Kanso Native Housing Summit

Kanso: Continuous Improvement

A review of 2023 & 2024 development.

July 30th, 2024, at 1:00 P.M.

Main Room

Slides will be shared at kansosummit.com post-summit.

What we will cover in this session:

- Mobile - Mobile App & Inventory
- HDS Queue & Tenant Portal Forms
- Unit Transfers
- Vendor Management, Vouchers, & Payables
- Live Sync and "Double Data Mapping"

Kanso Executive Team

Doug Chapiewsky - CEO

Fearless leader of Kanso Software with a passion for helping organizations adopt new technologies to better serve their communities.

Jenn Wageman - COO & CFO

Wrangler of all teams and departments at Kanso to drive them forward with the company's vision and mission.

Kanso Development Team

Josh Blair - SR Lead Developer

Josh has dedicated many years to Kanso leading the team's architecture design, implementation, dev mentorship, and development to new heights.
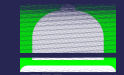
Joe Moore - SR Developer

Joe's development career started at Kanso, as such a fast and capable learner, it landed him a role as a respected senior developer on the team with a passion for creating quality features that customers love.

A Note from the Head of Product & Development

Haile Elizondo

| 📗 HUD Changes are TOP Priority	Enhancing Backbone of Application is Second	Then we get to do the FUN stuff! 👁
We serve Native and Public Housing organizations. This means we have to juggle HUD regulation updates for all of our clients. A lot of what is effecting PHA now, will affect IHAs in the near future. ***We will be ready to make this a seamless transition for your organization.***	We want Kanso to last forever, and remain a modern & integrated system. Keeping systems up to date, and integrating with other companies who serve your organization will make interactions with software simple.	Portal Enhancements & New Portals Dashboards with Data Visualization Expanded groups functionality

Kanso - Mobile Maintenance Inspections

Currently in Apple and Android store review process.

- Current inspections application is outdated, and for some, not fully functional, and only available in the Apple app store.

- For the last year we have focused on building a sustainable, easy to update, easy to navigate inspection application for any device.

- We intend to add the work order functionality to this same app in the future, no longer necessary to keep two separate application!

Want more information?

We will go into depth about the NEW Mobile Maintenance Application in a session tomorrow the 31st at 2:45 in the Training Room.
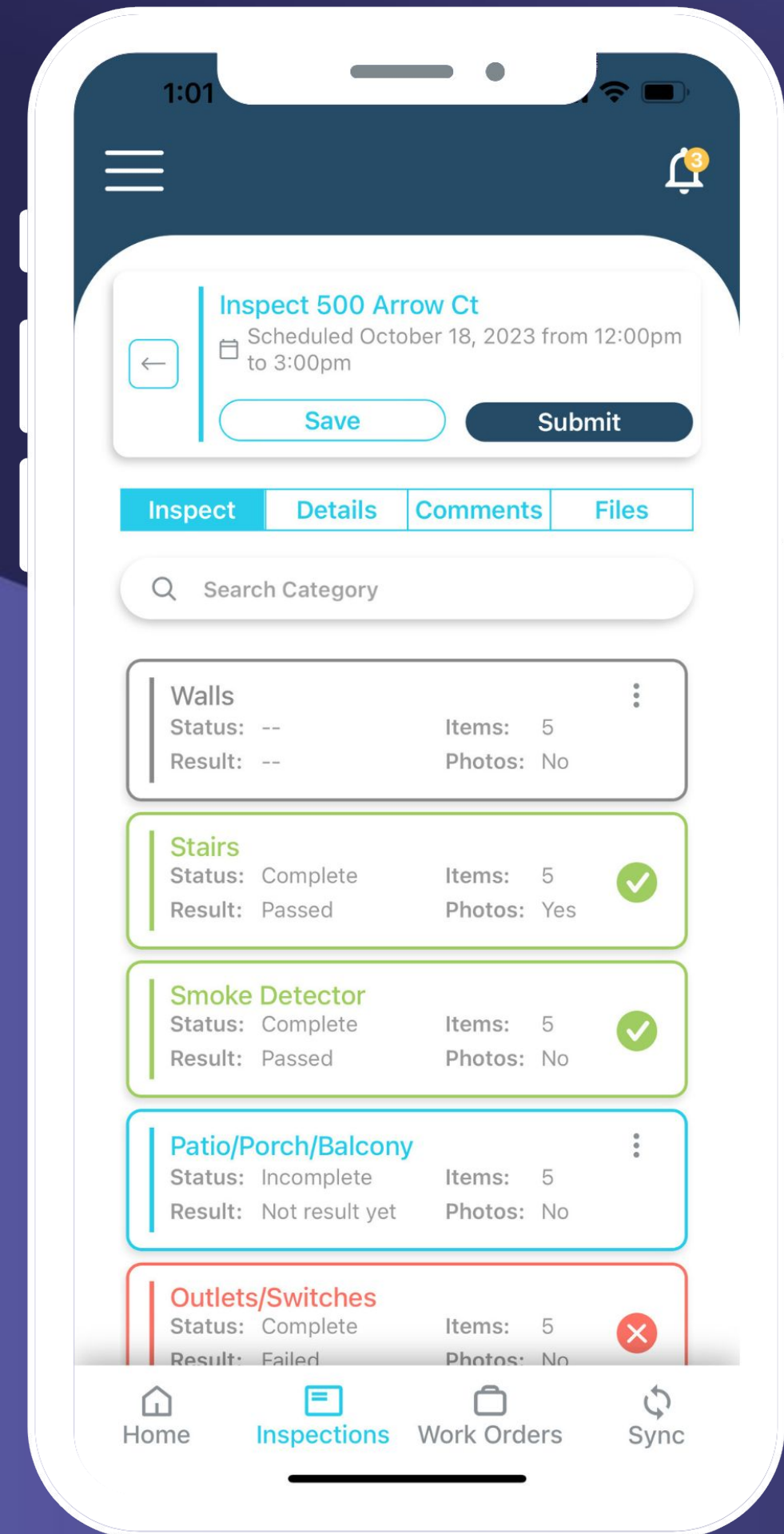
Tenant Portal Forms

Customizable Forms for Tenant Information Gathering

Enhance Tenant Communication:

- Streamline interactions and gather essential information effortlessly.

Who Can Benefit?

- Current clients wanting to improve engagement and prospective clients looking to optimize tenant management.

Form Setup:

- **Client Success Team** manages requests for custom and default forms.
- **Included**: Kanso default forms; *Waiting List Application, Recertification Information Submissions, Work Order Requests*
- **Pro Services:** Additional costs for complex forms or custom branding.

Getting Started:

- Provide an example form or list of questions.
- Email addresses for submissions (different for each form).
- Branding assets (logo and color palette) for customization.

Revolutionize your tenant interactions with these customizable forms! Contact us for more info.

Want more information?

We will go into depth about Kanso's Tenant Portal

tomorrow July 31st @ 2:45 pm in the Main Room
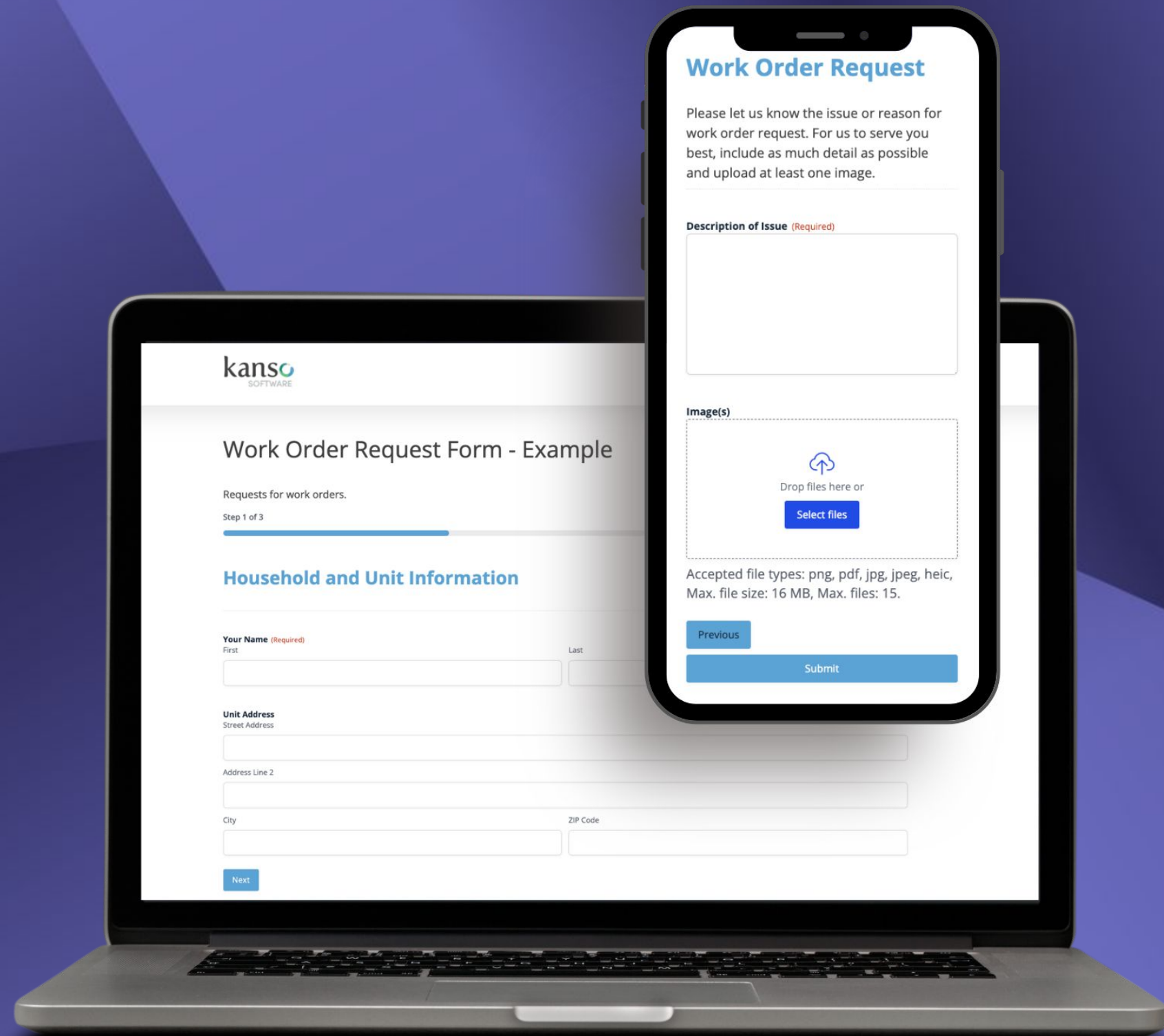
HDS Queue - Online Waiting Lists

HDS's Online Waiting List Application is now Compatible with Kanso!

Streamlined Management:

- **Fair Online Lotteries** for Voucher, Low Rent, and more—no in-person queues.
- **Flexible Control**: Easily manage registration dates and applicant limits.
- **Direct Access** from your website.
- **Automated Selection** and integration with Kanso.

Efficiency & Security:

- **Customizable preferences:** Identify eligible applications (ensuring only qualified applicants make it to your waiting list) as well as to rank lottery winners on your waiting list according to your housing authority's specific preference criteria.
- **Secure Data Backup** for all registrants - not just lottery winners - protecting housing authorities from unexpected data loss and allowing post-lottery audits if required.

User-Friendly:

- **Easy Access** to update or review status of application anytime.

Want more information?

We will go into depth about Online Waiting Lists in a session tomorrow

July 31st @ 2:45 pm in the Main Room

Unit Transfers

Simplify Tenant Management:

- **One-Click Transfers:** Move tenants from one unit to another in a single action.

Key Benefits:

- **Efficiency:** Streamlines the transfer process, saving time and reducing errors.
- **Seamless Transition:** Ensures a smooth relocation for tenants without multiple steps.

Automated Features:

- **Document Generation:** Automatically create necessary documents for each transfer, ensuring compliance and accuracy.
- **Historical Records:** Maintain detailed records of move-ins and move-outs for easy reference and reporting.

How It Works:

- Select the tenant and destination unit, then complete the transfer with just one action.

Enhance your property management efficiency with Kanso's Unit Transfer feature!

Vouchers & Vendors

Key Features:

- **Real-Time Tracking:** Monitor voucher statuses and updates in real-time, ensuring transparency throughout the process.
- **Landlord Coordination:** Seamlessly link with landlord tracking systems to enhance collaboration and efficiency.

Benefits:

- **Improved Communication:** Stay informed about voucher statuses.
- **Simplified Management:** Easily manage and track vouchers alongside landlord payments owed/paid in one centralized system.

How It Works:

- Track the entire lifecycle of vouchers, from issuance to renewal, while ensuring alignment with program requirements and rent calculations.
- How do you make HAP payments to Landlords or your own organization? (Next Slide)

Process Payables

Generate ACH, Check, or GL export Payouts

Overview:

- Kanso's Payables feature simplifies financial transactions, enabling *efficient payments to landlords, maintenance vendors, utility companies, and more*.

Key Payment Options:

- **Flexible Payment Methods:** Pay via electronic transfer, check, or export payments directly to your general ledger system for processing.

Benefits:

- **Efficiency:** Automate payment processes to save time and reduce manual errors.
- **Versatility:** Support various vendors, ensuring all payments are managed in one place.

How It Works:

- HAP and URP is automatically calculated and posted to vendor ledgers. These transactions then appear as due for processing within the payables feature.

Enhance your financial operations and ensure timely payments

DEPOSITS | BILLING STATEMENTS | MONTH END | BATCH PAYMENTS | MISC. RECEIPTS | LATE FEES | PAYABLES

Payables

New batch | Historical

SHOW FILTERS

	Pay To	# of Transactions	Last Payable Amt	Total Balance	Balance to be Paid	Notes
☑	Click to Deselect All					
☑	> Metropolis Landscaping	1	$300.00	$150.00	$150.00	✎
☑	⌄ Lonnie Machan	2	$1,554.00	$1,554.00	$1,554.00	✎

	Name	Unit	Posted Date	Payment Type	Transaction Amount
☑	Elizondo, Haile	HCV-001-0003	02/25/2024	HAP	$1,029.00
☑	Le, Khang	HCV-001-0004	02/25/2024	HAP	$525.00

Grand Total	3	$1,854.00	$1,704.00	$1,704.00

< 1 >

Process Payables

DEPOSITS | BILLING STATEMENTS | MONTH END | BATCH PAYMENTS | MISC. RECEIPTS | LATE FEES | PAYABLES

Payable Batched on Jul 10, 2024

Created By sam
Batch ID: 79

⊕ Back to Historical List

Summary Report

ACH/Direct Deposit

Pay to	Last Payment Amount	Amount Paid		Post
Metropolis Landscaping	$300.00	$100.00		
Metropolis Landscaping	$300.00	$100.00		
Metropolis Landscaping	$300.00	$100.00		
Metropolis Landscaping	$300.00	$200.00		
Metropolis Landscaping	$300.00	$150.00		
Metropolis Landscaping	$300.00	$200.00		
Total	**$1,800.00**	**$250.00**		

Inventory Enhancements

- In early 2024 we launched our Average Weighted Cost strategy for the Kanso Inventory system.
- Additional enhancements have been made to approach the different operations of our partners.
- A robust inventory system available with your Kanso software!

Want more information?

We will go into depth about the Inventory System today at 2:45 pm in the Maintenance Training also in the Getting the Most from Kanso tomorrow the 31st at 9:00 am.

Let's Get Nerdy

Live Sync and Double Data Mapping

A look at what you ***can't see*** but will make your experience

more efficient and effective in Kanso.

Additional Technical Developments

- DDM
  - more reliable reporting
  - keeping the reporting and functional data stores in sync (real-time)
  - deprecates the need for manual syncs, live-syncing, and eliminates stale data
- Encryption for PII and sensitive data:
  - purposely segmented services
  - client-side encryption before being sent to the API
  - each piece of data is encrypted with a unique data key
  - sensitive data is isolated from the linked non-sensitive data
  - dev team builds software with a security-first mindset

What does the future look like?

sage Intacct	**Uflex** Your Money Your Terms	**ON LINE** RENTAL EXCHANGE
Direct API integration with Intacct general ledger software.	New tenant rent payment opportunity for your Tenant Portal!	Background check integration between Kanso and O.R.E.

Features

- Groups actions and enhancements
- Tenant Portal enhancements
- Applicant modules
- FSS/ROSS/Community Service tracking, and so much more!

Thank you to our Sponsors!

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HOUSING ALLIANCE
HOUSING RELATIONSHIPS BUILT TO LAST
100% INDIAN OWNED SMALL BUSINESS

AMERIND
Protecting Our People

RAYMOND JAMES
AFFORDABLE HOUSING INVESTMENTS

A Gathering Place

Wagenlander & Heisterkamp, LLC
Attorneys at Law

UFlex
Your Money Your Terms

Summit Agenda - July 30th

- 2:30pm - Main Room - Meeting the Supportive Housing Needs in Your Community

- 2:45 - Training Room - Maintaining your Homes for Future Generations

- Support Room Blocks
  2:00pm Block 2
  3:00pm Block 3
  4:00pm Block 4
  4:30 Support Room Closes

- 4:30pm - Welcome Reception at Rockies Stadium