



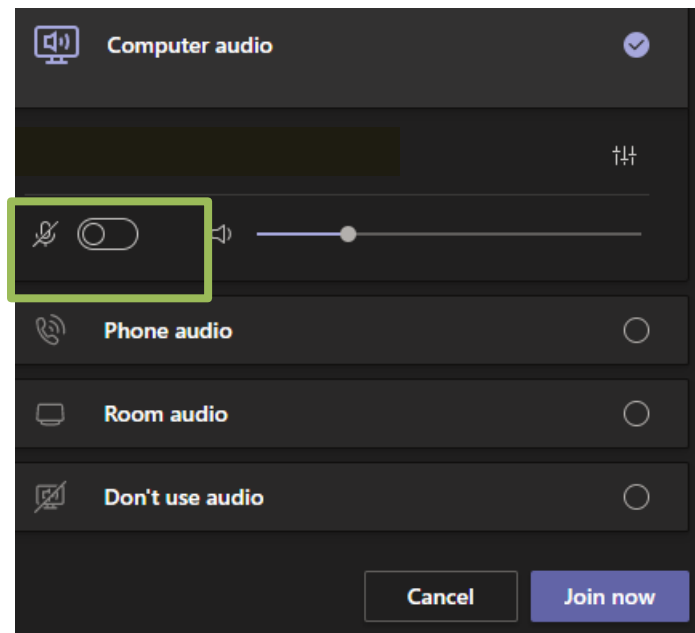
# RAA Office Hours RAFT and ERMA HAPPY Guidance

2/5/2020

Last Updated: 2/4/2020

## Please Mute

Please join the meeting muted during the session to keep interruptions to a minimum

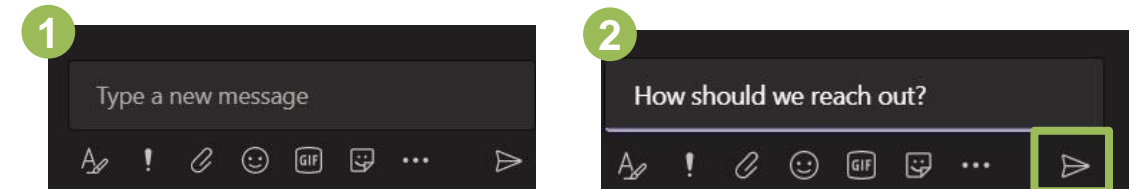


## Engage During Meeting

### 1. Teams Chat

Send a message in the **Teams Chat** panel

1. Type in your **question**
2. Hit Enter



### 2. Questions

- We will be monitoring the Teams Chat for questions throughout the session
- During the designated checkpoints for questions, **please come off mute** to ask your questions once the moderator calls on you

# This Call Is Being Recorded





# WELCOME

# Our Journey Today 1 HOUR



**Welcome & Objective**



**HAPPY Overview**



**Capabilities & Benefits**



**Reduced Reporting Requirements for Denials**



**Payment Entry Steps & Program Tab**



**HAPPY Best Practices**



**Resources**



**Reminders & Next Steps**



**Q&A | HAPPY & General RAFT Questions**

**10 mins**

**20 mins**

**30 mins**

## Purpose



Review **RAFT HAPPY guidance** related to recent policy changes and overall data entry best practices and reporting requirements with RAA staff

## Goal



Create a **standardized understanding** of HAPPY guidance and ways to utilize HAPPY to drive reporting and data standardization towards decreasing application processing times

## **HAPPY** serves as a central repository for tracking financial data across the state



HAPPY is a state-wide database used to make payments for RAFT, ERMA, HomeBASE, and METAR



HAPPY collects demographic and program data for reporting purposes



HAPPY is used to inform eligibility based on past payments



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.



HAPPY was not originally developed for RAFT/ERMA, and **many fields will be left blank**. Refer to the required fields list to know what sections to complete.



## Capabilities of reporting in HAPPY

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1

### Custom Reports

PDFs built by the HAPPY Implementation Team

2

### Report Writer

- Build your own report
- Pull in any data fields
- Export reports to Excel

3

### Exporting from a find

Export a found data set

## Benefits of using HAPPY

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**Replaces and supplements tracking logs with HAPPY data pulls**



**Supervisors leverage HAPPY reports to quality check data entry**



- Denials must still be tracked in **HAPPY**
- RAAs can provide **limited** data for ineligible households on HAPPY

## No longer required

- ✗ Household member name, date of birth, SSN, demographics
- ✗ Unit data
- ✗ Owner data

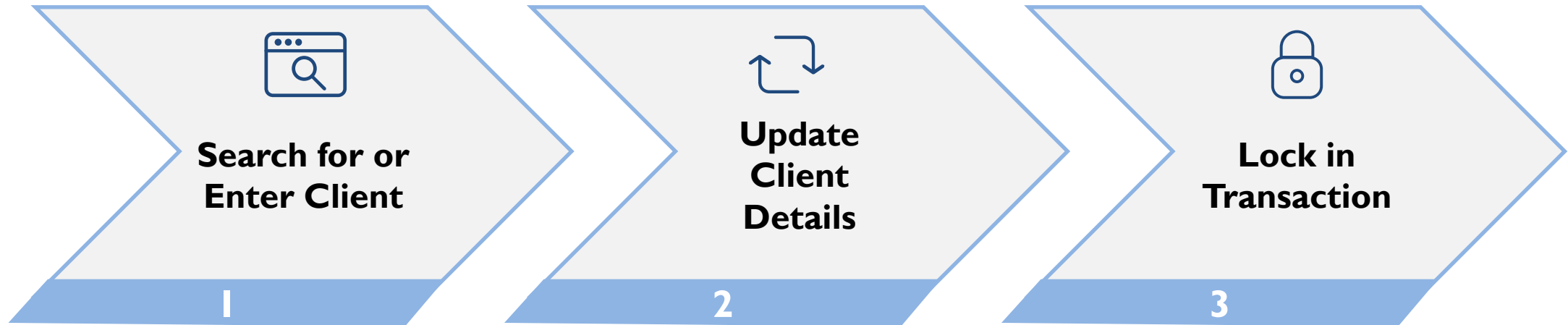
## Still required

- ✓ Head of household name, date of birth, SSN, demographics
- ✓ Initial Data screen
- ✓ Program screen

# 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



**For step-by-step instructions on payment entry and/or a detailed breakdown of required fields, visit the reference guides linked on the Resource slide of this PowerPoint**



Below is an overview of the **Program tab** in HAPPY. All **required data fields** are highlighted in a red box.

Dashboard

Tenants

Lists

Reports

Settings

T88610 - Testy McTesterson - Pending

1 found | 91797 total

NoteHistoryFindPrint

Initial Data

Household

Unit Data

Owner

Eligibility

TTP

Program

FSS/WTW

Portability

Transactions

Documents

SELECT OTHER PROGRAM TO VIEW DETAILS

RAFT

Start Date: 12/22/2000

Inactive

+

SELECTED PROGRAM DETAILS

Program Status

Inactive

Start Date

12/22/2000

End Date

6/30/2001

Funding Limit Type

Fiscal Year

Linked Program

Screening Questionnaire

Funding Limit

\$10,000.00

Actual Payments

-

Projected Payments

-

Remaining Balance

=

**\*Note:** All the data in the screenshots is for example purposes only

# PROGRAM TAB (CONT.)



Below is an overview of the **Program tab** in HAPPY. All **required data fields** are highlighted in a red box.

Initial Data	Household	Unit Data	Owner	Eligibility	TTP	Program	FSS/WTW	Portability	Transactions	Documents
Dependent Under 21 (Y/N)		Y							Housing Crisis	PCRA
Applied for EA (Y/N)							1500		Income	30-50%
Determined EA Eligible (Y/N)							6000		Pregnant	
Rec. Shelter Placement (Y/N)									Children	
									Education	
Increased Expenses Y/N									Employment	
Decreased Income Y/N									Public Assistance	
Rent Calc Issues Y/N									Active DCF Case	
									Children Placed in Foster Care	
Landlord Door Y/N		N							History of Shelter Stay	
									Re-entering Community	
									Age	
									Moves in the past year	
									Lease	
									Override	
									RAFT status	A
									Family Type	
									Current Housing Status	

**\*Note: All the data in the screenshots is for example purposes only**

# PROGRAM TAB REQUIRED FIELDS




## REQUIRED FIELDS

- ✓ Program Status
- ✓ Start Date
- ✓ End Date
- ✓ Funding Limit Type
- ✓ Funding Limit
- ✓ Dependent Under 21
- ✓ Landlord Door
- ✓ Monthly Rent
- ✓ Total Arrearage amount
- ✓ Eligibility Determination Date
- ✓ Application Date
- ✓ Housing Crisis
- ✓ Income
- ✓ RAFT Status

## FIELDS THAT ARE NOT REQUIRED

- ✗ Household member name, date of birth, SSN, demographics
- ✗ Linked Program
- ✗ Screening Questionnaire
- ✗ Actual Payments
- ✗ Projected Payments
- ✗ Remaining Balance
- ✗ Applied for RA
- ✗ Determined EA Eligible
- ✗ Rec. Shelter Placement
- ✗ Increased Expenses
- ✗ Decreased Income
- ✗ Rent Calc Issues
- ✗ Shelter Placement Date
- ✗ Pregnant
- ✗ Children
- ✗ Education
- ✗ Employment
- ✗ Public Assistance
- ✗ Active DCF Case
- ✗ Children Placed in Foster Care
- ✗ History of Shelter Stay
- ✗ Re-entering Community
- ✗ Age
- ✗ Moves in the Past Year
- ✗ Lease
- ✗ Override
- ✗ Family Type
- ✗ Current Housing Status

- HAPPY is a live system so **be careful** moving around in the system.
- **Log out** every night using the silhouette icon (top right of the screen).
  - This is very important for processing speed.
- Try to perform searches by the **most detailed/specific information** to cut down on search time

- Enter clients in the **same order** every time.
- **Do not** create duplicate client records.
- HAPPY was not originally developed for RAFT/ERMA, so **many fields will be left blank**. Refer to required fields list to know what fields to complete.
- These fields **MUST** be entered before transaction is locked in:
  - ✓ Tenant ID
  - ✓ Address in unit tab
  - ✓ Increment
  -  **If a payment is locked in before these fields are entered, they will not be associated with payment record**



1

## HAPPY Support Phone Line

For any technical issues, call the HAPPY Support Line at (888) 484-2779 (*Option 1*)

2

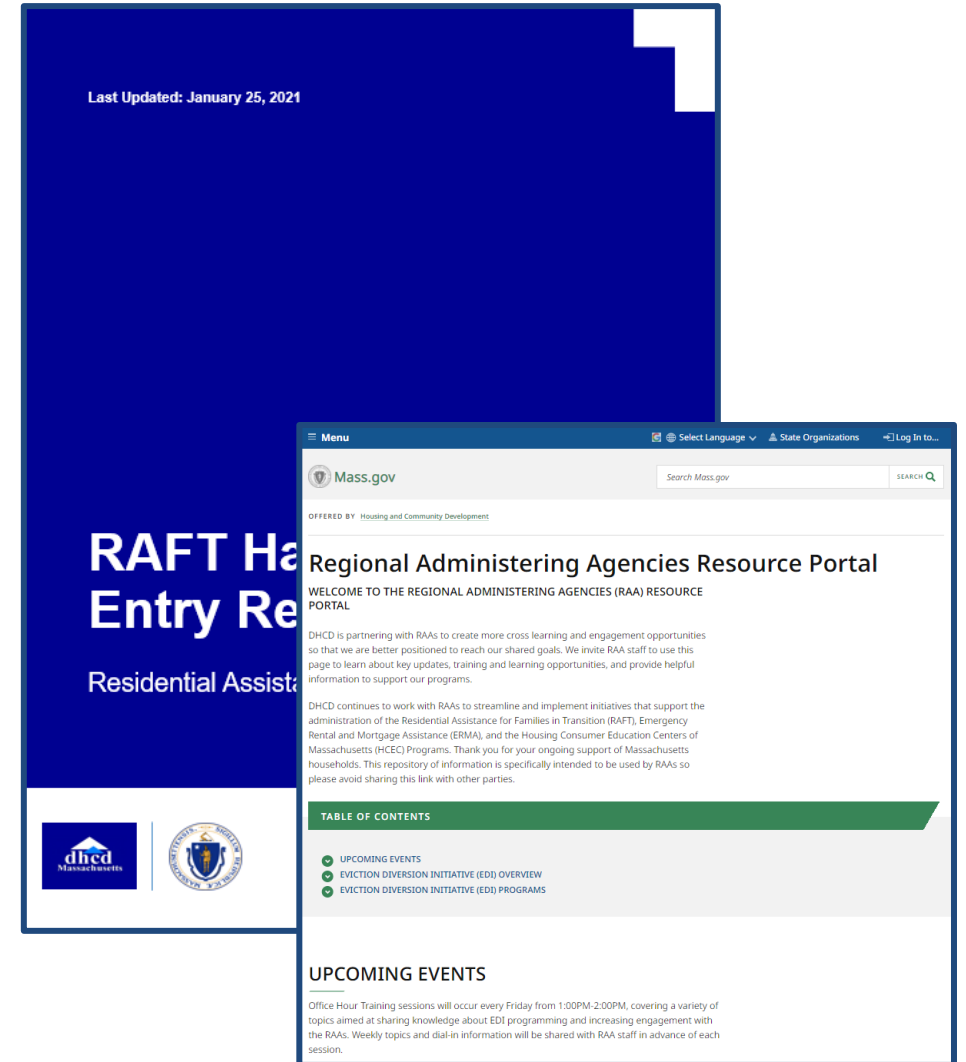
## [RAA Resource Portal](#)

Central resource to provide RAA staff with key updates, training and learning opportunities, and helpful information to support programs

3

## Payment Entry Steps & Required Fields Reference Guide

Detailed step-by-step instructions for completing a payment entry and all data fields related to HAPPY reporting. Reference the RAA Resource Portal for this reference guide.



## Reminders

- Utilize the [RAA Resource Portal](#) as a central resource for learning about key updates, training and learning opportunities, and providing helpful information to support our programs.

## Next Steps

- Next Office hours will cover Landlord Best Practices

Friday, February 12<sup>th</sup>

1:00PM – 2:00PM



QUESTIONS | HAPPY



# QUESTIONS | GENERAL RAFT



THANK YOU!