

Using Technology to Help Struggling Homeowners Get a Fresh Start

Rhode Island Housing

Management Innovation: Technology

HFA Staff Contact

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EXECUTIVE SUMMARY

RIHousing's Fresh Start App allowed this HFA to successfully roll out and administer \$2 million in Hardest Hit Funds (HHF) to struggling homeowners in the midst of a pandemic and when staff were working remotely. Using in-house staffing and resources, RIHousing designed, built and rolled out our new online application portal in a 6-week timeframe. The Fresh Start App stands as our first fully online, internally developed customer interface. To date, RIHousing has utilized the app to deploy \$1.9 million to assist over 300 homeowners. The online portal allowed us to meet the state's housing needs while keeping our staff and members of the general public safe and in compliance with social distancing guidelines.

OFFERING HOMEOWNERS A "FRESH START"

RIHousing was in the process of winding down our long running Hardest Hit Fund (HHF) program with only close-out activities remaining when the COVID-19 pandemic hit. With a remaining balance of \$2 million in administrative funds, we initially expected to return these funds to Treasury at the close of the program. And then *the COVID-19 pandemic arrived and homeowners across the state were hard hit again and struggling to make their mortgage payments.*

Seeing the need, RIHousing requested that the U.S. Treasury allow the reallocation of administrative funds to program funds to help those homeowners. With the approval to proceed from Treasury, we *needed to be able to easily accept applications for mortgage assistance in a virtual world*. Prior to COVID, we were able to meet with applicants in person and also accept applications and documentation in hard copy format.

Due to COVID precautions, our offices were closed to visitors and the vast majority of our employees were working remotely. We needed a new application process that provided the ability to apply for assistance completely online, allow staff to review and process applications, and we needed it quickly.

We had previously shut down the online application system we had used for the administration of HHF funds ("Counselor Direct") almost two years prior as part of winding down the program. The technology requires an annual fee and we wanted to conserve as much of the \$2 million as possible and get it into the hands of struggling homeowners. With the quick turnaround time needed and the desire to not use program funds for technology costs, we decided to build the system in-house.

THE "TECHY" STUFF

Utilizing our existing IT staffing capacity, we built the new app on AZURE Cloud Datacenter with .NET CORE software and a Microsoft SQL database. Once an application is submitted, it gets routed to our Atlassian JIRA Service Desk App to manage the underwriting process. HHF staff receive an email notification via the JIRA Service Desk application to alert them when a new application has been received. We also utilize uScanlt, which allows applicants to use their iPhones as a portable document scanner and as a repository for the submitted documents. Documents are then accessible via the JIRA ticketing system. At the end of the process, all documents and data are fed into our MITAS system, where Finance can pull reports and process checks. Best of all, the data from the Fresh Start App flows through to our Data Warehouse, where senior management and program staff can review both highlevel and detailed information on program applications, create mapping and reporting.

Fresh Start App Highlights

• The online system allows applicants to complete all the required information as well as upload all necessary documentation.



- Ability to access the application via a laptop, tablet or phone to apply for assistance.
- The online application portal is available in both English and Spanish.
- It is completely ADA accessible and mobile friendly.
- Collects all data required by Treasury, allowing staff to pull reports and required reporting and demographic information.
- Incorporates all Treasury-approved disclosures needing to be signed by all parties; applicants utilize Docusign for the application and all disclosures.
- Applicants can complete the entire application process in the app, returning multiple times to upload additional requested documents.

OUTCOMES

Our new mortgage assistance application signals a fresh start for homeowners as well as a new way of doing things at RIHousing. If not for COVID, we may have continued with paper applications and/or inperson meetings. But *we were pushed to innovate and respond to the changing landscape: both the social distancing requirements of COVID as well as the drastic increase in homeowners struggling to make their mortgage payments*. We're incredibly proud that within a short timeframe and utilizing only existing staffing, we were able to quickly and successfully pivot from a paper-heavy process, with on-site staff, to the roll out of the "Fresh Start App," which allowed homeowners the ability to log into a simple, easy-to-use platform and complete their application. And we were able to *preserve the money needed to outsource the design and roll-out of a new application portal and use those funds to help Rhode Island homeowners*.

The new app also met agency and state remote work guidelines as it allowed staff to safely work from home during the pandemic. Staff could work remotely, interact with program colleagues remotely, and provide quick and easy updates on application status and outstanding documents. Program supervisors can manage the workflow, approvals, and closing of the requests.

To date, RIHousing has utilized the app to deploy \$1.9 million to assist over 300 homeowners. 77% of applications came through the electronic application process, increasing response time, decreasing review time, and reducing the need for on-site staff. Top further ensure staff and public safety, underwriting took place remotely and closings were also scheduled remotely.

LOOKING AHEAD

While the revived HHF program recently closed to new applicants, we plan to template this app into a new application for homeowner assistance with the \$40 million in COVID Relief funds anticipated to be coming to Rhode Island, as well as a new Customer Service application and a One-Stop application portal for development funding. The experience of building and launching the Fresh Start App in 2020 for the HHF program means we can use the experience and lessons learned to utilize the same technology to quickly stand up any new programs.

WHY IT'S AWARD-WORTHY

Innovative: Most HHF states have utilized outside vendors for accepting applications. The Fresh Start App was created using in-house capacity to address a time-sensitive need to help homeowners during the pandemic when physically collaborating in person was difficult or non-existent.



Replicable: The effort can be replicated for other programs at very little cost and in a limited amount of time. We will use this development process and template for future programs, and other HFAs can utilize this same model for success.

Responds to a management challenge or opportunity: The COVID-19 pandemic shut down much of the world, but at the same time, it greatly increased customer needs. While our offices were closed to visitors, we still needed to provide assistance to struggling homeowners that required teamwork and innovation during a challenging time.

Achieves measurable improvements in agency operations: With fewer paper files, integration of systems to make it easier to track, review, manage and communicate, and the ability to support a remote workforce, the effort has helped us continue in our mission to assist struggling homeowners.

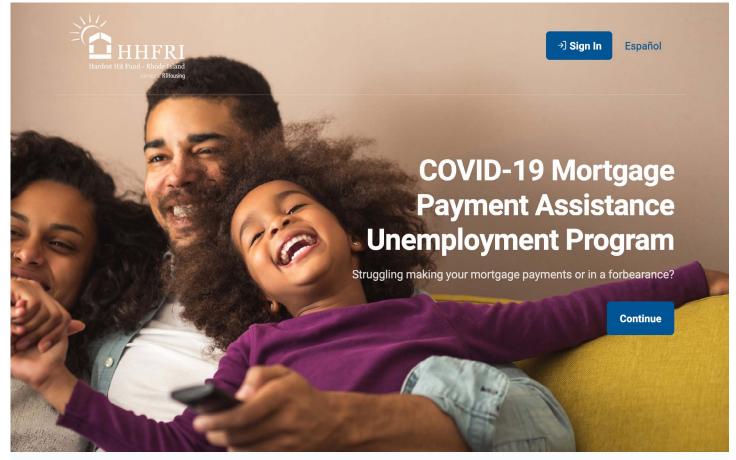
Provides benefits that outweigh costs: Beyond the use of staff time and existing technology, the only cost associated with the effort is cloud-based storage.

Demonstrates effective use of resources: The effort involved a project manager and two development engineers to build, alongside two HHF program staff.

Achieves strategic objectives: The Fresh Start App effectively deployed HHF funds in a COVID world. Quick turnaround time allowed us to help people when they needed it most. As the online application does not require any personal interaction, it reduced health and safety risks for applicants and our staff.



FRESH START APP https://hhfcovid19.rihousing.com/



Applicants can access the Fresh Start App via the RIHousing.com website, which links to the new application portal. The site uses the same branding as our main website and is available in English and Spanish.

The home page features a list of documents required to complete the application, allowing prospective applicants the ability to gather these documents prior to beginning their application.

REQUIREMENTS

You will be required to upload the following documents to complete your application:

- Most recent mortgage statement
- · Proof of unemployment benefits from the Department of Labor and Training or other provider
- 2019 federal tax return
- Copy of government issued photo identification
- · Proof of income for all adults residing in the household
 - Two most recent pay stubs for working adults 23 years of age or older. Pay stubs for full-time students not needed.
 - Social Security Award letter, Pension Award letter, proof of Unemployment Benefits, or similar proof of income for nonworking individuals receiving other forms of income.
- An application is not considered complete unless all supporting documents have been uploaded.

Continue



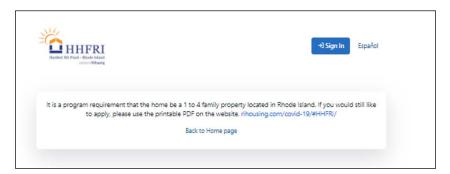
Eligibility See if you are eligible to apply	
First Name *	Last Name *
First name	Last name
Fmail *	
Enter email	
ls your home a 1-4 unit property located in Rhode Isla	and? *
Yes No	
Do you own the home and live there as your full time,	primary residence? *
Yes No	•
Do you currently have a forbearance agreement with y	your mortgage servicer? *
Yes No	
Are you or any co-borrowers currently in active bankr	uptcy? *
Yes No	
How many people reside in the home? *	Annual Household Income *
1	Enter income
Have you received or are currently receiving unemplo	oyment benefits for loss of work due the Covid-19 pandemic? *
Yes No	
Have you previously received Hardest Hit Fund RI as	sistance? *
Yes No	
	uid assets? Non-retirement liquid assets include bank accounts, urrance. IRAs and 401(k) and other retirement accounts should
	Submit
Already ha	ive an account? Sign in.

Screening Tool

The Screening Tool allows applicants to see whether they meet the program eligibility requirements prior to completing and submitting an application. New applicants answer a series of pre-screening questions to determine eligibility prior to moving to the application.

Hardest Hil Pand-Rhode Island zanice (Riboong	-) Sign In Español
You may be Eligible	
You may apply to the Hardest Hit Fund RI by starting	an application.

Eligible applicants will receive this message and a link to begin the application process.



If an applicant answers "No" to any of the questions, they receive a message which identifies the reason they do not appear to be eligible.



Application Process

The online application portal is easy-to-use and understand.

Register	Application.	d Rhode Island			
Create a new account	In order to start your application yo	u need to create an			
irst Name *	account.				
test	Your password must meet th	e following			
ast Name *	guidelines:				
testing	Password must be at least 6 cha	¹	-		
mail *	It must include an uppercase le It must include a lowercase lett	HHFRI Applicatio			
	It must include a lowercase letto	Provide the following information	on regarding the borrow	ver(s)	
· · ·	It must include a special charac				
assword *		Borrower Informati	ion		
		We will not share personal infor	mation outside of RIHo	using without your p	rior permission.
Password		Borrower Name *	Email *		Date of Birth *
onfirm password *		test testing	mary_kate_ha	rrin@hotmail.com	6
Confirm your password		Social Security Number *	Primary Phone P	lumber *	Secondary Phone Number
commi you passiona		Lan			
Register		Physical Address Address Line 1 *		Address Line 2	
ready have an account? Login here!		Street address		Apt/Unit/Build	ng
		City *		State *	Zip Code *
		Citý		State	Zip code
		Mailing Address Use a different address that Are you a US Citizen?*	n physical address *	Are you a Perman	ent Resident? *
		Yes No		Yes No	
				Yes No Military Status *	
		Yes No Civil Status * Select value			
		Yes No Civil Status *		Military Status *	-
		Yes No Chill Status * Select value Years of School * Employment Information	•	Military Status *	
		Yes No Civil Status * Select value Years of School * Employment Information Employment Status *	Job Title	Military Status *	Employer
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Application Process

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iorrower data saved.			×			
HHFRI Application Provide the following information regarding th	e household member(s)					
Household Information						
Member #1 Name	Relationship	Age	Property Information Please provide the following informat Property Type *	ion regarding the prope	rty. Purchase Date *	
Member #2			Select value	*		
Name	Relationship	Age	Property Condition *		Estimated Proper	
			Select value	•		
Member #3			I want to *		This property is n	ny •
Name	Relationship	Age	Select value	•	Select value	
			Is the property listed for sale? *		Have you contact	ted a credit-counseling agency for he
Member #4			Yes No		Yes No	
Name	Relationship	Age	For sale by owner? Yes No		Counselor's Nam	e
			Agent's Name			
Member #5			rgens mane		Counselor's Phon	e Number
Name	Relationship	Age	Agent's Phone Number			
					Counselor's Email	1
			Have you received an offer?			
🗃 Save			Yes No			
			Date of Offer Amo	unt of Offer		
			C*	:		
			Have you received a foreclosure sale	date?*	Foreclosure Date	
			Yes No			
			Have you received a notice of Media Yes No	tion or Conciliation?*		
			Have you filed for bankruptcy? *	Bankruptcy Chapt	ler	Bankruptcy Filling Date
			Yes No	Select value	•	
			Has your bankruptcy been discharged?	Bankruptcy Case I		Bankruptcy Attorney Name



HHERI Application		
HHFRI Application		
Provide the rollowing information	regarding your mongage(s)	
Mortgage Information		
Please provide the following informati	ion regarding the mortgage loan.	
First Mortgage Lender/Servicer Nam	e *	
First Mortgage Loan Number *	Mortgage Balance *	Interest Rate *
	:	:
Monthly Payment Amount (Principal,		
		:
Monthly Mortgage Insurance Payme	nt (If Applicable)	
		:
Are you current on your First Mortga	ge? *	
Yes No	5.940 V	
f yes, are you in danger of falling de	linguent?	
Yes No		
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	ed or have you entered into a forbearance	plan? *
Yes No		plan? *
Yes No Have you received Hardest Hit Funds		plan? *
Yes No		plan? *
Yes No Have you received Hardest Hit Funds	in the past? *	plan? * d insurance policy for your property?
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<<Mortgage Information

Hardship Affidavit

Applicants submit a hardship affidavit attesting to how the COVID-19 pandemic has impacted their employment and ability to make their mortgage payments

COVID-1	9 Hardship Affidavit	
Briefly explain ho	v the COVID-19 pandemic has affected hours or unemployment and if you ar	d your employment. Please include important dates, e back to work or if you have been notified that you will b
Covid-19 Hardship	Affivadit	

Document Upload

Applicants can upload and sign all required documents.

	👺 Submit & Sign
Appli	cation Documents
You are	required to upload these documents
Most rec	ent mortgage statement
With loan	number and lender/servicer contact information
You're rec	uired to provide this document.
Select f	es
Proof of	Unemployment
Award let	ter or other documentation from the Department of Labor and Training or other provider
You're rec	ulred to provide this document.
Select f	es
Governm	ent-issued Identification
Driver's Li	cense, State Issued ID with photo, Passport, Military ID, or Permanent Resident Card
You're rec	uired to provide this document.
Select f	es
Proof of	income for all adults residing in the household
Two most	recent paystubs for working adults 23 years of age or older. Paystubs for full-time students not needed.
Social Sec of income	urity Award letter, Pension Award letter or similar proof of income for nonworking individuals receiving other for 5
You're rec	uired to provide this document.
Select f	



Summary/Eligibility Review

Applicants can do a final review of the information and documents submitted. Based, on the information included, they will receive a message as to eligibility.

Document has be	en sinned
Decoment has be	en signed
Application Documents	
You are required to upload these documents	
Most recent mortgage statement	
With loan number and lender/servicer contact information	
RIHousing Privacy Policy_EngDSpa.pdf	Download
Select files	
Proof of Unemployment	
Award letter or other documentation from the Department of Labo	or and Training or other provider
RIHousing Privacy Policy_EngDSpa.pdf	Download
Select files	
Government-issued Identification	
Driver's License, State Issued ID with photo, Passport, Military ID, o	r Permanent Resident Card
RIHousing Privacy Policy_EngDSpa.pdf	Download

Sign in

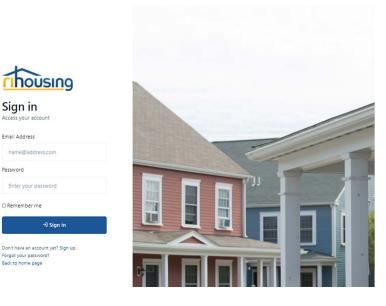
Email Address

Password

Remember me

Back to home page

You provided the following dat			
First Name	Last Name	Email	
test	testing	mary_kate_harrin@hotmail.com	
Is your home a 1-4 unit property loc	ated in Rhode Island?		
Yes			
Do you own the home and live there	e as your full time, primary r	esidence?	
Yes			
Do you currently have a forbearance	agreement with your mort	gage servicer?	
Yes			
Are you or any co-borrowers current	tly in active bankruptcy?		
Yes			
How many people reside in the hom	ie?	Annual Household Income	
3		\$60,000.00	
Have you received or are currently re	eceiving unemployment ber	efits for loss of work due the Covid-19 pandemic?	
Yes			
Have you previously received Harde	st Hit Fund RI assistance?		
No			
		Non-retirement liquid assets include bank accounts, and 401(k) and other retirement accounts should not b	e
Yes			



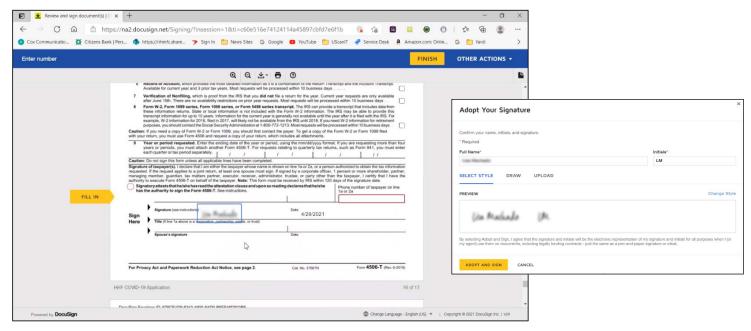
Returning applicants can sign into their existing account.

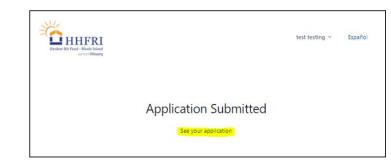


Submit & Sign

DocuSign allows applicants to complete their submision packets and the Required Checklist ensures they understand all required documentation.







Applicants can review their application and/or log in at a later date to upload any additional items needed.



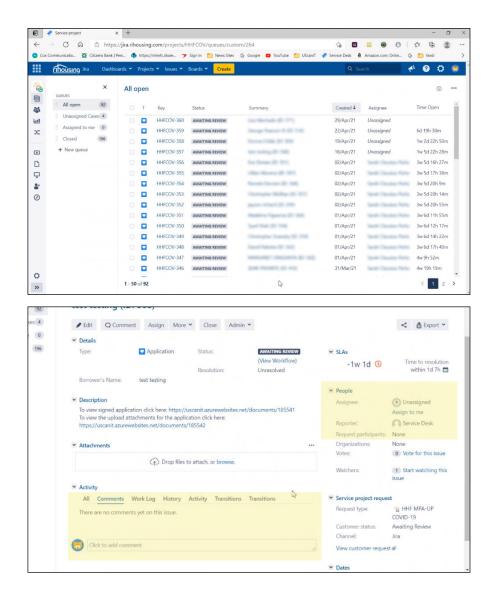
Integration with JIRA E-ticketing System

Our IT, Communications and Legal departments all utilize a JIRA E-Ticketing system for staff requests for assistance. Utilizing this existing technology, we created an alert system for HHF staff to be alerted when a new application is submitted. Staff receive an email alert with a link to the JIRA "ticket" for more information and details.

The HHF Manager can go into the e-ticket and review the application, make any notes or comments to share with other HHF staff and also assign the ticket to another staff member for further review, follow up and outreach to applicants.

Links within the ticket connect to the uScanIt document repository for staff to review uploaded materials.







All open Unassigned Cases Assigned to method Closed Closed Hew queue

JIRA E-ticketing

Helping Struggling Homeowners Get a "Fresh Start"

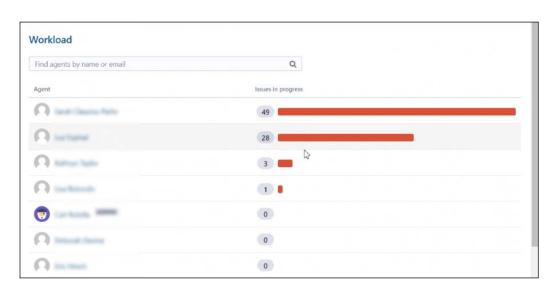
Management Innovation: Technology

RIHousing

Program staff can review all applications and supporting documents in the Jira E-ticketing platform, which identifies applications as opened, closed and/or assigned to specific staff.

Jira tracks dates of application submission and assigns a unique identification number to each.

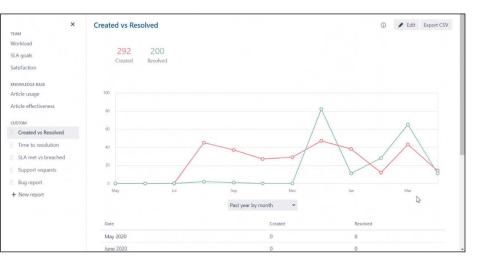
housing Jira									* 0 ¢	
QUEUES	×	All op	ben						٢	
All open	92		T	Key	Status	Summary	Created 4	Assignee	Time Open	1
Unassigned Case	25 4			HHFCOV-360	AWAITING REVIEW	Confederate di 175	29/Apr/21	Unassigned		1
Assigned to me	0			HHFCOV-359	AWAITING REVIEW	George Property 10 (19)	22/Apr/21	Unassigned	6d 19h 30m	
Closed	196			HHFCOV-358	AWAITING REVIEW	Dame (1988) (20 West	19/Apr/21	Unassigned	1w 2d 22h 50m	
+ New queue				HHFCOV-357	AWAITING REVIEW	territing 45 Mill	16/Apr/21	Unassigned	1w 5d 22h 28m	
				HHFCOV-356	AWAITING REVIEW	for Januar 30, 1915	02/Apr/21	Sealt Country Party	3w 5d 16h 27m	1
				HHFCOV-355	AWAITING REVIEW	Mariness di 101	02/Apr/21	Sect Dame Freit	3w 5d 17h 36m	
				HHFCOV-354	AWAITING REVIEW	Agenda Decoup. (D. 1985)	02/Apr/21	Serie Channe Serie	3w 5d 20h 9m	
				HHFCOV-353	AWAITING REVIEW	Complex Mollow (E) 701	02/Apr/21	Intel County Parks	3w 5d 20h 14m	
				HHFCOV-352	AWAITING REVIEW	papers wheat (2) (20)	02/Apr/21	Self-Taulor Nets	3w 5d 20h 55m	
				HHFCOV-351	AWAITING REVIEW	Maleire Typerce (C. 198)	01/Apr/21	Sand-Channe Party	3w 6d 11h 55m	
				HHFCOV-350	AWAITING REVIEW	Section (E-198)	01/Apr/21	Sandi Churkey Parks	3w 6d 12h 17m	
				HHFCOV-349	AWAITING REVIEW	Character Street, NY 158	01/Apr/21	Intelligencer Party	3w 6d 14h 22m	



From a management perspective, staff can review workload broken down by program staff as well as reporting on all submissions.



Can run a report on all submissions; identifying closed vs resolved cases. Red represents requests received and green represents approved applications.



Week starting 16 Nov 2020	11	0
Week starting 23 Nov 2020	2	0
Week starting 30 Nov 2020	7	0
Week starting 7 Dec 2020	14	82
Week starting 14 Dec 2020	8	0
Week starting 21 Dec 2020	8	0
Week starting 28 Dec 2020	13	0
Week starting 4 Jan 2021	9	0
Week starting 11 Jan 2021	12	11
Week starting 18 Jan 2021	8	0
Week starting 25 Jan 2021	8	0
Week starting 1 Feb 2021	4	0
Week starting 8 Feb 2021	4	27
Week starting 15 Feb 2021	2	1
Week starting 22 Feb 2021	2	0
Week starting 1 Mar 2021	7	0
Week starting 8 Mar 2021	8	0 0
Week starting 15 Mar 2021	10	64

Search

Links to UScanIt for all uploaded documents >>

ocument Name: test_testing_Uploaded_Files.pdf		~		
reation Date: 4/16/2021 3:51:59 PM				Par. Jan
ocument Owner: User Error		Final disruption for the first of the first	Low science description	faderal berginte
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First Name: test	13	Owners Data (Data) (Data) (Data)		
Last Name: testing				
Language Type: English				
Application ID Number: 568				

<< Can search by applicant name and access specific uploaded documents.

Hardest Hit Funding			•					
Search Document <mark>r</mark>								
Document Name	T	urchived Date		Ţ	Action	s		
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Development of App

IT staff utilize "Balsamiq Cloud," a UX drafting tool to sketch out pages of the online application, identify required fields, buttons and what each does.

C) > RiHousing DevOps Team > Mediation 2020	Project Edit View Help
+ 88	
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IT Staff Notes on proposed workflow

Fresh Start 6/2020

What will Fresh Start App do?

Support clients that need to address the COVID 19 payment of loans due to income delays.

Who are the Admins?

The admins for the application with be service and IT [5] along with service employees to manage the workflow, approvals, and closing of the requests.

How it will work

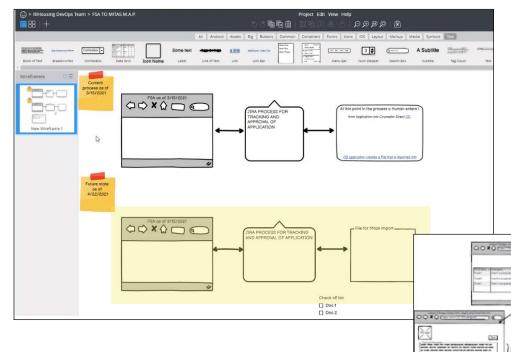
- 1. The client will select a link on the RIhousing website.
- 2. The link will connect to a RIH APP that is called Fresh Start App. [FSA]
- 3. FSA will guide the client to fill in some details via a question and answer model.
 - a. Leslie and Lisa will supply the Questions
 - b. Data will be PII and will follow the PII data flow law.
- 4. FSA will allow the client to upload a set of documents to prove the case.
 - a. Leslie to supply the type of document by name and estimate page count.
 - b. Tom will store the documents for Admin and Case Managers access.
- Each client will be assigned a Client ID for tracking the process of the request over the work flow of approval or decline.
- 6. Once the workflow reaches the two selection of Approval or Decline, the client is notified.
 - a. Email and Phone number entered at the time of request step 1.
- 7. Workflow Process stage tracking is required.
 - a. Client enter started Client ID, Time, and date stamped.
 - b. The client submitted a completed request Client ID, Time, and date stamped.
 - c. FSA Case Manager notice of submission Case Manager ID, Time and date stamped.
 - d. FSA Case sent to the approval step. Approved. Date and Time. Amount.
 - e. FSA Case closed.
- 8. Reports. This will be defined after the process completes UAT.



Programming

Staff include notes on how the app should work and which fields they need/want on each page. IT staff can communicate with program staff as they develop the application, sharing notes and comments as staff move through the design and development stages.

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Daily Reports			
Case Resoluted No Cont. Issued	Daily Initial Fees	Expired som Response Listing	
Cases without Certificate Contacts	Daily Penalty Fees	Missing-First cetter Soul Date	
Cases without Servicer Contacts	Daily Mediation Fees	Filssing Second Letter Sent	
Dunlicate Certificate Lee	Daily Workout Mediation Fees	Pending Scheduling Mediation by counselor	
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Interaction

36

Diagram identifies the interaction between various technologies; shown here is the interface between the Fresh Start App and our JIRA e-ticketing software.



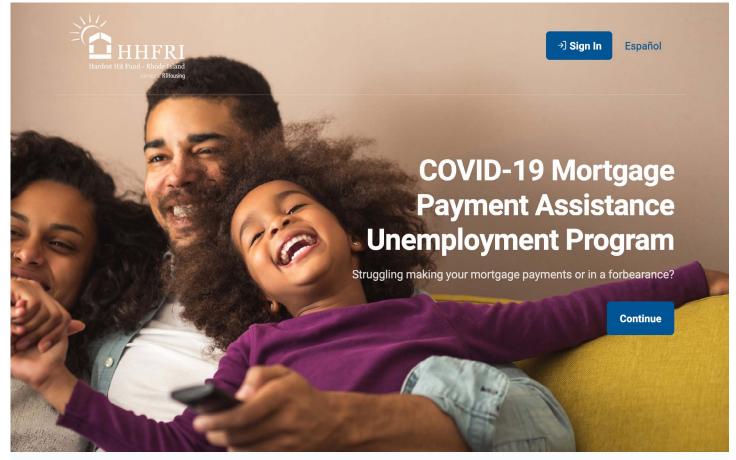
Next Steps:

Staff will be utilizing a similar approach to develop our new One-Stop Application.

Image: state of the state o	The first of the second
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	Fund Applications Network Policial and



FRESH START APP https://hhfcovid19.rihousing.com/



Applicants can access the Fresh Start App via the RIHousing.com website, which links to the new application portal. The site uses the same branding as our main website and is available in English and Spanish.

The home page features a list of documents required to complete the application, allowing prospective applicants the ability to gather these documents prior to beginning their application.

REQUIREMENTS

You will be required to upload the following documents to complete your application:

- Most recent mortgage statement
- · Proof of unemployment benefits from the Department of Labor and Training or other provider
- 2019 federal tax return
- Copy of government issued photo identification
- · Proof of income for all adults residing in the household
 - Two most recent pay stubs for working adults 23 years of age or older. Pay stubs for full-time students not needed.
 - Social Security Award letter, Pension Award letter, proof of Unemployment Benefits, or similar proof of income for nonworking individuals receiving other forms of income.
- An application is not considered complete unless all supporting documents have been uploaded.

Continue



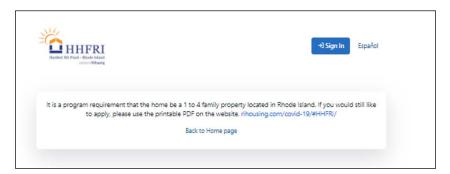
Eligibility See if you are eligible to apply	
First Name *	Last Name *
First name	Last name
Fmail *	
Enter email	
ls your home a 1-4 unit property located in Rhode Isla	and? *
Yes No	
Do you own the home and live there as your full time,	primary residence? *
Yes No	•
Do you currently have a forbearance agreement with y	your mortgage servicer? *
Yes No	
Are you or any co-borrowers currently in active bankr	uptcy? *
Yes No	
How many people reside in the home? *	Annual Household Income *
1	Enter income
Have you received or are currently receiving unemplo	oyment benefits for loss of work due the Covid-19 pandemic? *
Yes No	
Have you previously received Hardest Hit Fund RI as	sistance? *
Yes No	
	uid assets? Non-retirement liquid assets include bank accounts, urrance. IRAs and 401(k) and other retirement accounts should
	Submit
Already ha	we an account? Sign in.

Screening Tool

The Screening Tool allows applicants to see whether they meet the program eligibility requirements prior to completing and submitting an application. New applicants answer a series of pre-screening questions to determine eligibility prior to moving to the application.

Hardest Hil Pand-Rhode Island zanice (Riboong	-) Sign In Español
You may be Eligible	
You may apply to the Hardest Hit Fund RI by starting	an application.

Eligible applicants will receive this message and a link to begin the application process.



If an applicant answers "No" to any of the questions, they receive a message which identifies the reason they do not appear to be eligible.



Application Process

The online application portal is easy-to-use and understand.

Register	Application.	d Rhode Island			
Create a new account	In order to start your application yo	u need to create an			
irst Name *	account.				
test	Your password must meet th	e following			
ast Name *	guidelines:				
testing	Password must be at least 6 cha	¹	-		
mail *	It must include an uppercase le It must include a lowercase lett	HHFRI Applicatio			
	It must include a lowercase letto	Provide the following information	on regarding the borrow	ver(s)	
· · ·	It must include a special charac				
assword *		Borrower Informati	ion		
		We will not share personal infor	mation outside of RIHo	using without your p	rior permission.
Password		Borrower Name *	Email *		Date of Birth *
onfirm password *		test testing	mary_kate_ha	rrin@hotmail.com	6
Confirm your password		Social Security Number *	Primary Phone P	lumber *	Secondary Phone Number
commi you passiona		Lan			
Register		Physical Address Address Line 1 *		Address Line 2	
ready have an account? Login here!		Street address		Apt/Unit/Build	ng
		City *		State *	Zip Code *
		Citý		State	Zip code
		Mailing Address Use a different address that Are you a US Citizen?*	n physical address *	Are you a Perman	ent Resident? *
		Yes No		Yes No	
				Yes No Military Status *	
		Yes No Civil Status * Select value			
		Yes No Civil Status *		Military Status *	-
		Yes No Chill Status * Select value Years of School * Employment Information	•	Military Status *	
		Yes No Civil Status * Select value Years of School * Employment Information Employment Status *	Job Title	Military Status *	Employer
		Yes No Chil Status * Select value Years of School * Employment Information Employment Status * Select value	•	Military Status * Select value	
		Yes No Civil Status * Select value Years of School * Employment Information Employment Status * Select value Starting Date	* Work Phone Nu	Military Status * Select value	
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Application Process

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iorrower data saved.			×			
HHFRI Application Provide the following information regarding th	e household member(s)					
Household Information						
Member #1 Name	Relationship	Age	Property Information Please provide the following informat Property Type *	ion regarding the prope	rty. Purchase Date *	
Member #2			Select value	*		
Name	Relationship	Age	Property Condition *		Estimated Proper	
			Select value	•		
Member #3			I want to *		This property is n	ny •
Name	Relationship	Age	Select value	•	Select value	
			Is the property listed for sale? *		Have you contact	ted a credit-counseling agency for he
Member #4			Yes No		Yes No	
Name	Relationship	Age	For sale by owner? Yes No		Counselor's Nam	e
			Agent's Name			
Member #5			rgens mane		Counselor's Phon	e Number
Name	Relationship	Age	Agent's Phone Number			
					Counselor's Email	1
			Have you received an offer?			
🗃 Save			Yes No			
			Date of Offer Amo	unt of Offer		
			C*	:		
			Have you received a foreclosure sale	date?*	Foreclosure Date	
			Yes No			
			Have you received a notice of Media Yes No	tion or Conciliation?*		
			Have you filed for bankruptcy? *	Bankruptcy Chapt	ler	Bankruptcy Filling Date
			Yes No	Select value	•	
			Has your bankruptcy been discharged?	Bankruptcy Case I		Bankruptcy Attorney Name



HHERI Application		
HHFRI Application		
Provide the rollowing information	regarding your mortgage(s)	
Mortgage Information		
Please provide the following informati	ion regarding the mortgage loan.	
First Mortgage Lender/Servicer Nam	e *	
First Mortgage Loan Number *	Mortgage Balance *	Interest Rate *
	:	:
Monthly Payment Amount (Principal,		
		:
Monthly Mortgage Insurance Payme	nt (If Applicable)	
		:
Are you current on your First Mortga	ge? *	
Yes No	5.940 V	
f yes, are you in danger of falling de	linguent?	
Yes No		
1	and any horizon and sound links a dealer sound in	-12 *
	ed or have you entered into a forbearance	plan? *
Yes No		plan? *
Yes No Have you received Hardest Hit Funds		plan? *
Yes No		plan? *
Yes No Have you received Hardest Hit Funds	in the past? *	plan? * d insurance policy for your property?
Yes No Have you received Hardest Hit Funds Yes No	in the past? *	
Yes No Have you received Hardest Hit Funds Yes No	in the past? * our property? * Who pays hazar	
Yes No Have you received Hardest Hit Funds Yes No Vho pays the real estate tax bill on yo	in the past? * our property? * Who pays hazar	
Yes No Have you received Hardest Hit Funds Yes No Who pays the real estate tax bill on you	in the past? * wur property? * Who pays hazar me Equity Loan? *	
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Yes No Have you received Hardest Hit Funds Yes No Who pays the real estate tax bill on you o you have a second mortgage/ Hor Yes No econd Mortgage Lender/Servicer Na	in the past? * wur property? * Who pays hazar me Equity Loan? * me Second Mortgage Balance	d insurance policy for your property?
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Yes No Have you received Hardest Hit Funds Yes No Who pays the real estate tax bill on you to you have a second mortgage/ Hor Yes No econd Mortgage Lender/Servicer Na econd Mortgage Loan Number econd Monthly Payment econd Insurance Monthly Payment ist other Liens/Mortgages or Judgment	in the past? * wr property? * Who pays hazar me Second Mortgage Balance \$	d insurance policy for your property? Second Mortgage Interest Rate Second Mortgage Interest Rate Con(s), company or firm and their Lien Balance
Yes No Have you received Hardest Hit Funds Yes No Who pays the real estate tax bill on you o you have a second mortgage/ Hor Yes No econd Mortgage Lender/Servicer National Action of the second Mortgage Loan Number econd Mortgage Loan Number econd Monthly Payment econd Insurance Monthly Payment st other Liens/Mortgages or Judgmore elephone numbers. en Holder's Name/Servicer	in the past? * wr property? * Who pays hazar me Second Mortgage Balance \$	d insurance policy for your property? Second Mortgage Interest Rate Second Mortgage Interest Rate Contest of the second secon

<<Mortgage Information

Hardship Affidavit

Applicants submit a hardship affidavit attesting to how the COVID-19 pandemic has impacted their employment and ability to make their mortgage payments

COVID-1	9 Hardship Affidavit	
Briefly explain ho	v the COVID-19 pandemic has affected hours or unemployment and if you are	d your employment. Please include important dates, e back to work or if you have been notified that you will b
Covid-19 Hardship	Affivadit	

Document Upload

Applicants can upload and sign all required documents.

	👺 Submit & Sign
Appli	cation Documents
You are	required to upload these documents
Most rec	ent mortgage statement
With loan	number and lender/servicer contact information
You're rec	uired to provide this document.
Select f	es
Proof of	Unemployment
Award let	ter or other documentation from the Department of Labor and Training or other provider
You're rec	ulred to provide this document.
Select f	es
Governm	ent-issued Identification
Driver's Li	cense, State Issued ID with photo, Passport, Military ID, or Permanent Resident Card
You're rec	uired to provide this document.
Select f	es
Proof of	income for all adults residing in the household
Two most	recent paystubs for working adults 23 years of age or older. Paystubs for full-time students not needed.
Social Sec of income	urity Award letter, Pension Award letter or similar proof of income for nonworking individuals receiving other for 5
You're rec	uired to provide this document.
Select f	



Summary/Eligibility Review

Applicants can do a final review of the information and documents submitted. Based, on the information included, they will receive a message as to eligibility.

Document has be	en sinned
Decoment has be	en signed
Application Documents	
You are required to upload these documents	
Most recent mortgage statement	
With loan number and lender/servicer contact information	
RIHousing Privacy Policy_EngDSpa.pdf	Download
Select files	
Proof of Unemployment	
Award letter or other documentation from the Department of Labo	or and Training or other provider
RIHousing Privacy Policy_EngDSpa.pdf	Download
Select files	
Government-issued Identification	
Driver's License, State Issued ID with photo, Passport, Military ID, o	r Permanent Resident Card
RIHousing Privacy Policy_EngDSpa.pdf	Download

Sign in

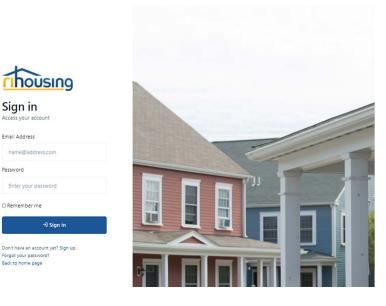
Email Address

Password

Remember me

Back to home page

You provided the following dat			
First Name	Last Name	Email	
test	testing	mary_kate_harrin@hotmail.com	
Is your home a 1-4 unit property loc	ated in Rhode Island?		
Yes			
Do you own the home and live there	e as your full time, primary r	esidence?	
Yes			
Do you currently have a forbearance	agreement with your mort	gage servicer?	
Yes			
Are you or any co-borrowers current	tly in active bankruptcy?		
Yes			
How many people reside in the hom	ie?	Annual Household Income	
3		\$60,000.00	
Have you received or are currently re	eceiving unemployment ber	efits for loss of work due the Covid-19 pandemic?	
Yes			
Have you previously received Harde	st Hit Fund RI assistance?		
No			
		Non-retirement liquid assets include bank accounts, and 401(k) and other retirement accounts should not b	e
Yes			



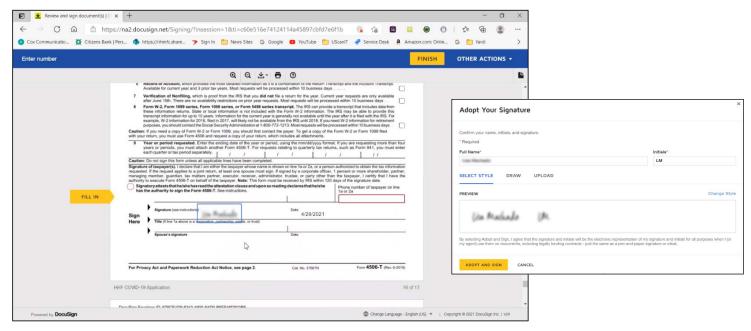
Returning applicants can sign into their existing account.

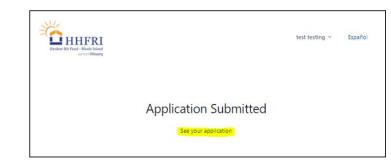


Submit & Sign

DocuSign allows applicants to complete their submision packets and the Required Checklist ensures they understand all required documentation.







Applicants can review their application and/or log in at a later date to upload any additional items needed.



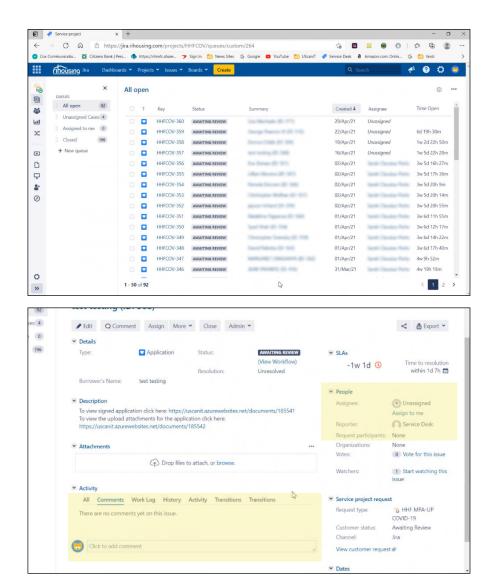
Integration with JIRA E-ticketing System

Our IT, Communications and Legal departments all utilize a JIRA E-Ticketing system for staff requests for assistance. Utilizing this existing technology, we created an alert system for HHF staff to be alerted when a new application is submitted. Staff receive an email alert with a link to the JIRA "ticket" for more information and details.

The HHF Manager can go into the e-ticket and review the application, make any notes or comments to share with other HHF staff and also assign the ticket to another staff member for further review, follow up and outreach to applicants.

Links within the ticket connect to the uScanIt document repository for staff to review uploaded materials.







All open Unassigned Cases Assigned to method Closed Closed Hew queue

JIRA E-ticketing

Helping Struggling Homeowners Get a "Fresh Start"

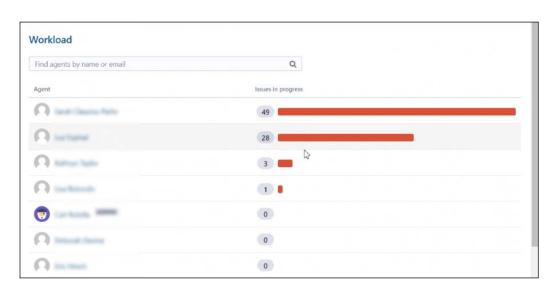
Management Innovation: Technology

RIHousing

Program staff can review all applications and supporting documents in the Jira E-ticketing platform, which identifies applications as opened, closed and/or assigned to specific staff.

Jira tracks dates of application submission and assigns a unique identification number to each.

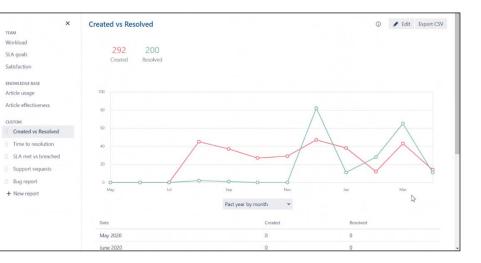
housing Jira									* 0 ¢	
QUEUES	×	All op	ben						٢	
All open	92		T	Key	Status	Summary	Created 4	Assignee	Time Open	1
Unassigned Case	25 4			HHFCOV-360	AWAITING REVIEW	Confederate dil 175	29/Apr/21	Unassigned		1
Assigned to me	0			HHFCOV-359	AWAITING REVIEW	George Property 10 (19)	22/Apr/21	Unassigned	6d 19h 30m	
Closed	196			HHFCOV-358	AWAITING REVIEW	Dame (1988) (20 West	19/Apr/21	Unassigned	1w 2d 22h 50m	
+ New queue				HHFCOV-357	AWAITING REVIEW	territing 45 Mill	16/Apr/21	Unassigned	1w 5d 22h 28m	
				HHFCOV-356	AWAITING REVIEW	for Januar 30, 1915	02/Apr/21	Sealt Country Party	3w 5d 16h 27m	1
				HHFCOV-355	AWAITING REVIEW	Mariness di 101	02/Apr/21	Sect Dame Freit	3w 5d 17h 36m	
				HHFCOV-354	AWAITING REVIEW	Agenda Decoup. (D. 1985)	02/Apr/21	Serie Channel Party	3w 5d 20h 9m	
				HHFCOV-353	AWAITING REVIEW	Complex Mollow (E) 701	02/Apr/21	Intel County Parks	3w 5d 20h 14m	
				HHFCOV-352	AWAITING REVIEW	papers wheat \$2.290	02/Apr/21	Self-Taylor Sele	3w 5d 20h 55m	
				HHFCOV-351	AWAITING REVIEW	Mobile Typeres (C. 16)	01/Apr/21	Sand-Channe Party	3w 6d 11h 55m	
				HHFCOV-350	AWAITING REVIEW	Section (E-198)	01/Apr/21	Sandi Churkey Parks	3w 6d 12h 17m	
				HHFCOV-349	AWAITING REVIEW	Character Street, NY 158	01/Apr/21	Intelligencer Party	3w 6d 14h 22m	



From a management perspective, staff can review workload broken down by program staff as well as reporting on all submissions.



Can run a report on all submissions; identifying closed vs resolved cases. Red represents requests received and green represents approved applications.



Week starting 16 Nov 2020	11	0
Week starting 23 Nov 2020	2	0
Week starting 30 Nov 2020	7	0
Week starting 7 Dec 2020	14	82
Week starting 14 Dec 2020	8	0
Week starting 21 Dec 2020	8	0
Week starting 28 Dec 2020	13	0
Week starting 4 Jan 2021	9	0
Week starting 11 Jan 2021	12	11
Week starting 18 Jan 2021	8	0
Week starting 25 Jan 2021	8	0
Week starting 1 Feb 2021	4	0
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Development of App

IT staff utilize "Balsamiq Cloud," a UX drafting tool to sketch out pages of the online application, identify required fields, buttons and what each does.

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IT Staff Notes on proposed workflow

Fresh Start 6/2020

What will Fresh Start App do?

Support clients that need to address the COVID 19 payment of loans due to income delays.

Who are the Admins?

The admins for the application with be service and IT [5] along with service employees to manage the workflow, approvals, and closing of the requests.

How it will work

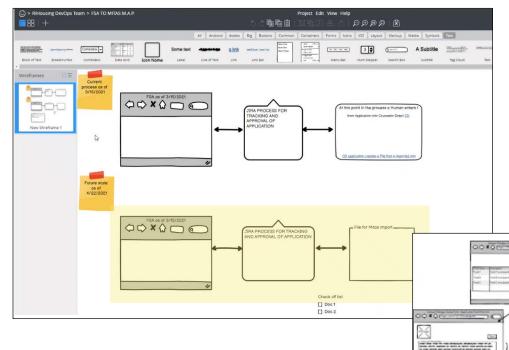
- 1. The client will select a link on the RIhousing website.
- 2. The link will connect to a RIH APP that is called Fresh Start App. [FSA]
- 3. FSA will guide the client to fill in some details via a question and answer model.
 - a. Leslie and Lisa will supply the Questions
 - b. Data will be PII and will follow the PII data flow law.
- 4. FSA will allow the client to upload a set of documents to prove the case.
 - a. Leslie to supply the type of document by name and estimate page count.
 - b. Tom will store the documents for Admin and Case Managers access.
- Each client will be assigned a Client ID for tracking the process of the request over the work flow of approval or decline.
- 6. Once the workflow reaches the two selection of Approval or Decline, the client is notified.
 - a. Email and Phone number entered at the time of request step 1.
- 7. Workflow Process stage tracking is required.
 - a. Client enter started Client ID, Time, and date stamped.
 - b. The client submitted a completed request Client ID, Time, and date stamped.
 - c. FSA Case Manager notice of submission Case Manager ID, Time and date stamped.
 - d. FSA Case sent to the approval step. Approved. Date and Time. Amount.
 - e. FSA Case closed.
- 8. Reports. This will be defined after the process completes UAT.



Programming

Staff include notes on how the app should work and which fields they need/want on each page. IT staff can communicate with program staff as they develop the application, sharing notes and comments as staff move through the design and development stages.

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Interaction

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Diagram identifies the interaction between various technologies; shown here is the interface between the Fresh Start App and our JIRA e-ticketing software.



Next Steps:

Staff will be utilizing a similar approach to develop our new One-Stop Application.

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The data from the Fresh Start App flows through to our Data Warehouse, where senior management and program staff can review both high-level and detailed information on program applications, create mapping and reporting.