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

February 10, 2023

DRAFT FOR POLICY AND PROGRAM DEVELOPMENT

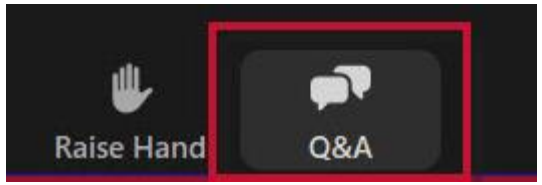
WELCOME

ENGAGEMENT BEST PRACTICES

Asking Questions

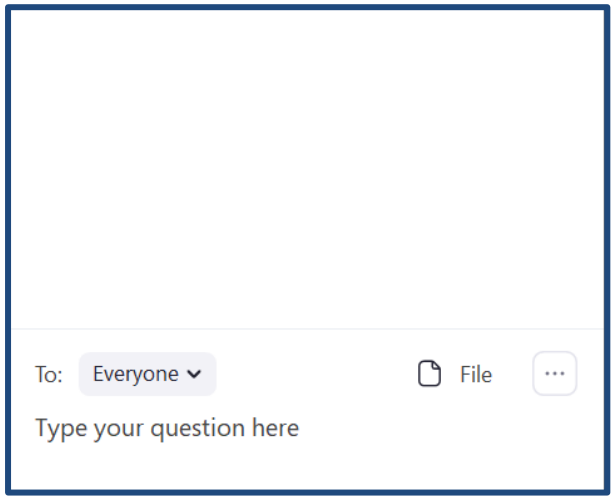
We will be monitoring the Q&A for questions

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

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THIS CALL IS BEING RECORDED

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TRAINING OBJECTIVE

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

- 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

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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"

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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

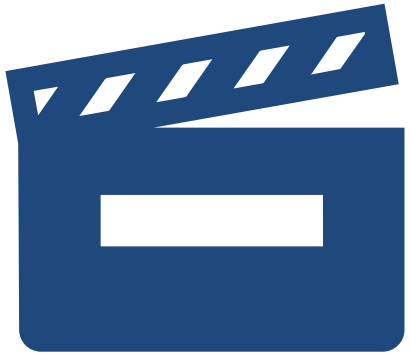
**There is a current, open defect related to manual assignments not being retained when Case Owners go offline*

MANUAL ASSIGNMENTS: USE CASES & WORKAROUNDS

- "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

DELOITTE VIDEO ON MANUAL ASSIGNMENT WORKAROUND

Video tutorial *showing a workaround for manual assignments, also available on Zendesk*



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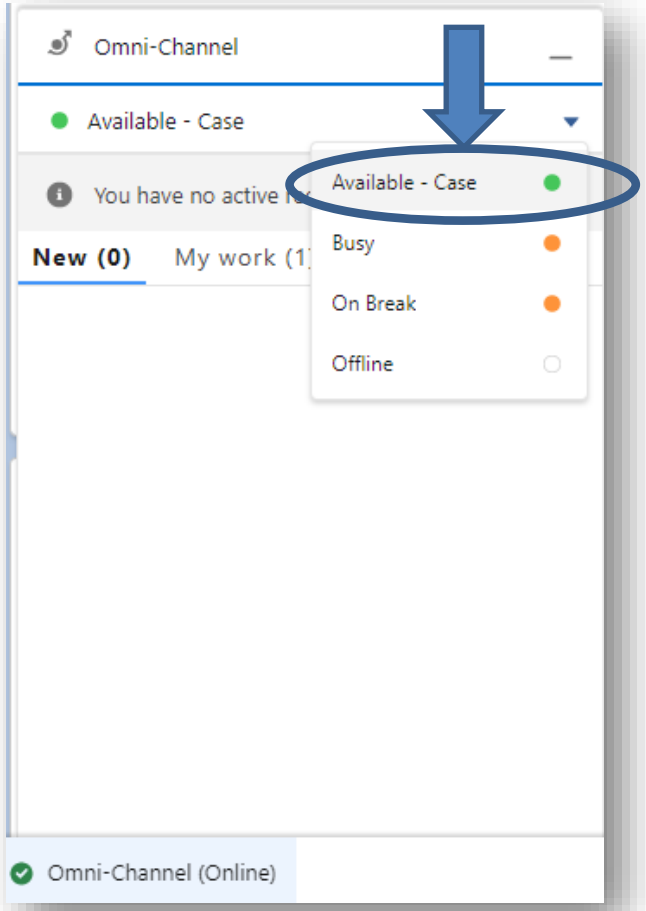
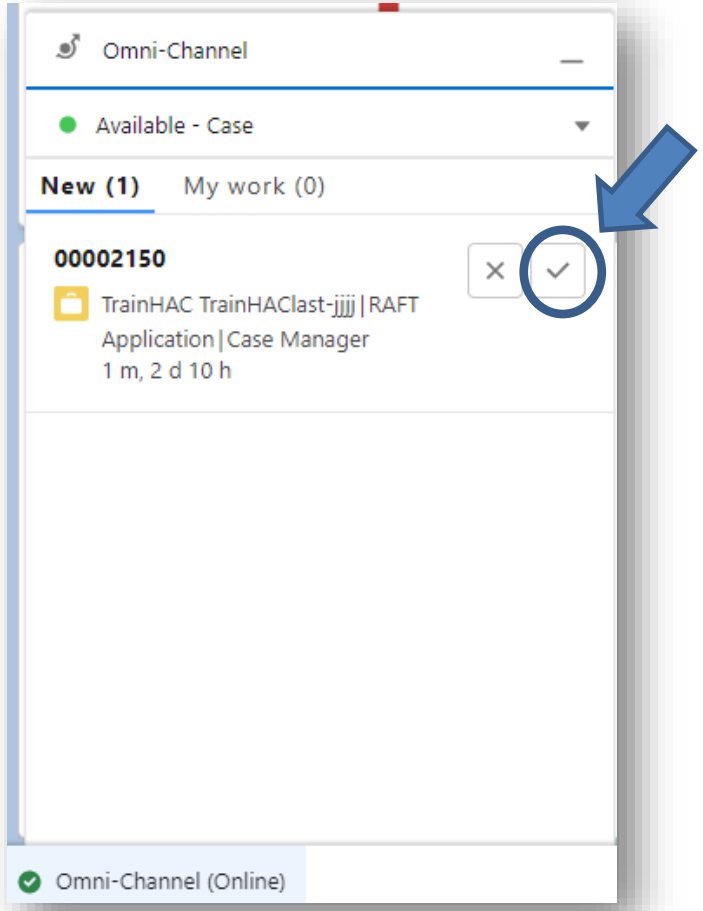
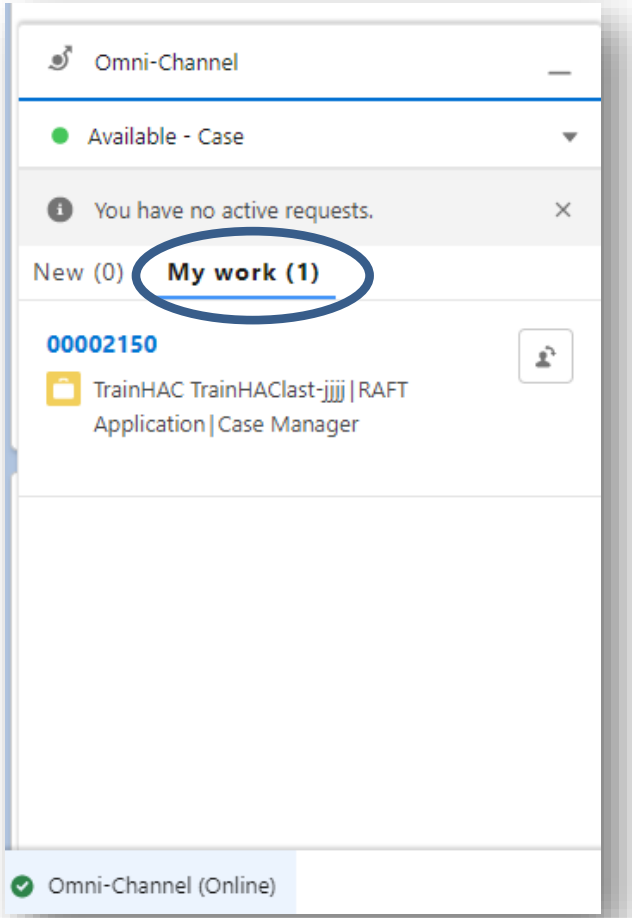
OMNI CHANNEL: ACCEPTING ASSIGNMENTS

- 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







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COMMON MISTAKES WITH CASE ASSIGNMENTS

- Forgetting to open Omni Channel
- Forgetting to set status to "Available" in Omni Channel
- Failing to accept assigned cases punctually

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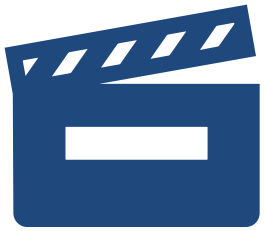
NHS VIDEO ON MANAGING A CASELOAD

- 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!

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IMPORTANT REMINDERS

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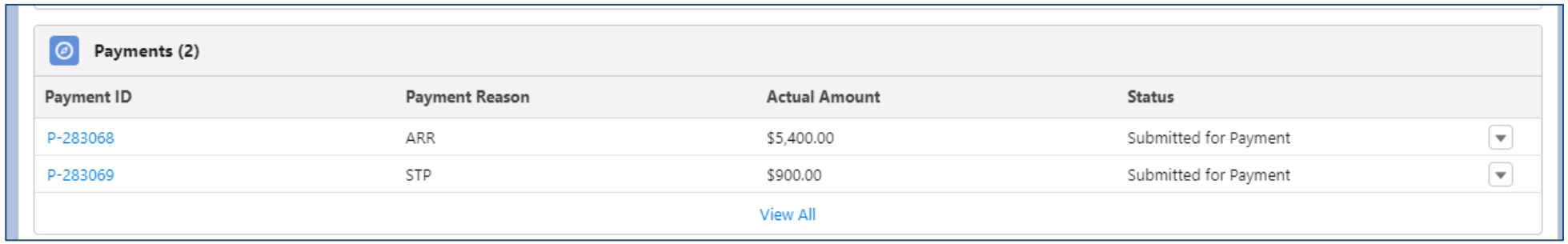
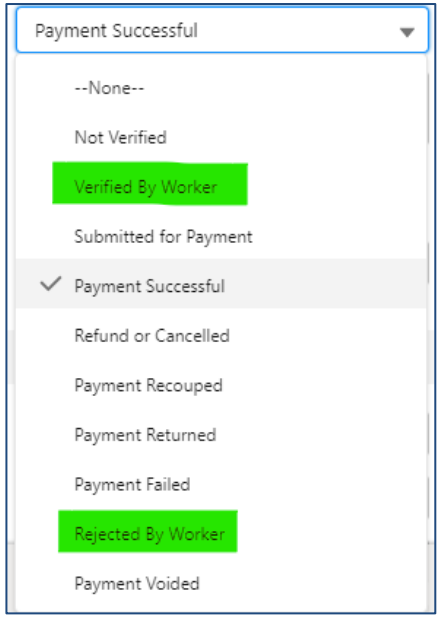
- Do not change payment status after it has been submitted for payment
  - If payments are in 'Submitted for Payment' or 'Payment Successful' status, making changes in E2E will not changes payments in Happy





- 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

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.

QUESTIONS

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!

dhcd
Massachusetts
RCAP Solutions
Resources for Communities And People
Metro Housing
BOSTON
SMOC
EVERYBODY MATTERS
HRA
DEVELOPING BETTER COMMUNITIES
cmha
Central Massachusetts Housing Alliance, Inc.
Leading the way home
COMMUNITY TEAM WORK
Housing Assistance
BERKSHIRE HOUSING
Development Corporation & Housing Services, Inc.
NeighborWorks®
HOUSING SOLUTIONS
LYNN HOUSING AUTHORITY
& NEIGHBORHOOD DEVELOPMENT