

Helpdesk Evolution: Above and Beyond the Call

Ohio Housing Finance Agency

Management Innovation: Internal Operations

HFA Staff Contact

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Category: Management Innovation
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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.

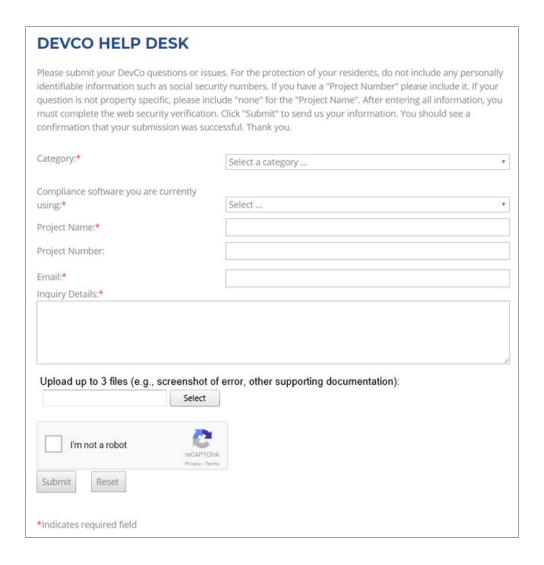
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VISUAL AIDS

Figure 1. Original DevCo Helpdesk Webform

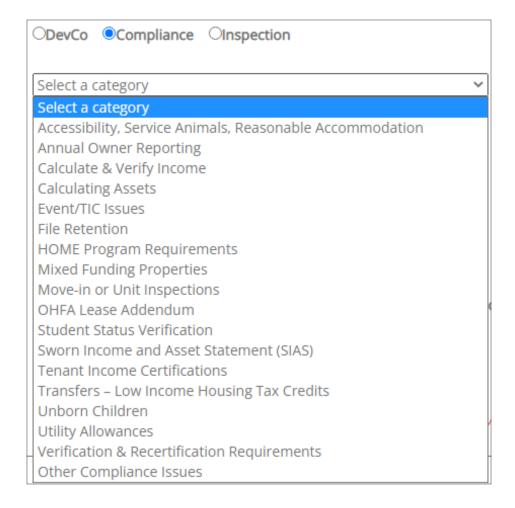


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Figure 2. Compliance Helpdesk Ticket Issue Categories

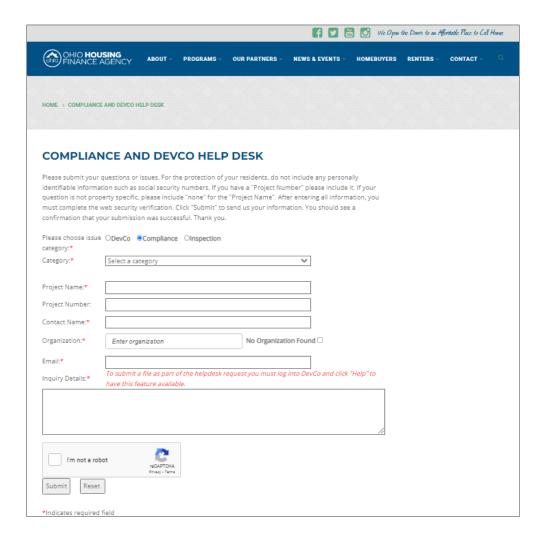


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Figure 3. DevCo, Compliance and Inspection Helpdesk Webform



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Figure 4. Helpdesk Ticket Detail Internal View

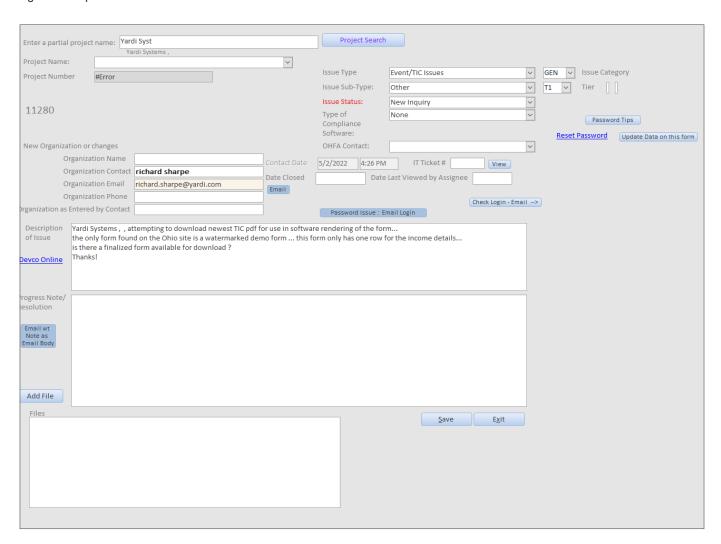


Figure 5. Unassigned Helpdesk Ticket Internal View

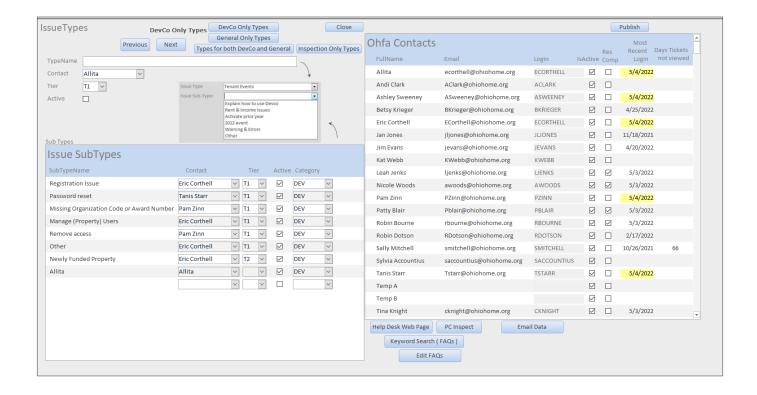


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Figure 6. DevCo Issue Type Staff Assignments



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Figure 7. Resident Complaint Webform

