Last Updated: June 21, 2021

ERAP HAPPY Data Entry Reference Guide

Federal Emergency Rental Assistance Program (ERAP)

dhcd Massachusetts

OVERVIEW

About HAPPY

HAPPY is a state-wide database used to make payments for RAFT, ERMA, HomeBASE, and ERAP. It collects demographic and program data for reporting purposes.

About This Guide

This document walks through the ERAP HAPPY Payment Entry Steps. Follow this guide for step-by-step instructions and best practices for working in HAPPY.

CONTENTS

HAPPY Overview

Updates to the ERAP Program Tab

HAPPY Best Practices

Logging into HAPPY

Payment Entry Steps

- Step 1: Search for or Enter Client
- Step 2: Update Client Details
- Step 3: Lock In Transaction

Viewing Past Payments

HAPPY Support Line Information

NOTE: All data contained in this guide is fictitious and for training purposes only. It is not representative of real client data.

The exclamation point means Pay Attention! This is important. It could also show you a valuable tip.

HAPPY Overview

HAPPY Overview

HAPPY is a **statewide system**. You can see payments made by your RAA and other RAAs in the state.

HAPPY is a **live system**, so be careful navigating around to maintain data quality and accuracy.

The HAPPY Program tab has been updated to only display required fields. This means **that every fields in the Program tab must be completed** for an applicant to receive payment.

Payment Entry Steps

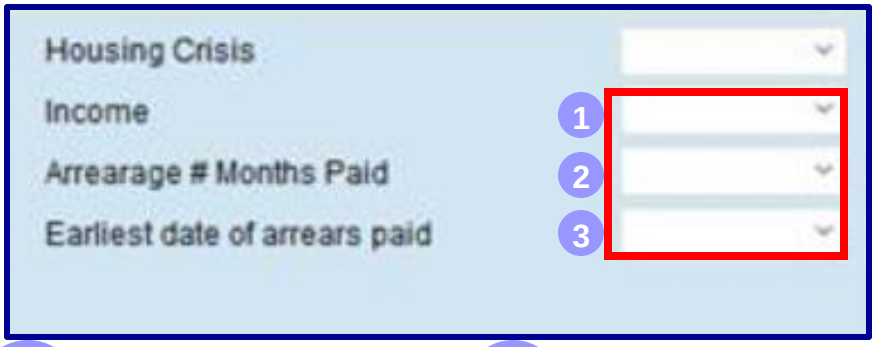
The payment entry steps in HAPPY are used to **track** and **record financial data** to be used to make final payment disbursement.

The ERAP Program Tab

The Program Tab has three new fields updates to the Income field, Arrearage # Months Paid field, and the Earliest Date of Arrears Paid field.

NEW REQUIRED FIELDS

1. **Three New Options for Income**:
   - Zero income
   - 50-80% AMI
   - Above 80% AMI
2. **Arrearage Number of Months**
3. **Earliest Date of Arrears**



These new fields must be completed in addition to the data fields that are currently required for RAFT.

1 Income Options

Code	Description
0	Zero Income
<15	Below 15% AMI
15-30	Between 15-30% AMI
30-50	Between 30-50% AMI
50-80	Between 50-80 % AMI
>80	Above 80% AMI

2 # Months Options

Code	Description
0	
1	
2	
3	
4	
5	
6	
7	

3 Earliest Date Options

A April - April 2020
B May - May 2020
C June - June 2020
D July - July 2020
E August - August 2020
F September - September 2020
G October - October 2020
H November - November 2020
I December - December 2020
J January - January 2021
K February - February 2021
L March - March 2021
M April 2021 April 2021
Z None - No arrears

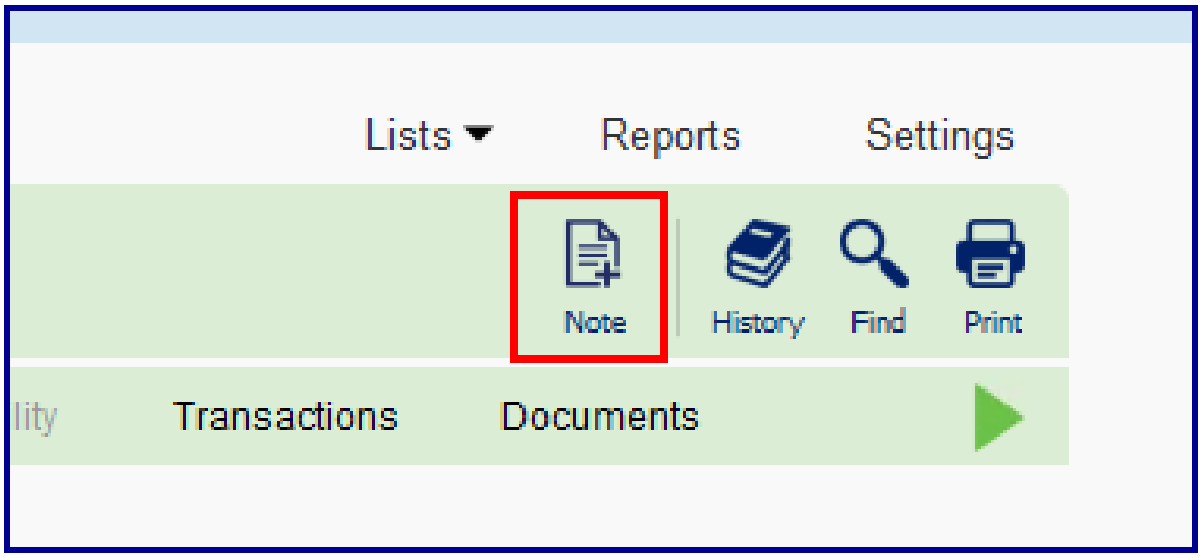
Example: A household receives an arrears payment that covers partial rent for December 2020, January 2021, and February 2021.

- Fill in "12/1/2020" for "Earliest date of arrears"
- Fill in "3" for "Arrearage # of months"

HAPPY Best Practices

Below is a list of best practices to follow when using HAPPY to ensure efficient data entry and record management.

1. Press **Shift** while selecting an option to revert a field to blank.
2. Any client with **ERAP status "A"** should have all required fields completed and payments entered.
3. **Do not make any payment** with any ERAP status other than "A"
4. If an applicant denies stipends, make sure to **include a note** in their HAPPY record (see image below).

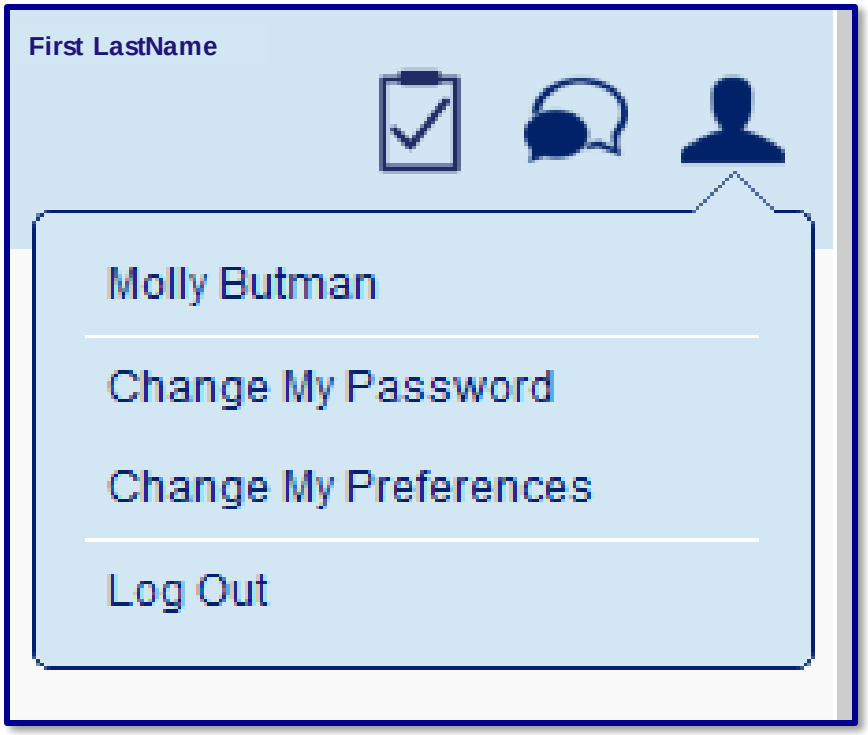


Logging into HAPPY

LOGGING INTO HAPPY

LOG IN / LOG OUT

1. First log in to **Amazon Workspace**
2. If you forgot your password, follow the “forgot password” prompts.
3. Next, login to HAPPY.
4. Enter your Username: Firstname_Lastname
5. Enter your Password.
   - **If you need a password re-set for Housing Pro, email your HAPPY Administrator.**
6. To **log out** of HAPPY, click on the silhouette at the top right.
7. Select **Log Out.**

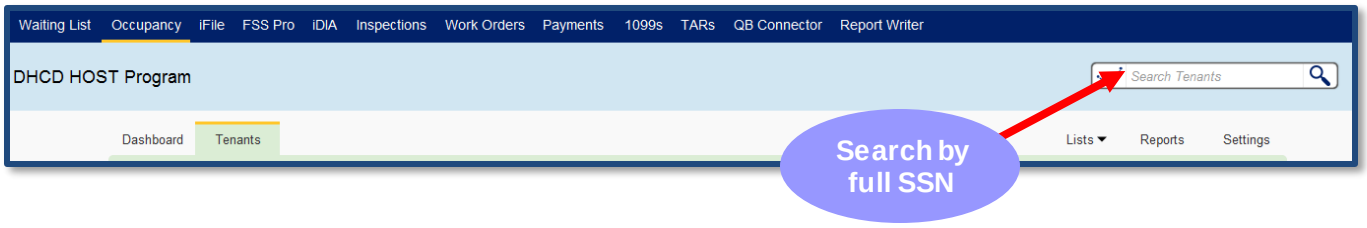


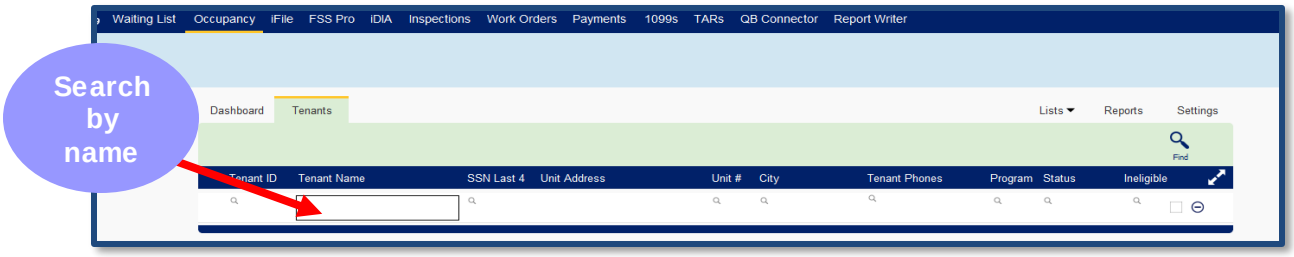
HAPPY Payment Entry Steps

HAPPY PAYMENT ENTRY STEPS

STEP 1: SEARCH FOR OR ENTER CLIENT

In **Occupancy mode**, search by full SSN or search by name by clicking the **Find button** of “Ctrl + F”.





- Confirm that it is the same person by comparing name, SSN, members, etc.

Do not create multiple records for one client.

- If the client is currently assigned to another RAA, reach out to the contact person at that RAA to release the client.

  NOTE: If the case is time sensitive and you aren’t getting a response from the RAA, email Molly Butman (molly.butman@state.ma.us) at DHCD to release the client.

If the client IS in HAPPY, skip to Step 2.

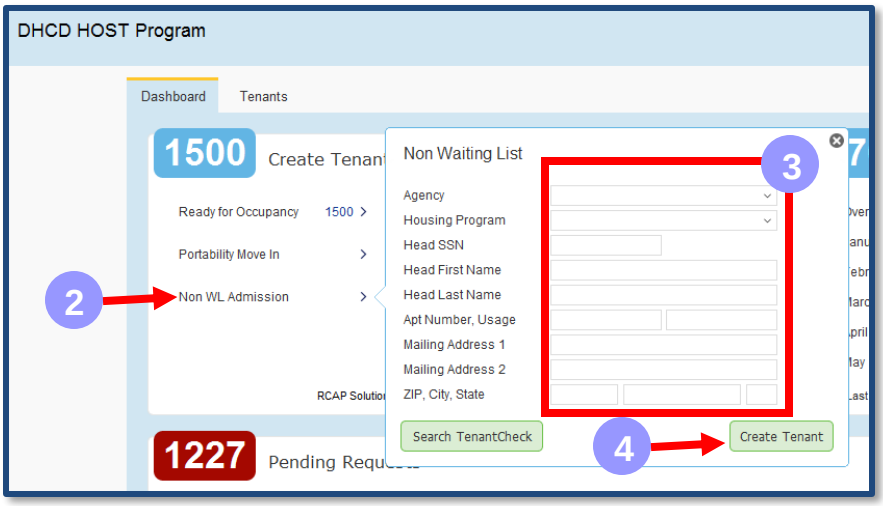
If the client IS NOT in HAPPY, move to Step 1B to enter a new client.

STEP 1: SEARCH FOR OR ENTER CLIENT (CONT.)

Use the below process if the client is not in HAPPY.

STEP 1B: ENTER CLIENT

1. Navigate to the **Occupancy module** (for new clients).
2. Select "**Non WL Admission**".
3. Enter the information for the **Head of Household**.
4. Select "**Create Tenant**".



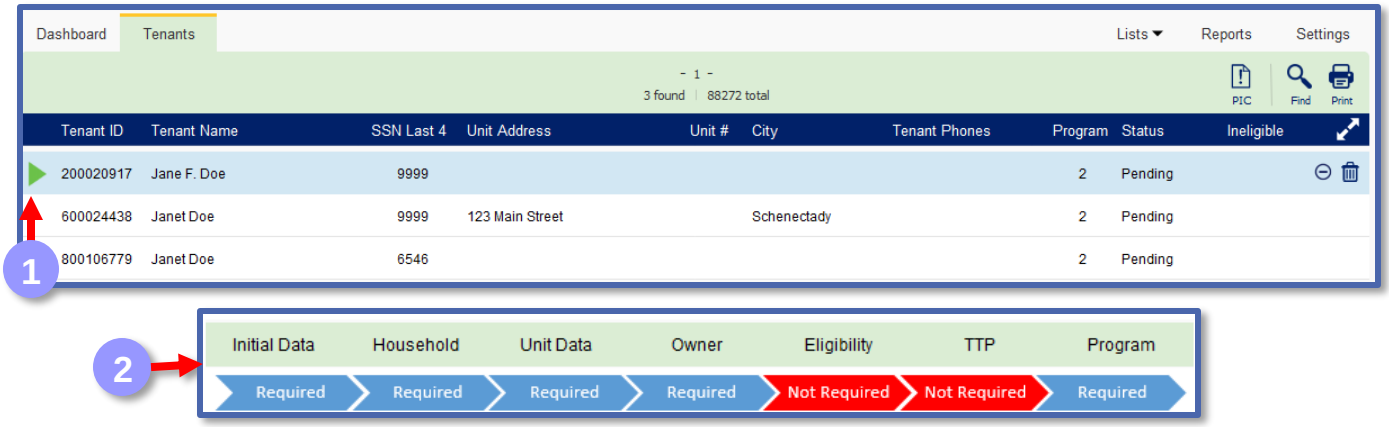
If the client does not have a SSN, input 888-88-888 as their SSN.

The address should be where the funds are paid to (the new address if client is moving).

STEP 2: UPDATE CLIENT DETAILS

Once the client has been located or entered:

1. Select the **green arrow** that appears left of their name.
2. Update the required tabs.

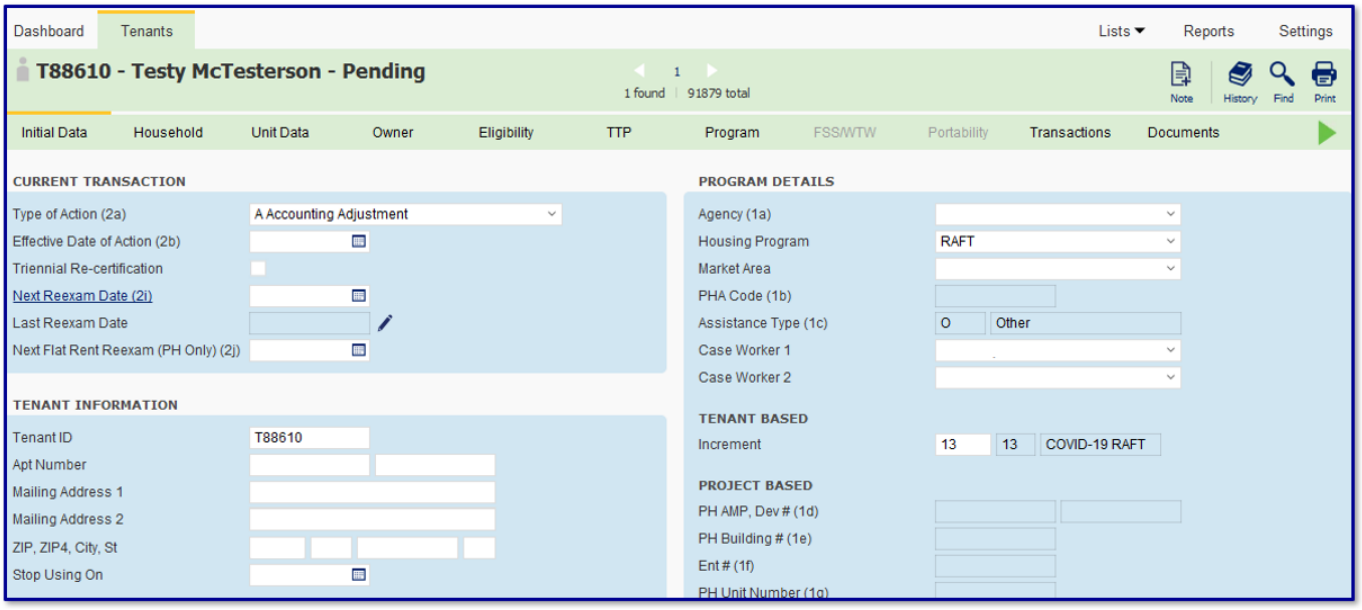


STEP 2A: INITIAL DATA TAB

1. Enter Type of Action: **Accounting adjustment**
2. Enter Effective date of action: **Enter first payment date**
3. Enter Tenant ID: Enter T and number from bottom left of screen (see note below)

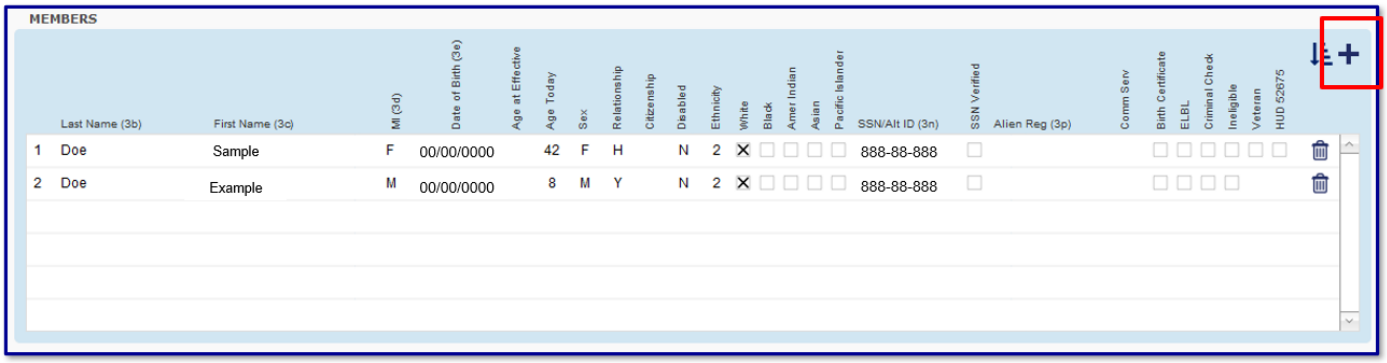
Do not change a preexisting tenant number if the client is already in HAPPY.

4. Enter **Address**: Address of the unit the funds will be paying for
5. Enter **Phone number, Email address, Language, Agency, and Case worker**
6. Enter Housing Program: **RAFT/ERMA/ERAP**
7. Enter Increment: **Make sure to enter this before payment is entered**
8. Select Yes or No for RAP Center
    1. Enter Y for Nan McKay Staff
9. Enter **Housing Type**



STEP 2B: HOUSEHOLD TAB

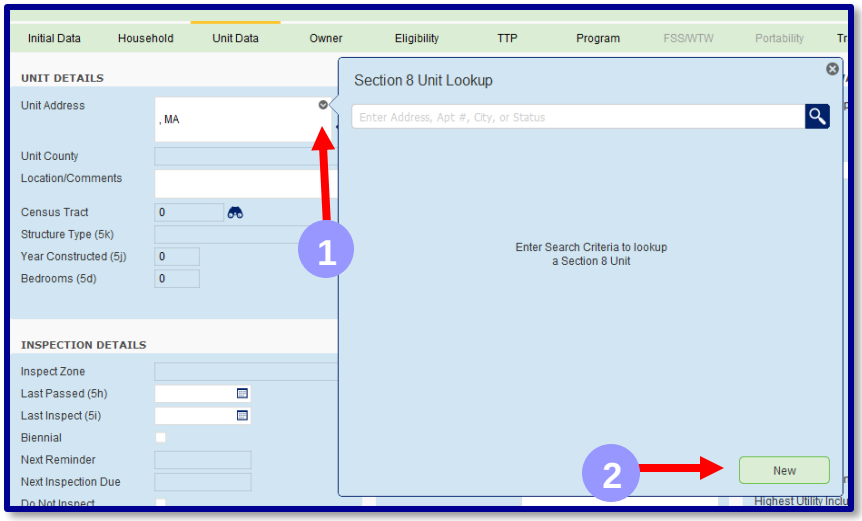
- Enter each member of the household using the "**+**" button
- Enter the **Name**, **DOB**, **Sex**, **Relationship**, **Ethnicity**, **Race**, and **SSN** (if there is no social, input all 8s)



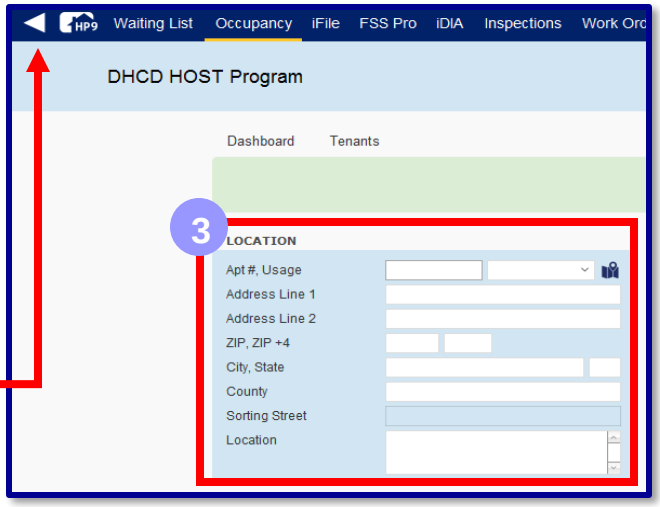
STEP 2C: UNIT DATA TAB

To add a new address for a client:

1. Select the grey arrow in **Unit Address**.
2. Select the "**New**" button.



3. Add the **client's address information**.
   - **NOTE**: This is very important to do before payment, this will keep the payment from being issued if not entered.
   - Use arrow on top left of screen to navigate back to the client's record.



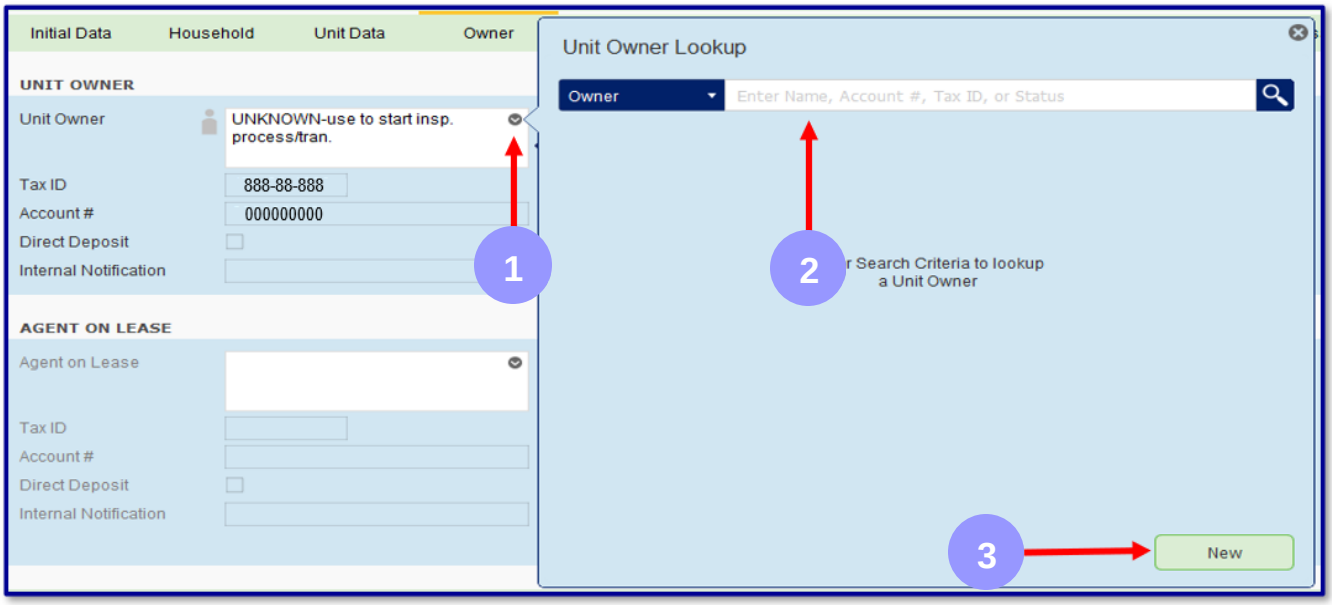
STEP 2D: OWNER TAB

Defer to your manager on Owner Entry.

1. Click on the grey arrow in the "**Unit Owner**" box.
2. Search for the owner by **Tax ID** or **SSN** from the provided W-9.
   - Verify that it is the correct address or direct deposit information.
   - You can search for and add a vendor if you are not paying a property owner.
     - This will make payment entry easier.
     - Make sure to keep it as vendor so that they do not get a 1099.

NOTE: If you do not find the owner in your search, or if the owner has a different address or Direct Deposit account, you can add a new owner.

3. To add a new owner, select "**New**" at the bottom of the search screen or click "**Lists**" and choose "**Contacts**"



STEP 2D: OWNER TAB (CONT.)

4. Fill in:
   - **Owner type**
   - **Name**
   - **Company Name** *(if applicable)*
     - If using Company name, select in Name Usage
   - **Tax ID** or **SSN** – mark the type
   - Select if they should get a 1099 or no (vendors will automatically not get 1099)
   - **Account #**
     - Very important – use letter O and the number from bottom left ex O89299
     - If adding a duplicate owner with a different Direct Deposit account, add RAA # in front ex – 5O89299
   - **Phone number/email** (if you have)
   - **Address** – where check and 1099 will be sent

STEP 2E: ELIGIBILITY

This section does not need to be populated.

STEP 2F: TTP

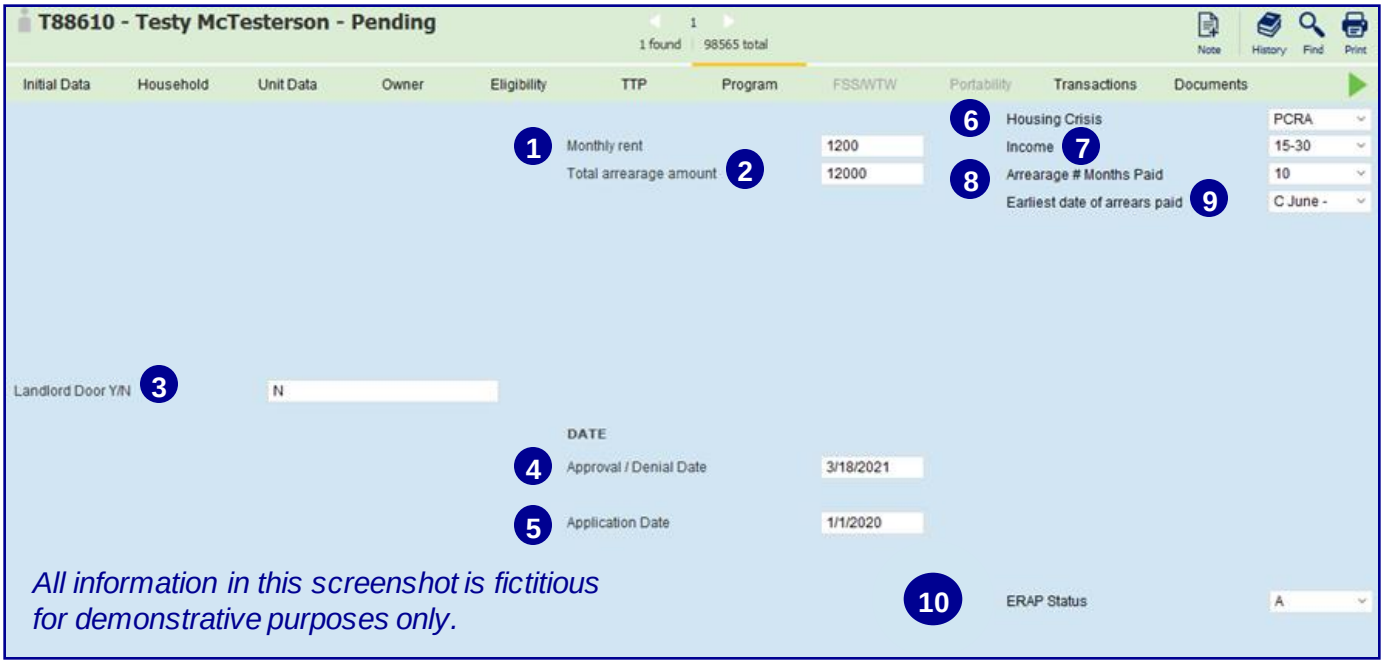
This section does not need to be populated.

STEP 2G: ERAP PROGRAM TAB

The Program tab has been updated to reflect the appropriate fields required for ERAP. Now, **all fields must be completed** for an applicant to receive a payment.

REQUIRED FIELDS

1. Monthly Rent
2. Total Arrearage Amount
3. Landlord Door *(Y/N)*
4. Approval/Denial Date
5. Application Date
6. Housing Crisis
7. Income
8. Arrearage # Months Paid
9. Earliest Date of Arrears Paid
10. ERAP Status



All information in this screenshot is fictitious for demonstrative purposes only.

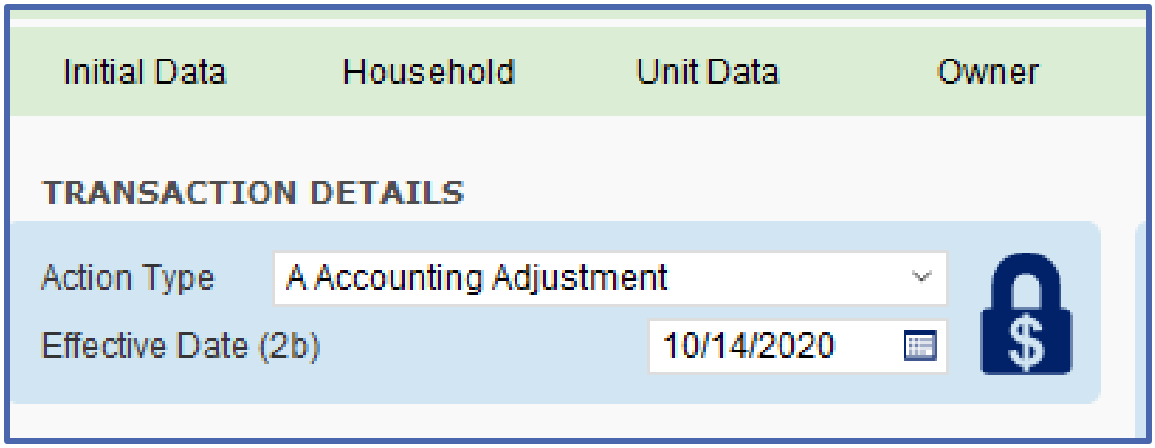
If you **accidentally make a RAFT program line when you mean to make a ERAP one**, please do the following:

- Erase all start and end dates
- Erase all data from fields
- Make the program status inactive

STEP 3: LOCK IN TRANSACTION

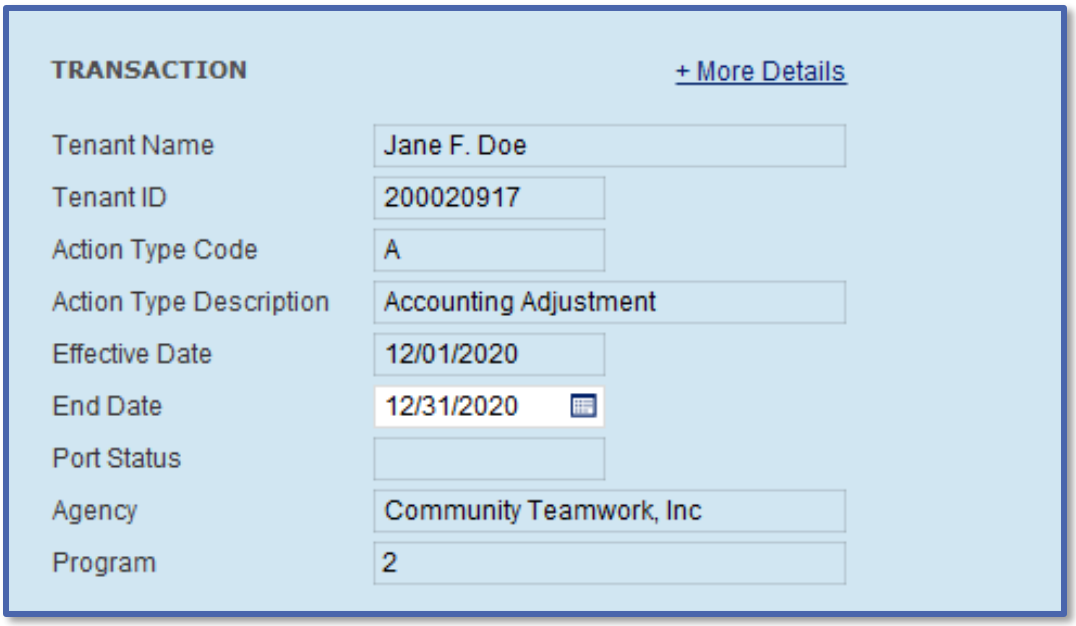
1. Select the lock icon in the **Transaction tab**.
2. Select "**Continue**" to bypass suggested notifications.
3. Click the "**+**" button to add each approved payment
4. Add the payment type.
   - Approved payment types include ARR, FMR, FUR, LMR, MIS, MOR, MOV, MST, SEC, STP, TRA, UTL.
5. The account will prepopulate.
6. Add the **Contact** (Payee). ⚠ **Best practice is to search by SSN/Tax ID or Owner Number instead of name. Do not make any payments to Client.**
7. Select **Frequency**
   - One time – Used for all payments other than stipends
   - Monthly – Can be used for stipends
     - Adjust the End Date**:** stipends will be added on the first of each month
     - Stipends must be made monthly – no bulk payments
8. Add utility account number or notes in the memo line.
9. Enter the amount.

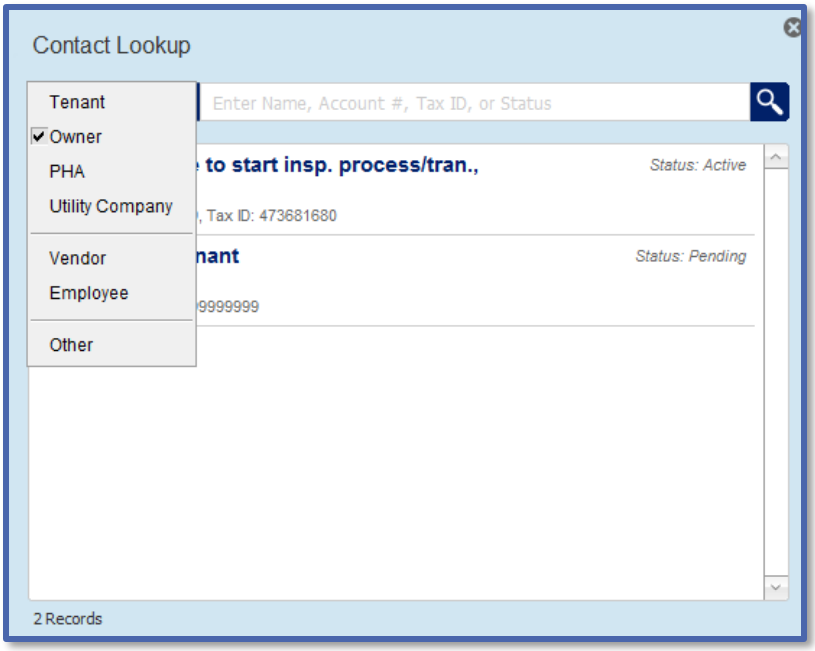
Images below are examples of the HAPPY interface



STEP 3: LOCK IN TRANSACTION (CONT.)

10. Select "**Continue**".
11. Review the payments carefully.
12. Select "**Continue**" to lock in the transaction.
13. Once the lock-in is complete there is no option to edit payments, the only option is to void and reissue.

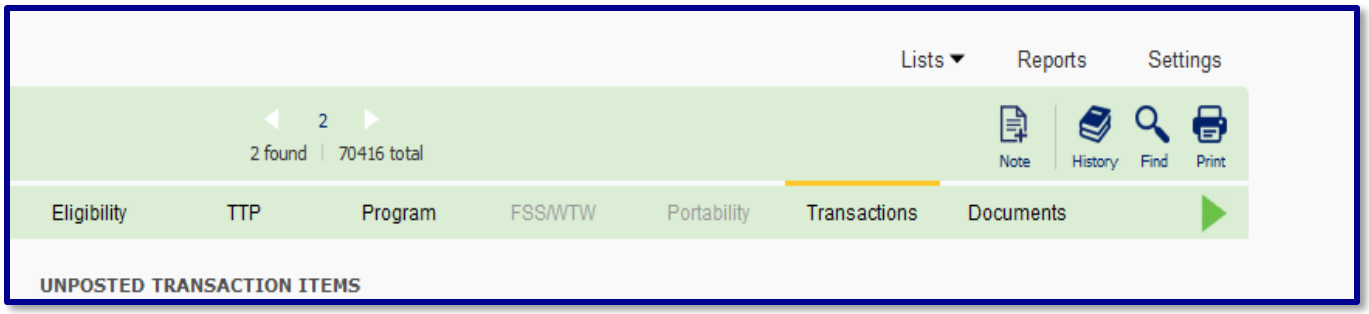


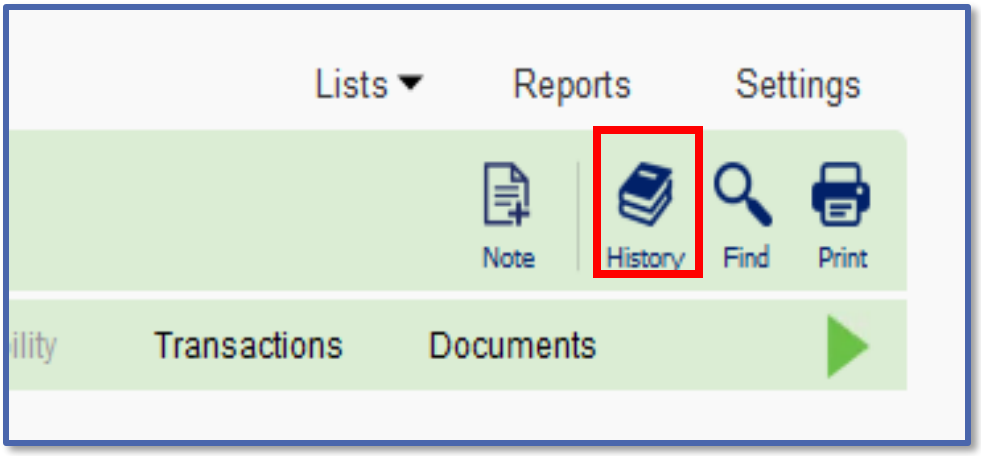


Viewing Past Payments

VIEWING PAST PAYMENTS

1. Search for your client in the **Occupancy tab** under **Tenants**.
2. Open the client's record using the green arrow.
3. Select the "**History**" button at the top of the client's page.
4. View the client's history.
5. Select "**Accounting**" to view past payments.
6. Continue into payment history by selecting the green arrows next to each payment. Access to viewing previous payments will depend on the settings.
7. In payment detail (1099 module) you will be able to view Direct Deposit and check information.





Thanks!

HAPPY SUPPORT

Looking for additional HAPPY Support? For any technical issues, call the **HAPPY Support Line**: 888-484-2779 (*Option 1*)

dhcd Massachusetts