



# FY23 RAFT Program File Review

*EOHLC Office Hours*  
November 17, 2023



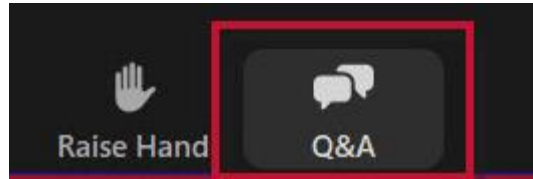
WELCOME



## Asking Questions

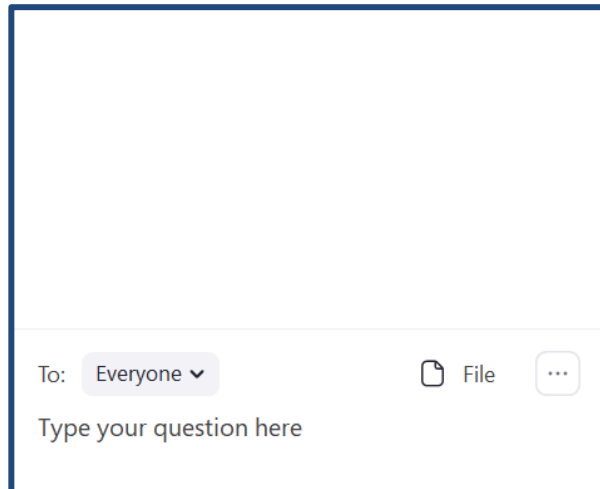
We will be monitoring the Q&A for questions

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





## RAFT Program File Review Findings

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



# 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"

00079060 | Case    I-10408 |...

### Income

#### Earned Income/Salaries/Wages

Amount: \$56    Verification Status: Not Verified

Related    **Details**

Information

Income Name	I-10408	Case	00079060
Contact	<a href="#">Test advtest</a>	Income Type	Earned Income/Salaries/Wages
Frequency of Income	Daily (every day)	Amount	\$56
Calculated Annual Amount	\$20,440	Verification Status	Not Verified

System Information

Created By	<a href="#">Test advtest</a> , 9/12/2023, 3:28 AM	Last Modified By	<a href="#">Test advtest</a> , 9/12/2023, 3:28 AM
Owner	<a href="#">Test advtest</a>	Category	Income

# 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 %

Tenant	Assigned RAA	Case Record Type	Total Benefit Award	Date/Time Opened	Risk Level
Test advtest	LHAND	RAFT Application	\$7,000.00	9/12/2023, 3:21 AM	Standard Review

Case Header	
Case Number	00079060
Potential Case Owner	Awaiting Assignment
Living situation	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.
Has Moving Expenses	
RAA Phone	(339) 883-2342
RAA Email	raft@lhand.org
Docs/Info Due Date	
Applicant Type	Tenant
Geographic RAA	LHAND
No LL Payment Case	<input checked="" type="checkbox"/>
Did TT add an advocate?	
Is Converted LOI	<input type="checkbox"/>
LOI Case #	
Escalated	<input type="checkbox"/>
HAPPY Program	RAFT
HAPPY Increment	Standard RAFT



# Required Documentation

# Required Case Documents

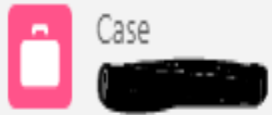


- Application field responses in E2E/Salesforce
- Identification for head of household
- Verification of current housing
- Verification of eligible housing crisis
- Verification of income, or verification of presumed income eligibility
- W-9 for property owner or authorized agent
- Proof of identity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



# Case Documentation

# Case Comments



Case



Tenant	Assigned RAA	Case Record Type	Status	Date/Time Opened	Risk Level
	MHB	Letter Of Intent	Denied	11:57 AM	Standard Review



Draft

Chaser

Case Manager

Reviewer

- Details
- Related
- Documents
- Case Comments**



Case Comments (6+)

New



# 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?

The screenshot displays a web application interface for checking duplicate contacts. At the top, there are navigation tabs for 'DHCD E2E Staff Por...', 'Reports', 'Supervisor Overview', and 'All RAFT Tenant Appl...'. A notification banner at the top right states: 'It looks as if duplicates exist for this Contact. [View Duplicates](#)'. Below this, the contact profile for 'Frank E' is shown, with a 'Happy Member' badge. The profile includes fields for Full Name, Title, Phone (2) (413), and Email. A message below the profile states: 'We found no potential duplicates of this Happy Member.' The 'Details' section is expanded, showing fields for Tenant Key (12345), Gender (Male), Date of Birth (1/22/77), SSN (56789123), Email, Relationship (H), Name (Frank E), Phone ((413)), HOH Member # (12345-1), and Head of Household. The 'Address Information' section shows a map of the address in Chicopee, MA 01020, with a red pin indicating the location in Aldenville. The 'System Information' section shows the Lead Owner (Saba Ansari) and Created By (Saba Ansari, 11/2/2022, 9:18 PM). The Full Name (Frank E) and Lead Status (New) are also visible.



# 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)

<input type="checkbox"/>	Name	Birthdate	Gender	SSN/TIN	Phone	Email	Other Street	Other Zip/Postal Code	Apartment Number
<input checked="" type="checkbox"/>	Kelly C	6/2/	Female		(508)	@gmail.c...	109 V... et	02723	1
<input type="checkbox"/>	kelly c	6/2/	Female		(105)	@gmail.c...	109 V... et	02723	apt 1
<input type="checkbox"/>	kelly _inactive	6/2/	Female		(508)	@gmail.c...	109 V... et	02723	apt 1
<input type="checkbox"/>	kelly _inactive	6/2/	Female		(508)	@gmail.c...	109 V... et	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

Cases (4)		New	
00170008 Case Record T... Status: Reviewer Date Opened: 4/29/2023, 5:11 AM	▼	00120311 Case Record T... Status: Fully Paid Date Opened: 3/12/2023, 9:07 AM	▼
00010656 Case Record T... Status: App Timeout Date Opened: 12/13/2022, 7:51 PM	▼	00075408 Case Record T... Status: App Timeout Date Opened: 1/31/2023, 2:01 PM	▼

[View All](#)



# 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



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

The screenshot shows the 'Regional Administering Agencies Resource Portal' on the Mass.gov website. The page header includes a 'Menu' button, 'Select Language', 'State Organizations', and 'Log In to...'. The main content area features a search bar and a welcome message from DHCD. Below the welcome message is a 'TABLE OF CONTENTS' section with three items: 'UPCOMING EVENTS', 'EVICTION DIVERSION INITIATIVE (EDI) OVERVIEW', and 'EVICTION DIVERSION INITIATIVE (EDI) PROGRAMS'. At the bottom, there is an 'UPCOMING EVENTS' section with a paragraph of text.





## 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!

