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

January 27, 2023
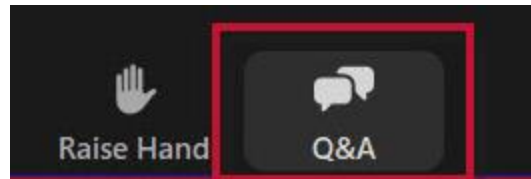
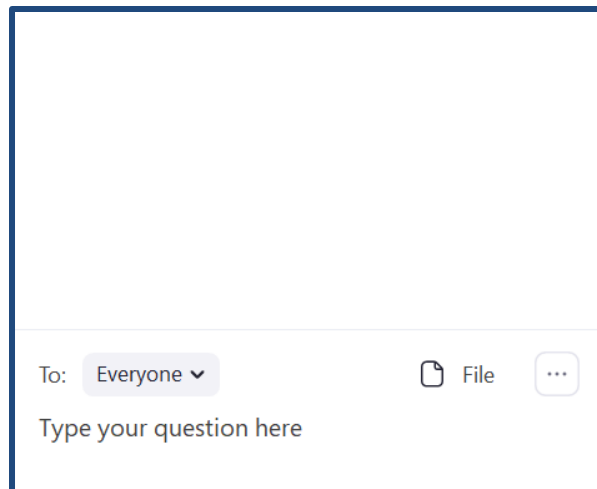# WELCOME

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

THIS CALL IS BEING RECORDED

TRAINING OBJECTIVE

Purpose

Provide reminders related to **End-to-End (E2E) Case Management System for RAFT** and a live Q&A

Goal

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

AGENDA

- Menti Activity

- Landlord (LL)/Property Owner (PO) Support

- Important Reminders

- Recent System Defects & Updates

- Q&A

- RAA Support & Resources

DRAFT FOR POLICY AND PROGRAM DEVELOPMENT

How to Participate

1. Go to **Menti.com** on your smartphone or computer browser.
2. Enter the code **1625 2580** into the field shown to the right

LANDLORD/PROPERTY OWNER SUPPORT
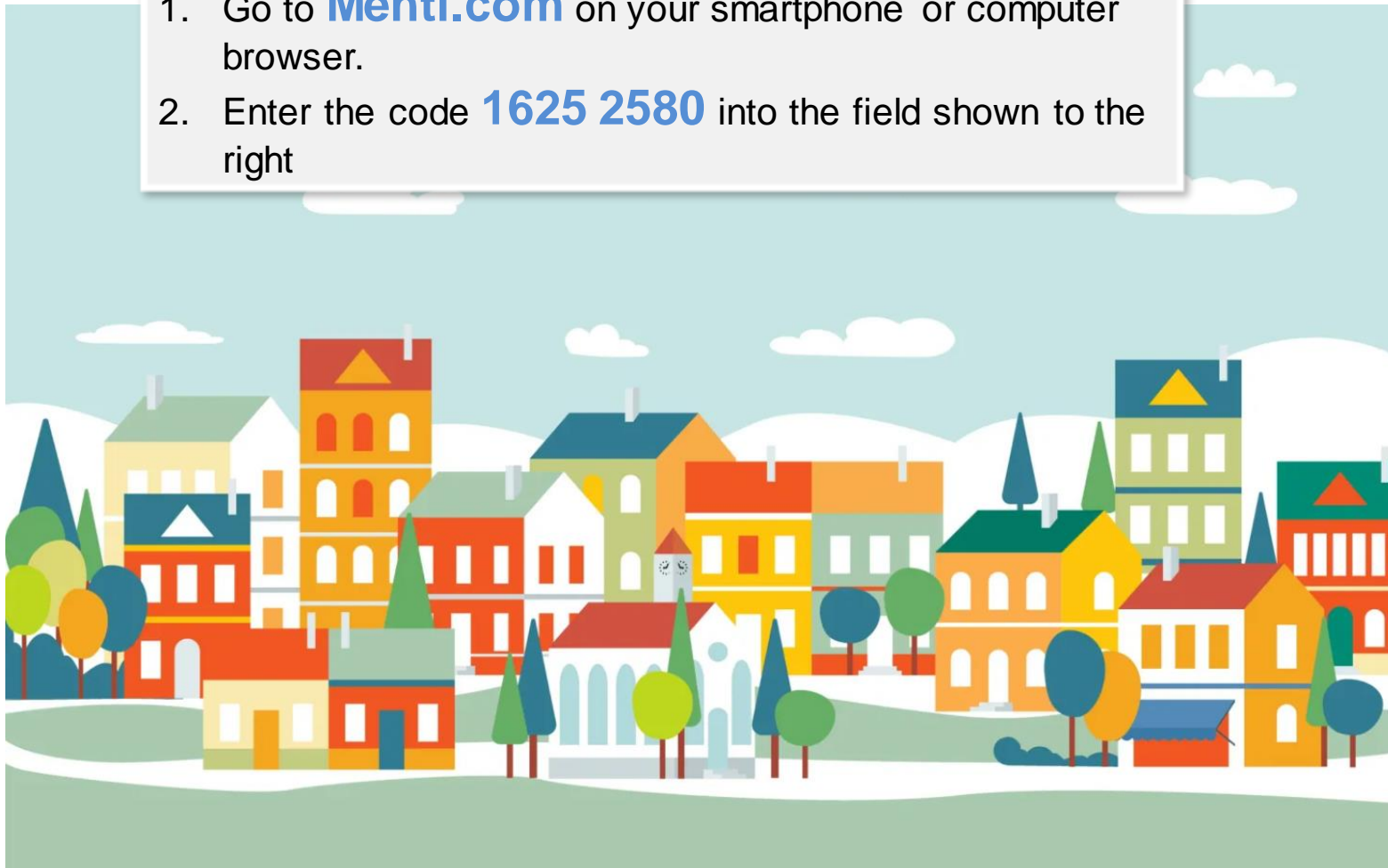
Common LL/Property Manager Issues & Mitigation Tips

- Issue: LL/PM gets stuck mid-application, cannot see Payee or select Property
  - ➤ Fix: Advise LL/PM they must complete the LL/PM Profile **FIRST** before trying to Apply
- Issue: LL/PM registered as a LL or PM when they are opposite
  - ➤ Fix: Business Admins should inactivate the incorrect account, marking the username with an X for DO NOT USE so that LL/PM can re-register correctly
- Issue: LL/PM registered as an Individual or Business when they are opposite
  - ➤ Fix: Business Admins should inactivate the incorrect account, marking the username with an X for DO NOT USE so that LL/PM can re-register correctly
- Issue: LL/PM Name / Tax Information not Verified
  - ➤ Fix: Case Mgrs & Reviewers should use Job Aide: E2E LL Intake Portal - Steps for LL/Prop Mgrs who fail GIACT Verification (TIN Matching) – Department of Housing and Community Development (DHCD) (zendesk.com) and/or refer to: LL_GIACT_Reset_and_Override_20230103_v01.pdf (zendesk.com)

- For Payees/Owners whose Information was unable to be verified by GIACT, RAAs may select "Verified by Worker." DHCD recommends this when:
  1. RAA Case Managers or Reviewers have used IRS TIN Matching application to verify Payee Name and Tax ID match and RAA uploads the screenshot of the IRS TIN Match to E2E
  2. RAA Case Managers or Reviewers have confidence that the IRS EIN Letter supplied by the Landlord / Property Manager is valid for the Payee

- To see LL/PMs Verification Status:
  - [Landlord/Property Managers | Salesforce](#) Report in DHCD Reports Folder

- To support LLs/PMs with creating a LL profile in E2E:
  - [Creating And Setting Up a Landlord Profile In E2E](#)

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

Do Not
- Use Happy Tenant ID
- Use Tenant Key for non H
- Match if SSN is different

- When a case is reviewed and the LL is the one missing documents, it's the LL case that should be moved back to Draft status by the Chaser for LL action
- Cases should _not_ be manually moved by RAA Staff from Draft to Chaser
  - Cases must be Signed and Submitted by Applicants
- Cases should _not_ be manually moved by RAA Staff from App Match to Chaser
  - Both tenant and landlord cases must be Signed and Submitted by Applicants
- Contact Cards should _not_ be created manually by RAA Staff
  - Contact Cards are created as a result of applicant registrations and case submissions
  - The one exception to this is the scenario of adding a household member to a case via the Staff Portal rather than returning the tenant case to Draft – please see the Zendesk job aide on adding a household member via the Staff Portal
- If you find you cannot Generate Payments
  - One item to check is to see if there are multiple LL cases in the Related Tab and if so, please close the extras as Duplicates, then in the Duplicate cases remove the 'Parent Case' reference so it is no longer linked to the Tenant Case

	Issue k	Created	Summary	Fix Version/s	Issue Type
1					
2	DHC-1493	12/12/2022 10:05	Community Login page isn't using Mayflower?	02/16 Fix Version	Defect
3	DHC-1508	12/14/2022 17:27	Case 1790 Happy Duplicate Benefit Check did not flag initially	02/16 Fix Version	Defect
4	DHC-1529	12/20/2022 9:00	Cases 16407 and 17605 Renter Staying in Taunton and Norwood don't reflect Geo or Assigned RAA	02/16 Fix Version	Defect
5	DHC-1560	1/3/2023 8:10	Table is not visible for HomeBASE - View Case Summary	02/16 Fix Version	Defect
6	DHC-1564	1/3/2023 14:22	LOI Cases Not Converting	02/16 Fix Version	Defect
7	DHC-1567	1/4/2023 5:41	Paragraph in View case summary is repeating twice & upload document is not getting translated for Khmer	02/16 Fix Version	Defect
8	DHC-1573	1/4/2023 12:21	LL Account Using Account Name As Owner	02/16 Fix Version	Defect
9	DHC-1576	1/4/2023 13:44	New LL activity on an app previously submitted for payment erroneously brought the app back to chaser	02/16 Fix Version	Defect
10	DHC-1580	1/5/2023 8:57	Chinese, Khmer & Russian Issues in Accessibility Recommendations & Tips Page	02/16 Fix Version	Defect
12	DHC-1590	1/6/2023 11:16	Case 9009 - STP should have been for February, but was created for January	02/16 Fix Version	Defect
13	DHC-1610	1/10/2023 18:30	Tenant is not able to withdraw application in App Match Status	02/16 Fix Version	Defect
14	DHC-1611	1/11/2023 2:25	DataRaptor issue after Rent details screen	02/16 Fix Version	Defect
15	DHC-1613	1/11/2023 7:38	Case 18943 did not get submitted for payment	02/16 Fix Version	Defect
17	DHC-1615	1/11/2023 9:33	Tenants can repeatedly Repeal a case	02/16 Fix Version	Defect
18	DHC-1616	1/11/2023 9:35	Users changing Case Record Type	02/16 Fix Version	Defect
19	DHC-1622	1/11/2023 14:19	HomeBASE Approval Letters not being sent	02/16 Fix Version	Defect
20	DHC-1625	1/11/2023 17:00	Matching should only occur if both the cases are in Application Match status	02/16 Fix Version	Defect
21	DHC-1628	1/12/2023 12:25	ERAPApplicationController : convertCaseContact Insert failed. First exception on row 0	02/16 Fix Version	Defect
22	DHC-1636	1/12/2023 17:21	Appeals Case 47150 doesn't appear associated to Tenant Case 13727	02/16 Fix Version	Defect
23	DHC-1639	1/13/2023 11:37	Skills Backlog contains many spurious entries about Texts Inbound	02/16 Fix Version	Defect
24	DHC-1640	1/13/2023 11:52	Few Tenant Cases submitted with missing LL details even though they were not Utility Only in Prod	02/16 Fix Version	Defect
25	DHC-1642	1/13/2023 15:02	Close Stage Typo	02/16 Fix Version	Defect
26	DHC-1643	1/13/2023 15:06	Closure Stage should not include 'Suspected for Fraud'	02/16 Fix Version	Defect
27	DHC-1645	1/13/2023 16:23	Case sent back to Draft did not time out after 14 days	02/16 Fix Version	Defect
28	DHC-1647	1/17/2023 3:09	8 Issues in HomeBASE and RAFT app intake	02/16 Fix Version	Defect
30	DHC-1649	1/17/2023 12:23	MASSGIS matches	02/16 Fix Version	Defect
31	DHC-1650	1/17/2023 12:46	My Open Cases Filter is incorrect for RAA Workers	02/16 Fix Version	Defect
32	DHC-1651	1/17/2023 12:49	LL Cases not going back to App Match when Tenant Case is sent back to Draft	02/16 Fix Version	Defect
33	DHC-1657	1/18/2023 14:39	Payee Name not showing correctly in payment detail	02/16 Fix Version	Defect
34	DHC-1659	1/19/2023 6:06	Duplicate check is not working in tenant app Intake	02/16 Fix Version	Defect
35	DHC-1661	1/19/2023 8:19	Zip Code is blocking user to move ahead from Prescreening page in Edit functionality	02/16 Fix Version	Defect
36	DHC-1669	1/19/2023 20:24	Application confirmation email not going out to Tenant when LL app code is included	02/16 Fix Version	Defect
37	DHC-1672	1/20/2023 13:20	Do not allow payments to be verified if payment method is empty	02/16 Fix Version	Defect
38	DHC-1673	1/20/2023 13:21	Payment methods in Payment Detail	02/16 Fix Version	Defect
39	DHC-1671	1/20/2023 8:35	LOI Approval Letter email - Approval and Expiration Dates Incorrect	02/16 Fix Version	Defect
40	DHC-1675	1/20/2023 15:16	CM And Reviewers Not able to Manually Verify GIS	02/16 Fix Version	Defect
41	DHC-1679	1/23/2023 9:58	Some Apps where Applicant selects to use their entered Unit Address not getting Geo & Assigned RAA populated	02/16 Fix Version	Defect
42	DHC-1678	1/23/2023 9:54	Restrict case workers from modifying closed cases	02/16 Fix Version	Defect
43	DHC-1685	1/24/2023 8:20	Unable to add expense in tenant app intake	02/16 Fix Version	Defect
44	DHC-1701	1/25/2023 11:44	Payee Not showing in Payment details	02/16 Fix Version	Defect

February 16ᵗʰ Build Plan to date – 41 Defects, 6 Change Requests

DHC-1385	11/18/2022 9:52	Update logic for Application number creation	02/16 Fix Version	Change Request
DHC-1387	11/18/2022 11:41	Provide a button to allow Staff Portal Workers to re-call MH/DTA API	02/16 Fix Version	Change Request
DHC-1475	12/7/2022 17:50	Re Upload Docs Pages - Need Improvement	02/16 Fix Version	Change Request
DHC-1629	1/12/2023 15:33	Label Change on DHC-69 for Utility Document	02/16 Fix Version	Change Request
DHC-1631	1/12/2023 15:48	Label Change in LOI Approval Notice	02/16 Fix Version	Change Request
DHC-1663	1/19/2023 12:06	Landlord Advocate Functionality to allow advocates to submit applications for Landlord	02/16 Fix Version	Change Request

*Also considering enabling the 21-day timeout for Tenant Apps Awaiting Match.
Will seek RAA input in early Feb.
Decision due to Deloitte a week prior to build.

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!