



E2E New Functionality and Updates

EOHLC Office Hours
August 25, 2023

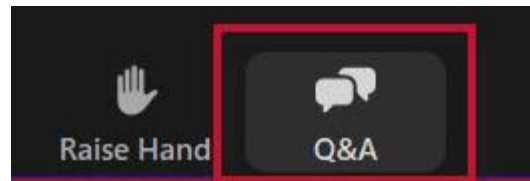


WELCOME

Asking Questions

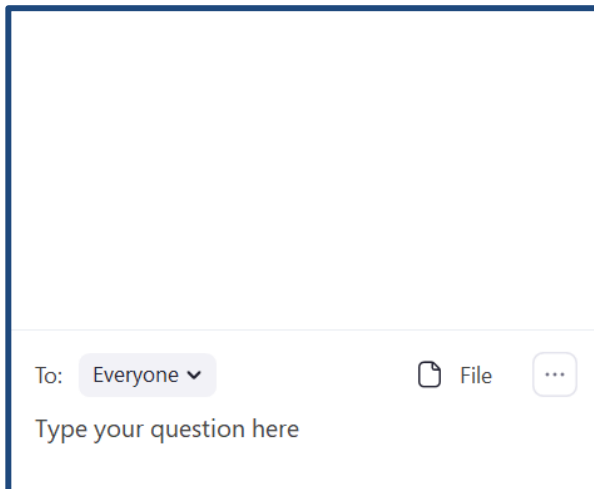
We will be monitoring the Q&A for questions

1



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

2

A screenshot of a Q&A submission form. It features a large, empty text area for entering a question. Below the text area, there is a 'To:' dropdown menu currently 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 that says '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



- E2E New Functionality
- Reminders
- Q&A Break
- RAA Support & Resources



E2E New Functionality

Add Payment Status – Recoup



- Two new payment statuses added, will allow RAAs and EOHLC to track and report on the amount of funds being recouped
- Manual update needed when RAA staff identify payments that need to be recouped
 - Payment Admins will have access to change payment status in Fully Paid cases
- Once funds have been recouped and processed in Happy – response file will auto update to ‘Payment Returned’
- RAAs should mark any payments currently being recouped with this status

A screenshot of the Happy software interface. On the left, there are input fields for "Status", "Happy Notes", "Payment Object Id", "Paid to Type", "Invoice/Account Number", and a "New" button. On the right, a dropdown menu is open, showing a list of payment statuses. The "Submitted for Payment" status is selected and highlighted with a checkmark. Below it, the new statuses "Attempted Recoup - Fraud" and "Attempted Recoup - Overpayment" are highlighted with a red rectangular box. Other statuses in the list include "Payment Successful", "Refund or Cancelled", "Payment Recouped", "Payment Returned", "Payment Failed", "Rejected By Worker", "Payment Voided", "Void/Returned and Reissued", and "Void/Returned - No Reissue".

Payment Status
Submitted for Payment
Payment Successful
Refund or Cancelled
Payment Recouped
Payment Returned
Payment Failed
Rejected By Worker
Payment Voided
Void/Returned and Reissued
Void/Returned - No Reissue
Attempted Recoup - Fraud
Attempted Recoup - Overpayment

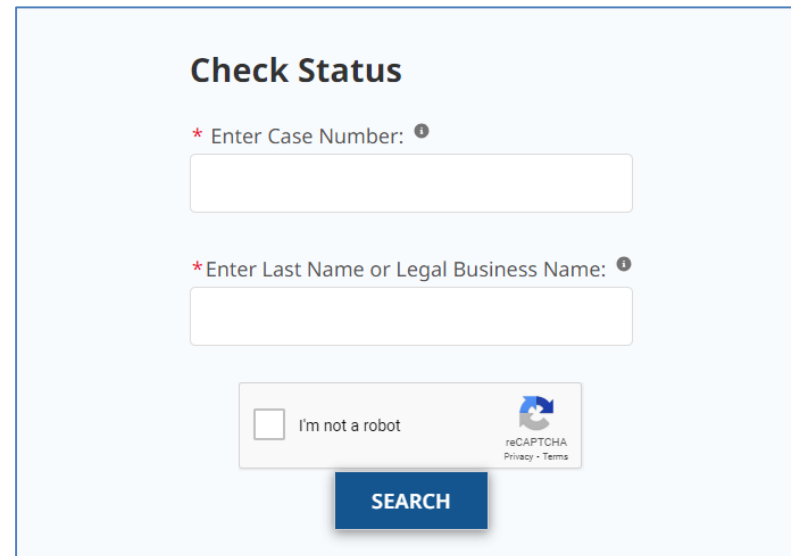
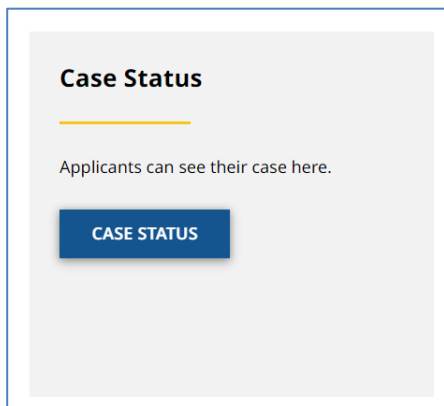
Cases without LL Payment



Details	Related	Documents	Benefits/Payment	Case Comments
▼ Case Header				
Case Number	00078063		Applicant Type	Tenant
Potential Case Owner	QA Chaser		Geographic RAA	MHB
Living situation	Moving: I need to leave where I am currently staying (i.e., homeless, couch surfing, or living in unsafe conditions).		No LL Payment Case	<input type="checkbox"/>

- ‘Utilities/miscellaneous’ case checkbox renamed to ‘No LL Payment Case’
 - No change to functionality - will auto-check for cases with no LL payments (this includes Utilities only cases, Homeowner cases, and other miscellaneous cases where no LL is involved)

- Automated maintenance of Untrusted List
- Pre-populating/locking some fields for Tenant/Homeowner Contact
 - To address tenants/homeowners changing the HOH
 - If changing HOH, need to create a new registration
- Updating Splash Page to bring Quick Actions to the top
 - Highlighting for tenants/advocates/landlords that they can check their status without having to log in every time



The screenshot shows a page titled "Check Status". It has two input fields: "Enter Case Number:" and "Enter Last Name or Legal Business Name:". Below these fields is a reCAPTCHA widget with the text "I'm not a robot" and a "SEARCH" button.

All 8/24 Changes



Issue key	Issue Type	Fix Version/s	Summary	Created	Updated
DHC-2259	Change Request	08/24 Fix Version	Pre-populate/lock some fields for Tenant Contact	6/6/2023 16:23	8/21/2023 6:22
DHC-2249	Change Request	08/24 Fix Version	Automate Maintenance of the Untrusted & Trusted Lists (w/ Pallium interface)	6/5/2023 10:39	8/18/2023 11:46
DHC-2300	Change Request	08/24 Fix Version	LL trying to create new case gets Dupt Error Message : Change the logic for duplicate error message to show the message only when the prior case is open	6/22/2023 16:03	8/16/2023 14:03
DHC-2415	Change Request	08/24 Fix Version	Update the Splash/Landing page (Confluence DHC-84) to bring QUICK ACTIONS: Case Status & Doc Upload to top row	8/7/2023 11:47	8/21/2023 3:34
DHC-2255	Change Request	08/24 Fix Version	Add payment status - Recoup	6/6/2023 9:22	8/19/2023 3:50
DHC-2390	Change Request	08/24 Fix Version	Force RAA Worker to select a 'Request for Addtl xxx' substatus when sending cases back to draft	7/28/2023 15:24	8/16/2023 14:04
DHC-2353	Change Request	08/24 Fix Version	Label change for utilities/miscellaneous check box	7/20/2023 7:40	8/16/2023 14:04
DHC-2367	Defect	08/24 Fix Version	LL Contact Preferred Language Defect	7/25/2023 12:52	8/21/2023 3:07
DHC-2402	Defect	08/24 Fix Version	Tenant created multiple cases for the same address	8/2/2023 15:11	8/20/2023 22:36
DHC-2412	Defect	08/24 Fix Version	GIAC Tenant - Validation does not appear to be working correctly	8/7/2023 10:05	8/19/2023 1:52
DHC-2371	Defect	08/24 Fix Version	Cases Sent Back to Draft Not Timing Out After 14 Days	7/26/2023 9:00	8/18/2023 11:54
DHC-2429	Defect	08/24 Fix Version	Converted LOI Case Created 8/11/23 was erroneously App Timeout on 8/14	8/14/2023 8:47	8/18/2023 11:51
DHC-2395	Defect	08/24 Fix Version	TT and LL Cases in Case Manager, but somehow the TT was able to change Status from Case Manager to App Match	7/31/2023 13:51	8/20/2023 3:27
DHC-2356	Defect	08/24 Fix Version	Deep Dive Into This LOI case and Procedure	7/21/2023 12:29	8/20/2023 3:15
DHC-2411	Defect	08/24 Fix Version	Draft Cases Going to RAP Center	8/4/2023 13:15	8/21/2023 1:44
DHC-2387	Defect	08/24 Fix Version	LL View Case Summary does not include the full consent language	7/28/2023 11:00	8/11/2023 11:52
DHC-2426	Defect	08/24 Fix Version	DHC-2259 - Issue in tenant application intake	8/14/2023 4:22	8/18/2023 12:30
DHC-2276	Defect	08/24 Fix Version	Regression: Advocate certification paragraph is not visible in edit mode for RAFT application	6/14/2023 6:42	8/18/2023 14:06
DHC-1998	Defect	08/24 Fix Version	Translation issues for Registered LL, Guest LL and Tenant users	3/28/2023 7:36	8/18/2023 14:06
DHC-2384	Defect	08/24 Fix Version	UAT2 Return to Draft Option Menu in Tenant Portal is Incorrect	7/27/2023 13:55	8/16/2023 22:17
DHC-2393	Defect	08/24 Fix Version	Issues in landlord profile setup and application intake	7/31/2023 10:21	8/11/2023 11:46
DHC-2329	Defect	08/24 Fix Version	Issue in Homeowner expense screen	7/7/2023 10:49	8/11/2023 11:45
DHC-2410	Defect	08/24 Fix Version	Soft Warning message is not getting displayed in Tenant and Rent Details screen. - Salesforce Case	8/4/2023 3:40	8/18/2023 14:37
DHC-2445	Defect	08/24 Fix Version	Issue in applicant details screen for Tenant advocate and Shelter users	8/17/2023 8:55	8/18/2023 12:23
DHC-2398	Defect	08/24 Fix Version	Issues in the Household Members Pop-Up Screen	8/2/2023 7:43	8/10/2023 9:01
DHC-2198	Defect	08/24 Fix Version	Issue in guest landlord upload document - Salesforce Case	5/19/2023 6:00	8/18/2023 14:38
DHC-2401	Action Item	08/24 Fix Version	Document the Data fix for duplicate tenant contact cards - bucket 5 & Schedule a date to run the job	8/2/2023 13:20	8/18/2023 16:07
DHC-2379	Action Item	08/24 Fix Version	DHC-2150 revert the changes done for attachments to work	7/26/2023 17:40	8/18/2023 6:13

8/4 New Functionality - Payments on Contact Record



- Payments originating from E2E can be found on tenant's contact card
 - View on the Related tab, click 'view all' to see payment dates, program, etc.
- Will combine payments from multiple cases to allow for quicker view at past payments
- Does not include:
 - Happy payments made prior to E2E
 - Payments from advocate-initiated applications

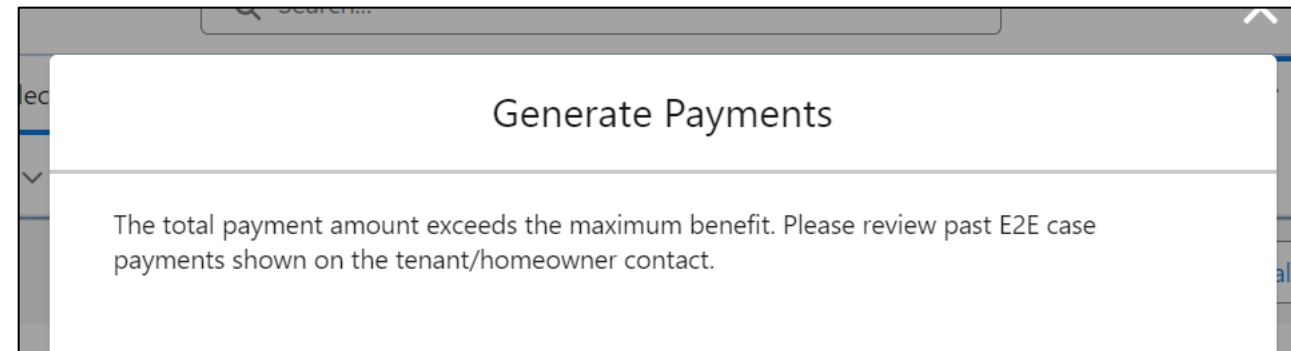
Contacts > Eugenia 										
Payments										
3 items • Sorted by Payment Date • Updated a few seconds ago										
	<input type="checkbox"/>	Payment ID	Case Number	Payment R...	Status	Actual Amount	Payment Date ↑	Happy Key Pr...	Happy Key Increment Key	
1	<input type="checkbox"/>	P-286586	00089354	ARR	Payment Successful	\$2,025.00	2/21/2023	RAFT	Standard RAFT	<input type="button" value="▼"/>
2	<input type="checkbox"/>	P-286587	00089354	STP	Payment Successful	\$1,025.00	3/1/2023	RAFT	Standard RAFT	<input type="button" value="▼"/>
3	<input type="checkbox"/>	P-351341	00274558	ARR	Submitted for Payment	\$1,025.00	8/23/2023			<input type="button" value="▼"/>



12 month look-back at contact's benefit level

- The benefit level validations will now look back at the HOH Contact Record's payments made out of E2E in the last 12 months
 - Validation at payment generation and when moved to Ready for Payment
- If the payments you're trying to generate/approve, combined with the past E2E payments are more than \$7,000 - an error will pop up and payments will not be generated

- This validation will not account for Happy payments or payments associated with an advocate-initiated case
- Staff should still review duplicates and perform a benefit calculation



Reviewing past payments



- Happy members only show payments originating from Happy
- Must review all related cases in Contact Record and potential E2E dupes

★ Mary H... Payments

Happy Members > Mar. Payments

6 items • Sorted by Happy Payment Date • Updated a minute ago

Happy Payments – In Happy Member Record

New Change Owner

<input type="checkbox"/>	Payment ID	Actual Payment	Happy Payment Date ↓	Happy Key Program Key	
1	<input type="checkbox"/> P-262063	\$850.00	11/1/2022	RAFT	▼
2	<input type="checkbox"/> P-254065	\$2,550.00	10/14/2022	RAFT	▼
3	<input type="checkbox"/> P-58325	\$850.00	7/5/2022	ERAP	▼
4	<input type="checkbox"/> P-52093	\$850.00	6/2/2022	ERAP	▼
5	<input type="checkbox"/> P-46472	\$850.00	5/3/2022	ERAP	▼
6	<input type="checkbox"/> P-43015	\$850.00	4/28/2022	ERAP	▼

006... | Case MAR' Payments

Contacts > MAR' Payments

4 items • Sorted by Payment Date • Updated a few seconds ago

E2E Payments – In Contact Record

New Change Owner

<input type="checkbox"/>	Payment ID	Case Number	Payment R...	Status	Actual Amount	Payment Date ↑	Happy Key Pr...	Happy Key Increment Key	
1	<input type="checkbox"/> P-283416	00042093	ARR	Payment Successful	\$4,250.00	2/10/2023	RAFT	Standard RAFT	▼
2	<input type="checkbox"/> P-283417	00042093	STP	Void/Returned - No Reissue	\$850.00	3/1/2023	RAFT	Standard RAFT	▼
3	<input type="checkbox"/> P-345307	00232500	ARR	Void/Returned and Reissued	\$2,350.00	7/19/2023	RAFT	Standard RAFT	▼
4	<input type="checkbox"/> P-347604	00232500	ARR	Payment Successful	\$2,350.00	7/19/2023	RAFT	Standard RAFT	▼



- Adding Providers
 - Mortgage company check address – ensure that we are entering the correct location

IMPORTANT INFORMATION					
Important Mailing Addresses (Please include your account number on all correspondence)					
Regular Payments Select Portfolio Servicing, Inc. Attn: Remittance Processing P.O. Box 65450 Salt Lake City, UT 84165	Overnight/Express Payments Select Portfolio Servicing, Inc. Attn: Cashiering Dept. 3217 S. Decker Lake Dr. Salt Lake City, UT 84119	Notice of Error or Information Request or Qualified Written Request Select Portfolio Servicing, Inc. P.O. Box 65277 Salt Lake City, UT 84165 Fax: (801) 270-7856	General Correspondence Select Portfolio Servicing, Inc. P.O. Box 65250 Salt Lake City, UT 84165	Check by Phone (800) 258-8602 Option 1	Bankruptcy Correspondence & Notices must be sent to: Select Portfolio Servicing, Inc. Attn: Bankruptcy Dept. P.O. Box 65250 Salt Lake City, UT 84165

- Denial vs Time Out
 - Use Timeout status if missing documentation
 - Use denial for ineligibility or suspected fraud
 - Ineligibility includes: Over Income, No housing crisis, Household Received \$7k already, etc
 - Do not use participant non-compliance for missing documentation
 - Do not use no funding for households who have exhausted their benefit limit



QUESTIONS



RAA SUPPORT

1

[RAA Resource Portal](#)

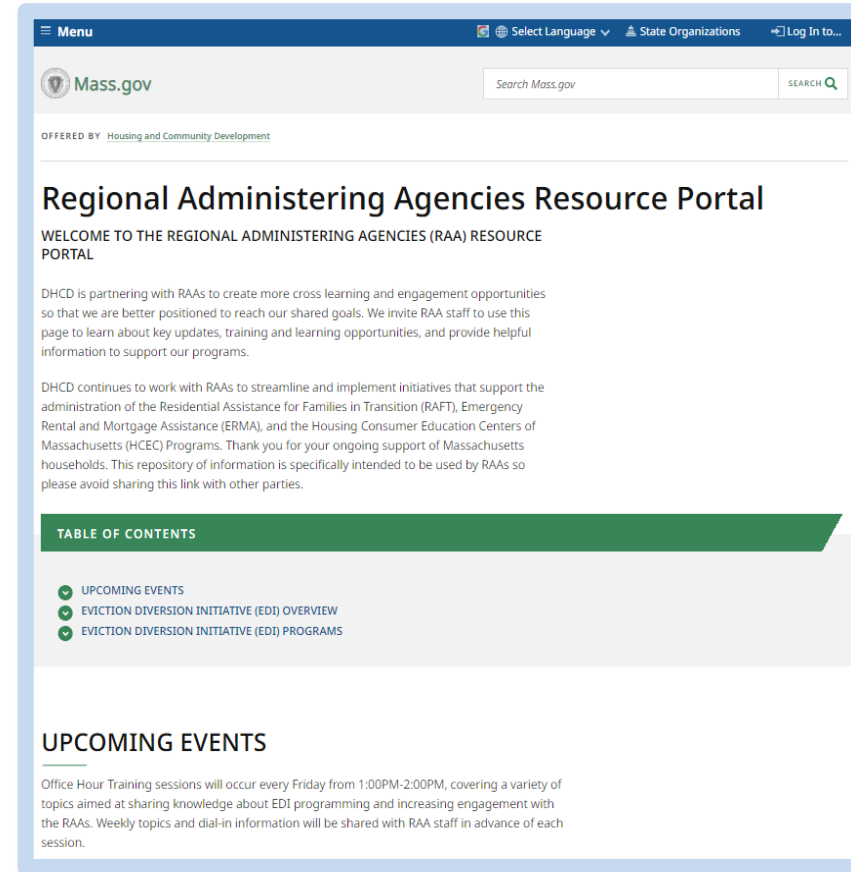
Central resource to provide RAA staff with key updates, training and learning opportunities, and helpful information to support programs

2

[Frequently Asked Questions \(FAQs\)](#) that provide additional, concise program guidance.

3

[Zendesk training materials](#) offer helpful info on processing within E2E/Salesforce





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!

