



Instructions for NeighborWorks Western Pennsylvania Online Portal

Initial Sign-up & Account Creation

- 1) Navigate to NeighborWorks Western Pennsylvania's online portal page by clicking the following link <https://nwwpa.force.com/nwwpacft> or by typing the link in the address bar of your browser



- 2) Click on the Sign Up Now button on the home screen.



Training Center

Contact Us

Resources

Sign In

English ▼



- 3) Select type of service by clicking on the corresponding drop-down menus
 - Customers interested in Homeownership services should click on Homeownership
 - Customers interested in Financial Wellness Services should click on Financial Wellness



Tell us more about what services you're interested in

For us to help you, we need to know which of the services that we offer that you would like to know more about. Please read the descriptions of the programs and services we offer below, and then select the ones you're interested in and then we can get started crafting a custom plan just for you!

▼ Homeownership

We work to help you reach your goals and dreams of owning a home through our counseling and education services.

▼ Financial Wellness

We work to help reach your financial goals through education and counseling services.

☐ I agree to the [Consent to Receive Documents Electronically](#)

Continue

Already have an account? [Sign In](#)

Homeownership Customers

Go to Step 4

Financial Wellness Customers

Go to Step 9

Homeownership Customers

4) Choose one of the two check box options

- Customers that have not taken a homebuyer workshop with NeighborWorks Western Pennsylvania in the past 12 months should select the first check box
- Customers who have attended a workshop with NeighborWorks Western Pennsylvania in the past 12 months and would like to schedule their follow-on one-on-one counseling sessions should select the second check box

The screenshot shows a web form titled "Homeownership" with a sub-header: "We work to help you reach your goals and dreams of owning a home through our counseling and education services."

Step 4 is indicated by a red circle around the first checkbox and a green circle around the second checkbox. The first checkbox is labeled: "I am Interested In learning more about Homeownership and I have not attended a Homeownership workshop within the last 12 months." The second checkbox is labeled: "I am Interested In working one-on-one with a counselor in preparation for homeownership and I have attended a Homebuyer workshop within the past year."

Step 5 is indicated by a blue box labeled "Step 5" pointing to a dropdown menu titled "What is the primary area in which you are looking to purchase a home? *". The dropdown menu shows "--Select One--".

Step 6 is indicated by an orange box labeled "Step 6" pointing to a section titled "What other areas are you interested in?". This section includes instructions: "Please click on one or more of the locations listed in 'Available Areas' to move it to the 'Selected Areas' column; to remove a selection from the 'Selected Areas' column, simply click on that selection to move it back to 'Available Areas'." Below the instructions are two columns: "Available Areas" and "Selected Areas". The "Available Areas" column contains: "City of Pittsburgh", "Allegheny County", "Other Counties in PA", and "Outside Pennsylvania". The "Selected Areas" column is empty.

- ### 5) Select primary area in which you are interested in purchasing a home
- ### 6) Select secondary area (s) in which you are interested in purchasing a home
- ### 7) Click on the checkbox to agree to the Consent to Receive Documents Electronically

The screenshot shows a checkbox labeled "I agree to the [Consent to Receive Documents Electronically](#)". A red circle is drawn around the checkbox, indicating step 7.

8) Click on the continue button

Please skip to Step 12

Financial Wellness Customers

- 9) Select the Financial Wellness Checkbox

▼ **Financial Wellness**

We work to help reach your financial goals through education and counseling services.

☐ I would like to improve my finances and improve my knowledge about a range of financial topics such as: spending plans, budgets, credit, or student loans. Our Financial Wellness program includes one financial workshop and two one-on-one sessions with our expert counselors.

- 10) Click on the checkbox to agree to the Consent to Receive Documents Electronically

☐ I agree to the [Consent to Receive Documents Electronically](#)

- 11) Click on the continue button

- 12) A new page will open and once it opens fill in all fields and click the create account button

Create Your Free Account

First Name *

Last Name *

Email Address *

Confirm Email Address *

Phone Number

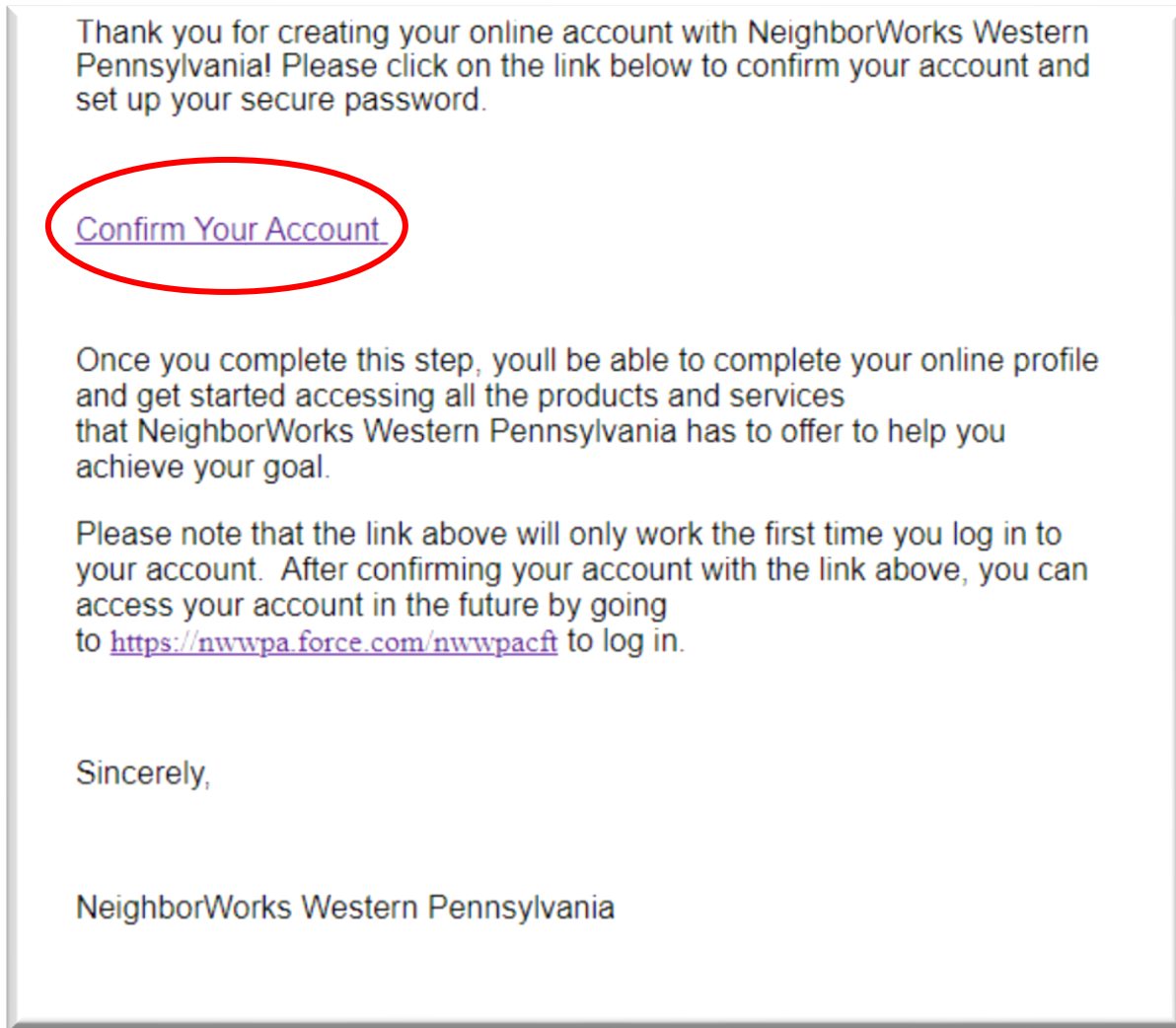
How did you hear about us? *

--Select One--

Create Account

Already have an account? [Sign In](#)

- 13) A confirmation email will now be sent to email address provided
- 14) Once the email is received open it and click on the link confirm your account

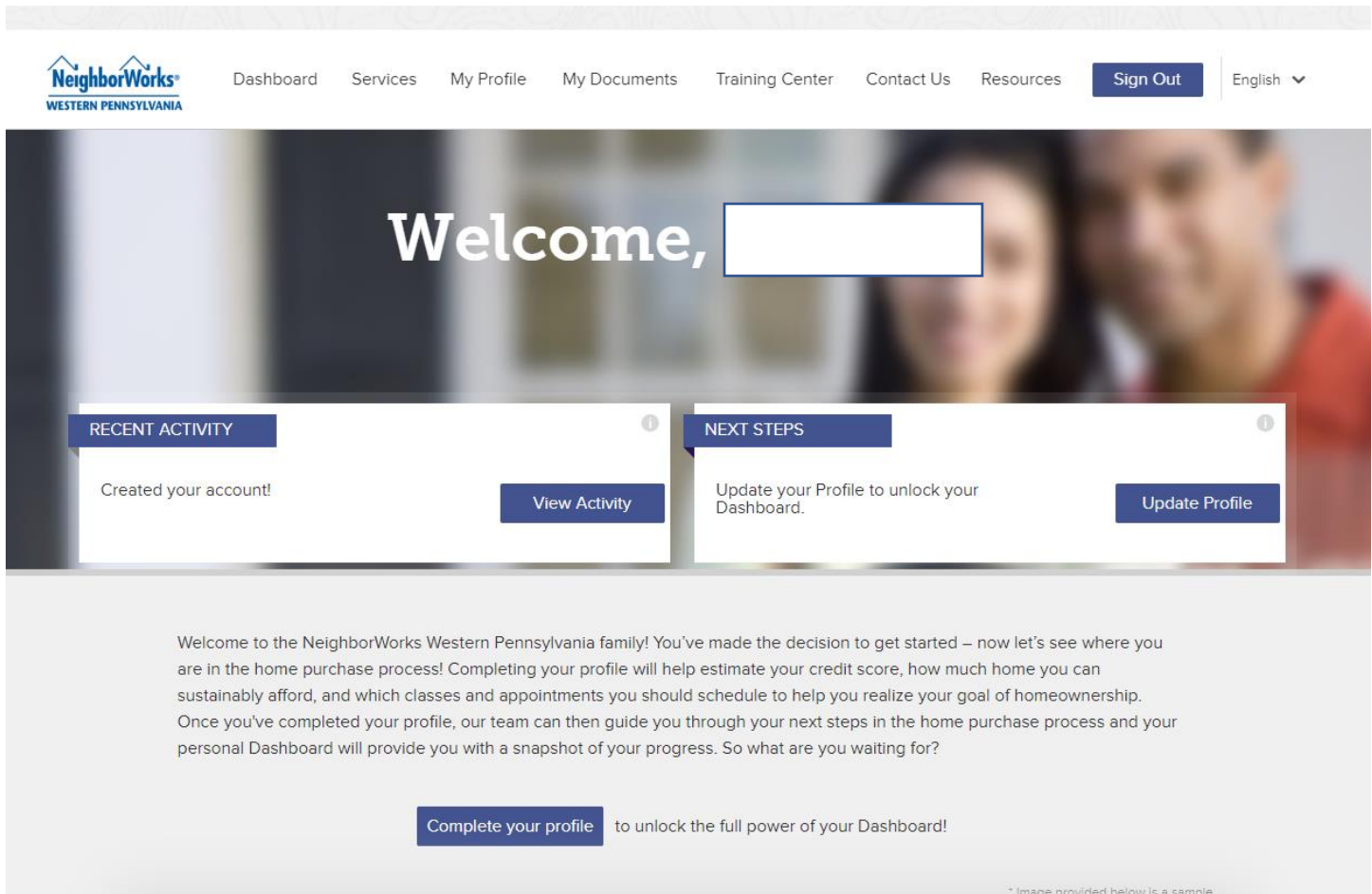


- 15) A new page will open to set a new password and account confirmation

Set your password
Your password must be at least 8 characters long and have a mix of letters, numbers and at least one of these special characters: !#\$%-_+=<>

New Password	<input type="password"/>
Verify your new password	<input type="password"/>

16) Your account is now confirmed, and your new dashboard page will open



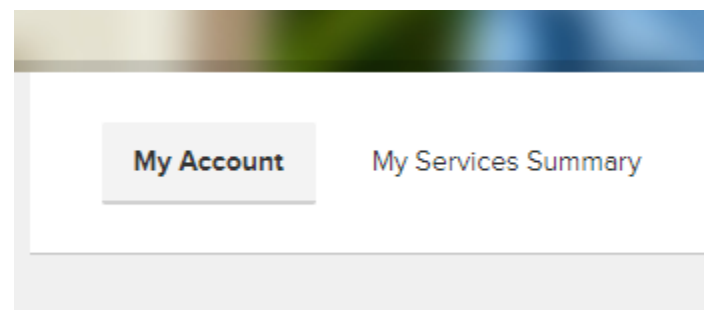
Custom Profile Creation

Custom Profile Overview

Once your account is created the next step is to create your custom profile. A custom profile is made up of two components

- 1) My Account component: same for all services
- 2) My Services Summary component: based on which service utilized

Your new profile will be customized for you and will provide a financial snapshot as well as other information that is based of the information provided when you complete your profile.



Instructions for Completing Custom Profile

My Account

- 1) Fill in remaining fields (some fields should be pre-filled) and field marked with a red asterisk are required, but you are encouraged to complete all fields.

My Account

First Name *

Last Name *

Suffix
--Select One--

Email Address *

Phone Number *

Preferred Phone Type *
Work / Trabajo

Additional Phone

Additional Phone Type
--Select One--

My Address

Street Address *

Apt #

City *
Pittsburgh

State/Province *
Pennsylvania, PA

Postal Code *

Do you require language or other special needs assistance? If so, please specify language interpretation needs.

How would you like to be contacted? *
Email / Correo electrónico

Best time to call?
--Select One--

How did you hear about us?

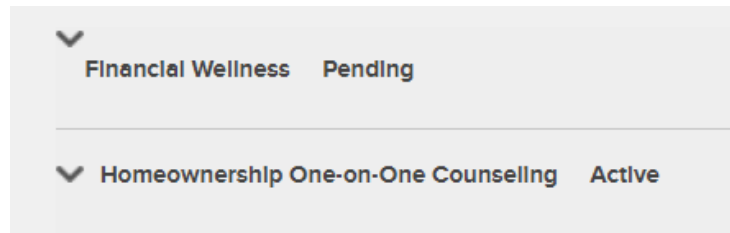
Please specify

- 2) Once all fields are complete click on the Save & Continue Box

Save & Continue >

My Services Summary

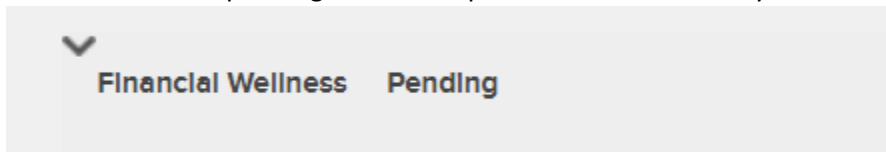
Under the “My Services Summary” it is possible to have more than one service listed. Prior to completing each service summary, they will be listed as “pending.” Once they are completed, they will be switched to “active.”



There are three possible “My Services Summary” options to choose from

- In-person Homebuyer Workshop My Services Summary – for customers that intend to take an in-person homebuyer workshop.
- Homeownership One-on-One Counseling My Services Summary – for customers that have already attended a homebuyer workshop and want to attend one-on-one counseling services.
- Financial Wellness My Services Summary – for customers that want to utilize financial wellness services.

1) Click on the corresponding service to open the service summary



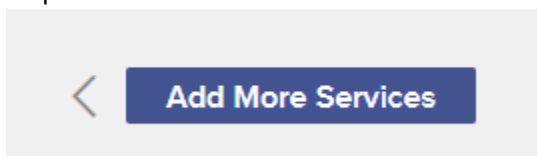
2) Complete all fields

- Help text is available in the small yellow symbol located at the top left of each field.
- Co-Applicant – a co-applicant is an individual that attending / participating in that service with you. They should be a member of your same household.
- Credit score – If you do not know your credit scores you can use the following credit estimator tool <https://www.myfico.com/free-credit-score-range-estimator/> (you are not required to know your credit score or obtain a new copy of your credit report)

3) Once all fields are complete click on the save section box.



4) Repeat steps for all services for which you are interested. You can come back to this page at any time to add more services (by clicking on the “Add More Services” button or complete another section by repeating the above steps.



Your Custom profile is now complete.