon has a user manual. If desired by the agency, training is available at the rates listed in the pricing section.

Updates

Product is updated once every two weeks, on average.

For More Information

For a brief overview of the product, visit:
https://www.paragondms.com/ParagonSystems.asp

NFMC reporting	Y
Pop-up warnings/reminders/ticklers	Y
Contacts management	Y
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	N
Referral system (send out referrals)	N
Calendar system	Y
Calendar system links with other calendar systems	N
Client emailing/messaging from the system	Y
Client online portal - can view and/or enter data	Y
Export to Hope LoanPort	N
Employee payroll	N
Client data tracking over time/client history	Y
Credit report interface	Y
Mobile app	Y
Security - customizable by field	Y
Security - customizable by user	Y
Security - customizable by location	Y*

* If user is assigned to a specific location

PCAP

Cleverex

Although PROMIS for CAP, or PCAP, is a system that has only been around for three years, its parent product PROMIS has been providing a web-based case management system for Head Start agencies in its current form since 2004. The company Cleverex began in 1997 with a focus on information security and access.

Custom Reports	Yes	
Custom Fields	Yes	
Export Capabilities	Yes	.pdf, .xls, .docx
Data Storage	Mixed	Most data is stored on Cleverex's servers. A small portion is stored on the cloud
Parent Agency Data Aggregation	No	
Look of Interface	Color scheme can be changed by agency	
Compatability	Can be run as an independent app or inside a browser. If run through a browser, Internet Explorer is preferred.	
Special Features	Program eligibility tracking, flexible outcome tracking	
Best Suited For	Agencies with Head Start programs, agencies who want a system to track client program eligibility and outcomes	

Product Highlights

Agency can house program-specific data into different "projects" in PCAP. Each project has one area in which fields can be customized by the agency. In addition, agencies can build their own criteria for program eligibility that is tracked by PCAP. As client data is entered into the system, a thermometer shows how the client ranks against the program's specific eligibility criteria.

PCAP has a complete set of communication and collaboration features such as texting, email surveys, internal referrals and staff collaboration, and external referrals management. For example, PCAP allows users to email surveys to clients; client responders can complete surveys on any device; and the survey results are automatically stored back into PCAP for analysis. Community Service Block Grant (CSBG) and national performance indicator (NPI) reports are automatically generated based on user defined date range. Diagnosis tools allow user to trouble shoot the results generated. The NPI is linked to the ROMA Work Plan. The bar code scanning feature allows agency to auto track service data, such as attendance sign in and sign out and food box distribution.

Other features:
Ability to send payments on behalf of clients, custom performance indicators, pie and bar chart generator.

Product Costs

Setup Fee	*See Note
Monthly Subscription	
Each Additional User (per mo.)	
Support	
Training	
Data Storage	
Data Migration	
Other Costs to Organization	
Estimated Cost 5 users/year	
Estimated Cost 25 users/year	

*Note: Vendor said pricing information is only shared with agencies that have viewed the product. Vendor stated that pricing is on a case-by-case basis and that they try to keep prices affordable for nonprofit agencies.

Support and Training

Helpdesk support is available to users through an 800 number and email. Email responses to problems are generally handled within 48 hours and phone support is often resolved during the conversation. Additionally, in the newest product release, online support will be available. A user manual and pre-recorded webinars are also available.

Two days of onsite training are provided for new clients.

Updates

No information on frequency and scope of updates.

For More Information

For some information about PCAP's parent product, PROMIS, visit:
http://www.cleverex.com/PROMIS.html

NFMC reporting	N
Pop-up warnings/reminders/ticklers	Y
Contacts management	Y
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	Y
Referral system (send out referrals)	Y
Calendar system	Y
Calendar system links with other calendar systems	N
Client emailing/messaging from the system	Y
Client online portal - can view and/or enter data	Y
Export to Hope LoanPort	N
Employee payroll	N
Client data tracking over time/client history	Y
Credit report interface	N
Mobile app	N
Security - customizable by field	Y
Security - customizable by user	Y
Security - customizable by location	Y

RxOffice

IndiSoft LLC

Established in 2005, IndiSoft LLC has developed a suite of products under the name RxOffice for housing counseling, mortgage underwriting, auditing, legal services, and more.

Custom Reports	Yes	
Custom Fields	Yes	
Export Capabilities	Yes	.csv,.xls, html and .pdf, and other industry standard formats
Data Storage	Cloud-Based	
Parent Agency Module	Yes	
Look of Interface	Similar to Hope LoanPort	
Compatability	Compatible with Firefox, Internet Explorer, and Chrome	
Special Features	Consumer portal, two-way integration with Hope LoanPort	
Best Suited For	Agencies who would benefit from a product with Hope LoanPort integration or NeighborWorks reporting	

Product Highlights

Clients and lenders are also able to interface with the system, reducing the barrier to collaboration and communication. Documents can be uploaded and stored in the system. Clients can email or fax documents directly into RxOffice, which counselors can retrieve and assign to the appropriate case file. A secure email function is built into RxOffice that meets the security standards of financial institutions.

RxOffice has experience working with parent organizations for data aggregation and reporting. Parent agencies are given read only access to all cases belonging to agencies in their network.

Other features:
Track time counselors spend on a case, mortgage affordability calculator, calendar and reminder system, PDF annotator, supports electronic signatures.

Product Costs

Setup Fee	Will be determined depending upon the user's requirement
Monthly Subscription	Minimum cost is $66.67/month per user*
Each Additional User (per mo.)	Generally determined during setup
Support	Warranty support at no additional cost
Training	Weekly online training at no additional cost
Data Storage	No additional cost
Data Migration	Options available to import case information to the portal
Other Costs to Organization	Generally no other costs
Estimated Cost 5 users/year	Starting at $800
Estimated Cost 25 users/year	Starting at $4,000

*Note: The minimum cost for this product is $800 for 5 users per year. Actual product pricing is based on the needs and case volume of the agency.

Support and Training

Helpdesk support is available from 9:00 a.m. to 5:00 p.m. Eastern Standard Time through an online system, email, or phone. Additional support can be made available for a fee. The receipt of a helpdesk request is usually acknowledged within 5 - 10 minutes.

There are weekly web-based trainings available.

Updates

Updates are done on a monthly basis with advance notice to users given.

For More Information

For a list of the different RxOffice products, visit:
http://indisoft.us/rx-office-product

NFMC reporting	Y
Pop-up warnings/reminders/ticklers	Y
Contacts management	Y
Employee time management/ time tracking/time spent per case	Y
Client document storage in system	Y
Survey generator/results tracking in system	Y
Referral system (send out referrals)	Y
Calendar system	Y
Calendar system links with other calendar systems	Y
Client emailing/messaging from the system	Y
Client online portal - can view and/or enter data	Y
Export to Hope LoanPort	Y
Employee payroll	N
Client data tracking over time/client history	Y
Credit report interface	Y
Mobile app	N
Security - customizable by field	N
Security - customizable by user	N
Security - customizable by location	Y

HOUSING ACTION ILLINOIS

is a statewide coalition formed to protect and expand the availability of quality, affordable housing throughout Illinois.

NEIGHBORHOOD HOUSING SERVICES OF CHICAGO

creates opportunities for people to live in affordable homes, improve their lives, and strengthen their neighborhoods.

11 East Adams Street, Suite 1601
Chicago, IL 60603
(312) 939 - 6074
housingactionil.org

Housing Action Illinois

A stronger Illinois begins at home