



# End-to-End (E2E) Overview & Q&A Part II

January 13, 2023

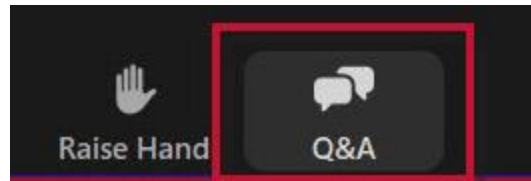


# WELCOME

## Asking Questions

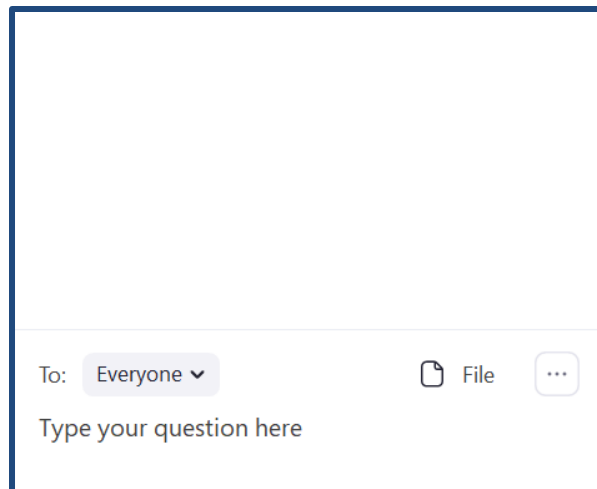
**We will be monitoring the Q&A for questions**

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



## 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.

- Menti Activity
- End-to-End (E2E) System Overview
- Landlord & Property Owner Support
- Zendesk
- Important Reminders
  - Paper Applications
  - Omni Channel
- Recent System Defects & Updates
- Questions
- RAA Support & Resources



yn/Natalie to confirm  
Menti code works

## How to Participate

1. Go to [Menti.com](https://www.menti.com) on your smartphone or computer browser.
2. Enter the code **1625 2580** into the field shown to the right

## 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.



## 4 Most Common LL/Property Manager Issues and how to fix them

- 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 deactivate 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 deactivate 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

# ZENDESK: A NEW TICKETING SYSTEM

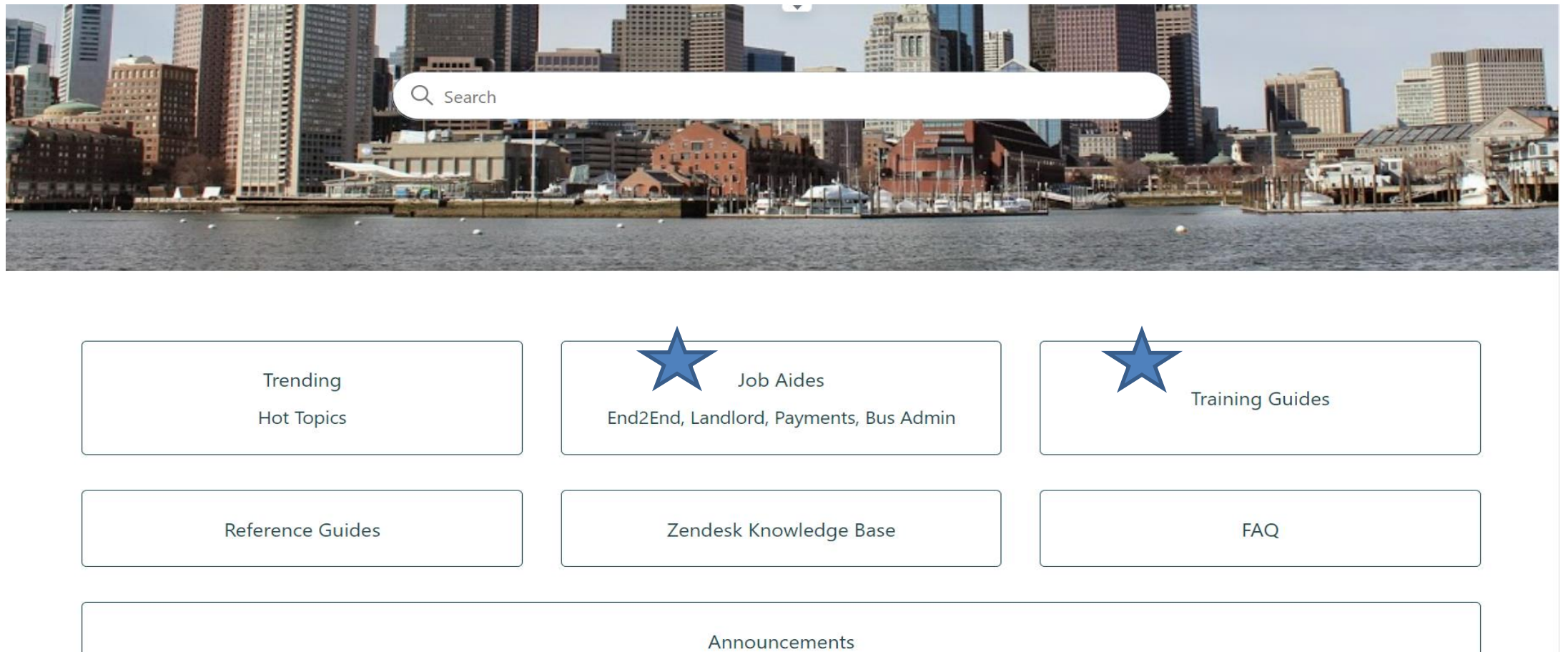


- [Zendesk](#) is a new ticketing system that rolled out along with E2E
- Zendesk is being used to track, prioritize, and solve customer support tickets submitted by the RAAs and the RAP Center staff for the RAFT and HomeBASE Programs
- For the applications in E2E, the intent is for this new RAA ticketing 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? E-mail [support@dhcdma.zendesk.com](mailto:support@dhcdma.zendesk.com)

# ZENDESK: NEW RESOURCES



- For additional resources, please visit [Zendesk](#)



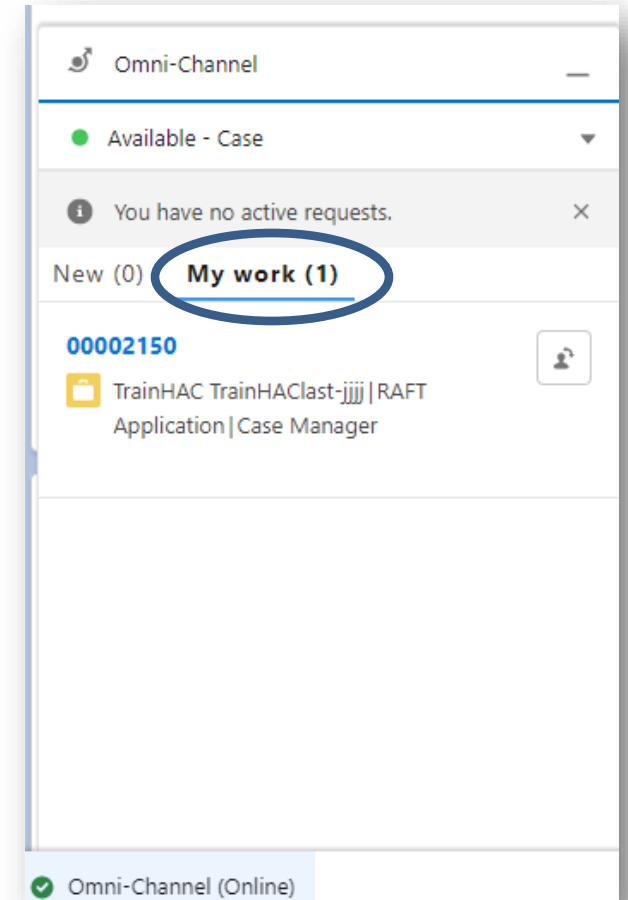
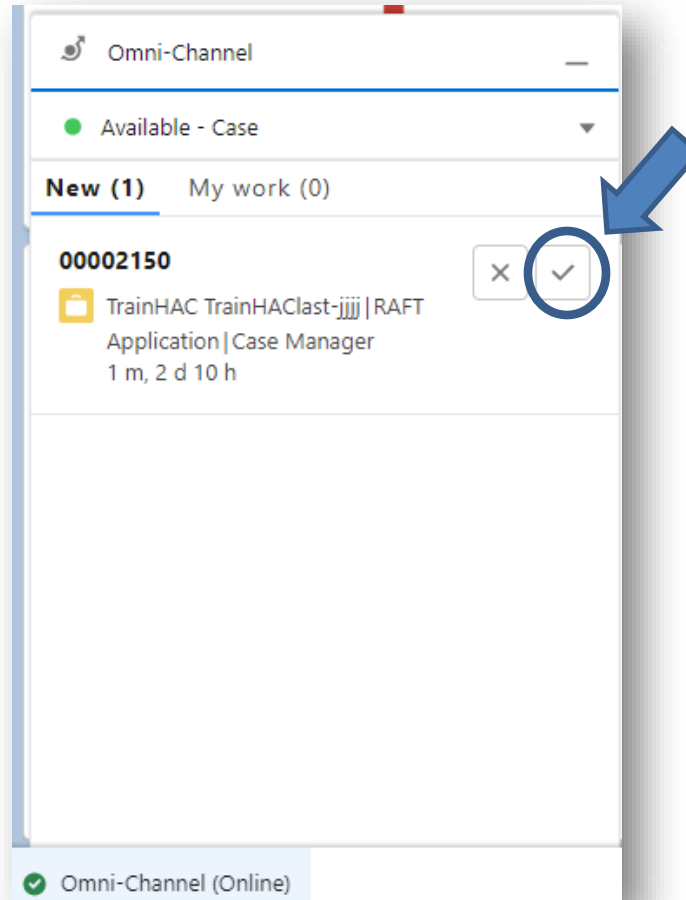
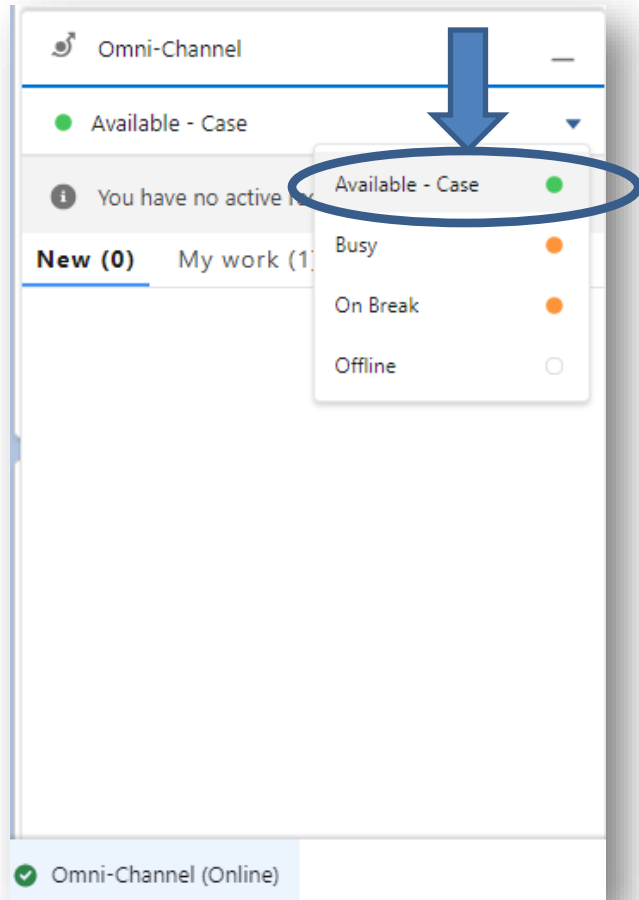
# IMPORTANT REMINDERS: PAPER APPLICATIONS IN E2E



- 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

# IMPORTANT REMINDERS: OMNI CHANNEL

- 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



- 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
    - SSN and HOH must match between E2E and Happy
- Do not change case status once 'Submitted for Payment'
  - Exception – when Happy upload fails and DHCD sends you a notification to re-verify
- Do not edit Memo line in Happy transactions from E2E
  - Editing the memo line of a Happy transaction will break connection between E2E & Happy
- Time outs of unmatched applications are still paused



# RECENT DEFECTS & FIXES and CHANGES DEPLOYED 1/6/2023



Issue k	Status	Created	Updated	Summary	Issue Type
DHC-1559	Ready	1/2/2023 2:01	1/4/2023 11:47	Signature Date updating before submitting a case	Defect
DHC-1548	Ready	12/23/2022 3:54	1/4/2023 11:47	Payee last name is getting updated to loggedin user last name	Defect
DHC-1461	Ready	12/6/2022 11:52	12/20/2022 10:44	Field missing on new rent expense creation	Defect
DHC-1452	Ready	12/2/2022 17:32	12/30/2022 9:02	RAFT App Case in Chaser without "Match Date" Populating	Defect
DHC-1438	Ready	12/1/2022 13:19	12/20/2022 9:35	LL Apps missing LoggedIn City, LoggedIn State	Defect
DHC-1490	In Progress	12/11/2022 14:14	1/4/2023 10:45	RAA Assignment failing if city/town is not capitalized	Defect
DHC-1525	Ready	12/19/2022 16:35	1/3/2023 14:10	Appeals Case Denial Reason For Fraud Not Working	Defect
DHC-1518	Ready	12/16/2022 11:28	1/3/2023 14:15	Editing Tenant Key Field in Contact Record	Defect
DHC-1498	Ready	12/13/2022 13:38	1/3/2023 14:18	AMI Not being Calculated Or Populated	Defect
DHC-1466	New	12/6/2022 17:17	1/4/2023 11:45	Permissions changes / errors	Defect
DHC-1459	Ready	12/6/2022 11:24	12/20/2022 9:32	Unable to create new stipend expense record	Defect
DHC-1440	Ready	12/1/2022 17:58	12/22/2022 14:02	Fully Paid Parent Case 1537 field showing 'error' and its LL Case 1978 missing assigned RAA	Defect
DHC-1424	Ready	11/29/2022 13:17	1/3/2023 14:20	Sprint 6 - Issues with other languages in Tenant and Landlord	Defect
DHC-1572	New	1/4/2023 11:15	1/4/2023 11:28	Radio button 'Other' is available extra in tenant app intake	Defect
DHC-1562	New	1/3/2023 13:42	1/4/2023 10:43	LOI SMS May Have Typo	Defect
DHC-1549	New	12/23/2022 4:53	1/3/2023 0:56	Text notifications are triggering to LL cases which are not in Draft	Defect
DHC-1547	New	12/22/2022 16:46	1/3/2023 14:39	Unit address missing in 12/22 tenant file for import	Defect
DHC-1536	New	12/21/2022 11:12	1/4/2023 5:47	Data for Payee LLs needs cleanup	Defect
DHC-1453	Ready	12/5/2022 13:06	1/4/2023 10:49	In Fraud Section - seem to be missing Pallium Recommended Actions for cases with Standard Review Risk Level	Defect
DHC-1366	New	11/17/2022 2:18	1/4/2023 11:52	Issue in Prescreening page for edit functionality	Defect
DHC-1471	Approved	12/7/2022 13:19	1/3/2023 14:13	Correct RAA Acronyms	Change Request
DHC-1462	Approved	12/6/2022 14:17	1/3/2023 14:13	Add LL Texting Consent Question to LL Profile Setup DHC-92	Change Request
DHC-1455	Approved	12/5/2022 13:31	1/3/2023 13:46	Remove Sex question from LL Profile Set up (DHC-92)	Change Request
DHC-1433	Approved	11/30/2022 16:57	12/23/2022 11:53	Label Change in LOI PDF to remove the \$10K specification	Change Request
DHC-1431	Approved	11/30/2022 15:35	1/3/2023 13:43	Insert Link in DHC133 Email Notification	Change Request
DHC-1430	Approved	11/30/2022 13:25	1/3/2023 13:44	Label Change - DHC75 "Landlord/Owner" field label	Change Request
DHC-1429	Approved	11/30/2022 13:09	1/3/2023 13:44	Link for RAA assistance everywhere is <a href="https://hedfuel.azurewebsites.net/raa.aspx">https://hedfuel.azurewebsites.net/raa.aspx</a>	Change Request
DHC-1418	Approved	11/28/2022 12:00	12/23/2022 11:54	DHC-76 Change order of LL app questions and make tenant email fields conditional	Change Request



# DEFECTS & FIXES and CHANGES PLANNED for 1/19/2023



Issue Key	Status	Created	Updated	Summary	Issue Type
DHC-1456	New	12/5/2022 15:04	1/10/2023 17:23	Secondary RAA and COI_or_FRAUD skill category mapping with Overflow Routing	Defect
DHC-1467	Done	12/7/2022 6:07	12/19/2022 1:17	Text message is not getting triggered when landlord, Tenant application is in draft status	Defect
DHC-1474	New	12/7/2022 16:51	1/11/2023 16:16	Provider validation rule forcing user to select provider when expense is being rejected	Defect
DHC-1478	New	12/8/2022 12:21	1/10/2023 17:06	Reissue payment not working in UAT for cases with multiple payments	Defect
DHC-1491	In Progress	12/11/2022 14:19	1/10/2023 17:17	Assigned RAA for out of state movers missing	Defect
DHC-1499	New	12/13/2022 19:16	1/5/2023 10:56	Fraud Details Section of Staff Portal - Other Describe Field Missing and Fraud Doc Types Dropdown Incomplete	Defect
DHC-1512	Not Started	12/15/2022 10:24	1/10/2023 0:24	Landlord properties created without addresses	Defect
DHC-1523	New	12/19/2022 14:17	1/11/2023 8:36	HomeBASE stipends should show 24 months	Defect
DHC-1540	In Progress	12/21/2022 16:38	1/11/2023 9:29	Emails Not Going to Tenant In Advocate Cases	Defect
DHC-1543	New	12/22/2022 12:12	1/10/2023 17:06	Rent Payments are not getting generated for Movers case	Defect
DHC-1546	In Progress	12/22/2022 15:42	1/11/2023 9:22	Tenant Is Showing as Case Owner When Case Is In Chaser Status	Defect
DHC-1549	In Progress	12/23/2022 4:53	1/11/2023 9:20	Text notifications are triggering to LL cases which are not in Draft	Defect
DHC-1555	New	12/30/2022 10:20	1/10/2023 18:23	Date Review 2 Complete Not Populating In Reports	Defect
DHC-1557	Ready	12/30/2022 11:23	1/11/2023 8:32	Staff Portal Error message when approving Moving Payments with account number	Defect
DHC-1558	New	12/30/2022 16:12	1/10/2023 18:23	Payment Vendor File Address Errors	Defect
DHC-1563	New	1/3/2023 14:11	1/11/2023 16:44	24 Hour Rule Preventing Password Resets	Defect
DHC-1581	In Progress	1/5/2023 9:05	1/11/2023 11:01	Date/Time Stamp error on Status field causes reminder emails sent in error	Defect
DHC-1585	New	1/5/2023 14:30	1/10/2023 18:23	Payment Method - Staff Portal "Check Addressed To" name showing incorrect (sent to HAPPY is correct)	Defect
DHC-1597	Not Started	1/9/2023 5:33	1/10/2023 18:24	Upload document screen is not getting queued in LL Profile: Setup Property	Defect
DHC-1599	New	1/9/2023 10:21	1/11/2023 12:47	The AMI box is blank and when you press recalculate AMI a blank box appears. The AMI will not recalculate.	Defect
DHC-1603	Done	1/9/2023 16:16	1/11/2023 9:06	Massachusetts spelled incorrectly on Home Page <a href="https://applyhousinghelp.mass.gov/">https://applyhousinghelp.mass.gov/</a>	Defect
DHC-1618	New	1/11/2023 12:54	1/11/2023 12:56	Additional Emails limit optimization - emails should be sent to contacts and not email fields on Cases and Contact	Defect
DHC-1385	Approved	11/18/2022 9:52	1/10/2023 13:45	Update logic for Application number creation	Change Request
DHC-1401	Approved	11/22/2022 12:43	1/10/2023 12:41	Add 3 Stabilization Questions to HomeBASE intake prescreen DHC-446	Change Request
DHC-1454	Approved	12/5/2022 13:07	1/11/2023 9:50	Staff Portal Layout - In Top Case Header please add Fraud Risk Level	Change Request
DHC-1463	Approved	12/6/2022 16:02	1/11/2023 16:38	AMI Calculations to take Deductions into considerations	Change Request
DHC-1470	Approved	12/7/2022 12:23	1/11/2023 8:53	Add DHCD Header on all Email Notifications	Change Request
DHC-1486	Approved	12/9/2022 12:16	1/11/2023 9:00	Add more cities/towns/villages with appropriate RAA Assignments & AMI %	Change Request
DHC-1495	Approved	12/12/2022 17:12	1/11/2023 8:35	Add hover text to DHC-297 Upload Property Manager Authorization	Change Request
DHC-1503	Approved	12/14/2022 10:59	1/11/2023 9:31	Label Change in Staff Portal for AdvocateTenantHelp Custom Label	Change Request
DHC-1550	New	12/23/2022 9:05	1/10/2023 17:28	Tenant Key - Daily Import File	Change Request
DHC-1569	New	1/4/2023 7:19	1/10/2023 17:29	Accounting Contact Key - Daily Import File	Change Request



# QUESTIONS



# RAA SUPPORT



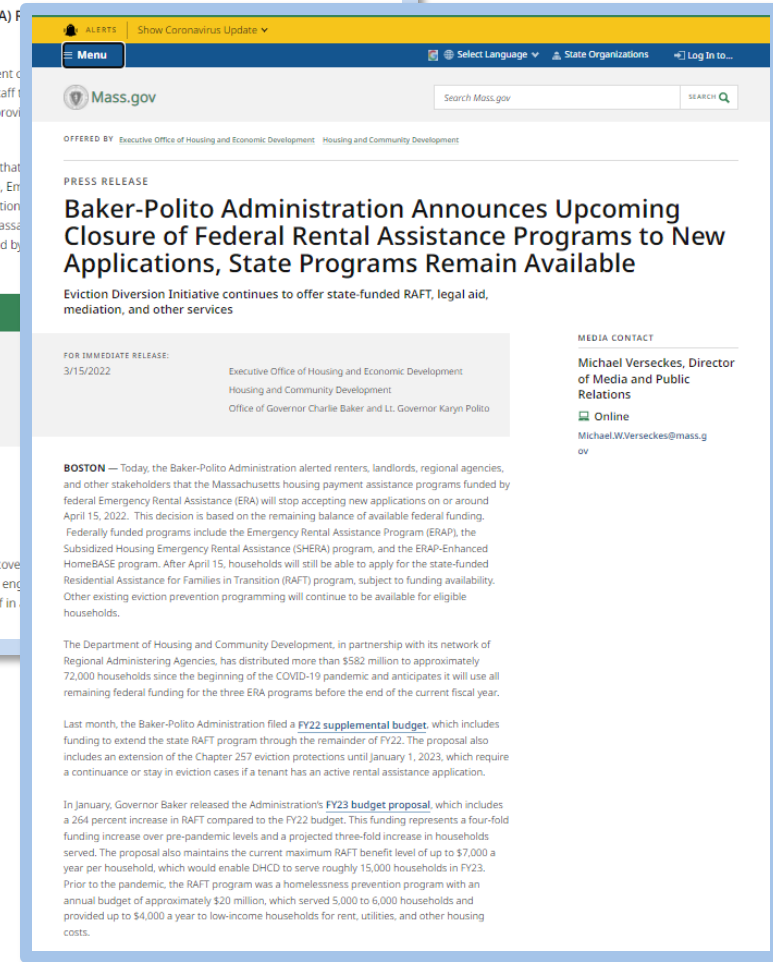
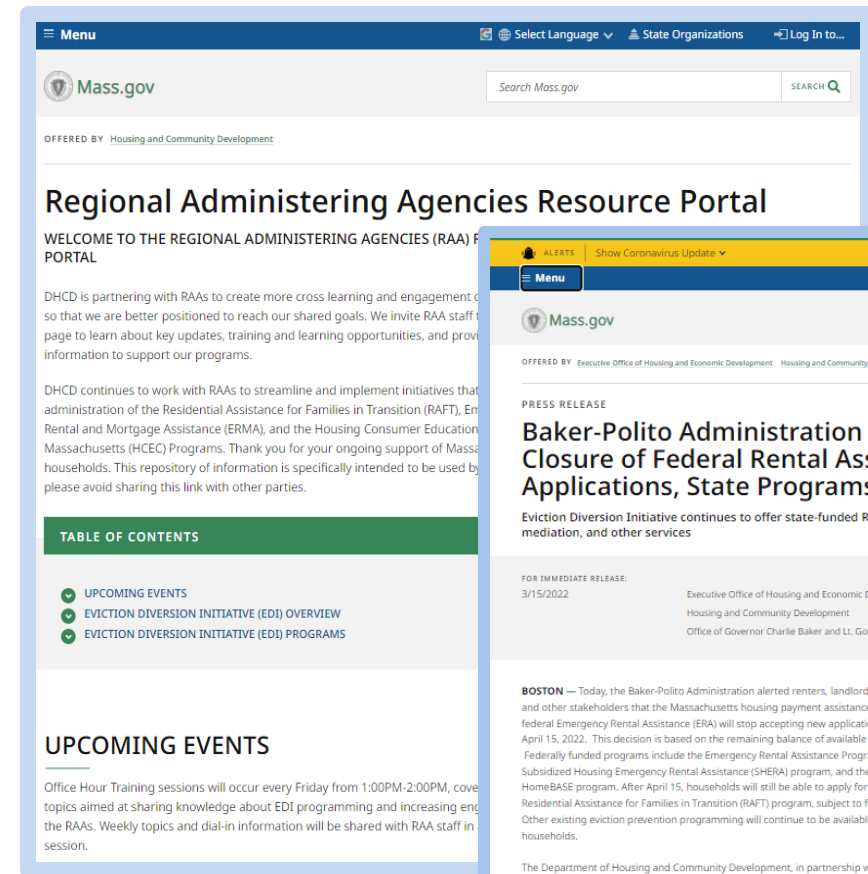
1

## [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](mailto: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!





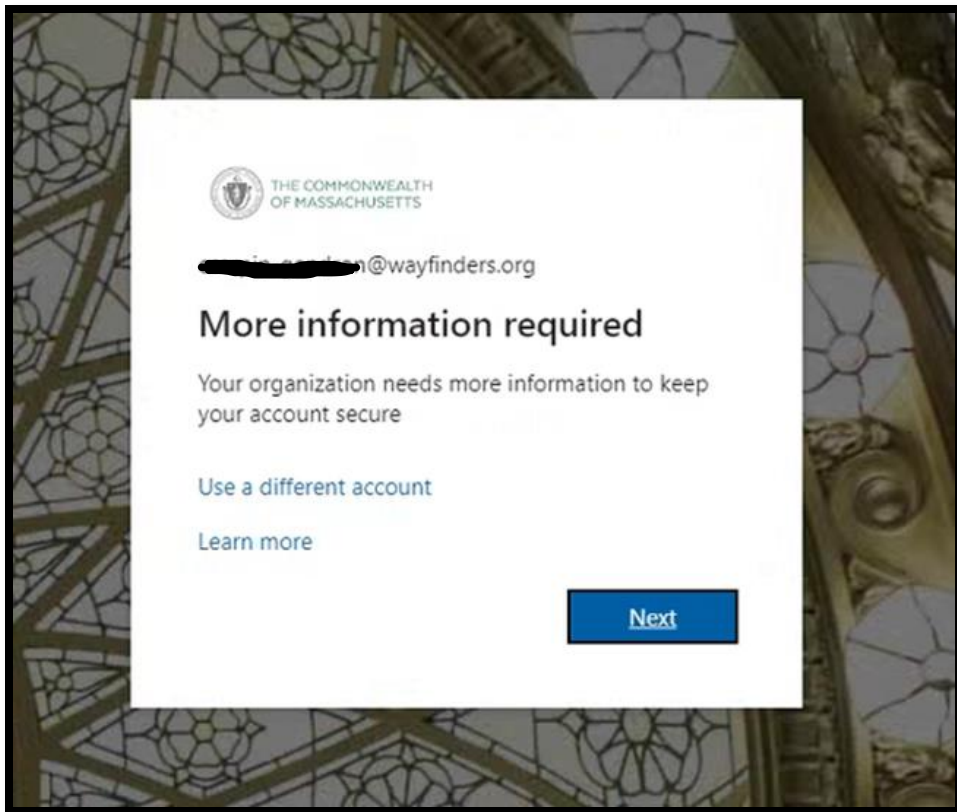




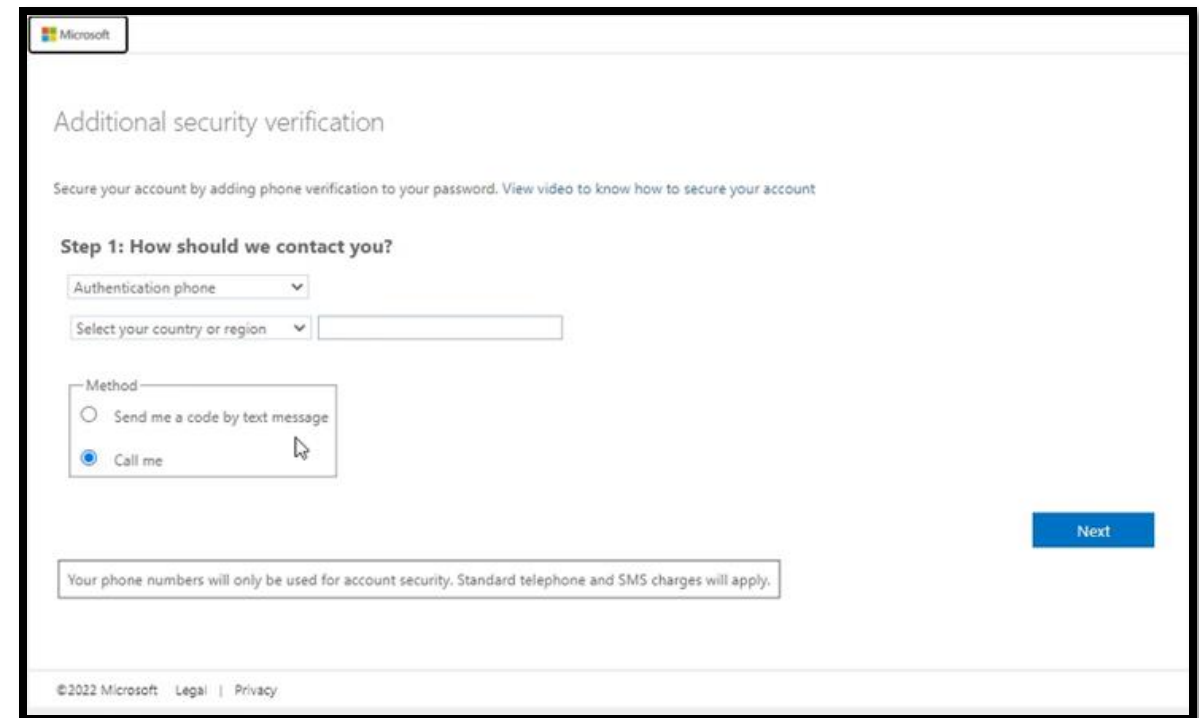
# INSTRUCTIONS FOR SETTING UP MULTI-FACTOR AUTHENTICATION (MFA)



- 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.



# INSTRUCTIONS FOR SETTING UP MULTI-FACTOR AUTHENTICATION (MFA)



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

A screenshot of the Microsoft 'Additional security verification' screen. The page title is 'Additional security verification'. Below it, a subtitle reads 'Secure your account by adding phone verification to your password. View video to know how to secure your account'. The main heading is 'Step 2: We've sent a text message to your phone at +1 XXX-XXX XX XX'. Below this, a smaller text says 'When you receive the verification code, enter it here'. There is a text input field. At the bottom right, there are two buttons: 'Cancel' and 'Verify'.

4 Phone verification is completed.

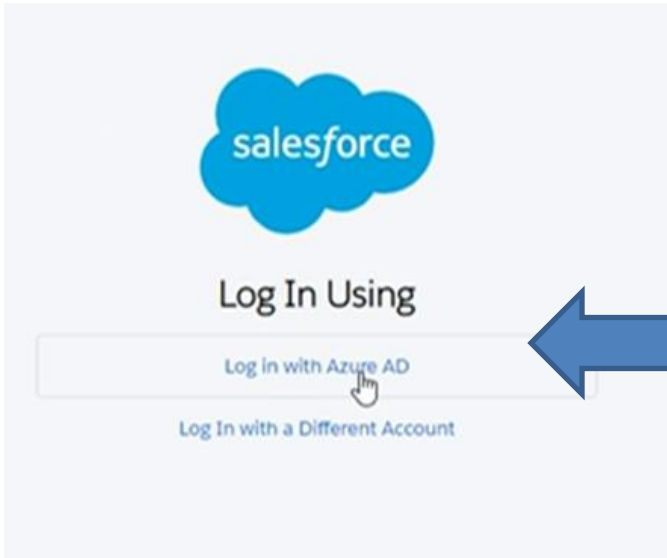
A screenshot of the Microsoft 'Additional security verification' screen. The page title is 'Additional security verification'. Below it, a subtitle reads 'Secure your account by adding phone verification to your password. View video to know how to secure your account'. The main heading is 'Step 2: We've sent a text message to your phone at +1 XXX-XXX XXXX'. Below this, a smaller text says 'Verification successful!'. At the bottom right, there is a single blue button labeled 'Done'.

# LOG IN TO SALESFORCE WITH AZURE AD

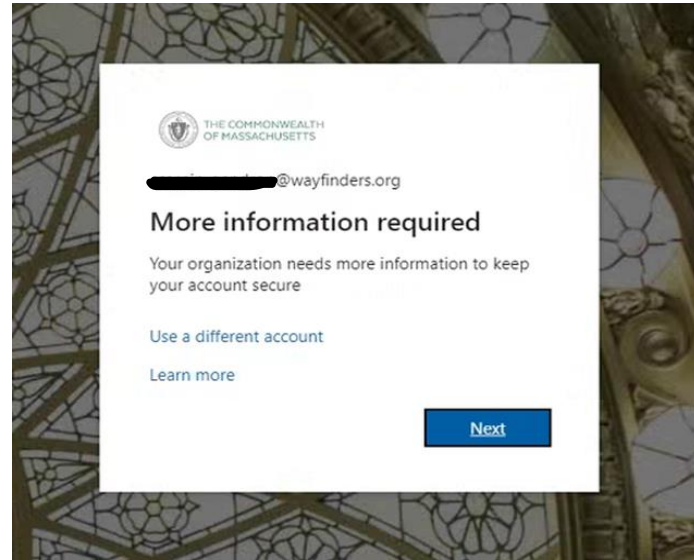


Once the MFA Phone verification steps are complete, you will be able to select “Azure AD” option

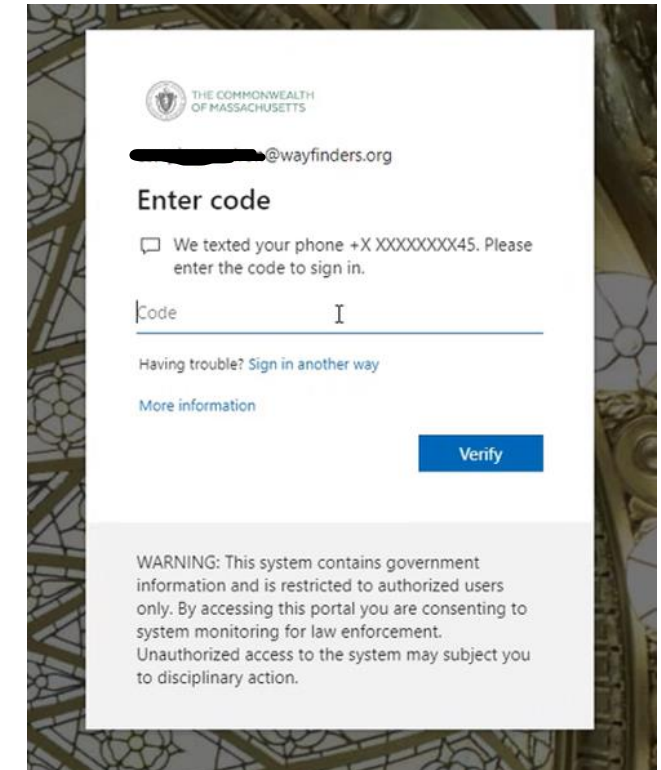
1 Login using Azure AD



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”