

Intake and Screening:

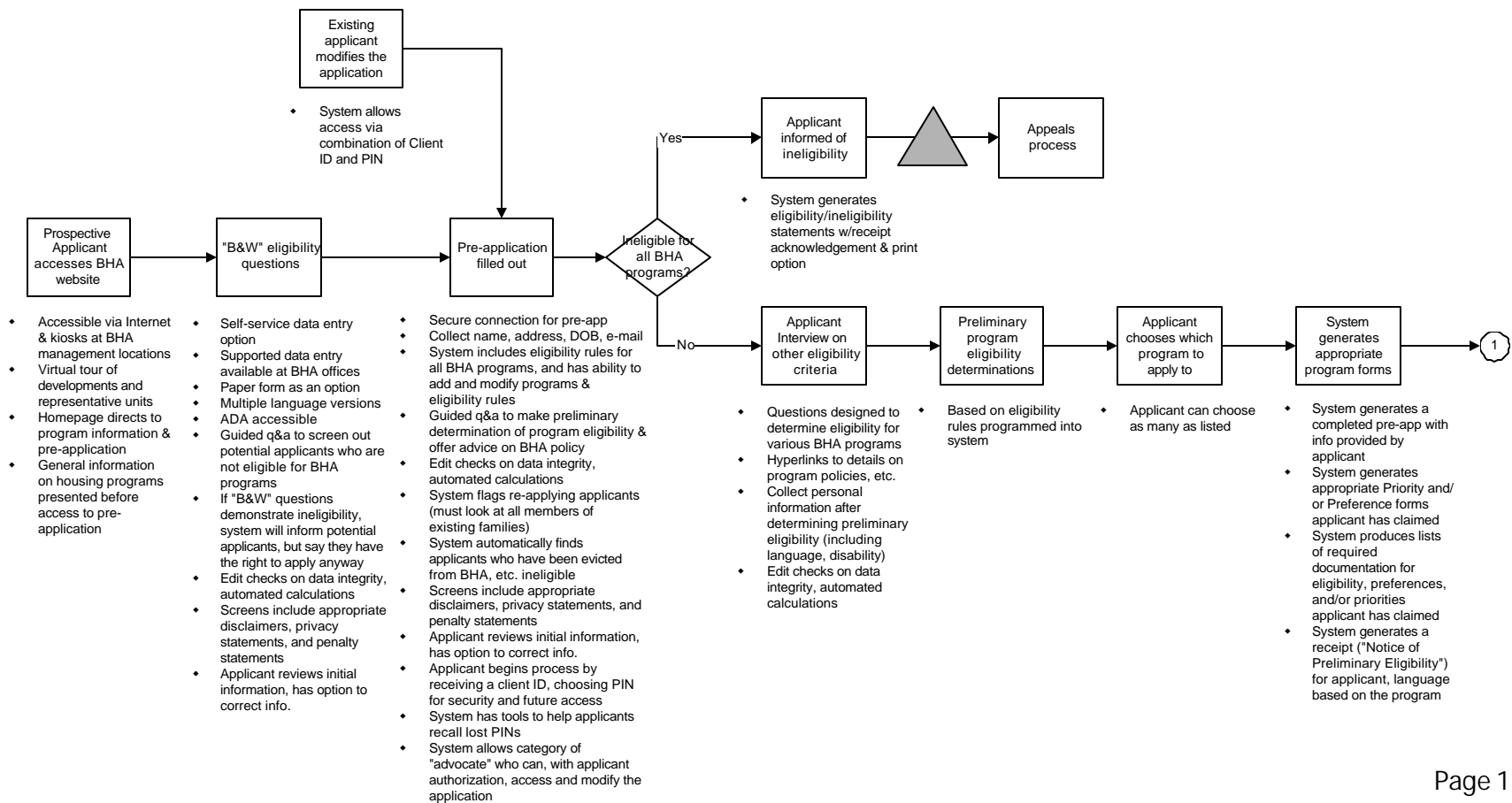
Overview

The intake and screening process for applicants to the BHA's Leased and Public Housing programs is currently managed by the BHA's Leased Housing and Occupancy Departments. To apply for these programs, applicants must currently travel to multiple locations, complete separate applications and often supply the same eligibility information to both departments.

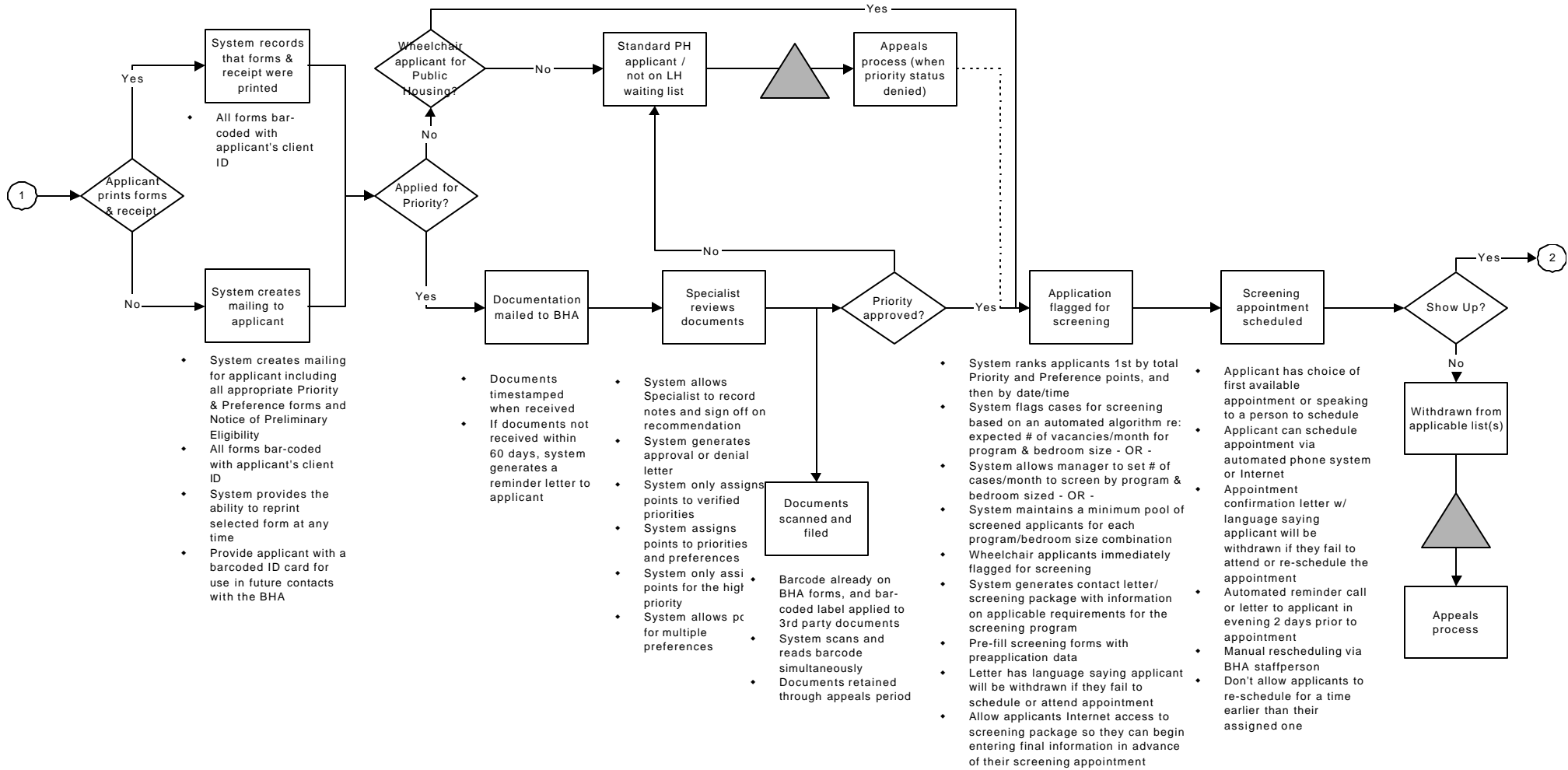
The BHA is seeking to create a one-stop application process by integrating the intake and screening process for its Leased and Public Housing Programs. Under this proposed process, applicants would apply and be screened for both programs in one location.

Future Workflow Process Maps:

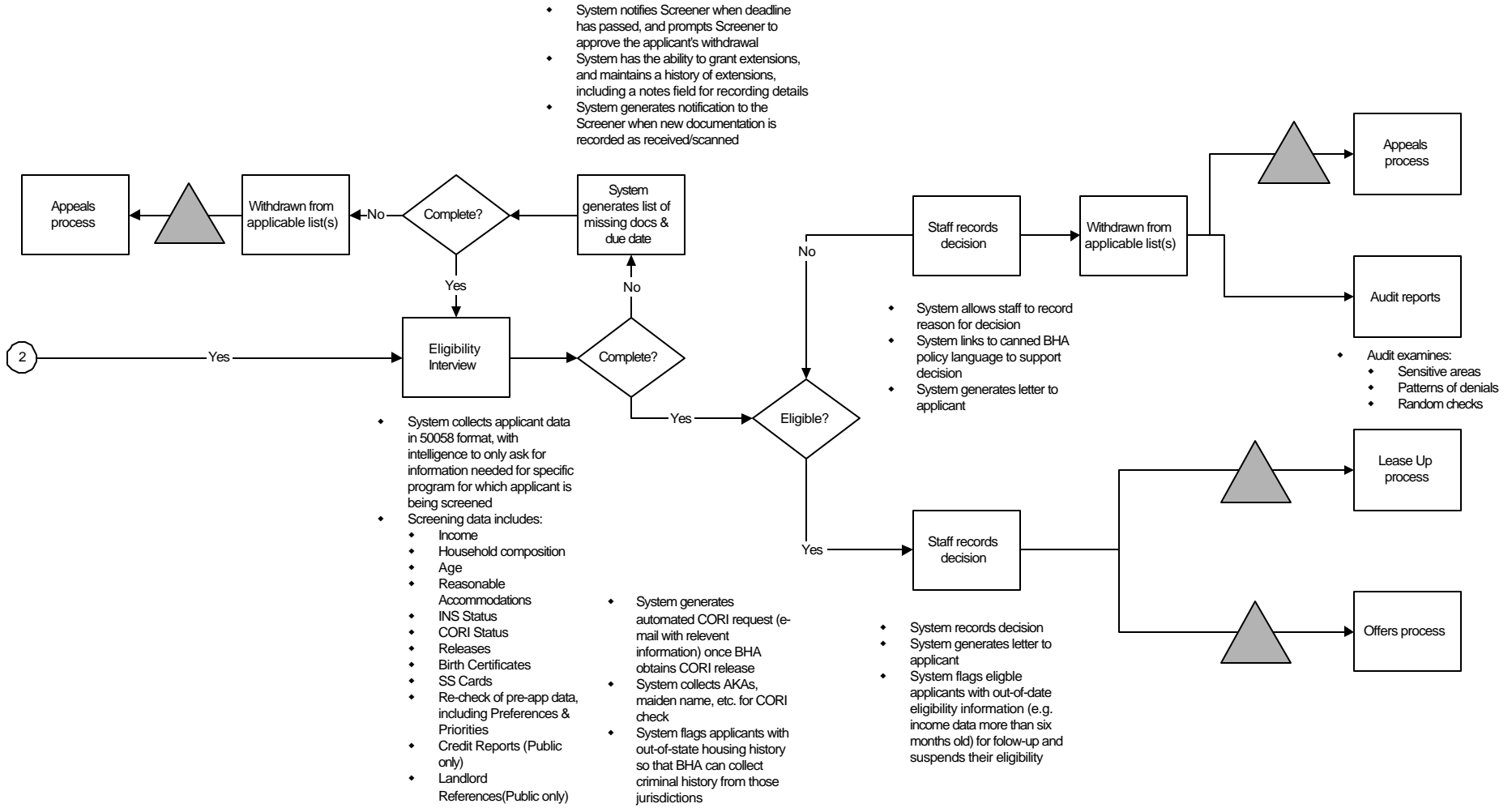
Application and Screening - future process recommendation



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No.	Process	Requirement Description	P*	Comments
1.	Intake:	System is accessible via Internet & kiosks at BHA management locations	2	
2.	Intake:	System provides a virtual tour of developments and representative units	2	
3.	Intake:	Homepage directs to program information & pre-application	2	
4.	Intake:	General information on housing programs presented before access to pre-application	2	
5.	Intake:	System provides customer self-service data entry option	2	
6.	Intake:	System allows supported data entry available at BHA offices	1	
7.	Intake:	System can generate a paper form as an option	1	
8.	Intake:	System provides multiple language versions of the application screens	2	
9.	Intake:	System intake screens are ADA accessible	1	
10.	Intake:	System provides guided Q&A to screen out potential applicants who are not eligible for BHA programs	2	
11.	Intake:	If "B&W" questions demonstrate ineligibility, system will inform potential applicants, but say they have the right to apply anyway	2	
12.	Intake:	System provides edit checks on data integrity, automated calculations	1	
13.	Intake:	Screens include appropriate disclaimers, privacy statements, and penalty statements	1	
14.	Intake:	Applicant reviews initial information, has option to correct information before submitting pre-application	2	
15.	Intake:	System allows access via combination of Client ID and PIN	2	
16.	Intake:	System provides secure connection for pre-app	2	
17.	Intake:	System initially collects name, address, DOB, e-mail	2	
18.	Intake:	System includes eligibility rules for all BHA programs, and has ability to add and modify programs & eligibility rules	1	
19.	Intake:	System provides guided Q&A to make preliminary determination of eligibility & offer advice on BHA policy	1	

Legend:

P*riority	1 = Mandatory	2 = Important	3 = Nice to Have
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No.	Process	Requirement Description	P*	Comments
20.	Intake:	System provides edit checks on data integrity, automated calculations	1	
21.	Intake:	System flags re-applying applicants (must look at all members of existing families)	1	
22.	Intake:	System automatically finds applicants who have been evicted from BHA, etc. ineligible	1	
23.	Intake:	Screens include appropriate disclaimers, privacy statements, and penalty statements	1	
24.	Intake:	Applicant has option to review and correct information	2	
25.	Intake:	Applicant begins process by receiving a client ID, choosing PIN for security and future access	2	
26.	Intake:	System has tools to help applicants recall lost PINs	2	
27.	Intake:	System allows category of "advocate" who can, with applicant authorization, access and modify the application	1	
28.	Intake:	System provides "Fail-back" to save partial applications once underway	2	
29.	Intake:	System generates eligibility/ineligibility statements w/receipt acknowledgement & print option	1	
30.	Intake:	System provides questions designed to determine eligibility for various BHA programs	1	
31.	Intake:	System provides hyperlinks to program policies, etc.	1	
32.	Intake:	System collects personal information after determining preliminary eligibility (including language, disability)	1	
33.	Intake:	System makes preliminary determination of eligibility based on eligibility rules programmed into system	1	
34.	Intake:	Applicant can choose as many housing programs as the system has determined s/he is eligible for	1	
35.	Intake:	System generates a completed pre-app with info provided by applicant	1	
36.	Intake:	System generates appropriate Priority and/or Preference forms applicant has claimed	2	

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37.	Intake:	System produces lists of required documentation for eligibility, preferences, and/or priorities applicant has claimed	1	
38.	Intake:	System generates a receipt ("Notice of Preliminary Eligibility") for applicant, language based on the program	1	
39.	Intake:	System creates mailing for applicant including all appropriate Priority & Preference forms and Notice of Preliminary Eligibility	1	
40.	Intake:	System prints all forms bar-coded with applicant's client ID	2	
41.	Intake:	System provides the ability to reprint selected form at any time	1	
42.	Intake:	Provide applicant with a bar-coded ID card for use in future contacts with the BHA	2	
43.	Screening:	If documents not received within 60 days, system generates a reminder letter to applicant	1	
44.	Screening:	System allows Specialist to record notes and sign off on recommendation	1	
45.	Screening:	System generates approval or denial letter	1	
46.	Screening:	System assigns defined points to Priorities and Preferences	1	
47.	Screening:	System only assigns points to verified Priorities	1	
48.	Screening:	System only assigns points for the highest Priority	1	
49.	Screening:	System allows points for multiple Preferences	1	
50.	Screening:	System prints bar-coded labels, applied to 3rd party documents	2	
51.	Screening:	System scans and reads barcode simultaneously	2	
52.	Screening:	System ranks applicants 1 st by total Priority and Preference points, and then by date/time	1	
53.	Screening:	System flags cases for screening based on an automated algorithm re: expected # of vacancies/month for program & bedroom size - OR - System allows manager to set # of cases/month to screen by program & bedroom sized - OR - System maintains a minimum pool of screened applicants for each program/bedroom size combination	1	

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No.	Process	Requirement Description	P*	Comments
54.	Screening:	Wheelchair applicants immediately flagged for screening	1	
55.	Screening:	System generates contact letter/screening package with information on applicable requirements for the screening program	1	
56.	Screening:	Pre-fill screening forms with pre-application data	1	
57.	Screening:	Letter has language saying applicant will be withdrawn if they fail to schedule or attend appointment	1	
58.	Screening:	Allow applicants Internet access to screening package so they can begin entering final information in advance of their screening appointment	2	
59.	Screening:	Applicant has choice of first available appointment or speaking to a person to schedule	1	
60.	Screening:	Applicant can schedule appointment via automated phone system or Internet	1	
61.	Screening:	Appointment confirmation letter w/language saying applicant will be withdrawn if they fail to attend or re-schedule the appointment	1	
62.	Screening:	Automated reminder call or letter to applicant in evening 2 days prior to appointment, manual rescheduling via BHA staffperson	1	
63.	Screening:	Don't allow applicants to re-schedule for a time earlier than their assigned one	1	
64.	Screening:	System collects applicant data in 50058 format, with intelligence to only ask for information needed for specific program for which applicant is being screened	1	

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No.	Process	Requirement Description	P*	Comments
65.	Screening:	Screening data includes: <ul style="list-style-type: none"> • Income • Household composition • Age • Reasonable Accommodations • INS Status • CORI Status • Releases • Birth Certificates • SS Cards • Re-check of pre-app data, including Preferences & Priorities • Credit Reports (Public only) • Landlord References(Public only) 	1	
66.	Screening:	System notifies Screener when deadline has passed, and prompts Screener to approve the applicant's withdrawal	1	
67.	Screening:	System has the ability to grant extensions, and maintains a history of extensions, including a notes field for recording details	1	
68.	Screening:	System generates notification to the Screener when new documentation is recorded as received/scanned	1	
69.	Screening:	System generates automated CORI request (e-mail with relevant information) once BHA obtains CORI release	1	
70.	Screening:	System collects AKAs, maiden name, etc. for CORI check	1	
71.	Screening:	System flags applicants with out-of-state housing history so that BHA can collect criminal history from those jurisdictions	1	
72.	Screening:	System allows staff to record reason for decision	1	
73.	Screening:	System links to canned BHA policy language to support decision	1	
74.	Screening:	System flags eligible applicants with out-of-date eligibility information (e.g. income data more than six months old) for follow-up and suspends their eligibility	1	
75.	Screening:	System generates letter to applicant	1	
76.	Screening:	System records decision	1	

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No.	Process	Requirement Description	P*	Comments
77.	Screening:	Audit examines: <ul style="list-style-type: none"> • Sensitive areas • Patterns of denials • Random checks 	1	

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