

Helpdesk Evolution: Above and Beyond the Call

Ohio Housing Finance Agency

Management Innovation: Internal Operations

HFA Staff Contact

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BACKGROUND

The Office of Multifamily Housing: Compliance Division is a resource for affordable housing professionals who manage a rental property financed through an OHFA loan and/or Housing Tax Credits. The Compliance Division assists property managers in meeting reporting requirements, maintaining regulatory compliance, and ensuring their project's ongoing financial viability. In an effort to streamline manual processes and improve customer experience, helpdesks were created in 2015 to allow external partners to submit DevCo and Compliance inquiries via webforms. The goal was to ensure that any compliance-related issues could be addressed and resolved in a timely fashion. Eventually, the separate helpdesks were merged and later expanded to include an Inspection and Resident Complaint sections. This evolution from separate helpdesks to an all-inclusive platform has allowed OHFA to quickly respond to internal and external partners and support them more effectively than ever before.

The first helpdesk was for DevCo, an online system created internally by the Ohio Housing Finance Agency (OHFA). DevCo categories include Annual Owner Reporting, DevCo Inspections, Event and Tenant Income Certification (TICS) Issues, Utility Allowances, XML File Uploads and other instructional and informational resources (*Figure 1*). The second helpdesk was for Compliance, which includes a larger list of categories (*Figure 2*). The helpdesks were managed by one full-time employee, in addition to their regular duties, with the assistance of a revolving temporary employee. Tickets were received in a myriad of ways: phone calls, personal emails, helpdesk inbox emails, and through the ticket submission portals. While ticket submissions via a webform was the preferred method to centralize and track inquiries, many external partners chose not to submit tickets at all because they were unsure if someone was reviewing them due to not receiving a timely response. As you can imagine, prompt responses were nearly impossible with limited staffing and an unclear process for receiving and responding to tickets. At the time, tickets remained open for an average of 11 days.

In 2019, OHFA created an Inspection helpdesk to supply the same level of support to additional external partners. The Inspection helpdesk provided access to potential resident applications for housing counselors, Legal Aid, Community Action Agencies and more. This helpdesk also allowed for file uploads and included an option to input Compliance Audit Report (CAR) Owner Responses, and an option for tickets to be assigned. Assigned Inspection helpdesk tickets were the responsibility of a specific staff member with their first names beginning with A, E and T. This A.E.T. designation for internal use, allowed for common issues with uploading documents or requesting access to be resolved quickly without inundating internal auditors.

In an effort to organize three kinds of inquiries on DevCo, Compliance and Inspections, and to improve response times, the Compliance Division combined the three separate helpdesks (*Figure 3*). They also created a permanent internal team of six employees to manage workflow, each assigned to work closely with specific tickets. Part of the challenge with the old process was the need to train a new temporary employee each time their contract ended. With a team in place, institutional knowledge of the help desk was maintained, which resulted in issues being resolved more efficiently. With a successful online helpdesk already in place, in February 2022, the team took over Resident Complaints from a previous OHFA Consumer Advocacy team and incorporated this final piece into the all-inclusive helpdesk.

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PROCESS

The decision to have a larger team manage all three helpdesks reduced turnaround times tremendously. Initially, it took an average of 11.35 days for an issue to be resolved and the ticket closed. With response and resolution times now down to 2.39 days due to the helpdesk evolution, external partners began using the online helpdesk again and their confidence that had previously diminished was restored. Emails and calls were resolved without using the ticketing system in place, so their resolution time was unable to be tracked, however, the internal team noticed a decline in incoming emails and calls compared to the increase of helpdesk tickets. This was proof that the updated helpdesk was working.

As previously mentioned, inquiries were received in many ways. In an effort to receive a more prompt response, partners would submit the same inquiry using various avenues, making tickets very difficult to oversee and keep organized. To centralize intake methods, the helpdesk email inbox and personal email addresses were removed. Using only a webform for tickets ensures that all fields of information required are provided and are able to be tracked, whereas email and calls do not have this capability (*Figure 4*). One intake method also helps direct newly submitted, unassigned tickets to the correct staff member (*Figure 5*). To maintain accessibility and for partners who may be less tech-savvy, calling the main helpdesk number to submit an inquiry via phone is still an option. Each call is now submitted into the helpdesk to generate a ticket by the internal management team.

Initially, when partners had issues with the helpdesk system such as printing problems, or events not registering, an internal assigned staff member fixed the problem (*Figure 6*). This practice has ended and been replaced by an instructional approach. Instead of fixing the issues for our partners, a staff member now guides our partners through fixing issues themselves to avoid errors. This approach also places responsibility back on the partner and in return, teaches them how to manage the ticket submission process more effectively and efficiently on their own. While this approach required a little more time in the beginning, it has decreased the number of tickets received and improved turnaround times in 2021. A table illustrating this information and more will be provided below.

In June of the same year, the helpdesk was made accessible to OHFA's internal staff of compliance auditors, transforming it into an all-inclusive platform. This allowed both external partners and now internal staff to submit tickets for issues or concerns with OHFA Inspections. Previously, auditors would manually track information, return to the office and then share specific ticket items with the helpdesk management team. However, without an easily accessible system to track information at the time in which they were brought to the auditor's attention, some details would get lost in translation. Access to the helpdesk without time and location barriers permitted tickets to be addressed exponentially quicker while auditors were physically at the development site.

In February 2022, Resident Complaints moved to the Office of Multifamily Housing: Compliance Division from the Consumer Advocacy team in the Housing Preservation Division of the Office of Single Family Housing. With the move to the Compliance Division came the opportunity to better track and monitor these complaints to ensure they were addressed in a timely manner. Tracking the complaints also allowed the OHFA compliance staff to address repetitive issues at a specific property. Leveraging the online helpdesk that was already in place for three other groups, a portal for Resident Complaints tickets was developed. This permitted OHFA to tap into the same resources used for all other tickets. Specifically for residents, a very similar webform used for the other helpdesks was created (*Figure 7*). This webform was linked directly to the OHFA homepage for simple navigational use. Residents are able to submit tickets easily with prompts for key information that will allow the team to resolve the issue quickly, while also providing the options to submit unanimously, via a family member, or an advocate.

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The addition of the Resident Complaints to the helpdesk increased tickets, but with a static and highly trained team in place, the average days a ticket remained opened decreased. In 2019, tickets remained open for an average of 11.35 days. The following year, the number of days tickets remained open dropped to 5.27 days, even though during that time the number of tickets received doubled. In 2021, open ticket periods reduced further to 3.53 days.

Year	Days Open	# Tickets
2019	11.35	1266
2020	5.27	2112
2021	3.53	1599
May2021-May2022	2.39	591

IMPACT

OHFA's innovative approach to creating an all-inclusive helpdesk that resolves issues related to DevCo, Compliance, Inspections, and Resident Complaints is unique among Housing Finance Agencies. All of the actions to consolidate and revolutionize four helpdesks into one resulted in more productivity, efficiency and effectiveness both internally and externally, while greatly impacting residents positively. As previously mentioned, initially it took over 11 days for a resolution to be found and the ticket closed. Ticket resolutions are now down to 2 days, reduced by an outstanding 9 days over a 3.5-year period.

The all-inclusive helpdesk allows the office to see which projects, management companies, and/or management teams are having repetitive issues that might need addressed at a larger scale. This permits staff to have a more accurate pulse on how OHFA projects are operating and ensures the Agency can achieve its mission of providing safe, affordable housing across Ohio.

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VISUAL AIDS

Figure 1. Original DevCo Helpdesk Webform

DEVCO HELP DESK

Please submit your DevCo questions or issues. For the protection of your residents, do not include any personally identifiable information such as social security numbers. If you have a "Project Number" please include it. If your question is not property specific, please include "none" for the "Project Name". After entering all information, you must complete the web security verification. Click "Submit" to send us your information. You should see a confirmation that your submission was successful. Thank you.

Category:*

Compliance software you are currently using:*


Project Name:*

Project Number:

Email:*

Inquiry Details:*

Upload up to 3 files (e.g., screenshot of error, other supporting documentation):

I'm not a robot  reCAPTCHA
[Privacy](#) [Terms](#)

*Indicates required field

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Figure 2. Compliance Helpdesk Ticket Issue Categories

DevCo Compliance Inspection

Select a category ▼

- Select a category
- Accessibility, Service Animals, Reasonable Accommodation
- Annual Owner Reporting
- Calculate & Verify Income
- Calculating Assets
- Event/TIC Issues
- File Retention
- HOME Program Requirements
- Mixed Funding Properties
- Move-in or Unit Inspections
- OHFA Lease Addendum
- Student Status Verification
- Sworn Income and Asset Statement (SIAS)
- Tenant Income Certifications
- Transfers – Low Income Housing Tax Credits
- Unborn Children
- Utility Allowances
- Verification & Recertification Requirements
- Other Compliance Issues

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Figure 3. DevCo, Compliance and Inspection Helpdesk Webform

The screenshot shows the 'COMPLIANCE AND DEVCO HELP DESK' webform on the OHFA website. At the top, there is a navigation bar with the OHFA logo and menu items: ABOUT, PROGRAMS, OUR PARTNERS, NEWS & EVENTS, HOMEBUYERS, RENTERS, and CONTACT. Below the navigation bar is a breadcrumb trail: HOME > COMPLIANCE AND DEVCO HELP DESK. The main heading is 'COMPLIANCE AND DEVCO HELP DESK'. A paragraph of instructions explains that users should not include personally identifiable information like social security numbers and should include a 'Project Number' if available. Below this, there are radio buttons for 'DevCo', 'Compliance' (which is selected), and 'Inspection'. The form fields include: 'category:*' (a dropdown menu), 'Project Name:*' (text input), 'Project Number:' (text input), 'Contact Name:*' (text input), 'Organization:*' (text input with a 'No Organization Found' checkbox), and 'Email:*' (text input). An 'Inquiry Details:*' section has a red note: 'To submit a file as part of the helpdesk request you must log into DevCo and click "Help" to have this feature available.' Below the text area is a reCAPTCHA widget with the text 'I'm not a robot' and 'reCAPTCHA Privacy - Terms'. At the bottom are 'Submit' and 'Reset' buttons. A legend at the bottom left states '*Indicates required field'.

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Figure 4. Helpdesk Ticket Detail Internal View

Enter a partial project name: [Project Search](#)

Project Name:

Project Number:

11280

Issue Type: GEN Issue Category

Issue Sub-Type: T1 Tier

Issue Status:

Type of Compliance:

Software:

OHFA Contact:

New Organization or changes

Organization Name:

Organization Contact: Contact Date: IT Ticket # [View](#)

Organization Email: Date Closed: Date Last Viewed by Assignee:

Organization Phone: [Email](#)

Organization as Entered by Contact: [Check Login - Email -->](#)

[Password Issue - Email Login](#)

Description of Issue:

[Devco Online](#)

Progress Note/Resolution:

[Email with Note as Email Body](#)

[Add File](#)

Files:

[Save](#) [Exit](#)

Figure 5. Unassigned Helpdesk Ticket Internal View

3 All Open Issues [Open Issues Not "In Process"](#) [Enter a new inquiry from email or phone](#) **DevCo Issues** >= <= [Assignee last view date](#)

[All Issues](#) [Waiting on IT](#) [New Inquiries](#) [Waiting on Org](#) [All RCs](#) [Assigned Tickets Possibly Not Viewed](#) [Quit](#) [Project Search](#) [Administration](#) [Help Desk Web Page](#) [Resident Complaints](#) [User Tips](#) [Email DB Invite](#)

Unassigned Issues n=1

ISSUE	Date	Proj Number	Development	Organization	Issue Type / Status	S/W Type	Contact	Unassigned	RCs	Issue	Resolution
Edit	5/2/2022	11280	GEN	T1	richard sharpe	Event/TIC Issues	None			Yardi Systems , , attempting to download newest TIC pdf for use in software rendering of the form... the only form found on the Ohio site is a watermarked demo form	

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Figure 6. DevCo Issue Type Staff Assignments

IssueTypes

DevCo Only Types:

General Only Types:

Types for both DevCo and General: Inspection Only Types:

TypeName:

Contact:

Tier:

Active:

Issue Type:

Issue Sub-Type:

Sub Types

SubTypeName	Contact	Tier	Active	Category
Registration Issue	<input type="text" value="Eric Corthell"/>	<input type="text" value="T1"/>	<input checked="" type="checkbox"/>	<input type="text" value="DEV"/>
Password reset	<input type="text" value="Tanis Starr"/>	<input type="text" value="T1"/>	<input checked="" type="checkbox"/>	<input type="text" value="DEV"/>
Missing Organization Code or Award Number	<input type="text" value="Pam Zinn"/>	<input type="text" value="T1"/>	<input checked="" type="checkbox"/>	<input type="text" value="DEV"/>
Manage (Property) Users	<input type="text" value="Eric Corthell"/>	<input type="text" value="T1"/>	<input checked="" type="checkbox"/>	<input type="text" value="DEV"/>
Remove access	<input type="text" value="Pam Zinn"/>	<input type="text" value="T1"/>	<input checked="" type="checkbox"/>	<input type="text" value="DEV"/>
Other	<input type="text" value="Eric Corthell"/>	<input type="text" value="T1"/>	<input checked="" type="checkbox"/>	<input type="text" value="DEV"/>
Newly Funded Property	<input type="text" value="Eric Corthell"/>	<input type="text" value="T2"/>	<input checked="" type="checkbox"/>	<input type="text" value="DEV"/>
Allita	<input type="text" value="Allita"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text" value="DEV"/>

Ohfa Contacts

FullName	Email	Login	IsActive	Res Comp	Most Recent Login	Days Tickets not viewed
Allita	ecorthell@ohiohome.org	ECORTHELL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5/4/2022	
Andi Clark	AClark@ohiohome.org	ACLARK	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Ashley Sweeney	ASweeney@ohiohome.org	ASWEENEY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5/4/2022	
Betsy Krieger	BKrieger@ohiohome.org	BKRIEGER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/25/2022	
Eric Corthell	ECorthell@ohiohome.org	ECORTHELL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5/4/2022	
Jan Jones	JJones@ohiohome.org	JLONES	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11/18/2021	
Jim Evans	jevans@ohiohome.org	JEVANS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/20/2022	
Kat Webb	KWebb@ohiohome.org	KWEBB	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Leah Jenks	ljenks@ohiohome.org	LIENKS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5/3/2022	
Nicole Woods	awoods@ohiohome.org	AWOODS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5/3/2022	
Pam Zinn	PZinn@ohiohome.org	PZINN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5/4/2022	
Patty Blair	Pblair@ohiohome.org	PBLAIR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5/3/2022	
Robin Bourne	rbourne@ohiohome.org	RBOURNE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5/3/2022	
Robin Dotson	RDotson@ohiohome.org	RDOTSON	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2/17/2022	
Sally Mitchell	smitchell@ohiohome.org	SMITCHELL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10/26/2021	66
Sylvia Accountius	saccountius@ohiohome.org	SACCOUNTIUS	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Tanis Starr	Tstarr@ohiohome.org	TSTARR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5/4/2022	
Temp A			<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Temp B			<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Tina Knight	cknight@ohiohome.org	CKNIGHT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5/3/2022	

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Figure 7. Resident Complaint Webform

The screenshot shows the 'RESIDENT COMPLAINTS' webform on the OHFA website. At the top, there is a navigation bar with the agency logo and menu items: ABOUT, PROGRAMS, OUR PARTNERS, NEWS & EVENTS, HOMEBUYERS, RENTERS, and CONTACT. Below the navigation bar is a 'HOME' breadcrumb. The main heading is 'RESIDENT COMPLAINTS'. A paragraph of instructions follows, stating that users should provide as much detail as possible and not include their social security number. Below this is a form with the following fields: 'Property Name:*' (text input), 'Resident Name:*' (text input), 'Resident Phone:*' (text input), 'Resident Email:*' (text input), and 'Preferred Contact Method:*' (dropdown menu with 'Select your choice' selected). There are two checkboxes: 'I prefer to be left anonymous' and 'I have an advocate/family member helping me. You have permission to communicate with them on my behalf.' Below these is a large 'Complaint:*' text area. At the bottom of the form is a reCAPTCHA widget with the text 'I'm not a robot' and a 'Submit' button. A 'Reset' button is also present. A legend at the bottom left indicates that an asterisk (*) denotes a required field.