



OFFICE OF
HOUSING COUNSELING

Housing Counseling in the Digital Age: Moving Away From Paper Files

Audio is only available by
conference call

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Participant Access Code: **469580**

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September 17, 2019

Webinar Logistics



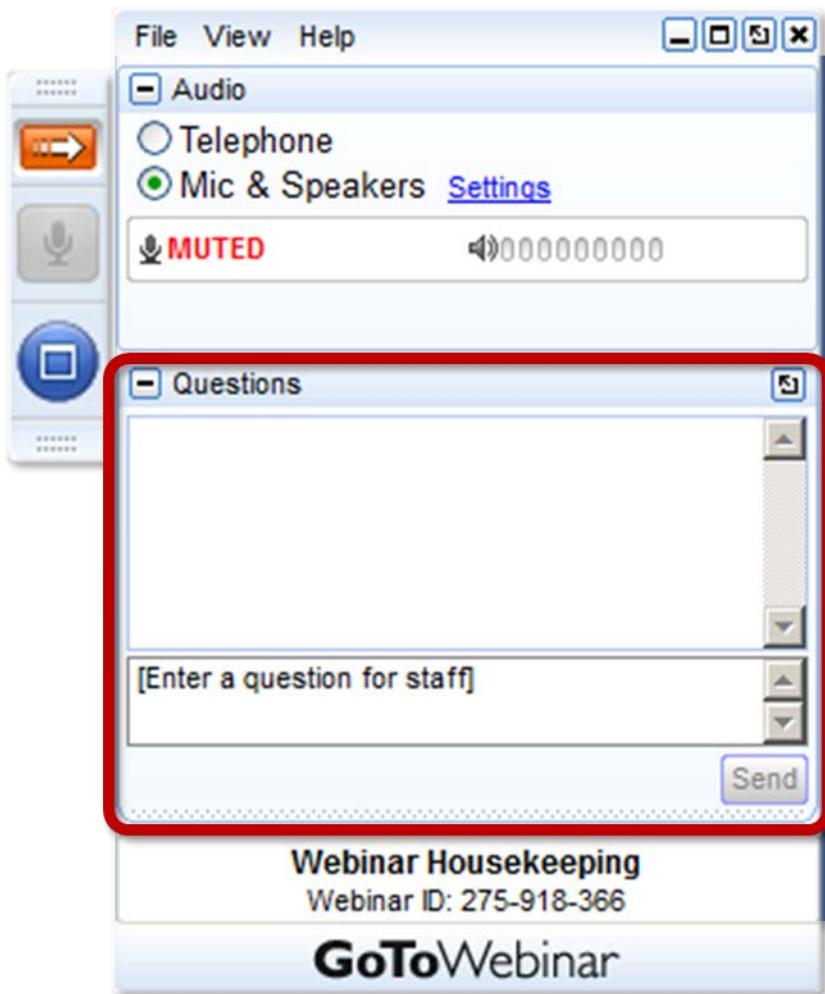
- Audio is being recorded. The playback number along with the PowerPoint and a transcript will be available on the HUD Exchange at www.hudexchange.info/programs/housing-counseling/webinars/
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- There may be Polling Questions. Please respond to them.
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 - With questions taken over the phone.
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Welcome



Jerrold H. Mayer

Director

The Office of Outreach and Capacity Building

Office of Housing Counseling (OHC)

U.S. Department of Housing and Urban Development

Note from HUD

HUD does not require you to go paperless. Review your grant agreement for full compliance. Digital platforms discussed today are not endorsed by HUD. HUD does not endorse any digital platform, format, or scope. The views expressed or the products and services covered are provided by our Technical Assistance Provider, ICF, and do not represent HUD's opinions. HUD encourages Housing Counseling Agencies to shop around and make an informed decision to select the best option for their agency.

Presenters and Q and A

- Presenters
 - **Shawna LaRue Moraille**, ICF, TA Provider
 - **Jason Zavala**, MitiGate, subcontractor to ICF
 - **Joseph Sant**, Center for New York City Neighborhoods, subcontractor to ICF
- Q and A – **Shae Williams**, HUD OHC, Office of Policy and Grant Administration, **Virginia Holman** and **Jane Charida**, Office of Outreach and Capacity Building

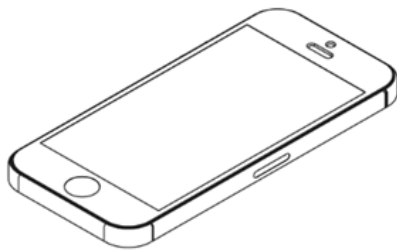
Agenda

- Introduction to Going Paperless
- Paperless: Benefits & Challenges
- Launching a Paperless Platform: Two Examples

Feedback

- There will be Feedback Provided in Mentimeter throughout this presentation. When prompted by the icon to the right, please respond to questions at www.menti.com using your computer or smart phone.

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Mentimeter!



1

Grab your phone

www.menti.com

2

Go to www.menti.com



3

Enter the code and vote!

Introduction to Going Paperless

Time for
Mentimeter!



What does going paperless mean?

- Paperless means:
 - Electronic maintenance and monitoring
 - Secure databases
 - Scanning and uploading
 - Improving capacity for efficiency of function
 - Improved capacity for efficacy of services

Typical Paperless Documents

- Internal (Agency Level)
 - Activity log (including follow-up)
- External (Client level)
 - Referral forms
- Both Internal/External
 - Intake
 - Client budget(s) & action plan(s)
 - Disclosures & authorizations
 - Applications & verifications (as applicable)

Paperless: Benefits & Challenges

Agency Level Considerations

- Benefits:
 - One or limited location for documents
 - Condensed physical space
 - Research capacity
 - Data mining
 - Minimized operating cost
 - Transferability of documents
 - More efficient management oversight

Agency Level Considerations (cont)

- Challenges:
 - Compliance extends to technology
 - Secure, encrypted means of transmitting any PII
 - Cybersecurity protocols and training
 - Compatibility of sharing
 - Readability of documentation
 - Flow of business integration
 - Staff capacity
 - HUD performance reviews

Client Level Considerations

- Benefits:
 - Convenience for clients
 - Expediency of service
 - Access of client-centric portals
- Challenges:
 - Client ability to access
 - Adaptability of technology
 - Method comprehension
 - Risk awareness

Launching a Paperless Platform: Two Examples

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Frontier Housing



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Create Your Free Account

First Name *

Last Name *

Email Address *

Confirm Email Address *

Phone Number

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FloodHelpNY

HelpNY by the Center for NYC Neighborhoods

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Launch phases

- Key decisions
- Design
- Develop & Test
- Go live

Key decisions

- What are your most important objectives?
- What is the scope of your project?
- Who are your intended users?
- What additional resources do you need to succeed?
- What is my budget

Key decisions example: FloodHelpNY.org

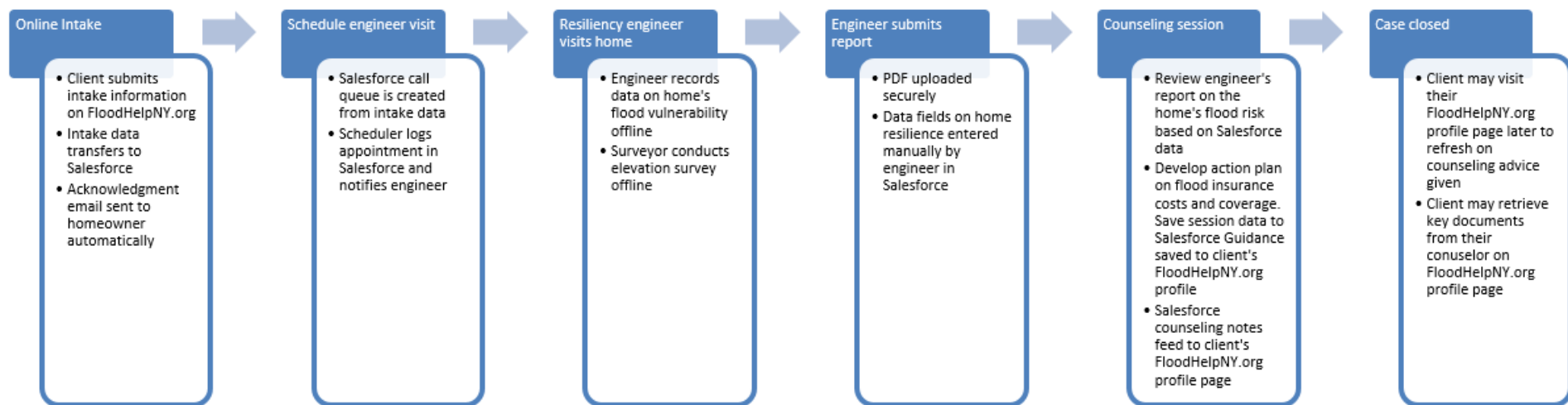
- Objectives
 - Seamless client experience
 - Integrity of data gathered
- Scope
 - Resiliency counseling program, and general flood insurance educational
- Intended users
 - Homeowners, counselors, management/researchers
- What additional resources did we need to succeed?
 - TA and grants from NY State, web and Salesforce developer, design firm

Design

- Get a snapshot of your current process
- Get design input before you start
- Map your envisioned process
- User and stakeholder feedback
- Plan for your legacy records

Design (cont)

Process Visualization Example



Design (cont)

Compliance Example: FloodHelpNY.org

Agree to Terms and Conditions

We cannot guarantee the accuracy of
your zone

Your flood insurance estimate may not
be accurate

Learn more in our [Terms and Conditions](#) and
[Privacy Policy](#)

By clicking submit you agree to our terms and
conditions

Previous

Submit

Develop & Test

- Implementing the design completed in last phase
- Procurement of software applications
- Coding and configuration
- Testing

Develop & Test Example: Frontier Housing

- Assistance and support provided by Neighborworks Business Sustainability Initiative
- Salesforce customization support provided through the Initiative
- Frontier staff implemented electronic document signing solutions
- Outside compliance subject matter experts

Go Live

- Training, re-training
- Marketing and outreach
- Maintaining and tweaking over time



Questions

Time for
Mentimeter!



Resources

- www.HUDExchange.info/housingcounseling
 - Press Release and Federal Register Notice
 - Information for applying to HUD's program
 - Subscription and Archive of **The Bridge** newsletter
 - Upcoming webinars and partner trainings
 - Toolkits and Program Models
- <https://www.hudexchange.info/programs/housing-counseling/technology/#housing-counseling-services>

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- Email:
housing.counseling@hud.gov
- The Bridge:
<https://www.hudexchange.info/programs/housing-counseling/the-bridge/>

Conclusion

THANKS
for
ATTENDING