

Case Study

Application Development and Integration Services Allow a Non-Profit to Streamline the Distribution of Over \$50 Million in Funds



Customer Overview

Customer:

A government organization striving to improve lives in the community

Profile:

The non-profit is committed to leading the fight for equality by removing barriers, closing gaps, and leveling the playing field for citizens

Industry:

Non-profit

Services:

Application Development, Enhancement, Salesforce Implementation & Customization, Integration, Data Migration and Management, and Ongoing Solution Support

Business Need

As a non-profit that supports the education, health, housing, and financial stability of every person in Orange County, the firm aims to create a stronger community where everyone has access to quality education, a sustainable income, better health, and stable housing - the building blocks for a good life.

One of the key initiatives launched by the firm was the deployment of a Rental Assistance App that streamlines payout to landlords on behalf of tenants. However, initially, the app could only be used for one specific program and had to be customized for multi-program assistance. The firm, therefore, sought application enhancement services, so they can support multiple programs under a single app.

Another key initiative taken up by the firm was to end homelessness, for which they began a landlord incentive program to help homeless individuals and families with rental assistance vouchers to secure housing. The program also provides financial incentives and other assurances to landlords who rent units to people with housing vouchers.

The program was dependent on an online administrative tool called Airtable which was used to store all the data related to landlords, clients, properties, and other touchpoints. In the initial phase of the program, Airtable seemed suitable to meet basic needs, but as the program grew in size and complexity, the non-profit encountered several problems:

- The tool was not HIPPA compliant which raised several data security and vulnerability issues
- In the absence of a single view of past data, there was a heavy reliance on manual efforts to track the history of each stakeholder
- Collection of documents and their signing was also largely a manual endeavor prone to errors
- The lack of a self-service portal made it difficult for landlords to manage their properties
- The inability to reuse a single application and extend the interface to landlords and tenants across multiple programs meant more time and effort spent in processing applications
- Inefficient processes for landlords and applicants to view applications and upload documents or add banking information
- No standardized way to verify and authenticate data – especially related to banking information
- Manual efforts by administrators to track documents received via email

To overcome these challenges, the non-profit was looking to

- Enhance the functionality of the Rental Assistance App and pave the way for multi-program assistance
- Enable integration between the Rental Assistance App and the county's Health Management Information System (HMIS)
- Enable integration between Airtable and the Rental Assistance app to sync all the data in a single portal as an intermediate solution and eventually migrate data and workflows to Salesforce for better efficiency and cost-effectiveness
- Build advanced admin, landlord, and applicant portals for seamless public housing and property and unit registration
- Digitize the landlord onboarding, management, and document signature process while improving the overall security of the application and stored data

Solution and Approach

To meet the varied requirements of the non-profit firm, Synoptek provided an array of application development, enhancement, integration, support, and data migration services.

Application Enhancement and Support Services for Rental Assistance Program

- Revamped the app's UI/UX and upgraded the admin portal so the same portal can be used for supporting assistance programs of multiple government entities
- Enabled the administration team to pay the same applicant twice under different funding sources covered under the same program
- Developed a digital form for tenants to check eligibility for the program and also to apply for the program
- Developed self-service portals for landlords and applicants to upload documents supporting their applications and provide ACH information for receiving payments
- Developed the overall capability to create / edit / delete reconciliation records for exception cases while also automating the process of reconciliations to be paid under the same application
- Enabled integration of the portal with HMIS while also enabling admin teams to view/manage/search using different landlords, properties, and units
- Developed an OCR capability for automatic extraction of data from handwritten or digital copies to meet 1099 form requirements

Portal Development and Integration Services for Supporting a Program to end Homelessness

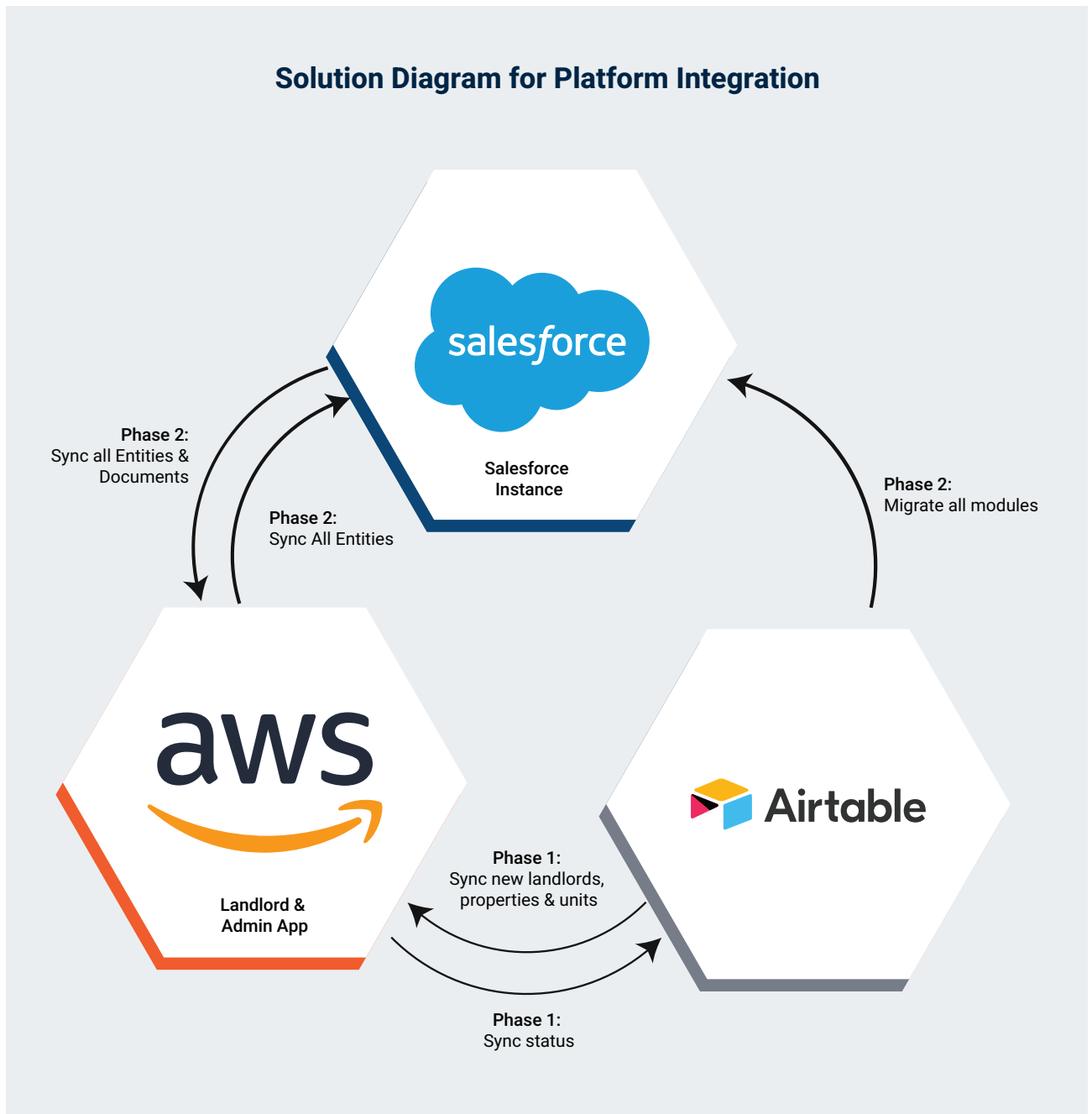
- Developed an independent portal for administrators to manage landlords, view properties and units enlisted, and send documents to be signed by authorized signatories
- Developed an independent self-service portal for landlords and property managers to manage their profile, enlist properties, manage units, and view the status related to the leasing of each property unit
- Developed a self-service module to register a property under Public Housing Authority (PHA) and introduced a security layer for session timeout and encryption
- Enabled user onboarding and profile setup and extended the platform to existing partners/landlords/property managers

Salesforce Implementation, Customization and Migration

- Customized the Salesforce instance to support the landlord management portal, including tracking client/voucher holder information, viewing units registered by property owners/managers, matching clients with units, checking history for clients, etc.
- Migrated all legacy data and workflows from Airtable to Salesforce and ensured HIPAA compliance

Data Migration and Management

- Developed a phase-wise approach to cleanse existing data residing in Airtable and migrated it to an upgraded AWS and Salesforce solution
- Enabled unidirectional integration between Airtable and AWS to ensure all information provided by new landlords related to their company, properties, or units gets auto-synced in the Airtable platform on a real-time basis
- Restructured the overall data table model via data normalization to support the solution including AWS, Airtable, and the Salesforce platform.



Business Benefits

Despite the many challenges encountered in developing a single portal for new as well as existing partners, training users to transition from Airtable to Salesforce, and enabling seamless integration with AWS, Synoptek was successful in meeting the firm's vision of digitizing the overall process of rental assistance and landlord management.

Synoptek's support and services have enabled the non-profit to deliver on its purpose, catering to the needs of 12,000+ families. Today, the firm hosts and manages a digital ecosystem of over 9 applications and portals, delivers more than 50 programs county-wide across Education, Health, Housing, and Financial Stability, and provides support to over 4300 application users.

With the range of application enhancement and support, portal development, and AWS and Salesforce migration services, the non-profit firm is witnessing many benefits across the business, including:

- Better and quicker management of landlord onboarding, management, and document signature
- Minimized manual effort and the ability for admins to use a single portal to manage multiple programs
- Reduced processing timeframe by automating repetitive process steps and improved data security via integration
- Improved access and reach to multiple other stakeholders of the landlord management program
- Quicker and better processing of 8000+ applications that help in the distribution of over \$50 million in funds under multiple programs
- Increased precision of fund distribution
- Enhanced quality of user interaction and communication



Streamlined the
Distribution of Over
\$50 Million
in Funds



Support Services
helped in catering
needs of
12,000+
Families

Testimonials



I heard 2 senior executives say, and I quote, "Synoptek is hands down the best developer I have ever worked with in my entire career...always exceed expectations...can handle curve balls... always timely and on budget." Congratulations on such rave reviews. This will get at a minimum County-wide recognition and perhaps National. You should educate the cities and counties about these programs...they must all have access to funds that need to be managed.

– VP, Corporate Engagement



I just wanted to take a moment and let you know how very much we appreciate your work thus far with your team. They have been incredibly professional, polite, and thorough. It really is lovely working with them. If there is a way to give them internal kudos, I think that'd be great.

– Senior Director, Corporate Social Responsibility

About Synoptek

Synoptek delivers accelerated business results through advisory led transformative systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.