End-to-End (E2E) Payments & Reminders

May 19, 2023
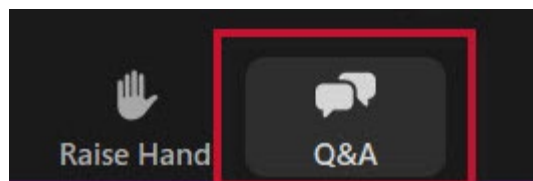
WELCOME

ENGAGEMENT BEST PRACTICES
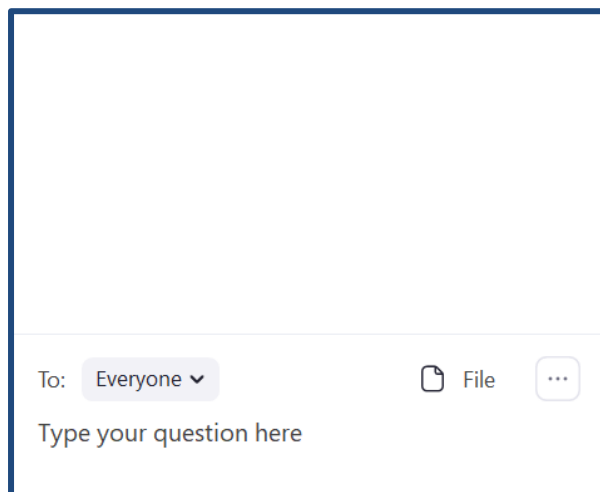
Asking Questions

We will be monitoring the Q&A for questions

1 Click "Q&A" to submit a question (or "Raise Hand" to share a verbal question at designated breaks)

2 Enter your question into the "Q&A" box

We will follow up with answers to any questions that we don't get to during the session

THIS CALL IS BEING RECORDED

AGENDA

- **E2E Payments**
  - Splitting Cases
  - Common Payment Error Pop-ups / solutions
  - E2E Duplicate Check
  - Other payment reminders
- **Q&A**
- **RAA Support & Resources**

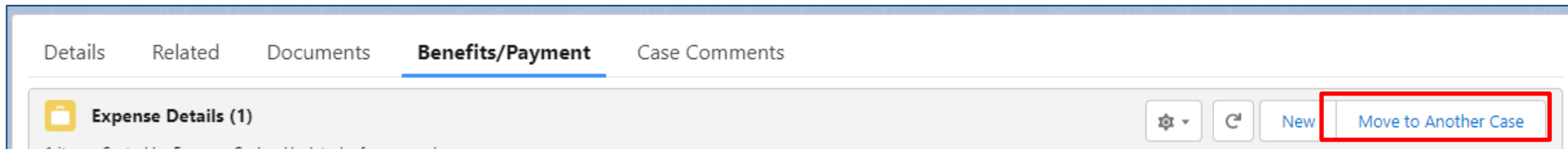# E2E Payments

Splitting Cases in E2E

- RAFT cases are submitted with a variety of expense types, paid to landlords (*FMR, SEC, STP etc.*) and vendors (*UTL, FUR, MOV etc.*)

- Cases should be worked and sent to a Reviewer for approval once documentation and information for **all payments** has been collected

- The system works best and allows the smallest room for error when all payments associated with the RAFT case are approved on the same day
  - This will create one payment disbursement notice, and to send payments over to Happy all at once

Payments (4)			
Payment ID	**Payment Reason**	**Actual Amount**	**Status**
P-313334	SEC	$2,400.00	Verified By Worker
P-313335	FMR	$489.00	Verified By Worker
P-313336	MOV	$1,955.00	Verified By Worker
P-313337	FUR	$468.99	Verified By Worker

Splitting Cases in E2E

- If an applicant's housing or utilities are in *immediate jeopardy*, and the payment that would solve that crisis is ready to be approved, but the others are not, the case can be split

- Split the case by using the 'Move to Another Case' button in the Expense Details section under Benefits/Payment
  - Step should be performed at the Case Manager step
  - This will create a child case, associated with the parent (original case)
  - Whenever possible, send the vendor expense to another case (rather than the LL expense)

- Risks associated with case splitting
  - May create multiple households in Happy (if tenant key is not handled appropriately)
  - May cause failed payments
  - Makes benefit calculation more complicated (will have to review multiple cases in the future)
  - Skews reporting if one incoming case has multiple outcomes
- Example: when to split a case
  - An applicant needs to move in tomorrow, needs checks in hand to give to LL, and the furniture invoice is the only thing holding up approval
    - Split the FUR expense to a new app
- Example: when not to split a case
  - An applicant applied for utility and rent arrearage, you have everything for the UTL but still waiting for one document from the LL
    - If the client's UTL is not in jeopardy of immediate shut off, do not split the case
    - Wait for the LL doc and approve all together

E2E Duplicate Contacts

- In addition to Happy duplicates, you may be presented with Duplicate Contacts in E2E
  - Happy duplicate check only includes households and payments that were manually entered in Happy (not E2E payments)
- DHCD is working to rid the system of E2E duplicate contacts, but in the meantime, each duplicate must be reviewed to determine if there are any payments that should count toward the total benefit

Potential Duplicate Records

View Duplicates

To merge duplicates, choose up to 3 contacts. Then click Next and choose the fields to keep.

∨ Contacts (3)

−	Name	Birthdate	Gender.	SSN/TIN	Phone	Email	Other Street	Other Zip/Postal Code
✔	Tara C	977	Female	012	(508)	✉ ⟩yahoo.com		
☐	Tara C	977	Female	012	(508)	✉ @yahoo.com		
☐	Tara C	'977	Female	012	(508)	✉ @yahoo.com		

E2E Duplicate Contacts

- If there are duplicate E2E contacts, click into each contact, review the related cases and associated payments

- If payments have been sent over to Happy, use the Tenant Key from that Contact Card

Editing Program / Increment

- If your RAA has access to additional ERAP funding, and the case has been found ERAP eligible, the Happy Program/Increment must be changed prior to being sent to Happy
- Changes made after the payments are sent to Happy will not fix the actual payments
- Do not edit the actual individual payments, only change on the Details section shown below
- All cases will still show as 'RAFT'

Details	Related	Documents	Benefits/Payment	Case Comments

∨ Case Header

Case Number	00077801	Applicant Type	Tenant
Potential Case Owner	Awaiting Assignment	Geographic RAA	MHB
Living situation ⓘ	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Utilities/Miscellaneous Case	✔
Has Moving Expenses		Did TT add an advocate?	
RAA Phone	(617) 425-6700	Is Converted LOI	☐
RAA Email	resourceline@MetroHousingBoston.org	LOI Case # ⓘ	
Stop Payment Notifications	☐	Escalated	☐
Docs/Info Due Date	5/12/2023	HAPPY Program	RAFT
		HAPPY Increment	Standard RAFT

Unable to Generate Payments

Error	Solution
All Documents must be marked approved or not required	Review documents in all related cases (including LL cases)
Chaser or Case Manager status denied	Review chaser/CM status on all related cases (need to look at drop down below status tracker)
Landlord contact verification status should be 'Verified by Automated Service – Green/Yellow' or 'Verified by Worker'	Review Verification Status in the system information on the payee's contact card
Payment Method must be marked 'Verified by Worker'	Payment Method failed GIACT, get voided check and verify if appropriate
Payments cannot be generated until the Happy Program and Increment are selected	Enter Happy Program / Increment in the details section on the tenant case
Missing info (amounts verified)	Put $0 verified in blank fields

- Payment Reason → Payment Type
  - Ensure that the Payment Reason is accurate prior to moving the case to 'Ready for Payment'

Payments (4)		
Payment ID	**Payment Reason**	**Actual Amount**
P-317443	FMR	$210.87
P-317444	MOV	$950.00
P-317445	FUR	$1,744.99
P-317446	FUR	$827.95

- Payment Date
  - Will determine the date sent to Happy, and will not be available in Happy for payment until the following business day
    - Not applicable for Stipends, those are to send 5 days prior to the first of the month
  - Example – if you want to make the 6/1 check run, do not schedule for 6/1
  - Best practice – leave with date that was created or use approval date
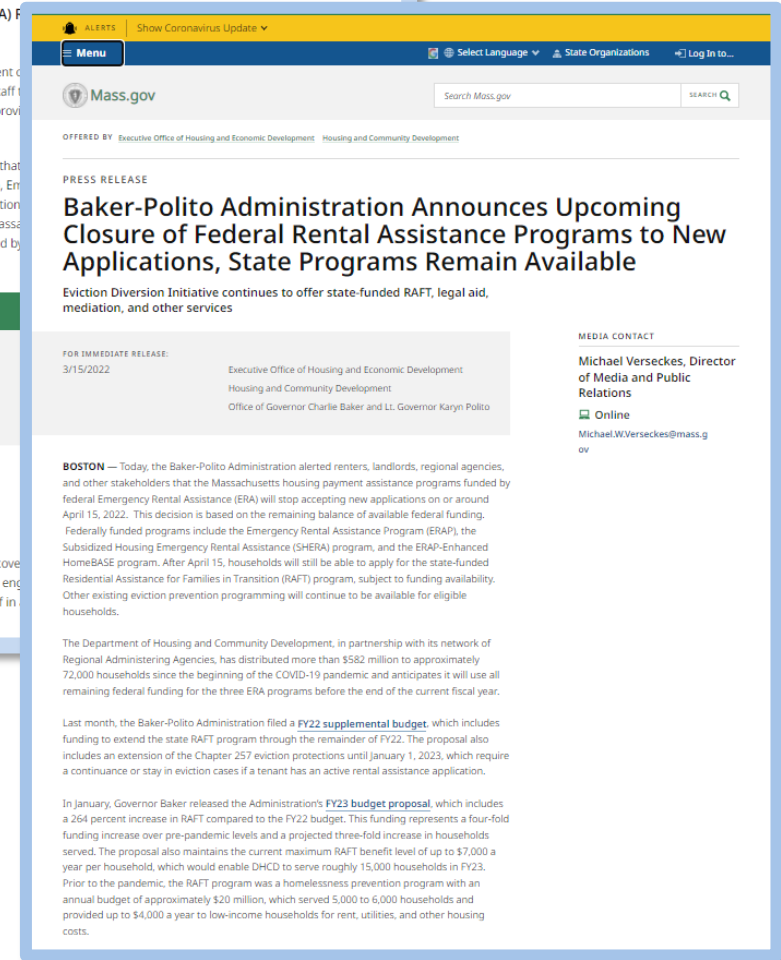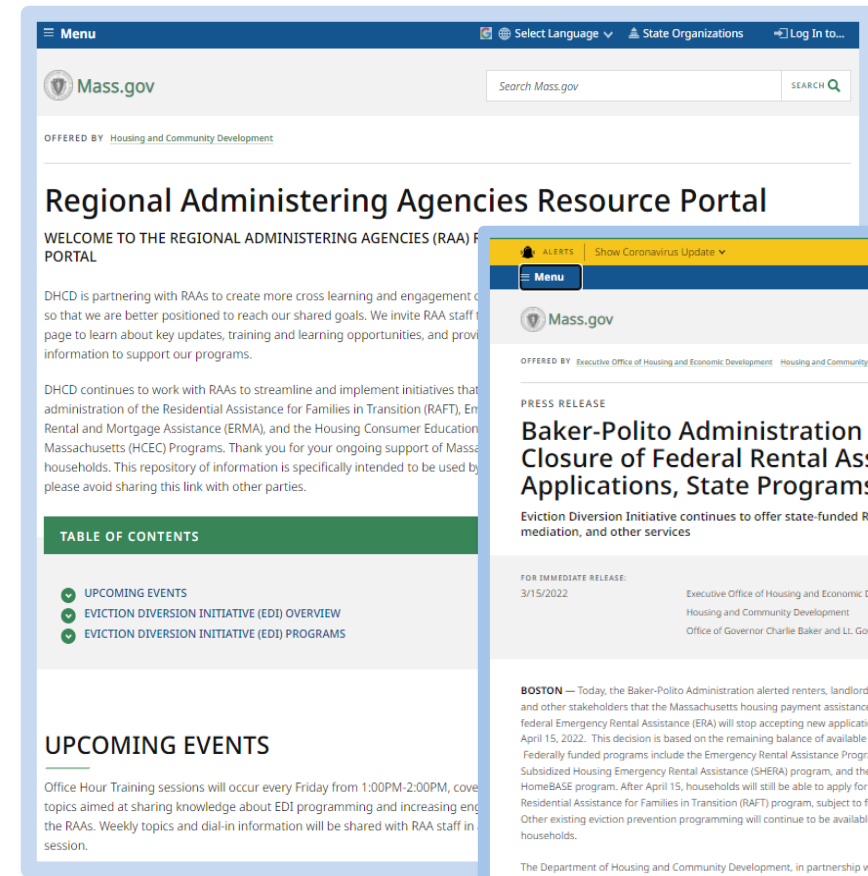
QUESTIONS

RAA SUPPORT

RESOURCES

1

RAA Resource Portal

Central resource to provide RAA staff with key updates, training and learning opportunities, and helpful information to support programs

2

Frequently Asked Questions (FAQs) that provide additional, concise program guidance.

Further Questions

Direct questions to your supervisor and then contact the RAA support inbox (dhcdraaraft@mass.gov) as a point of escalations for questions. A member of the RAA Support Team will respond.

- *Time-sensitive Questions*: Critical questions that require responses within 24hrs should be submitted with a subject line that includes "**URGENT**."

Best Practice

Please **specify the program** that you are reaching out about to ensure that the DHCD RAA Support team is best positioned to provide policy guidance.

THANK YOU!