FY23 RAFT Program File Review

EOHLC Office Hours

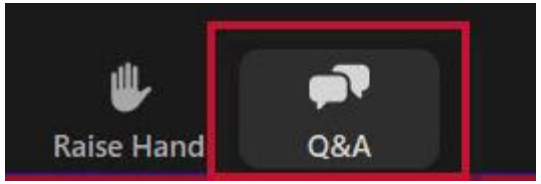
November 17, 2023

WELCOME

Asking Questions

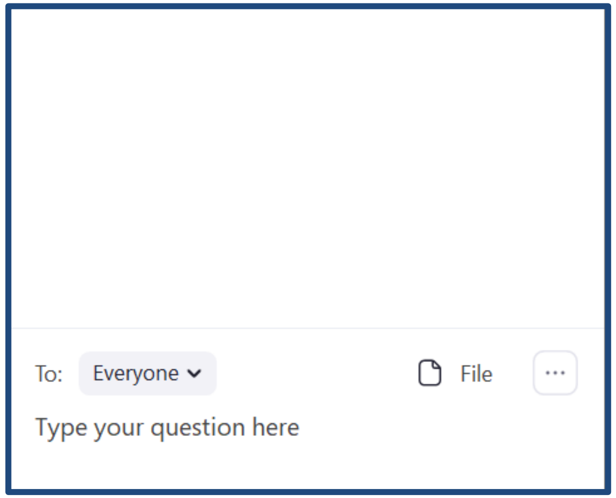
We will be monitoring the Q&A for questions

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

HAPPY BIRTHDAY E2E

AGENDA

RAFT Program File Review Findings

- Income Verification
- Required Documents
- Case Comment Documentation
- Duplicate Review

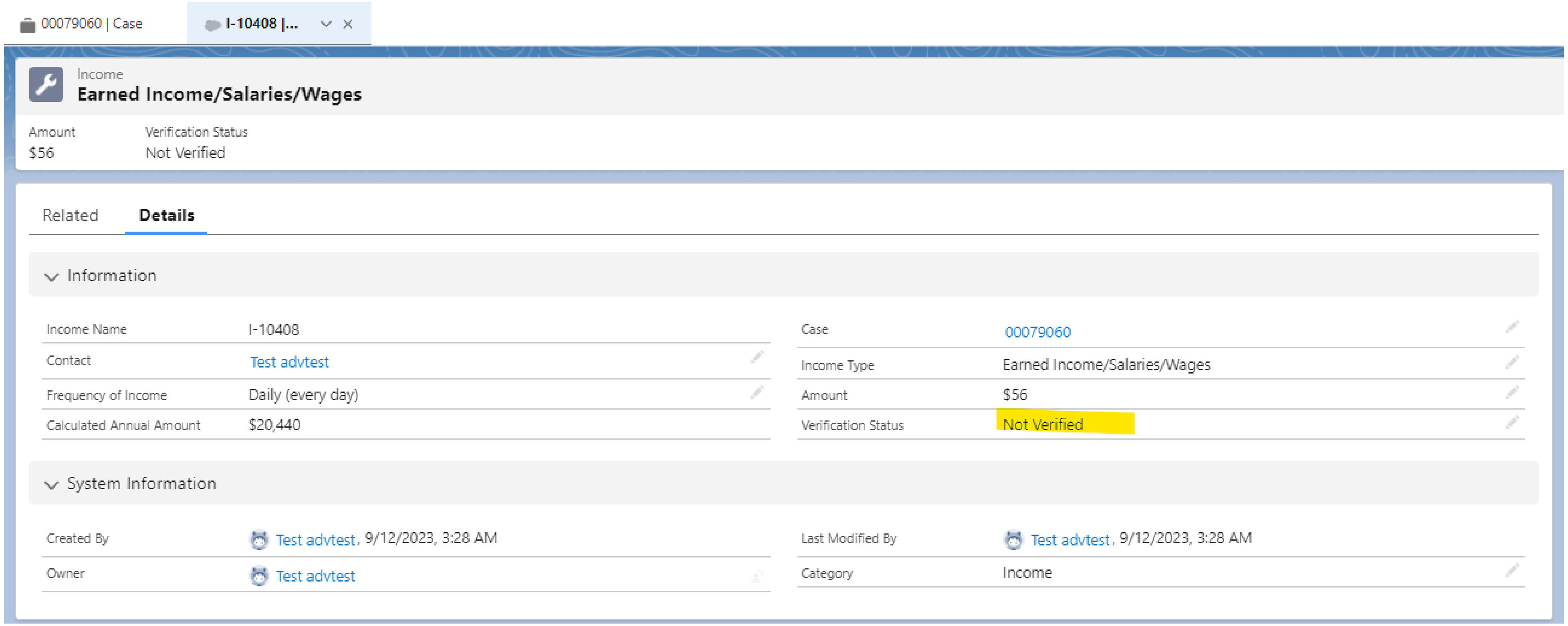
RAFT Income Verification

RAFT Income Verification

- MH/DTA Verification
- Income Verification
  - Paystubs,
  - Benefit Letter
  - Other Documentation
- State Databases

Verifying an Existing Income Record

- A household with income should enter income as part of their application
- The chaser is responsible for making sure the amount and frequency matches the income documentation (pay stubs, benefit letter, etc.) and then changing the Verification Status from "Not Verified" to "Verified by Worker"



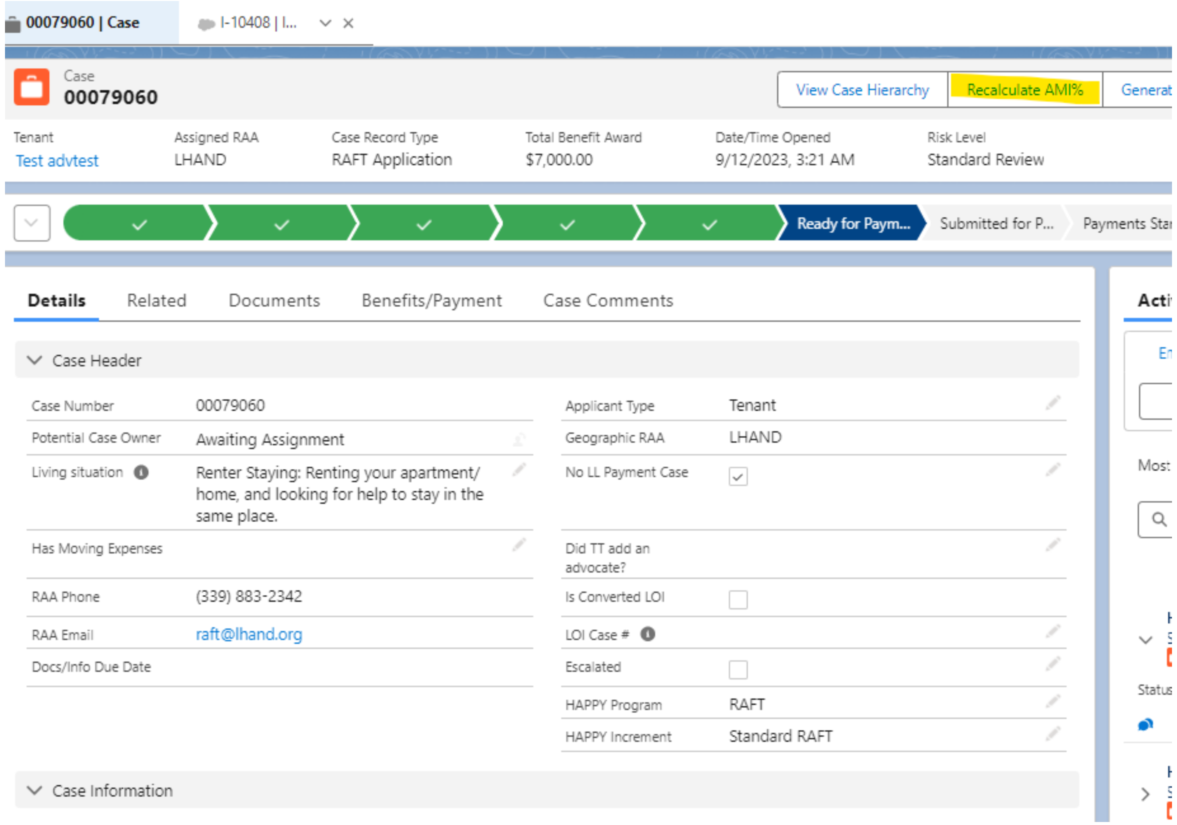
Zero Income and Unverified Cash Income

- Zero income status must be verified through WageMatch, UI Online, etc., or with self-certification as a last resort.

- For households with zero income, RAA staff must document that they attempted to check all income sources and verification methods listed in the RAFT Admin Plan.

Recalculating AMI %

- The final step in verifying is income is recalculating the AMI %
- The AMI % that you see on the case when you first receive it is calculated based off what the tenant put in
- Once the chaser verifies the income, the chaser needs to recalculate the AMI %. Otherwise, the AMI % that appears on the Details tab will show the unverified AMI %



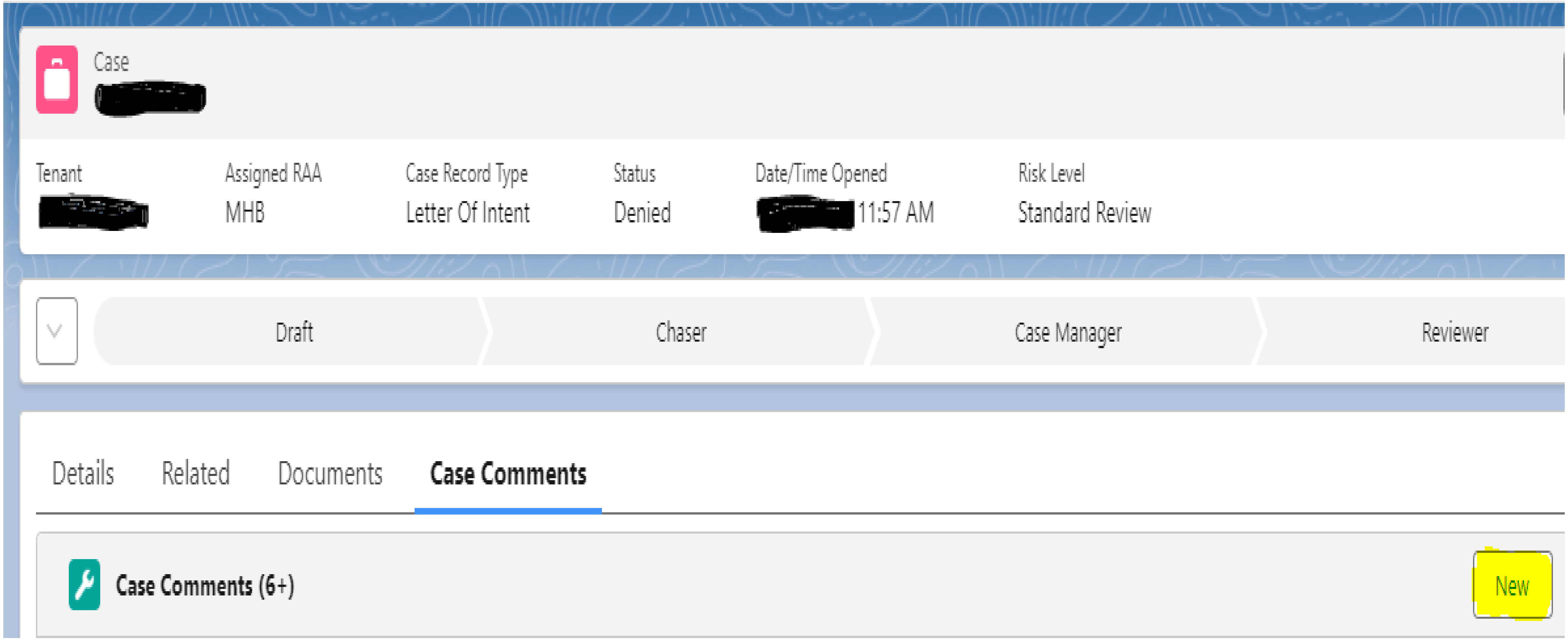
Required Documentation

Required Case Documents

- Application field responses in E2E/Salesforce
- Identification for head of household
- Verification of current housing
- Verification of eligible housing crisis
- Verification of income, or verification of presumed income eligibility
- W-9 for property owner or authorized agent
- Proof of identity for property owner or authorized agent
- Authorization of agent, if applicable
- Proof of ownership for unit

Case Documentation

Case Comments

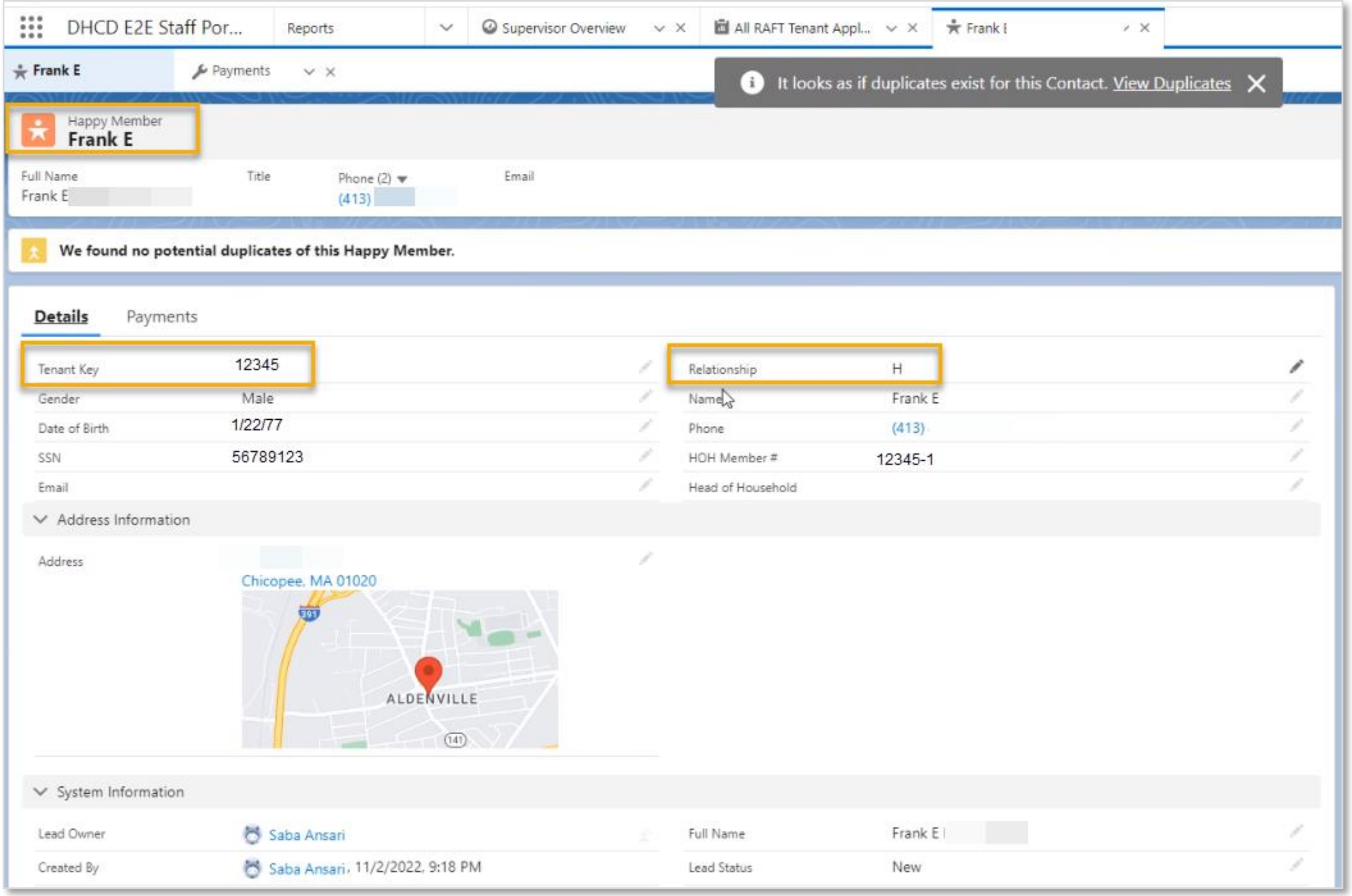


Duplicates Review

Checking for Duplicate HAPPY Contacts

- Review Happy Duplicates to ensure that all past payments are taken into consideration

- Use these 3 questions to determine if you may use the Tenant Key in the Contact Card
  1. Is the E2E contact a duplicate of a HAPPY contact?
  2. Is the HAPPY contact the Head of Household (H)?
  3. Is the Social Security Number the exact same?



E2E Duplicate Contacts

- In addition to Happy duplicates, you may be presented with Duplicate Contacts that originated in E2E
  - If an applicant created a login with a different email, or had an advocate submit an app on their behalf, it will not be part of their contact record
  - Click into any duplicate in the 'Contact' section of the duplicate check – above the Happy section
  - If a Contact Duplicate includes _inactive – that is a merged record and does not need to be reviewed
- Happy duplicate check only includes households and payments that were manually entered in Happy (not E2E payments)
- As we approach the one year mark in E2E, it is more likely that you need to review E2E payments and not Happy payments.

View Duplicates

To merge duplicates, choose up to 3 contacts. Then click Next and choose the fields to keep.

Contacts (4)

Name	Birthdate	Gender.	SSN/TIN	Phone	Email	Other Street	Other Zip/Postal Code	Apartment Number
Kelly C	6/2,	Female		(508)	@gmail.c...	109 \ et	02723	1
kelly c	6/2,	Female		(105)	@gmail.c...	109	02723	apt 1
kelly _Inactive	6/2	Female		(508)	@gmail.c...	109	02723	apt 1
kelly _Inactive	6/2/	Female		(508)	@gmail.c...	109	02723	apt 1

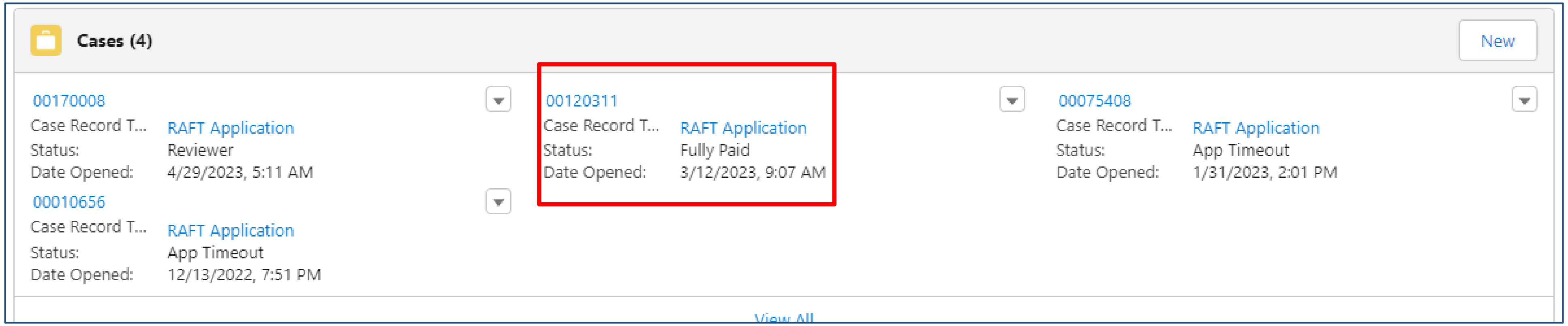
These duplicates can't be merged with contacts.

Happy Members (1)

Name	Tenant Key	Date of Birth	Gender	SSN	Phone	Email	Lead Status
Kelly C	1	6/2,	Female		(508)		New

E2E Duplicate Contacts

- If there are duplicate E2E contacts, click into each contact, review the related cases and associated payments
- If payments have been sent over to Happy, use the Tenant Key from that Contact Card
- Payments from duplicate contacts must be considered in the benefit check
  - E2E cannot and will not account for these payments, so must be carefully reviewed by staff



General Notes

Final General Notes

- Review income verification process with team
- Review required documents list and ensure all received documentation meet criteria to be accepted
- Staff should be encouraged to document more in the Case Comments section of Salesforce
- Check duplicates for other payments made on behalf of the same household in the last 12 months

QUESTIONS

RAA SUPPORT

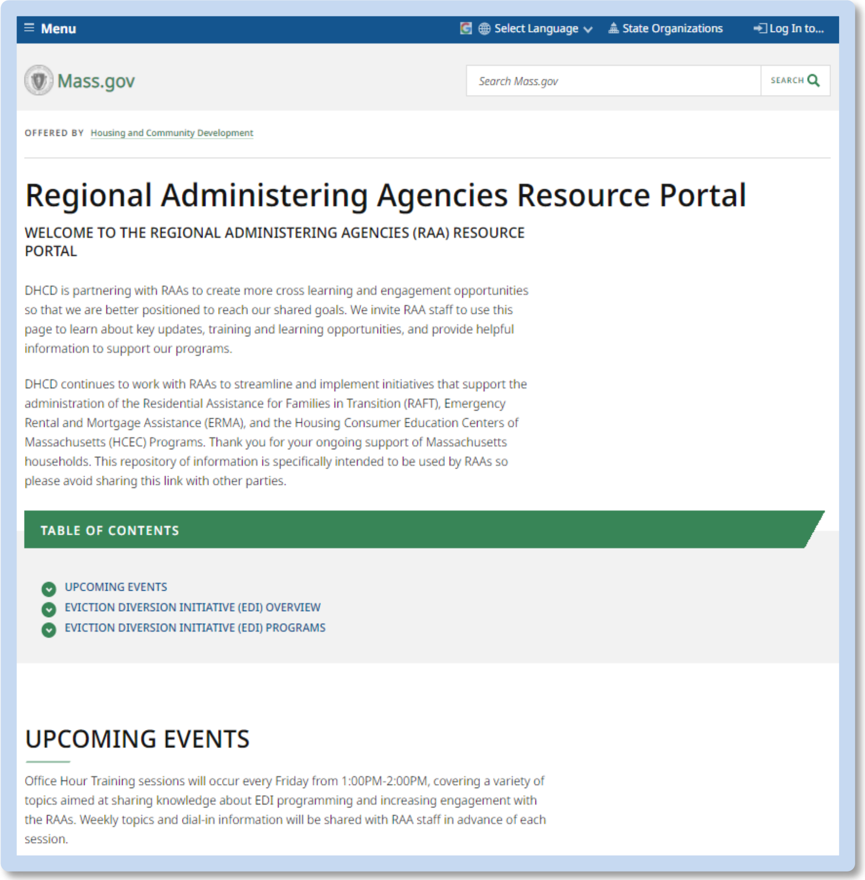
RESOURCES

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.

3 **Zendesk training materials** offer helpful info on processing within E2E/Salesforce



QUESTIONS

Further Questions

Direct questions to your supervisor and then contact [Zendesk] 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 the priority drop down option labeled "**URGENT**."

Best Practice

Please **specify the issue** that you are reaching out about to ensure that the EOHLC RAA Support team is best positioned to provide policy guidance.

THANK YOU!