CHAMP Technical Update #20

Document Uploads

Version 2 (12.08.2021)

From time to time you will be receiving CHAMP Technical Updates from CHAMP Project Manager, Andrew Clinton. These technical updates will cover important "How-To's," and new CHAMP functionality, as well as provide information related to system maintenance and planned downtime. Please review these technical updates so that you can stay current on system enhancements.

This Tech Update covers How to Upload Screening Responses and other documents into the Applicant File.

Document Upload Overview

Document Upload functionality in CHAMP was originally created to ensure that the Tenant Selection process could continue during the COVID-19 pandemic. Since that time, Document Upload functionality in CHAMP has become a robust tool for LHAs and Applicants to more efficiently communicate during the Screening process.

Document Upload functionality exists across many areas of CHAMP including:

1. **The Applicant File**
   a. Letters tab – Upload tenant selection-related letters that were generated outside of CHAMP
   b. Screening Responses tab – Upload all screening documentation Applicants have provided; Star useful documents for quick access later; Mark documents as "Read;" Organize document categories; Delete mistakenly uploaded documents
   c. Paper Applications tab – Upload CHAMP Paper Applications that the LHA has entered
2. **Pulled or Previewed Lists**
   a. View Priority/Preference Document indicators when an Applicant has unread Priority/Preference documents that the LHA should review
   b. View Vacancy Document indicators when an Applicant has unread Vacancy Screening documents that the LHA should review
   c. View Starred Documents indicators when an Applicant has Starred Documents that the LHA has indicated are useful for the verification process
3. **The Worksheet Review Items and the Vacancy Screening Checklist**
   a. View "New Document" indicators relevant to each Worksheet Review Item
   b. Review "Starred" Documents from the Applicant File related to the Eligibility and Qualifications Screening items listed on the Vacancy Screening Letter Package Cover Letter
   c. Check off document categories when all required Eligibility and Qualifications Screening documents for that category have been received *(checking off document categories when all required documents have been received will customize the Vacancy Screening Package for an Applicant; To learn more about the Vacancy Screening Checklist see CHAMP Technical Update 23 - Vacancy Screening Checklist)*

Per PHN 2021-23, LHAs are **required** to upload all CHAMP Paper Application, Written Application Updates, and Applicant Responses to Screening into the appropriate CHAMP Applicant File within 15 calendar days of the date of receipt. Any documents received from Applicants should be date and time stamped. This is to ensure the proper functioning of CHAMP and the Tenant Selection process.

The Applicant File

The Applicant File contains three major sections, each located on their own tab. These are the Letters tab, the Screening Responses tab, and the Paper Applications tab. You can see each tab located on the Applicant Profile Header in the below screenshot.

Alyssa Adams APPLICANT ID NUMBER: 2687214176

215 first st., Abington, MA 02351
No phone number provided · No Email
DOB: Dec. 8, 2005 · **Language:** English

EDIT APPLICANT INFO

DOWNLOAD ADDRESS FILE

| APPLICATION | HOUSING SELECTIONS | HISTORY | WORKSHEET | NOTES | APPLICANT FILE |

| LETTERS | SCREENING RESPONSES | PAPER APPLICATIONS |

The Letters tab contains all the letters sent to this Applicant on behalf of the LHA.

This includes any letter generated by CHAMP that has a Letter Sent Date **AND** any other Screening related letter **UPLOADED** by the LHA.

All letters on this tab are viewable by the Applicant in their account.

The Screening Responses tab contains all the Screening Response documents the Applicant has provided to verify their Application.

Each upload is named and labeled with a document category. Both Applicants and LHAs can **UPLOAD** documents. LHAs are required to **UPLOAD** all screening responses within 15 days.

The Paper Applications tab contains all the CHAMP Paper Applications that have been submitted by the Applicant and entered by an LHA.

Once an LHA enters any Application Update, they are required to **UPLOAD** the written update request within 15 calendar days. This includes Paper Applications and other written requests.

Applicant File Section 1 – Letters tab

The Letters tab contains all the letters sent to this Applicant on behalf of the LHA. This tab includes letters sent by a Screening Support vendor like MassNAHRO. This tab also includes any letter generated by CHAMP that has a Letter Sent Date **AND** any other Screening-related letter **UPLOADED** by the LHA. All letters on this tab are viewable by the Applicant in their account.

The Letters tab has three sections. These are:

1. Letters Generated by CHAMP
2. Other Letters Uploaded
3. Return to Sender Scans

Letters tab – Letters Generated by CHAMP

This section of the Letters tab shows a table of all the different types of letters that have been generated in CHAMP for this Applicant. Clicking on the File Name link will download the latest letter of that letter type. To see older versions of each letter type, click the "See all" link in the "See all mailings of this type" column. This table shows when the letter was generated, who the letter was generated by, and when the letter was sent.

LHAs must enter the Letters Sent Date for each letter generated by CHAMP so that the Applicant can view it in their online CHAMP Account. Click the "View Letters Ready to Send" button to see the letters that need a Letter Sent Date entered. When you click this button, you will be taken to a view of the Letters Ready to Send page filtered for the Applicant ID of the Applicant you are working on.

Letters tab – Letters Ready to Send Page

The Letters Ready to Send page shows the LHA which letters have been generated but not sent. The Letters Ready to Send button appears in the Letters Generated by CHAMP section of the Letters tab.

All Letters generated by CHAMP are required to have a Sent Date set by the LHA.

Letters tab – Other Letters Uploaded

The Other Letters Uploaded section of the Letters tab shows a table of all the different letters related to the Screening Process that the LHA has sent to the Applicant that **WERE NOT GENERATED BY CHAMP**. This includes Requests for Additional information, Offer Letters, Leases, or Vouchers that have been issued. Until the Determination Letter Generation feature set is completed in CHAMP, Denial Letters will also be in this section.

Other Letters Uploaded

UPLOAD OTHER LETTER SCAN

Documents in this table are visible to your LHA and the applicant through their CHAMP account.

File Name	Upload Date	Organization	Address	Sent Date	See all mailings of this type
Request for Additional Information	Nov. 24, 2021, 5:02 p.m.	Newton Housing Authority	49 Union Street, Barre, Massachusetts 01005	Nov. 13, 2021	See all

==To Upload Other Letter Scans, click the Upload Other Letter Scan button==

This will open the Upload screen where LHAs can indicate important information about the letter that was sent including: what type of letter it is, the date the letter was sent, and whether the address it was sent to matches the current mailing address in CHAMP for the Applicant.

Upload Other Letter Scan

Letters uploaded here will be sent digitally to the applicant, and should be an exact copy of what was sent to the applicant

Select file to upload *

Choose File | No file chosen

Sent Date *

YEAR | MONTH | DAY

Mailing type *

Offer Letter

The current mailing address on file is 49 Union Street, Barre, MA 01005.

Does the current mailing address on file match the address on the address that the letter was addressed to? *

⦿ Yes
◯ No

CLOSE | UPLOAD

It is important for LHAs to upload these other letters because the Applicant can then review them in their online CHAMP Account.

Other Letter Upload Types

Mailing type *

Offer Letter

Denial of Eligibility/Qualifications
Denial of Priority/Preference
Request for Additional Information
Offer Letter
Lease
Voucher

This section of the Letters tab shows a table of all the Return to Sender notices that the LHA has received after sending the Applicant a mailing of any kind. It is important for LHAs to upload any Return to Sender notices that they may have received so that the Applicant can review it in their online CHAMP Account and update their address.

Return To Sender Scans

UPLOAD RETURN TO SENDER SCAN

This table contains scanned copies of the letter packages and envelopes that were returned back to your Housing Authority for this applicant. Documents on this table are visible to your LHA and the applicant through their CHAMP account.

View File	Received on	Upload date	Uploaded by	Organization	Address
View Scan	Oct. 11, 2021	Nov. 24, 2021, 5:24 p.m.	test user	Newton Housing Authority	49 Union Street, Barre, Massachusetts 01005

To Upload Return to Sender Scans, click the Upload Return to Sender Scan button

This will open the Upload screen where LHAs can indicate important information about the Return to Sender notice including: what type of letter it is, the date the letter was sent, and whether the address it was sent to matches the current mailing address in CHAMP for the Applicant.

Upload Return to Sender Scan

Upload a scanned copy of the mail that was returned to you including the envelope. To the extent possible make sure that the undeliverable address is visible in the scan.

Select file to upload *

Choose File | No file chosen

Received Date *

| YEAR ⌄ | MONTH ⌄ | DAY ⌄ |

The current mailing address on file is 29155 first st., Abington, MA 12345.

Does the current mailing address on file match the address on the address that the letter was addressed to? *

○ Yes
○ No

CLOSE   UPLOAD

It is important for LHAs to upload any Return to Sender Notices that it may have received. It is also important to pay attention to the address questions on the upload screen – this will help alert the Applicant if their address is bad!

Applicant File Section 2 – Screening Responses tab

The Screening Responses tab shows the Screening Responses Upload area and the Screening Responses table containing all Applicant Screening Responses that have been uploaded by your LHA, the Applicant, or any other LHA to which the Applicant submitted Screening Response documentation.

> Per PHN 2021-23, LHAs are **required** to upload all CHAMP Paper Application, Written Application Updates, and Applicant Responses to Screening into the appropriate CHAMP Applicant File within 15 calendar days of the date of receipt. Any documents received from Applicants should be date and time stamped. This is to ensure the proper functioning of CHAMP and the Tenant Selection process.

Screening Responses Upload Area

The Screening Responses Upload area is the area at the top of the Screening Responses tab where LHAs upload the screening responses they have received. Whenever an LHA uploads a document this document will either be a document that is responsive to Priority/Preference Screening or a document that is responsive to Vacancy Screening (Eligibility and Qualifications Screening). There is a corresponding button for each type of document. To begin the upload process, determine which kind of response it is and click the corresponding button.

Uploading Priority/Preference Screening Responses

LHAs can upload Priority/Preference Screening Responses in two places in CHAMP: through a Pre-Screening Batch (See CHAMP Technical Update 19 – Pre-Screening Priority Applicants) or through the Responses tab of the Applicant File. In both cases, the documents end up in the Applicant File. This Tech Update will focus on uploading documents from the Applicant File. From the Applicant File, click the "Upload Priority/Preference Response" button.

To Upload Priority/Preference Screening documentation:

1. Scan and save the documents as .pdf files in an easily accessible folder on your computer. LHAs may want to set up an internal folder structure to organize the upload process.
2. Go to the Applicant File of an individual Applicant and click the "Upload Priority/Preference Response" button.
3. This will open the Priority Preference Response Upload screen.
4. On the Uploads screen, click the "Choose File" button to open file explorer which will allow you to choose a file from your computer.
5. Find the scanned document, select it, and click the "Open" button in the file explorer window.
6. Enter a name for the Document in the Document Name text box.
7. Star the upload if you will be using this document to verify the Applicant's application information.
8. Select which type(s) of information the document contains. For Priority/Preference documentation the options are as follows: Housing Situation Information (Priority), Residential Address Information (Local Preference by Residence), Employment Address Information (Local Preference by Employment), Veteran Status Information (Veterans Preference).

Upload a Priority Preference Response

Name: Victoria Russell   **ApplicationID:** 242450652

Select file to upload *
[Choose File] No file chosen

Date received from applicant *
| YEAR | MONTH | DAY |

Document Name *
Please enter a short description of the uploaded document here to be used as a document name. Do not use this field to enter a determination.

☐ Star this response

Response Types *

☐ Housing situation information

☐ Residential address information

☐ Employment address information

☐ Veteran status information

Notes

[CANCEL]   [UPLOAD]

a. It is possible that a single document may contain different types of Priority/Preference information. If so, select all that apply to the document being uploaded.

b. When you select a Response Type, CHAMP will put a link to the specific document on the related Worksheet Review Item for this Applicant, which will make it easier to find when conducting screening.

9. Click the "Upload" button. This will add the document to the Applicant File where you will be able to see it in the Screening Responses table.

Uploading Vacancy (Eligibility & Qualifications) Screening Responses/Documentation

LHAs are able to upload Vacancy (Eligibility & Qualifications) Screening Responses/Documentation through the Applicant File.

LHAs are prohibited from uploading any CORI related information in CHAMP.

To Upload Vacancy Screening Response Documentation

1. Scan and save the documents as .pdf files in an easily accessible folder on your computer. LHAs may want to set up an internal folder structure to organize the upload process.

2. Go to the Applicant File of an individual Applicant and click on the "Upload Vacancy Screening Response" button.

3. This will open the Vacancy Screening Response Upload Screen.

4. On the Uploads screen, click the "Choose File" button to open file explorer which will allow you to choose a file from your computer.

5. Find the scanned document select it and click the "Open" button in the file explorer window.

6. Enter a name for the Document in the Document Name text box.

7. Select which type of information the document contains. For Vacancy (Eligibility & Qualifications) documentation the options are as follows: Proof of ID, Income documentation, Asset documentation, Expenses documentation, Handicapped Status information, Accessibility Status information, Release of information form, Supplemental Application.

   a. It is possible that a single document may contain several different types of Vacancy Screening information. If so, select all that apply to the document.

   b. When you select a Response Type CHAMP will put a link to the specific document on the Worksheet for this Applicant, which will make it easier to find when conducting screening.

8. Click the "Upload" button. This will add the document to the Applicant File where you will be able to see it in the Screening Responses table.

Upload a Vacancy Screening Response

Name: Victoria Russell   **ApplicationID: 242450652**

Select file to upload *
[Choose File] No file chosen

Date received from applicant *
[YEAR ▼]   [MONTH ▼]   [DAY ▼]

Document Name *
Please enter a short description of the uploaded document here to be used as a document name. Do not use this field to enter a determination.

[   ]

☐ Star this response

Response Types *

☐ Proof of id   ☐ Income documentation

☐ Asset documentation   ☐ Expenses documentation

☐ Handicapped status   ☐ Accessibility status

☐ Release of information form   ☐ Supplemental application

Notes
[   ]

[CANCEL]   [UPLOAD]

The Screening Responses table – Viewing and Managing Uploaded Screening Responses

The Screening Responses table is a table that will show all Applicant Screening Responses for the Applicant that have been uploaded by any LHA. Only those LHAs that the Applicant has applied to can view these documents. The Screening Responses table can be found below the Screening Responses Upload area on the Screening Responses tab.

To View Screening Responses

LHAs can click the green "Open" button on the left side of the table. This will open a new web browser where you can view/print the document(s).

If requested, LHAs will need to provide copies of these documents to Applicants, although Applicants will have access to these documents through their online CHAMP Accounts. LHAs can also remove any documents from the Applicant File by clicking the "Delete" button. LHAs should only delete documents when they are uploaded in error or an Applicant has requested documents to be removed in writing.

To Manage Screening Responses

LHAs can "Star" a document and keep it as a "favorite" if the document is useful for verifying the Applicant's information. Starred Vacancy Screening Documents will appear in the Vacancy Screening Checklist on the Worksheet. When an Applicant has Starred Documents of any type in their Applicant File, LHAs will see a "Starred Document" indicator for the Applicant on a Previewed or Pulled List. LHAs can filter the Screening Response table to view just the Starred or favorited documents. This will help LHAs filter out non-useful documentation.

LHAs can also mark a document as "Read." Once an LHA has marked all Screening Documents of a certain type as "Read" they will no longer see the corresponding Screening Document indicator for the Applicant on a Previewed or Pulled List. See below for additional information on reviewing documentation on Previewed/Pulled Lists and Reviewing Lists.
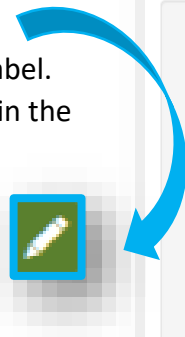
Editing Document Categories

LHAs can also edit the document category of a specific document.

From time to time, documents may be mislabeled with an incorrect document category or may be missing a document category label. By clicking on the "Edit Pencil" in the "Document Categories" column, LHAs can edit the document categories of a specific uploaded document.

When document categories don't seem quite right, it is a best practice to correct them to make more sense. The document category of a particular document impacts where in CHAMP an LHA can access that document. In order to view Starred Documents in the Vacancy Screening Checklist in the correct area, the document category needs to be correct.

Edit Document Categories

Document Name: Test document   **Upload Date: April 8, 2021**

Document Categories *

☐ Proof of id   ☐ Income documentation

☐ Asset documentation   ☐ Expenses documentation

☐ Handicapped status   ☐ Accessibility status

☐ Release of information form   ☐ Cori form

☑ Supplemental application

CANCEL   SAVE

Filtering the Applicant File

LHAs can also filter the Screening Response table by Document Category type, Screening Response Package type, or Starred vs not Starred (show favorites). LHAs can also change the number of documents that are shown to them in the Applicant File. LHAs can also search the Applicant File by document name or by the Organization that uploaded the document.

Show [100 ▼] responses

You can search this table by file name, document category, organization, and response package below.

File   Organization

FILTER DOCUMENT CATEGORIES ▼   FILTER BY RESPONSE PACKAGE ▼   Read/Unread (All) ▼

Starred/Unstarred (All) ▼   CLEAR ALL FILTERS

All of this functionality is built in CHAMP to help each individual LHA manage the documents that they must review for each Applicant. Managing documents is important and will help the LHA stay organized.

When Screening Applicants in the Screening Stage of a list, LHAs must review **ALL** documents for **ALL** Applicants that are available to them **AND** record all possible determinations **PRIOR** to moving to the Offer Stage. This includes all documents uploaded in the CHAMP Applicant File that are less than 90 Days and/or are responsive. ==**LHAs must consider and review all responsive documents in the CHAMP Applicant File regardless of who uploaded them.**==

Applicant File Section 3 – Paper Applications tab

The Paper Applications tab is where LHAs upload CHAMP Paper Applications or other written application updates once they have entered it into CHAMP. All submitted CHAMP Paper Applications or Written Application Updates must be scanned and uploaded after the information it contains is entered into CHAMP.

Per PHN 2021-23, LHAs are **required** to upload all CHAMP Paper Application, Written Application Updates, and Applicant Responses to Screening into the appropriate CHAMP Applicant File within 15 calendar days of the date of receipt. Any documents received from Applicants should be date and time stamped. This is to ensure the proper functioning of CHAMP and the Tenant Selection process.

Alyssa Adams   APPLICANT ID NUMBER: 2687214176

215 first st., Abington, MA 02351
No phone number provided • No Email
DOB: Dec. 8, 2005 • **Language:** English

EDIT APPLICANT INFO

DOWNLOAD ADDRESS FILE

APPLICATION	HOUSING SELECTIONS	HISTORY	WORKSHEET	NOTES	APPLICANT FILE
LETTERS		SCREENING RESPONSES			PAPER APPLICATIONS

Uploaded Paper Application Scans

All documents uploaded on this page will be visible to all LHAs.

Link to Scan	Uploaded On	Housing Authority	Status	Date Completed	Detach From Application	See previous scans of this type
View Scan	Nov. 27, 2021, 3:29 p.m.	Adams Housing Authority	Data Entry Completed	Nov. 27, 2021, 3:29 p.m.		See all

Upload a New Data Entry Complete Application Scan
This form is only for uploading application scans which have a status of "Data Entry Complete". To upload other scans, visit this page.

Select files to upload
Choose Files No file chosen

Notes:

SUBMIT

Document Uploads – Previewed/Pulled Lists

Whenever an Applicant has a "new" document that an LHA needs to review, the LHA will see an orange indicator next to the Applicant's ID when they are on a Previewed or Pulled List. The type of indicator(s) listed depends on whether the "new" document(s) are related to Priority/Preference Screening (P) or Vacancy Screening (Eligibility and Qualifications Screening) (V). LHAs that utilize the MassNAHRO mailing service will also see a blue "M" indicator. This indicator means that the given Applicant is currently in a MassNAHRO Pre-Screening batch.

3 **P** **V** **M** ⭐ 330658364 (click here to view)   Partially Verified
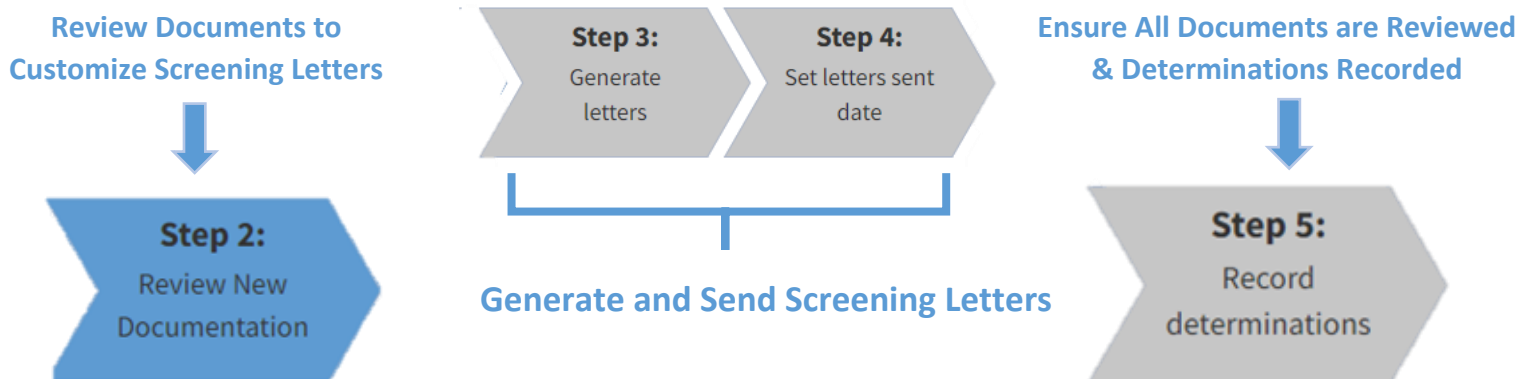
LHAs will also see a Star if the LHA has Starred or "favorited" any documents in the CHAMP Applicant File. Starring documents in the Applicant File is a useful tool for LHAs to keep track of responsive Applicants on a given list and useful documents

Reviewing Uploaded Screening Responses - List Pull Step 2 thru List Pull Step 6

When Screening Applicants in the Screening Stage of a Pulled List, LHAs must review **ALL** documents for **ALL** Applicants that are available to them **AND** record all possible determinations **PRIOR** to moving to the Offer Stage. This includes all documents uploaded in the CHAMP Applicant File that are less than 90 Days and/or are responsive. **LHAs must consider and review all responsive documents in the CHAMP Applicant File regardless of who uploaded them.**

LHAs should review new documentation in Step 2 of a Pulled List. Reviewing documents at this stage of the List will help LHAs ensure that the Screening Letters for each Applicant are accurate. After reviewing the documents in the Applicant File, LHAs can make and record determinations or use the Vacancy Screening Checklist to indicate which documents no longer need to be provided. Doing this is a best practice and will reduce Applicant confusion.

By the time the LHA moves the list to the Offer Stage (Step 6 of a Pulled List), all responsive documents received in person or through the CHAMP Applicant File must be reviewed. Likewise, all screening documents received by the LHA must be uploaded into CHAMP within 15 days of receipt.

Review Documents to Customize Screening Letters

⬇

Step 2: Review New Documentation

Step 3: Generate letters

Step 4: Set letters sent date

Generate and Send Screening Letters

Ensure All Documents are Reviewed & Determinations Recorded

⬇

Step 5: Record determinations

It is important for LHAs to Review New Documentation in Step 2 so that you do not generate letters to request information to which you already have access. CHAMP will continue to generate letters based upon what you have recorded in the Worksheet for each Applicant. Therefore, if you can make a determination prior to generating letters you may not have to send as many letters during screening.

Document Uploads – Review Priority/Preference documents before pulling a list

STOP Stop Before You Pull the List!

Preview the list first! If you see **P** indicators, spend time reviewing documents prior to pulling the list. This will make the top of your list more verified and save you time later on! Once you've reviewed a document make sure to mark it as "Read" in the Applicant File. This will remove the indicator. If the document is useful "Star" it to mark it as a "favorite" for easy access later.

Document Uploads – Review Items and the Vacancy Screening Checklist

Uploaded Documents interact with the Worksheet Review Items and the Vacancy Screening Checklist.

Review Items

On the Review Items tab of the Worksheet, LHAs will see links to the Applicant File on specific Review Items where there is a related document that has been uploaded. The link will appear at the bottom of the Review item and it will take the LHA to a filtered view of the Applicant File that contains documents related to Review Item.

Vacancy Screening Checklist

On the Vacancy Screening Checklist tab of the Worksheet, LHAs will see Starred documents in the relevant document category section. When an LHA sees that a document category has Starred documents listed, they can review those documents to determine if they satisfy the verification documentation requirements. If the provided documents are sufficient, the LHA can check off that document category and exclude it from the next Vacancy Screening Letter that is generated and sent to the Applicant.

Completed Supplemental Application Form

Application claim relevant to **Supplemental Application Uploads** last modified on **June 8, 2021, 4 p.m.**

☐ Documentation complete

Documentation for this claim will no longer be requested in vacancy screening packages for this applicant if the box above is checke

─ See Starred Documents for Supplemental Application Uploads (1)

Document Name	Upload Date	Uploaded By	Document Categories
vacancy	March 23, 2021, 12:21 p.m.	dhcd_admin@test	Proof of Id, Income Documentation, Asset Documentation, Expenses Accessibility Status, Release of Information Form, Supplemental Appl

GO TO SCREENING RESPONSES

Checking-off that documentation is complete when all documents are received for each document category will customize the Vacancy Screening Package for an Applicant. This is useful for tracking which documents have been received especially as you are waiting to make a determination on items that require multiple documents like an Applicant's Qualifications. LHAs should always check off documents they no longer need once they have uploaded those documents to CHAMP. To learn more about the Vacancy Screening Checklist see CHAMP Technical Update 23 - Vacancy Screening Checklist.