



DiversaLink


YOUR LOGO Fair Housing


Diversalink 001


⚙️ ☰


 **Case Manager**


 **Grant Manager**

 **E&O Manager**

 **Counseling Manager**

 **Time Manager**

 **Mobile Testing**

 **DiversaLink**

LOG OFF

Connected To:
FileMaker

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Case Manager

The screenshot shows the Case Manager dashboard. At the top left is the 'YOUR LOGO' placeholder and 'Fair Housing'. The top navigation bar includes buttons for 'Case Manager', 'Grant Manager', 'E&O Manager', 'Time Manager', and 'Mobile Testing'. On the right are user and settings icons. Below the navigation bar are four tabs: 'Case Manager' (selected), 'My Recent Cases (1)', 'All Recent Cases (2)', and 'Annual Case Volume (22)'. The main content area features a row of five buttons: '+ NEW INTAKE', 'SEARCH', 'MY INBOX', '+ NEW AUDIT TEST', and 'SHOW ALL AUDIT TESTS'. Below this is a grid of nine buttons: 'Testers', 'Training Sessions', 'Tests', 'Properties', 'Dependents', 'Respondents', and 'Witnesses'. The bottom footer contains a 'LOG OFF' button, the user name 'admin', and the DiversaLink logo with copyright information: 'Diversalink ©2017 DataFrame, LLC All Rights Reserved.'

TESTERS

Manage your testers including profiles, training, test history, payments and more.

TRAINING SESSIONS

Create, schedule, track and manage tester training sessions

TESTS

Tests are created in the Case Manager module for individual cases. This area is providing analysis and reporting of all tests submitted into the system by any tester for any case

PROPERTIES

Catalog of all properties identified in Case Manager for easier analysis and reporting

DEPENDENTS, RESPONDENTS, WITNESSES

Easier searching, analysis and reporting for these components in all cases

NEW INTAKE

Create new cases and being processing

MY INBOX

Each staff member has a virtual InBox of

NEW AUDIT TEST AND SHOW ALL AUDIT TESTS

Create, manage and track Audit Tests for grant deliverables or agency specific testing

Full Case File: New Intake

DiversaLink 002

CASE 114375

Save Cancel

Intake Investigation Tests (0) Resolution Notes (0) Docs (0) Time Log (0)

Intake Allegation Conversion Data

Date: 09/22/2017 Time: 2:21:19 PM Method of Contact: Client Type: Intake Number: 114375 Allegation Number:

Agency/Organization: Title:

First Name: Middle: Last Name / Project Name:

Over Age 65: Gender Identity (How do you identify today?): Sexual Orientation:

Marital Status: Disability: Race:

Ethnicity: National Origin:

Phone Type: Phone Number: Phone Comments:

E-Mail Address: Total Number (CP + #HH) For The Current Found Set:

Name of Apartment Complex: Home Address:

Unit No: Zip Code: City: State: County:

Language(s): Interpreter?: Amount: Per: CP ANNUAL:

HOUSEHOLD INCOME (CP ONLY): # HH: Household Type:

Case Type: Intake Allegation Audit

Transaction: Design/Construct Mortgage Lending Rent Insurance Unknown HOA Municipal Utilities Rental Home Insurance Permit/Zoning Sales

Referred By: Referred By - OTHER:

Call Issue: FH Allegation Housing Search FH Info L/T General Info RA/RM assist

Discrimination: Criminal History Discrimination Section 8

Referred To: ARC HOC/Hope House/UGM CFJ/Vol Law Prog Salv. Army CLEAR/NJP/Walaw/S.Ground SNAP-house,finan,energy Good Will-Vets VOA HFCA-Catholic Charities Women's Hearth

Information Sent: E-Mailed Faxed Mailed Nothing sent

List of Materials: 101 FH - RE Agent Housing search info Release of Information Tester brochure 101 FH FAQ - LL & Mngrs L/T Info Renter resources Trans/Emerg Shelter guide Assistance Animal Guide Legal resources Sample Verification letter Vets brochure Confidentiality Agreement LGBT brochure Self Advocacy DV Sample Policy NWFHA general brochure Student brochure Fair Lending brochure RA/RM Guide T- on-T

CASE STATUS AND COMMENTS: Open Closed

C: admin 09/22/2017 2:21:19 PM
M: admin 09/22/2017 2:21:19 PM

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INVESTIGATION TABS

Complainant, Respondent, Property, Incident, Details, Witnesses, Narrative, RA/RM, Mediations, Review

TESTS

Schedule, update and complete tests

RESOLUTION

Full Resolutions options and Litigation

NOTES

Notes from throughout the system (Can be added from any screen) compile here in an easy to use "rolodex" type view

DOCS

Attach documents to a cse

TIME LOG

Complete time management tied to grants and resources

E & O Manager

YOUR LOGO Fair Housing

Case Manager Grant Manager **E&O Manager** Time Manager Mobile Testing

My People (2) All People (2) Recent Events (3) New People Contributions

Name	Last Date Modified	Last Modified By
Fairbanks, Gregory	6/13/2017 2:11:37 PM	admin
Jones, Robert	6/13/2017 1:32:16 PM	admin

PEOPLE ENTITIES MAIL CHIMP PUBLICATIONS ARTICLES & POSTS

EVENTS AND TRAINING VENUES LITERATURE INVENTORY PAYMENTS VENDORS EVENT TASKS TEMPLATE

* Activity is displayed only for records that have been modified within the last 60 days.

LOG OFF admin

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PEOPLE & ENTITIES

Comprehensive "CRM" to track all non-case related contacts, companies and agencies

EVENTS & TRAINING, VENUES & VENDORS

Full featured planning & production for classes, seminars & events including evaluation, checklists & more

MAILCHIMP

Manage your online newsletters and web forms with the DiversaLink-Mailchimp Connector

PUBLICATIONS, ARTICLES AND POSTS

Track and confirm online, digital and paper based communications including live linking

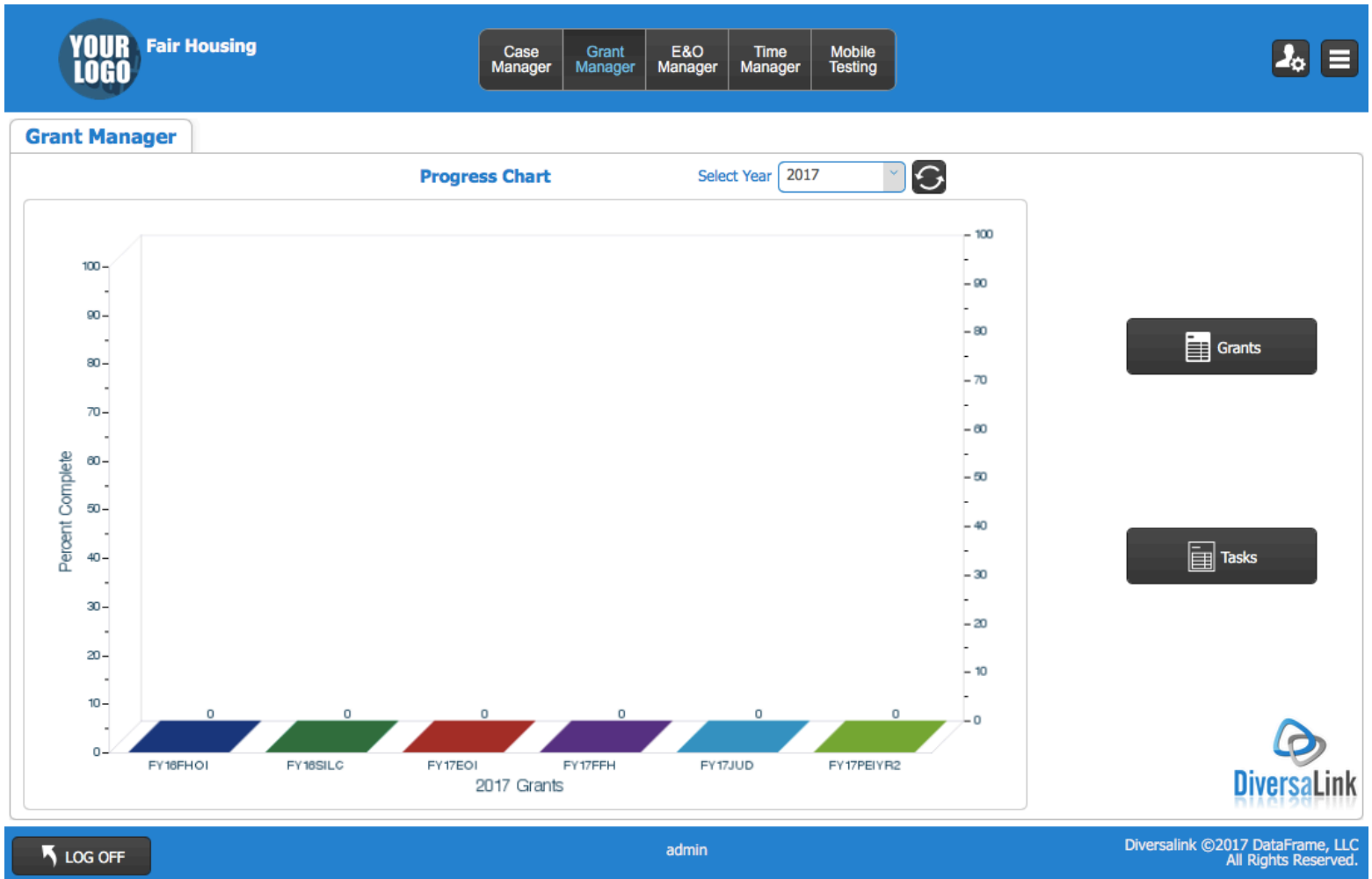
LITERATURE INVENTORY

Live tracking of agency literature, flyers and publications with easy grant reporting for distributed materials

EVENT TASKS

Create your own event checklists, evaluations and other material for your agency specific events

GRANT MANAGER



LIVE DASHBOARD

Live charts tracking grant progress, simply drag and drop the charts into Word, Excel or other files

GRANTS

Enter in statement of work, tasks and set performance goals, analyze man hours vs. grant projections, etc.

TASKS

Easily search for specific tasks across multiple grants or by assignees

Grant

Value List Type: FHIP Jurisdictional

Grant ID (Used in value lists and on Timesheet): FY17PEYR2

Show Outreach on Timesheet?: Yes

Status: Active

Grant Abbrev Name: 2nd year multi-year

Grant Name: FH700G15037

Start Date: 1/1/2017

End Date: 12/31/2017

Grant Type: Education Enforcement Tech

Filing Status Type: HUD

Notes:

Contact Name: Contact Email: Contact Phone:

Task ID	Description	Status	SubTasks
1.	Written Financial Report	Incomplete	0
2.	Copies of Board Agenda	Incomplete	0
3.	Assigned Staff to Project	Incomplete	0
4.	Contracts with Subcontractors- submit copy of signed	Incomplete	0
5.	Written Policy to avoid duplicate reporting & payments	Incomplete	0
6.	Submit Evidence of Compliance- copy of conflict of interest policy	Incomplete	0

Percent Complete: 0

C: LindaB 01/03/2017 12:40:04 PM M: admin 3/15/2017 5:09:53 PM

FY17PEYR2 1 of 6 Found (Unsorted) Total: 6

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TIME MANAGER

Fair Housing

Case Manager
Grant Manager
E&O Manager
Time Manager
Mobile Testing

Time Management

Custom Client Created Workflow for Payroll:

- 1) Staff Update [Open] 7 Day time sheets verifying grant hours and inputting any additional hours and comments.
- 2) Staff Submit [Open] 7 Day time sheets to become [Pending]. 7 Day time sheets that are NOT [Open] may not be modified by staff.
- 3) Admin Reviews [Open] 15 Day time sheets containing [Pending] 7 Day time sheet status entries and then [Approves] the 15 Day time sheet period. Time sheets that are not [Open] no longer allow updating of Grant Hours from the Time Logs.
- 4) Payroll Reviews [Approved] 15 Day time sheets and either marks them as [Archived] (finished) or [Pending] to return them to the Manager.
- 5) Admin Reviews [Pending] 15 Day time sheets and may unlock individual 7 Day time sheet status entries (mark as [Open]) to allow staff to make corrections. Alternately the Manager may [Reject] the 15 Day time sheet which marks all 7 Day status entries as [Open] as well to allow staff to make corrections.
- 6) Staff Update any [Open] 7 Day time sheets for the purpose of making corrections.
- 7) Staff Submit [Open] 7 Day time sheets again for review by manager.
- 8) Admin Reviews Open/Pending 15 Day time sheets and marks them as [Approved].
- 9) Payroll Reviews Approved 15 Day time sheets and marks them as [Archived].

Setup

Employees

Admin

Open

Pending

Payroll

Approved

Archived

LOG OFF
admin
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As staff logs their time throughout the system, the hours appear on their digital time card for review by the employee, payroll staff and management.

Employee hours are categorized by grant, activities, PTO and other standard payroll criteria.

Time cards are approved and the data can be sent to a payroll provider or program (ADP or Quickbooks)

Name	Brian Currell		Pay Type	Salary Non-Exempt		PP Status	Open		Month	6		PP	1		Year	2017											
Position			Standard Hours	35																							
																		Totals	Percent								
FY16FHOI	Thu01	Fri02	Sat03	Sun04	Mon05	Tue06	Wed07	Thu08	Fri09	Sat10	Sun11	Mon12	Tue13	Wed14	Thu15			0.00	100%								
FY16FHOI OR																		0.00	0.00								
FY17EOI																		0.00	0.00								
FY17EOI OR																		0.00	0.00								
FY17FFH																		0.00	0.00								
FY17FFH OR																		0.00	0.00								
FY17JUD																		0.00	0.00								
FY17JUD OR																		0.00	0.00								
FY17PEIYR2																		0.00	0.00								
FY17PEIYR2 OR																		0.00	0.00								
Conciliations																		0.00	0.00								
Training																		0.00	0.00								
Unrestricted																		0.00	0.00								
Indirect																		0.00	0.00								
Annual Leave																		0.00	0.00								
Sick Leave																		0.00	0.00								
Holiday																		0.00	0.00								
Personal Day																		0.00	0.00								
																		0.00	0.00								
Totals																		0.00	100%								
																		Grants	0.00	Outreach	0.00	Misc	0.00	Leave	0.00	Labor	0.00
																		7Day Status and Over/Under Hours									

Approve
Refresh Grant Hours
Employee 15 Day Time Sheet
Print Time Sheet

Remote Testing

DiversaLink 002									
Show: All Open Review Complete									
View Testers Update My Info Logoff									
Test Status	File Number	Tester ID	Test Type	Status of Forms					Coordinator
1	911588-1	9505	Rental	Asn: ●	Rpt: ●	Flp: ●	Con: ●	Exp: ●	Nicole Edner
2	912975-1	9219	Rental	Asn: ▶	Rpt: ●	Flp: ●	Con: ▶	Exp: ●	Malia
3	100095-4	9219	Rental	Asn: ▶	Rpt: -	Flp: ●	Con: ★	Exp: -	Brian Currell
4	913052-1	9261	Rental	Asn: ▶	Rpt: ▶	Flp: ▶	Con: ▶	Exp: ▶	Nicole Edner
5	913052-1	9219	Rental	Asn: -	Rpt: -	Flp: -	Con: -	Exp: -	Nicole Edner
6	913052-1	12063	Rental	Asn: ●	Rpt: ●	Flp: ●	Con: ●	Exp: ●	Nicole Edner
7	913953-1	9219	Rental	Asn: -	Rpt: -	Flp: ●	Con: -	Exp: -	Malia
8	913953-1	9158	Rental	Asn: ▶	Rpt: -	Flp: ▶	Con: -	Exp: -	Malia
9	913975-1	9778	Rental	Asn: ▶	Rpt: -	Flp: ●	Con: -	Exp: ●	Nicole Edner
10	913975-2	9735	Rental	Asn: ▶	Rpt: -	Flp: ●	Con: -	Exp: ●	Nicole Edner
11	913975-5	9643	Rental	Asn: ▶	Rpt: -	Flp: ●	Con: ▶	Exp: ▶	Nicole Edner
12	912091-2	9410	Rental	Asn: -	Rpt: -	Flp: ●	Con: -	Exp: -	Malia
13	912091-2	9084	Rental	Asn: -	Rpt: -	Flp: ●	Con: -	Exp: -	Malia
14	911791-2	9410	Rental	Asn: -	Rpt: -	Flp: ●	Con: -	Exp: -	Malia
15	912012-2	9410	Rental	Asn: -	Rpt: -	Flp: ▶	Con: -	Exp: -	Malia
16	912012-2	9253	Rental	Asn: -	Rpt: -	Flp: ●	Con: -	Exp: -	Malia
17	911791-2	9309	Rental	Asn: -	Rpt: -	Flp: ●	Con: -	Exp: -	Malia
18	913535-2	9219	Rental	Asn: ●	Rpt: ●	Flp: ●	Con: ●	Exp: ●	Malia
19	913535-2	9158	Rental	Asn: ▶	Rpt: ●	Flp: ●	Con: ●	Exp: ●	Malia
20	913533-2	9219	Rental	Asn: -	Rpt: -	Flp: ●	Con: -	Exp: -	Malia
21	913975-6	9770	Rental	Asn: ▶	Rpt: -	Flp: ●	Con: -	Exp: ●	Nicole Edner
22	913975-7	9773	Rental	Asn: ▶	Rpt: -	Flp: ▶	Con: -	Exp: ●	Nicole Edner
23	910348-3	9219	Rental	Asn: ★	Rpt: ★	Flp: ●	Con: ★	Exp: -	Nicole Edner
24	910348-3	9158	Rental	Asn: ★	Rpt: ★	Flp: ●	Con: ★	Exp: ★	Nicole Edner
25	912519-2	9253	Rental	Asn: -	Rpt: -	Flp: -	Con: -	Exp: -	Malia

Record 3 of 497 Found (Unsorted) Total Records: 497

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Remote Testing

Remote testing in the field using any kind of laptop, pad or phone. Tests are designed in the office with automatic emails sent between tester and tester coordinator updating status as the tests are completed.

All forms can be completed online by the tester.

The screenshot shows a web interface for updating test status. At the top, there are buttons for 'Go Back', 'DELETE', and 'Logoff'. The main form area contains the following elements:

- Tester ID:** 9219
- File Number:** 100095-4
- Test Type:** Rental
- Test Status:** Open (dropdown menu)
- Assignment Form:** 2 (dropdown menu)
- Report Form:** 3 (dropdown menu)
- Follow Up Form:** 1 (dropdown menu)
- Contact Form:** 4 (dropdown menu)
- Expense Form:** 3 (dropdown menu)
- Buttons:** Send Email, Print Final, Open DocuSign

A few One Click Features Throughout DiversaLink...

