



Instructions for Signing-up for a One-on-One Counseling Appointment

- 1) Sign-in to your online portal account using your username and password.
 - If you don't have an account & custom profile, please refer to the account & custom profile creation directions
 - In-order to sign-up for an appointment you must have an account & a custom profile
 - Prior to your appointment you must:
 - i. Attended a homebuyer workshop in the past 12 months
 - ii. Uploaded the required list of documents
- 2) Once signed in click on the training center tab on the top of the page

Dashboard Services My Profile My Documents **Training Center** Contact Us Resources

- 3) Click on the register button located in the Home Buyer Counseling box

A screenshot of a web interface for "Home Buyer Counseling". On the left is a calendar icon with the number "1". To its right is the heading "Home Buyer Counseling". Below the heading is a paragraph: "Our certified counselors work with you one-on-one offering guidance to help you assess credit, shop for a home, and pre-qualify for a mortgage. Together you will create an action plan and lay the road map for your home purchase." On the far right of this box is a blue button with the word "Register" in white text. The button is circled in red.

- 4) A new window will open in this window and in the new window please select the location of your appointment

A screenshot of an appointment booking interface. At the top is a blue button labeled "Locations". Below it is a search bar with the placeholder text "Find Location", a blue "Find" button, and a dropdown menu set to "25 miles". Below the search bar is a map area. To the left of the map, there are two text labels with red arrows pointing to the map: "HomeOwnership Center" and "Zoom Call Virtual one-on-one counseling using the Zoom platform." The map itself is a light gray rectangle with a blue location pin icon in the center. At the bottom left of the map area is a small "SSL Secure" icon. At the bottom center is the "Google" logo. At the bottom right is the text "Appointment booking by: setsto".

5) Once a location is selected click on the schedule box in the lower left-hand corner to continue

The screenshot shows a web interface for finding a location. At the top, there is a search bar with the text "Find Location", a blue "Find" button, and a dropdown menu set to "25 miles". Below the search bar, on the left, is a blue header "HomeOwnership Center" and a section titled "Zoom Call" with the text "Virtual one-on-one counseling using the Zoom platform." The main area is a map with a location pin. A white information box above the pin displays "HomeOwnership Center" and "710 Fifth Avenue, Suite 1000, Pittsburgh, Pennsylvania 152". In the bottom right corner of the map area, a blue "Schedule" button is circled in red. At the bottom of the page, there is an "SSL Secure" icon and the text "Appointment booking by: setste".

6) Select a provider (a provider is one of your counselors) *selecting "Any Available" provides the most comprehensive list of available appointments

The screenshot shows the "Select a Service Provider" interface. At the top, there are two tabs: "Locations" and "Providers", with "Providers" being the active tab. Below the tabs is the heading "Select a Service Provider". There are four provider options, each with a gray silhouette icon, a name, a title, and a unique ID. Red arrows point to the "Any available" option and the names of the three individual providers. The "Any available" option has the text "The provider will be automatically selected for you" below it. The individual providers are Jonathan Newell (Housing and Financial Counselor), George Burgardt (Homebuyer and Financial Coach), and Regina MacDowell (Homebuyer and Financial Coach). At the bottom of the page, there is an "SSL Secure" icon and the text "Appointment booking by: sets".

Provider	Title	ID
Any available	The provider will be automatically selected for you	
Jonathan Newell	Housing and Financial Counselor	0052M000009UaNsQAK
George Burgardt	Homebuyer and Financial Coach	0052M00000969UbQAI
Regina MacDowell	Homebuyer and Financial Coach	0052M00000969UHQAY

7) Once a provider is selected you will be prompted to pick a date and time to choose for your appointment

Locations

Providers

Schedule

Select the day and time for your appointment

< November 2019 >

SU	MO	TU	WE	TH	FR	SA
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

View [weekly](#) schedule.

Friday November 1, 2019

AM

PM

10:30 am

3:00 pm

All times are in EDT (GMT-04:00), [click to change](#).

Appointment booking by: [sets](#)

Select Date

Select Time

8) You will receive a confirmation email once your appointment is scheduled

If you have any additional questions, please contact us at info@neighborworkswpa.org