

End-to-End (E2E) Omni Channel & Case Assignments

February 10, 2023

DRAFT FOR POLICY AND PROGRAM DEVELOPMENT

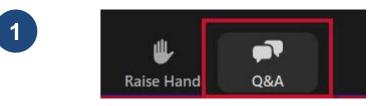


WELCOME



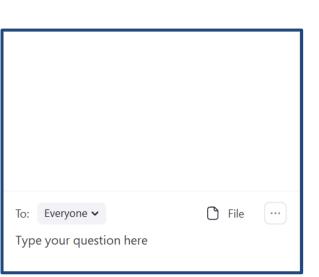
Asking Questions

We will be monitoring the Q&A for questions



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







Purpose



Provide reminders related to End-to-End (E2E) Case Management System for RAFT and review how to manage case assignments.

Goal

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

AGENDA

A DAY OF THE

- Omni Channel Basics
- Dynamic & Manual Assignments
 - Workarounds for Manual Assignments
 - Accepting Assignments in Omni Channel
- Common Mistakes
- Video Tips to Manage Caseloads
- Important Reminders
- Q&A & Best Practices
- RAA Support & Resources

OMNI CHANNEL BASICS



- The Omni Channel is used by staff to receive, accept, and monitor case assignments
- The E2E system uses staff skills as a basis for automatically routing case assignments to appropriate staff
 - The system will route cases to the staff with all needed skills necessary for the case
 - These cases appear in the appropriate staff's Omni Channel
- Once a case reaches the Chaser, Case Manager or Reviewer step and it is ready for assignment/processing, the case will reflect the offered staff member as the "Potential Case Owner" waiting for the staff member to accepts it in Omni Channel
- All staff that are involved in any stage of application processing Chasers, Case Managers, and Reviewers use the Omni Channel and accept their case assignments there
 - Staff should monitor their Omni Channel at least daily
- The system will automatically try to balance the workload
- If all staff members with the needed skills for the case have full buckets, then the case's "Potential Case Owner" will reflect "Awaiting Assignment"

OMNI CHANNEL: DYNAMIC & MANUAL ASSIGNMENTS



Dynamically Assigned Cases (aka Omni Channel)

- Cases that are dynamically assigned via the Omni Channel will stay with the staff person who accepts the case unless:
 - Case status changes (i.e., back to draft or forward to next step)
 - Case is manually reassigned to another case owner (see below, where the case is then not dynamically assigned/considered by Omni Channel)
 - Case is updated to the "Awaiting Assignment" Queue
- Cases that are not accepted by RAA staff are eligible to move to another 'less active' staff person
- These cases will be re-routed to other staff that are "Available" in Omni Channel, have the appropriate skills, and have <100 accepted and offered cases

Manually Assigned Cases

- Manually assigned cases stay with the assigned staff person and are *not* eligible for Dynamic Assignment or considered by Omni Channel until:
 - Case Status changes (i.e., back to draft or forward to next step), or
 - Case Owner is updated to the "Awaiting Assignment" Queue, or
 - Case Owner goes offline*
- These cases are not considered by Omni Channel when the system balances workload among "Available" staff

*There is a current, open defect related to manual assignments not being retained when Case Owners go offline



- "Kickbacks" / Reviewer or Case Manager needs rework by a prior worker
 - Instead of manually reassigning to the prior worker, keep the case in its current chevron status, create and assign a Task to the prior worker to rework as appropriate
 - Once the prior worker completes the task, they'll advise the person who assigned them the task that the rework is done so the case can progress
- Appeals Reviewer
 - Instead of manually reassigning, create and assign a Task to the Appeals Reviewer to perform the case review
 - Once the Appeals Reviewer completes their review work, they would manually assign the case to themselves, make their final case notes, and mark the review accordingly (upholding or overturning the original denial)
- Escalations
 - No workaround at this time, though staff may update the Priority on a case to "Urgent," so it gets fastest assignment offering in Omni Channel
 - DHCD will work towards supporting Escalations in Omni Channel via a new skill definition along with a means for RAA Workers to mark a case as Escalated, likely for use starting 4/14

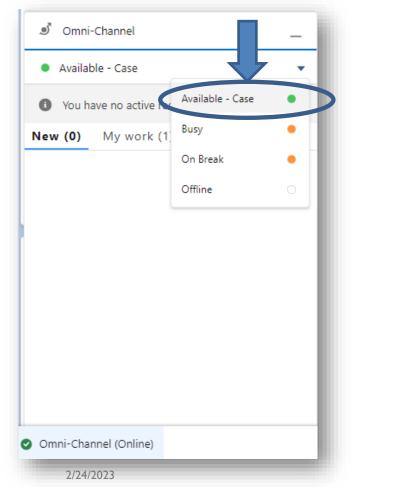


<u>Video tutorial</u> showing a workaround for manual assignments, also available on Zendesk



OMNI CHANNEL: ACCEPTING ASSIGNMENTS

- The second secon
- To receive new application assignments, staff must be logged into Salesforce and select "Available" in the Omni-Channel in the bottom left
- Staff must accept an application assignment via the Omni-Channel automatic routing



Omni-Channel	
Available - Case	
New (1) My work (0)	
00002150 TrainHAC TrainHAClast-jjjj RAFT Application Case Manager 1 m, 2 d 10 h	

I Omni-Channel	_
Available - Case	*
You have no active requests.	×
New (0) My work (1)	
00002150 TrainHAC TrainHAClast-jjjj RAFT Application Case Manager	- And
Omni-Channel (Online)	





Forgetting to open Omni Channel



Forgetting to set status to "Available" in Omni Channel



Failing to accept assigned cases punctually



• Video tutorial showing one way to manage a heavy caseload and how to organize your caseload from oldest to newest



Special thanks to Leah Garcia and NHS!



IMPORTANT REMINDERS

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- Do not change payment status after it has been submitted for Payment Successful --None-payment Not Verified If payments are in 'Submitted for Payment' or 'Payment Successful' Verified By Worker Submitted for Payment status, making changes in E2E will not changes payments in Happy ✓ Payment Successful Refund or Cancelled Payment Recouped \oslash Payments (2) Payment Returned Payment ID Payment Reason Actual Amount Status Payment Failed • P-283068 ARR \$5,400.00 Submitted for Payment Rejected By Worke -P-283069 STP \$900.00 Submitted for Payment Payment Voided View All
- Log out of Happy at the end of the day
 - Not logging out may result in clients being created with wrong programs
- Open Zendesk tickets for new providers
 - New provider form, include the address that the check should be mailed to



RAA SUPPORT

RESOURCES



RAA Resource Portal

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

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

Regional Administering Agencies Resource Portal

WELCOME TO THE REGIONAL ADMINISTERING AGENCIES (RAA) F PORTAL

OFFERED BY Housing and Community Development

DHCD is partnering with RAAs to create more cross learning and engagement so that we are better positioned to reach our shared goals. We invite RAA staff t page to learn about key updates, training and learning opportunities, and provi information to support our programs.

DHCD continues to work with RAAs to streamline and implement initiatives that administration of the Residential Assistance for Families in Transition (RAFT), En Rental and Mortgage Assistance (ERMA), and the Housing Consumer Education Massachusetts (HCEC) Programs. Thank you for your ongoing support of Massa households. This repository of information is specifically intended to be used by please avoid sharing this link with other parties.

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UPCOMING EVENTS

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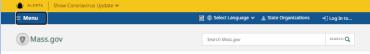
Mass.gov

EVICTION DIVERSION INITIATIVE (EDI) OVERVIEW

EVICTION DIVERSION INITIATIVE (EDI) PROGRAMS

UPCOMING EVENTS

Office Hour Training sessions will occur every Friday from 1:00PM-2:00PM, cove topics aimed at sharing knowledge about EDI programming and increasing enc the RAAs. Weekly topics and dial-in information will be shared with RAA staff in session



SEARCH Q

OFFERED BY Executive Office of Housing and Economic Development Housing and Community Developme

🝯 🌐 Select Language 🗸 🔺 State Organizations 🛛 🕂 Log In to...

PRESS RELEASE

3/15/2022

Search Mass any

Baker-Polito Administration Announces Upcoming Closure of Federal Rental Assistance Programs to New Applications, State Programs Remain Available

Eviction Diversion Initiative continues to offer state-funded RAFT, legal aid, mediation, and other services

FOR IMMEDIATE RELEASE Executive Office of Housing and Economic Development Housing and Community Development Office of Governor Charlie Baker and Lt. Governor Karyn Polito

BOSTON — Today, the Baker-Polito Administration alerted renters, landlords, regional agencies

MEDIA CONTAC Michael Verseckes, Director of Media and Public Relations

 Online Michael.W.Verseckes@mass.g

and other stakeholders that the Massachusetts housing payment assistance programs funded by federal Emergency Rental Assistance (ERA) will stop accepting new applications on or around April 15, 2022. This decision is based on the remaining balance of available federal funding. Federally funded programs include the Emergency Rental Assistance Program (ERAP), the Subsidized Housing Emergency Rental Assistance (SHERA) program, and the ERAP-Enhanced HomeBASE program. After April 15, households will still be able to apply for the state-funded Residential Assistance for Families in Transition (RAFT) program, subject to funding availability. Other existing eviction prevention programming will continue to be available for eligible households.

The Department of Housing and Community Development, in partnership with its network of Regional Administering Agencies, has distributed more than \$582 million to approximately 72,000 households since the beginning of the COVID-19 pandemic and anticipates it will use all remaining federal funding for the three ERA programs before the end of the current fiscal year.

Last month, the Baker-Polito Administration filed a FY22 supplemental budget, which includes funding to extend the state RAFT program through the remainder of FY22. The proposal also includes an extension of the Chapter 257 eviction protections until January 1, 2023, which require a continuance or stay in eviction cases if a tenant has an active rental assistance application.

In January, Governor Baker released the Administration's FY23 budget proposal, which includes a 264 percent increase in RAFT compared to the FY22 budget. This funding represents a four-fold funding increase over pre-pandemic levels and a projected three-fold increase in households served. The proposal also maintains the current maximum RAFT benefit level of up to \$7,000 a year per household, which would enable DHCD to serve roughly 15,000 households in FY23. Prior to the pandemic, the RAFT program was a homelessness prevention program with an annual budget of approximately \$20 million, which served 5,000 to 6,000 households and provided up to \$4,000 a year to low-income households for rent, utilities, and other housing costs.

QUESTIONS





Further Questions

Direct questions to your supervisor and then contact the RAA support inbox (<u>dhcdraaraft@mass.gov</u>) 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!

