End-to-End (E2E) Overview & Q&A

December 16, 2022
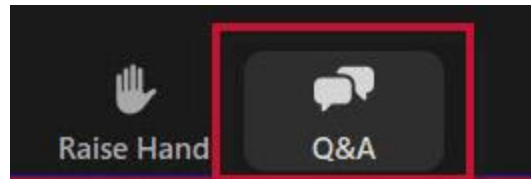
WELCOME

Asking Questions
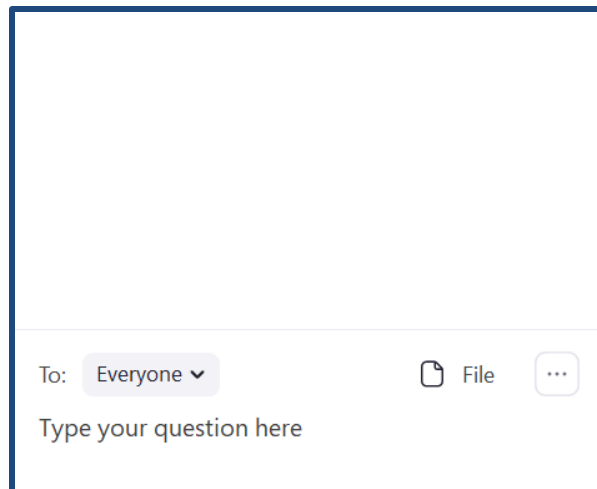
We will be monitoring the Q&A for questions

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

DRAFT FOR POLICY AND PROGRAM DEVELOPMENT

Purpose

Provide an overview and cover updates related to **End-to-End (E2E) Case Management System for RAFT** that went live across the state on December 12, 2022.

Goal

Provide RAA staff with **guidance and support** related to **system launch** and upcoming **RAA staff trainings** on the new system.

- Poll Activity

- End-to-End (E2E) System Overview

  – E2E System Benefits

  – Time Outs

  – Letter of Intent (LOI)

  – Paper Applications

  – IT Updates

- Questions

- RAA Support & Resources

How to Participate

1. Go to **Menti.com** on your smartphone or computer browser.
2. Enter the code **3614 6450** into the field shown to the right

END-TO-END (E2E) SYSTEM BENEFITS

As part of our work for continuous improvement, DHCD has implemented a new intake and case processing system for the RAFT and HomeBASE programs that has replaced the current Central Application Portal.

The new End-to-End (E2E) system provides tenants, advocates, and landlords (LLs) with a log in experience that will have numerous benefits including:

1) Save and resume functions for applications initiated by any party
2) Less document filing and looking in multiple locations for information about one application
3) Less manual data entry, especially into HAPPY, and less scanning of documents to upload to the case
4) RAA staff will spend less time chasing tenants and LLs for initial documents
5) The ability for all parties to check application and payment status for applications
6) The ability for landlords/property managers to upload their W-9 and payment information into a profile for re-use across multiple properties/applications

DRAFT FOR POLICY AND PROGRAM DEVELOPMENT

- On November 14th, the new online E2E application replaced the former RAFT Central Application in pilot regions

    - Way Finders – Greater Springfield area

    - Housing Assistance Corporation – Cape Cod and the Islands

- The full RAA E2E launch happened this Monday, December 12th

- As a reminder, tenants who have already submitted applications through the old system will have their applications processed in Central App and will be routed to the Central App Portal for any needed document uploads

Massachusetts Emergency Housing Payment Assistance Portal

Tenant Portal — Tenants, Advocates, RAA staff, EA Diversion Workers and Shelter Workers can submit, edit, and track applications.

Landlord Portal — Landlords and Property Managers create profiles, payment preferences and submit, edit, and track applications.

Staff Portal — Staff can view and process applications.

With the new save and resume feature, applicants (tenants and/or LLs) have 21 days to submit an application.

Once both the tenant and LL applications are submitted & matched, RAAs begin processing…

- RAA "Chasers" review submitted applications and mark documents as accepted, rejected or missing. If there are rejected or missing documents the Chaser puts the application back in Draft status triggering a system notification to the tenant and/or LL to upload and resubmit revisions within 14 days

- RAA "Chasers" will also review other information. and if anything needs to be clarified they use an E2E system template to manually send an email notification to the applicant requesting the specific needed information and again put the application back in Draft status for the tenant and/or LL to respond within 14 days

- If the draft case is not re-submitted by the applicant within 14 days, the application will ***time out***, and the system sends a timeout email notification to the applicant and marks the application as timed-out

- If the tenant or LL submit missing items within the 14 days, the case routes back to an RAA "Chaser"

- Should the re-submitted application still be missing any items and time remains on the 14-day clock, the Chaser can use an E2E template to manually send an email notification to the applicant indicating what is still missing In this instance the Chaser keeps the case and sets themselves a task reminder to look for the applicant's action prior to the end of the clock after which they would take action to time out the case.

- The new E2E system introduces a new feature and process change called *Letter of Intent (LOI)*

- Now, a tenant can be found eligible before they locate a unit and will be given a *LOI* to provide to landlords when searching for a unit
  - This does not mean that tenants have been approved for funds. Rather, it confirms their eligibility for potential funding.

- Tenants will have 60 days to locate a unit and can request an additional 30-day extension via the E2E system.

- When the tenant locates a unit, the landlord will need to complete the landlord application. Tenant eligibility does not have to be re-assessed.
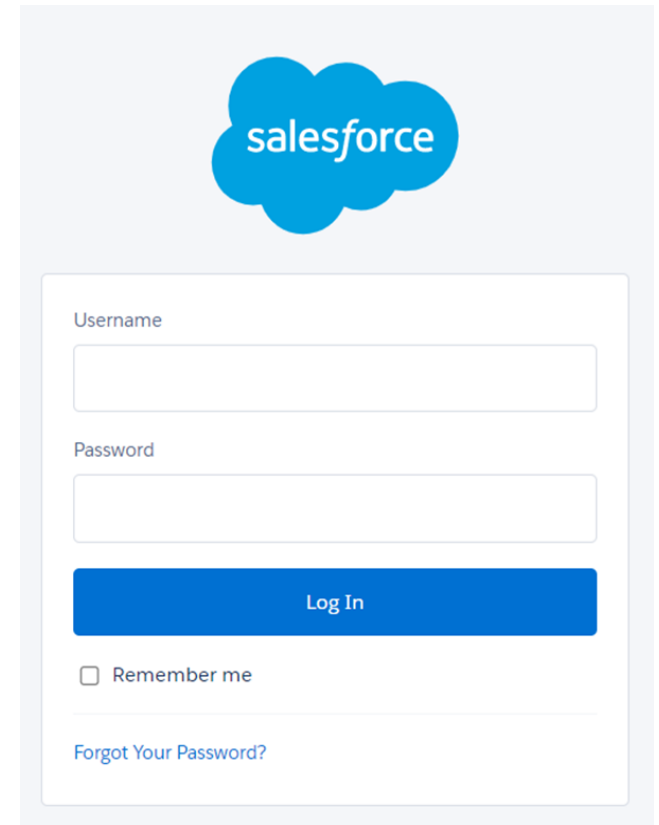
- The new E2E system requires e-mail addresses for applicants, which includes both tenants and LLs
- Whenever possible, RAAs should encourage all applicants to create e-mail addresses and assist with set up if necessary.
- Paper versions of the tenant and LL applications are on the RAA Resource Portal
    - Paper applications will *not* be publicly available
- In cases where RAAs are acting as an advocate on behalf of the tenant, staff will be responsible for "keying in" all paper applications into the E2E system as "advocates"
- There should be a lead advocate at your RAA who registers first and who can "invite" the remaining team from your RAA to act as delegated advocates, so please don't self register as an advocate until you receive a system invitation
    - Once invited and registered as delegates, you and your team will be able to see/act on all the applications your RAA initiates as advocates in your Portal

LOGGING IN WITH AZURE AD

- Live production (aka PROD) is now in use by all RAAs as of Dec. 12th

- Use your Azure AD log in

- As a reminder, click the "Azure AD Login" button at the bottom of the login screen to test your access works before going to class

  – You may need to follow the prompts to set up MFA (Multi-Factor Authentication) if you have not done this previously when accessing other Commonwealth of MA applications
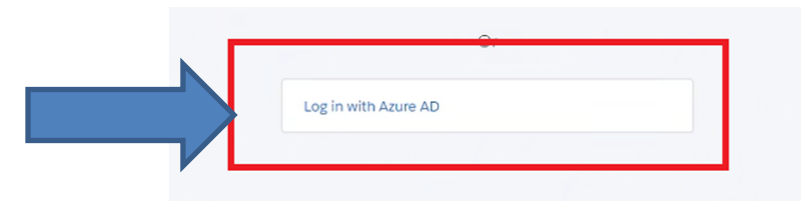
ZENDESK: A NEW TICKETING SYSTEM

- [Zendesk](#) is a new ticketing system that rolled out along with E2E

- Zendesk is being used to track, prioritize, and solve customer support tickets submitted by the RAAs and the RAP Center staff for the RAFT and HomeBASE Programs

- For the applications in E2E, the intent is for this new RAA ticketing system and knowledge base to replace the DHCD Central Inbox, NMA Service Requests, RAA Email Escalations and eventually, the RAA Resource Portal

- These are examples of the tools you can currently find in Zendesk:
    - Staff Portal Case Processing
    - E2E Processing Cheat Sheet
    - RAFT Tenant Cases – Awaiting Match
    - Checking for Duplicates

- **RAA staff only**: Any problems logging into Zendesk? email support@dhcdma.zendesk.com

Important Reminders
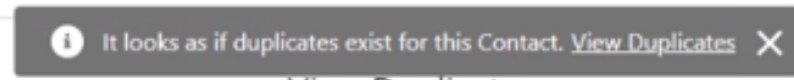
- Tenant Key
  - In order to connect to Happy, staff must review potential duplicates and add the Happy Tenant Key to the contact record if appropriate
    - Only add the Tenant Key if:
      - The Head of Household in E2E is the same as the Head of Household in Happy
        - » Check this by looking at the 'relationship' in the Happy Member details (H)
      - The Social Security Number in E2E and Happy match exactly
  - Copy/paste the Tenant Key into the E2E HOH contact record

- Cloning cases / moving payments to another case
  - This function should be used sparingly, only when it is absolutely necessary. If there is any chance that the other payments will be approved during the same check run, do not split the case.
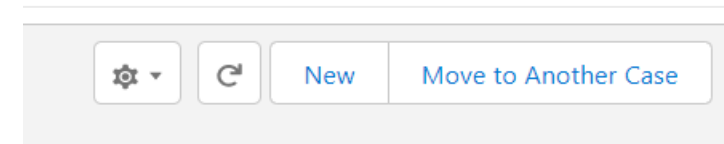
QUESTIONS

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.
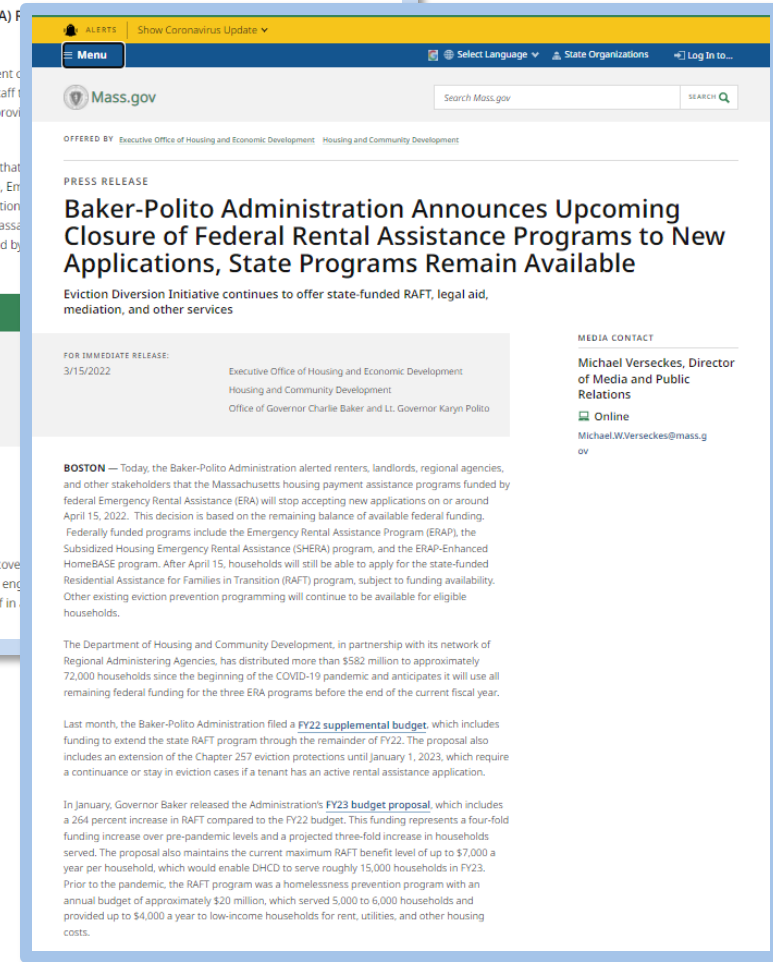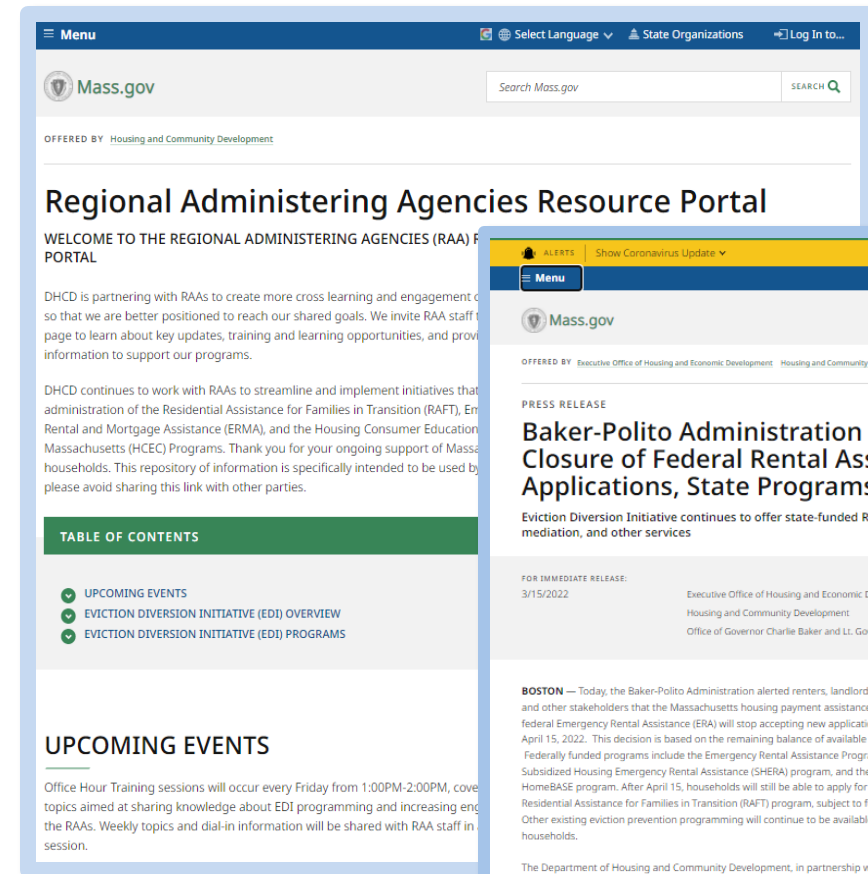
Further Questions

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!

INSTRUCTIONS FOR SETTING UP MULTI-FACTOR AUTHENTICATION (MFA)

1 Clicking on the Azure AD button above will bring you to the following page. Click "Next" to complete the MFA setup.
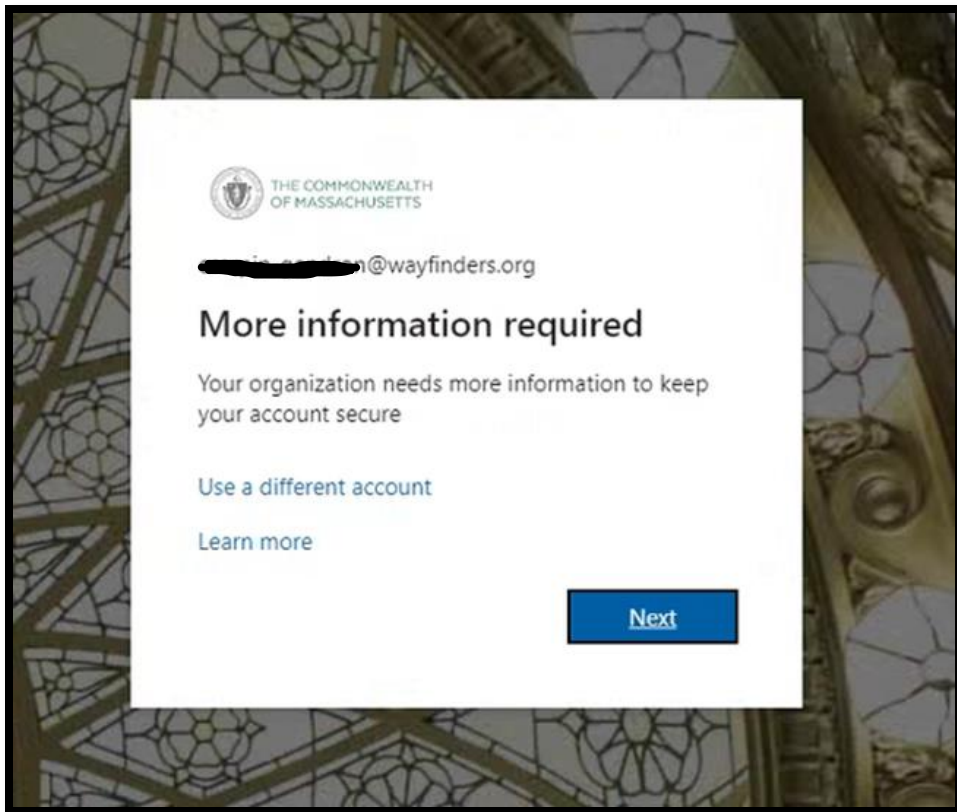
2 Pick one of the options of the verification method and provide phone number. Click "Next" to complete the MFA setup.

3 Enter the Code you have received either via text or phone call. Click "Verify" to complete the MFA setup.

4 Phone verification is completed.
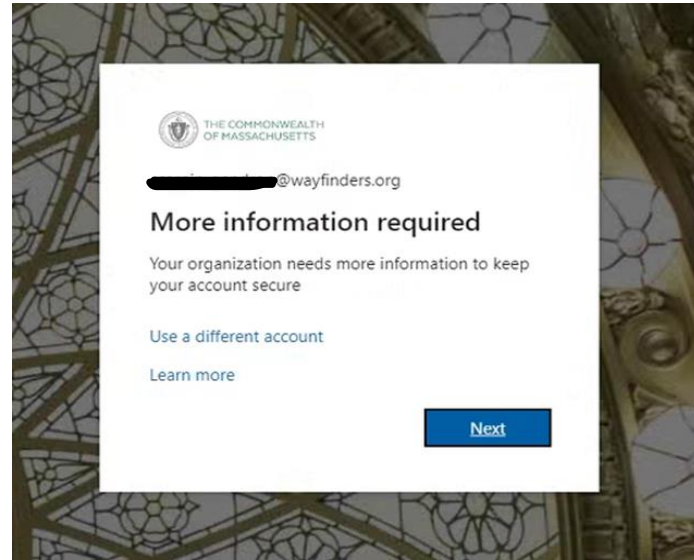
LOG IN TO SALESFORCE WITH AZURE AD

Once the MFA Phone verification steps are complete, you will be able to select "Azure AD" option
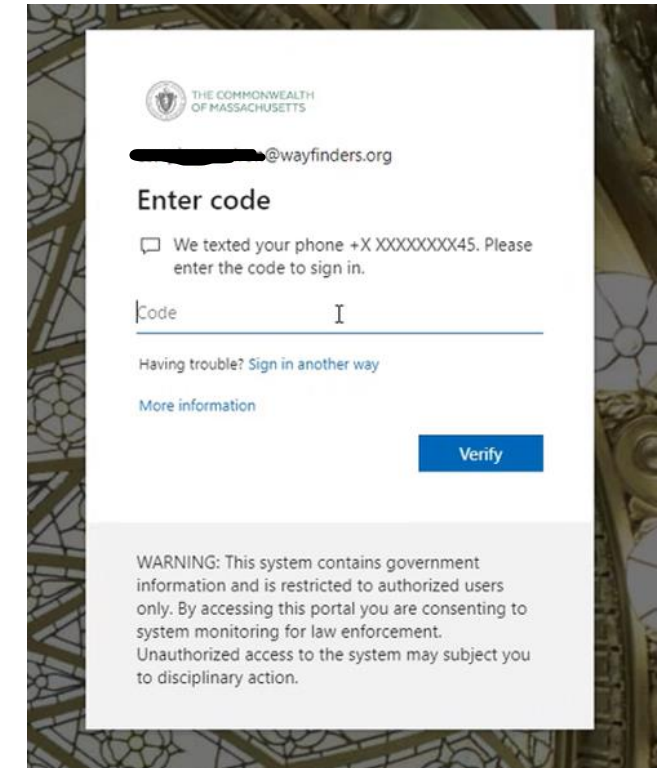
1 Login using Azure AD
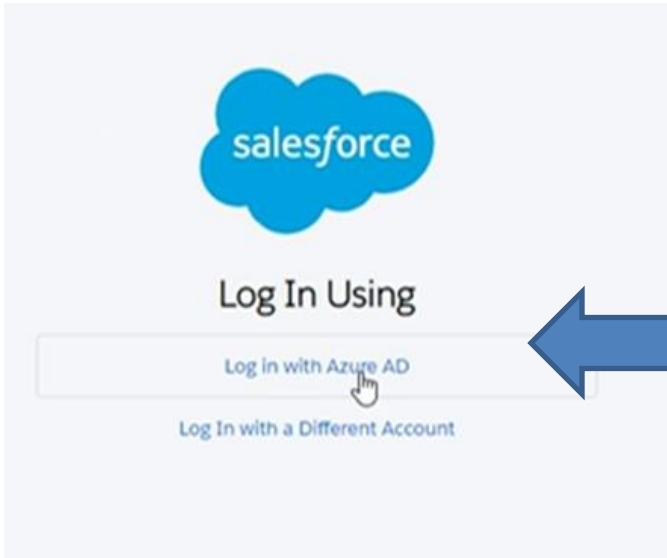
2 Confirm your email address is correct.

3 Verify the code you have received on your phone.

To reduce the frequency that you are asked to sign in you can check the box "Don't Show this again" and select "Yes"