

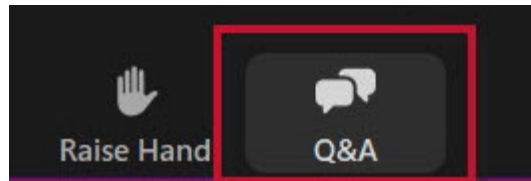


End-to-End Case Management System for RAFT and HomeBASE Intro for RAA Staff (Full Launch) October 21, 2022

Asking Questions

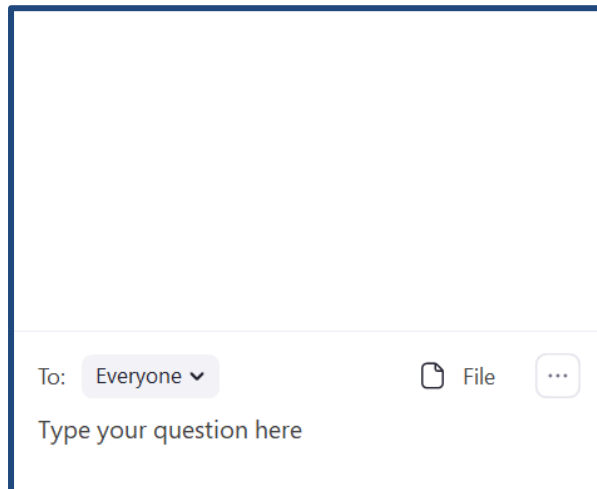
We will be monitoring the Q&A for questions

1



Click “Q&A” to submit a question (or “Raise Hand” to share a verbal question at designated breaks)

2

A screenshot of a Q&A submission form. It features a large white text area for entering a question. Below this area is a header bar containing a 'To:' dropdown menu set to 'Everyone', a 'File' button with a document icon, and a three-dot menu button. At the bottom of the form, there is a placeholder text 'Type your question here'.

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





WELCOME

Purpose



Introduce the new **Online Case Management System for RAFT and HomeBASE** that will go live across the state on December 5, 2022.

Goal



Provide RAA staff with **guidance and support** related to **system launch** and upcoming **RAA staff trainings** on the new system.

Introduction:



BACKGROUND:

- **End to End ("E2E")** case management system for RAFT and HomeBASE **launching Nov/Dec**
- **HAC and Wayfinders** were selected as **Pilot RAAs**
- **Go Live and Training Dates is dependent upon** tech staying on track

RAA/RAP Center	Go Live	Training Window
Pilot RAAs (WF, HAC)	Nov 7	Oct 31 – Nov 10
Remaining 9 RAAs	Dec 5	(Tentative) Nov 14 – Dec 2
RAP Center	Early 2023	TBD

- Zelus Consulting has reviewed our current application process and how staff complete the work ("Current State") now to determine how to map to the Salesforce End to End system ("Future State")
- E2E creates a common system across the state - common case statuses, business processes, and roles/functions across the 11 RAAs + the RAP Center

Plan to Keep Staffing Level the Same Following Launch

Day-To-Day Work of Some Staff May Shift

- E2E Overview
- Features and Benefits of E2E
- E2E Process Flow & Roles
- E2E Training Plan
- Next Steps
- Questions

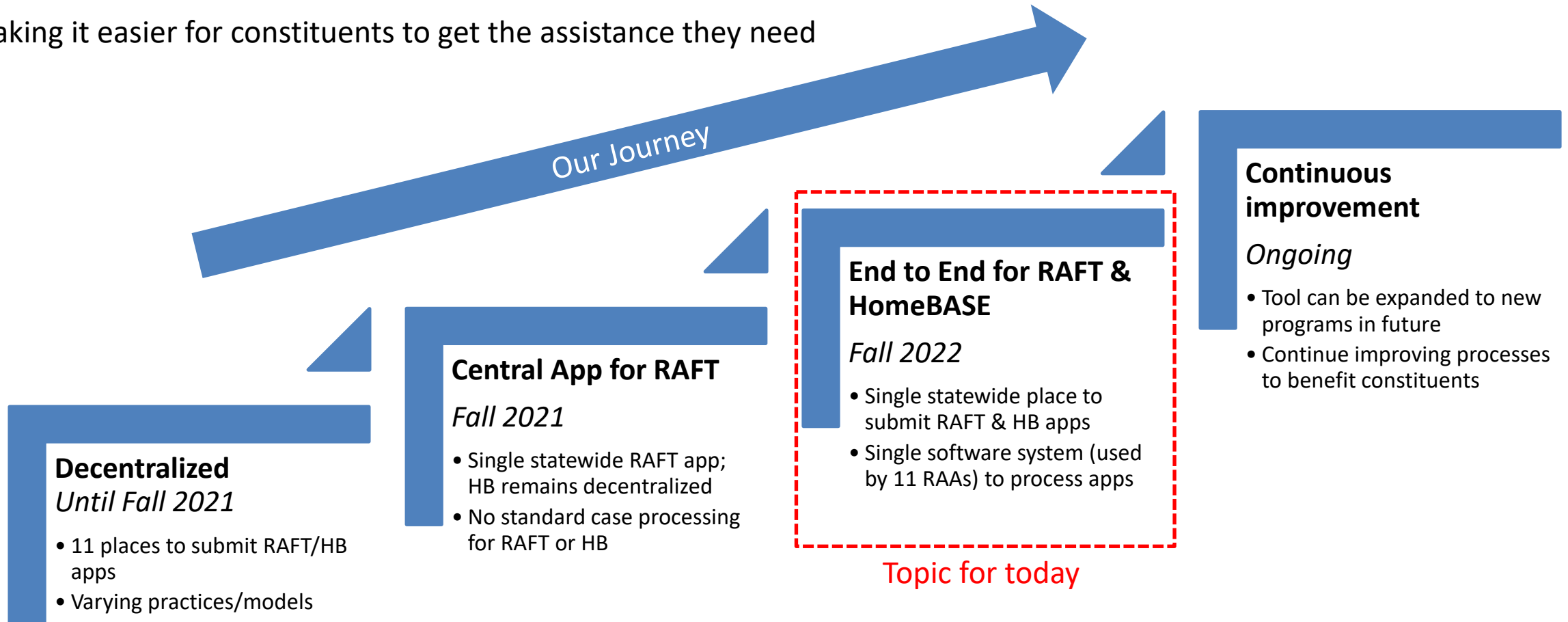


E2E Overview

Gradual technology improvements to better serve constituents



Making it easier for constituents to get the assistance they need



High Level: How will E2E change the RAFT and HomeBASE Process?



E2E will **replace**:

- ❖ Central App/HomeBASE Packet (app questions/order to stay generally the same)
- ❖ SharePoint, Docuphase, & other case management tools
- ❖ HAPPY Program and Payment Data Entry
 - Data from landlord, tenant, and vendor benefit payments will be sent to HAPPY from E2E
 - (HAPPY remains in use for payments and tax reporting)

Features and Benefits of E2E



E2E Feature	Resulting Benefit to RAA Staff
<p>Everything in one place. E2E organizes, sorts, and track applications and attachments and captures case notes, case history and activities like notifications sent to tenants and landlords</p>	<ul style="list-style-type: none">• Less document filing and looking in multiple locations for information about one application• Easy to see what has happened with a case and who did what on a case• Less requirements for RAAs to save documents
<p>E2E will capture data and attachments from the tenant and landlord applications and add them to the case</p>	<ul style="list-style-type: none">• Less manual data entry especially into HAPPY, less scanning of documents to upload to the case• Eg: LL's will upload W-9's prior to case submission and LL information will be populated to the case
<p>Tenants and Landlords must provide required documentation before their application can be submitted for processing</p>	<ul style="list-style-type: none">• Chasers will spend less time chasing tenants and LLs for initial documents• Chasers will focus on verifying submitted documents

Features and Benefits of E2E

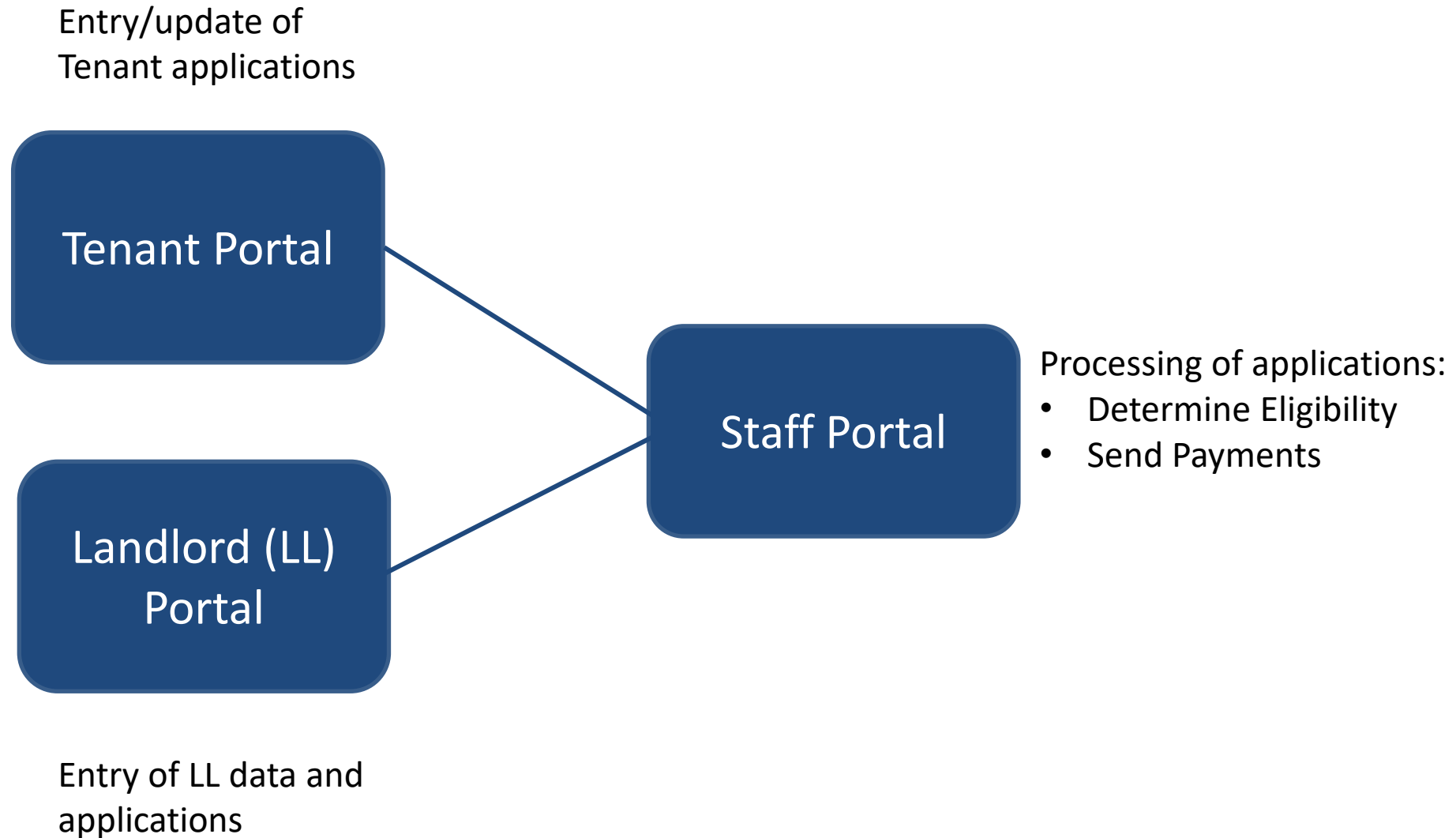


E2E Feature	Resulting Benefit to RAA Staff
Tenants and Landlords will have logins: 1) Applicants can resume an application over multiple sittings (application is automatically saved) 2) Applicants can check the status of an application	<ul style="list-style-type: none">• More accurate supporting documentation, more complete applications, less chasing• Less calls to the RAAs about application status
Email notifications automatically generated & tracked in E2E throughout the process including rejected or missing documents, time-outs, denials, and awards	<ul style="list-style-type: none">• No more time spent writing ad-hoc emails• Ability to quickly lookup and see what notifications were sent to tenants and landlords
E2E will identify potential payment duplicates for RAA staff to review	<ul style="list-style-type: none">• Much less time deduping required – Hooray!
E2E will generate payment transactions for review E2E Reviewers submit payment transactions to HAPPY daily- with a click of a button	<ul style="list-style-type: none">• Eliminates manual data entry into HAPPY• Less time spent confirming accuracy of data
E2E will provide automatic dashboards and reporting	<ul style="list-style-type: none">• Managers/Supervisors will manage staff and cases with easy-to-use, real-time data



E2E Process Flow & Roles

E2E High-Level Process Flow



E2E Case Review Roles



Application Intake & Call Center

Responsibilities:

- Assess tenants' needs and recommend program
- Help with the tenant and landlord portal
- Help tenants:
 - Use the Tenant Portal to create/update applications (self service)
 - Understand requirements
 - Update applications
- Create applications (as an Advocate for paper applications/walk-ins)
- Answer questions
- Help landlords use the Landlord Portal to create their profiles (self service)

Chaser

Responsibilities:

- Once **both** tenant & landlord applications complete & are matched into a Case:
- Review Case documentation and mark as accepted, missing or rejected for tenant and landlord documents
 - Send notifications to tenant and landlord for missing or inaccurate documentation
 - Upload received paper documents for tenant and landlord if needed

Case Manager

Responsibilities:

- Once all documentation is accepted by Chaser:
- Check accuracy of tenant and landlord documentation
 - Check for duplicate payments
 - Determine eligibility (housing crisis, AMI, etc.)
 - Review for suspected fraud
 - Review requested benefits and determine award amounts
 - Determine payments (stipends, arrearage, utilities, moving expenses, etc.)
 - Generate payment transactions

Reviewer

Responsibilities:

- Once an award has been determined by Case Manager:
- Quality review eligibility, award, and payments
 - If approved, the system will submit payments to HAPPY (via nightly process) and send automated award letters to tenants and landlords
 - If denied, the system will send automated denial letters

Manager/ Supervisor

Responsibilities:

- Manage cases and staff workload through E2E functions: queues, dashboards, list views, and reports

Reporting

Responsibilities:

- Access available system populated reports and dashboards

Fiscal/ Financial Review

Responsibilities:

- Once payment data is sent to HAPPY Fiscal/Financial staff will receive reports to confirm payment accuracy in HAPPY (before check runs)



E2E High-Level Process Flow Slide

Tenant Portal

Functions:

- Enter **Applications**
- Update **Applications**
- Upload Documents

Applications:

E2E handles both RAFT and HomeBase applications

- Applications can be Saved while in process
- Applications are in **Draft** status until complete
- Once complete, applications are in **Submitted** status
- Once both Tenant and LL applications are submitted, they are **Matched** into a **Case** for processing
- **Once matched, the Case is auto-assigned to a Chaser**

Landlord (LL) Portal

Functions:

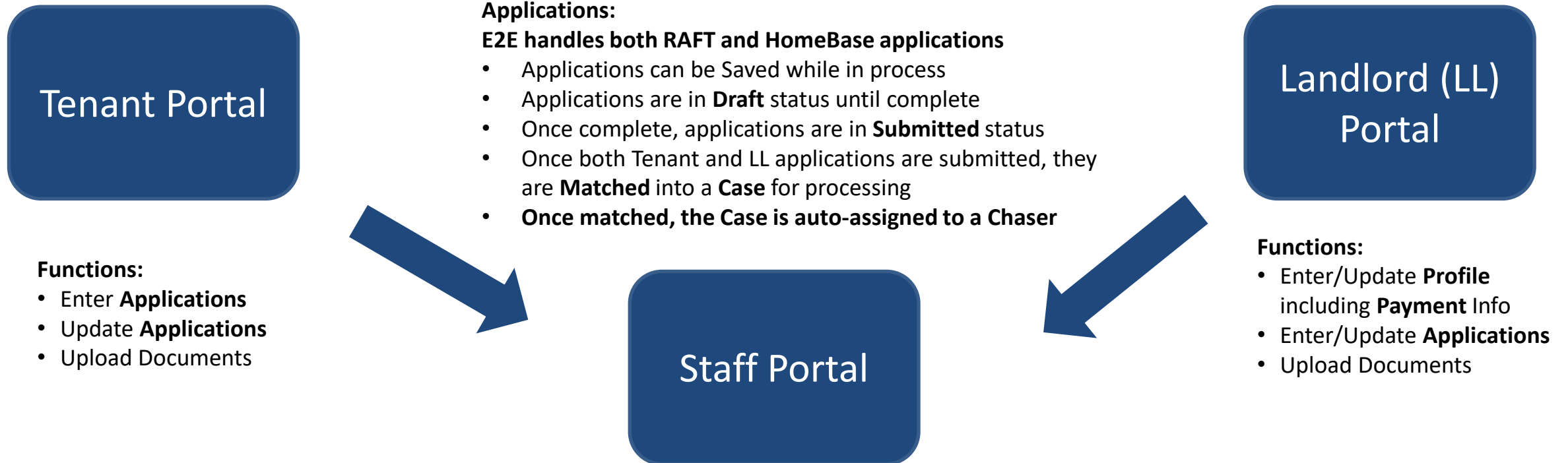
- Enter/Update **Profile** including **Payment** Info
- Enter/Update **Applications**
- Upload Documents

Staff Portal

Cases:

- Holds all data: Tenant and LL information and all documents, Tenant Requests, Award/Denial, Payments, Comments, History
- It also uses associated case contacts to present potential duplicates for RAA staff review, including both E2E and HAPPY data to check for duplicate benefit requests and duplicate payments

E2E High-Level Process flow Slide



The Staff Portal provides logic to complete the following functions:

- **Review Attachments**
- Mark as Accepted, Missing or Rejected
- Upload Documents
- Send Notifications

- **Determine eligibility functions:**
 - Review Tenant Requests
 - Award or Deny case
 - Determine & Generate payments

- **Approve functions (2nd set of eyes):**
 - Verify Eligibility & Payments
 - Submit Payments (to HAPPY)
 - Send Award or Denial Letter



E2E Training Plan & Next Steps

Staff at every RAA will attend these classes based on their role:

Class	Topics	Training Time
Supervisor Training	Managing cases, staff capacity & performance, and case assignment RAA Staff reviewing reports, dashboards, and cases	1 day
Intake: Tenant Portal Staff Portal View	RAA staff assisting tenants with application entry, update, and support RAA Staff reviewing cases to answer status questions	1 day
Landlord Portal	RAA staff assisting landlords to setup and update their profiles and payment types (direct deposit and/or check processing), and LL applications	4 hours
Staff Portal Read/Write (Separate classes for RAFT/HB)	RAA Staff review cases determining eligibility and generate payments Chasers, Case Managers and Reviewers are trained together to see the entire process	3 days
Business Administrator	Setting up RAA staff login credentials and case routing parameters	½ day/ Workshop on Go Live

- Training will include an E2E overview and review of the new business process for each role
- All students will have hands-on exercises to practice how to use E2E to perform their role
- Reference guides and job aids will be provided to use in class and once E2E is launched
- Some staff may be trained on more than one course.

Based on the draft training schedules, each RAA will complete training:

RAA	Date Training will be Complete
HAC	November 3
Way Finders	November 10
RCAP	November 16
NHS	November 30
CTI	November 30
LHAND	November 30
CMHA	November 30
SMOC	November 30
MHB	November 30
BHDC	December 2
FRCHA	December 2

Pilot Training Schedule Oct 31 – Nov 10



The first week of pilot training is scheduled as follows:

Pilot Training-Week 1				
31-Oct	1-Nov	2-Nov	3-Nov	4-Nov
Class 1: HAC/WF Supervisor 1 Day 10 Students	Class 3A: RAFT Intake and Chaser Staff Portal R/W 1-HAC 1 Day 5 Students	Class 3B: RAFT & HomeBASE CM/Reviewer Staff Portal R/W 1-HAC 2 Days 5 Students		Class 5: HomeBASE Staff Portal R/W - WF1 1 Day 2 Students
	Class 4A: LL Portal 4 Hours 11 Students	Class 3C: RAFT Staff Portal R/W - WF1 3 Days 15 Students		
		Class 2A: RAFT Intake 3- WF 1 Day 13 Students		Class 4B: LL Portal 4 Hours 11 Students
		Class 2B: RAFT Intake 3-WF 1 Day 13 Students	HomeBASE Webinar- Application Creation/Maintenace- Pilot EA Diversion & Shelter & HAC Staff 1.5 Hrs	

Pilot Training Schedule Oct 31 – Nov 10



The pilot training will continue into the 2nd week:

Pilot Training-Week 2				
11/7: Launch	8-Nov	9-Nov	10-Nov	11-Nov
Class 6A: Business Admin Wkshop-HAC				HOLIDAY: No Training
Class 6B: Business Admin Wkshop-Way Finders	Class 3D: RAFT Staff Portal R/W - WF2 3 Days 15 Students			
	Class 3E: RAFT Staff Portal R/W- WF3 3 Days 15 Students			



Full Launch Training Schedule Nov 8 – Dec 02

We created a draft schedule to get the remaining RAAs trained before December 5th. This schedule is tentative:

As we created the schedules, we followed these guidelines:

- Staff needed to be trained by 12/5.
- The Staff Portal R/W 3-day classes are the most complicated. We scheduled all these classes by RAA.
- Some classes have may have staff from more than one RAA. Class exercises will be by RAA.

Pilot Training-Week 2				
11/7: Launch	8-Nov	9-Nov	10-Nov	11-Nov
	Class 3D: RAFT Staff Portal R/W - WF2 3 Days 15 Students			HOLIDAY: No Training
	Class 3E: RAFT Staff Portal R/W- WF3 3 Days 15 Students			
RCAP Supervisor Class 1	RCAP Intake: Tenant Portal & Case View Class 1	MHB Intake: Tenant Portal & View Class 4	RCAP LL Portal (4 hours) Class 1	
NHS & CTI Supervisor Class 2	NHS & CTI: Tenant Portal & Case View Class 2		NHS & CTILL Portal (4 hours) Class 2	
MHB Supervisor Class 3	MHB: Tenant Portal & Intake Case View Class 3		HomeBASE CT! Class 1	

Full Launch Training Schedule Nov 8 – Dec 02



The week of November 14th looks like this:

14-Nov	15-Nov	16-Nov	17-Nov	19-Nov
RCAP RAFT & HomeBASE R/W: 3 days Class 1			Intake: Tenant Portal & Case View LHAND, SMOC, FCHRA Class 5	Supervisor LHAND, CMHA, SMOC, BHDC, FCHRA Class 4
CTI RAFT R/W:3 days Class 2			Intake: Tenant Portal & Case View CMHA, FCHRA Class 6	MHB LL Portal (4 hours) Class 4
NHS RAFT & HomeBASE R/W 3 days Class 3			MHB LL Portal (4 hours) Class 3	Tenant Portal EA- Conversion Workers RCAP, LHAND, CMHA, BHDC, FCHRA Class 1
MHB RAFT R/W 3 days Class 4			LL Portal (4 hours) BHDC, FCHRA Class 9	



No training is scheduled during Thanksgiving week.

21-Nov	22-Nov	23-Nov	24-Nov	25-Nov
Thanksgiving Holiday				
No Training				

Full Launch Training Schedule Nov 8 – Dec 02



The last week focuses on completing the Staff Portal R/W trainings.

28-Nov	29-Nov	30-Nov	1-Dec	2-Dec
MHB RAFT R/W 3 days Class 5				
LHAND HomeBASE RAFT R/W 3 day Class 7				
NHS & CTI RAFT & HomeBASE R/W 3 day Class 8				
CMHA RAFT R/W 3 day Class 8				
SMOC RAFT R/W 3 day Class 9				
LL Portal (4 hours) LHAND, CSHA, SMOC Class 8	HomeBASE MHB, CMHA, SMOC Class 2	BHDC RAFT & HomeBASE R/W 3 day Class 10		
	LL Portal (4 hours) MHB Class 9	FCHRA RAFT & HomeBase R/W 3 day Class 11		

We plan to leave time in the week after launch for make-up classes due to absences..

Pilot Training

- Classes scheduled and staff assigned to classes
- Finalize Training Material
- Send Pilot Class Invites
- Finalize Training Material
- Conduct Training (Zelus)
- Pilot Launch: Nov. 7
- Pilot Post Go-Live Support
 - 15 min open office hrs (each RAA)
 - Zen Desk
 - 1:1 support/refreshers

Full Launch Training

- Class schedules drafted
- Finalize schedule
- Assign staff to classes
- Send full launch class invites
- Conduct Training (Zelus)
- Full Pilot Launch: Dec. 5
- Post Go-Live Support
 - 15 min open office hrs (depending on how pilot goes and what is needed)
 - Zen Desk
 - 1:1 support/refreshers

AND PROGRAM D



Questions