DISCOVERY BRIEF

GRANT CASE AUTOMATION FOR ROAD

Recovering Oklahomans After Disaster · From eligibility to submission package, in one system

EXECUTIVE SUMMARY

Every grant case depends on verified income, proven ownership, and a package where every date, signature and payment lines up. We propose one system: automation moves each case forward, AI reads and checks the paperwork, and your team makes every decision and signature. Six short answers below let us quote exactly what you need.

SIX QUESTIONS TO GET ON THE SAME PAGE

Short answers are fine, by email or on a quick call. They let us send you an accurate, phased quote.

01 **How many cases do you process a year, and how many are open at once?**
WHY WE ASK Sizes the system and its running costs.

02 **How many hours does one case take today, from referral to submitted package?**
WHY WE ASK Shows where your team's time goes, and where the savings will come from.

03 **How many people touch a case, staff and outside signers combined?**
WHY WE ASK Sets up signature routing and reminders for everyone involved.

04 **Is there a deadline or funding window driving this?**
WHY WE ASK Sets the build timeline and what gets delivered first.

05 **Is this for one grant program, or several with different rules?**
WHY WE ASK Each program's rules become the checks the system runs.

06 **Would you like the whole system built at once? Or, if you started with one phase, which step would help you the most?**
WHY WE ASK Lets us start where it makes the biggest difference for your team.

WHAT WE HEARD

- Eligibility depends on financial documents: Social Security letters, bank statements and paystubs.
- Income is measured against the AMI for the homeowner's county, and those limits change over time.
- A third party has to confirm the work is complete.
- Every bill is paid, with proof of payment from your accountant.
- Documents should land in a folder as you go, with each phase's paperwork produced for you.
- Ownership has to be proven with a title, deed or will.
- After eligibility comes a manual damage assessment, a contractor to schedule, and completed work.
- Homeowner, contractor, assessor and inspector all sign at different steps.
- The final package is detailed: every date and signature has to be right.
- Homeowner documents must stay secure, without an in-house server.

HOW ONE CASE MOVES

Seven phases, one case file. The short demo video that comes with this brief walks a sample case through each one.

	PHASE	WHAT HAPPENS	WHO
01	INTAKE	A referral arrives and the case file builds itself, with one folder per phase.	■ AUTOMATION
02	DOCUMENTS	Paystubs, bank statements, SSA letters, deeds, titles and wills are read and the key details pulled out. Missing, outdated or mismatched documents are flagged right away.	● AI
03	ELIGIBILITY	Household income is compared with the county's AMI limit for that household size, using a dated table updated every year. Staff approves.	■ AUTOMATION ▲ PEOPLE
04	APPLICATION	The application is pre-filled. Anything unclear is marked for staff. The homeowner signs electronically.	● AI ▲ PEOPLE
05	ASSESSMENT	Your project manager visits the home. Photos and notes become a draft damage report and materials list. The PM reviews and signs.	▲ PEOPLE ● AI
06	REPAIR	Contractor license and insurance are checked, the work is scheduled, and every signature is tracked to completion.	■ AUTOMATION ▲ PEOPLE
07	CLOSEOUT	The inspector signs off. Your accountant's proof of payment is matched to each bill. Every date, signature and amount is checked, and the package is assembled for submission.	● AI ■ AUTOMATION

WHO DOES WHAT

■ AUTOMATION

MOVES THE CASE

- Builds each case file
- Runs the income limit math
- Sends signature requests
- Sends reminders
- Assembles the package

● AI

READS & CHECKS

- Reads every document
- Pre-fills the application
- Drafts the damage report
- Checks the final package

▲ PEOPLE

DECIDE & SIGN

- Approve eligibility
- Visit and assess the home
- Do the repair work
- Sign every step

WHY YOU CAN TRUST IT

AI NEVER APPROVES ANYTHING

Staff signs off on eligibility, your project manager signs the assessment, and every party signs their own part.

PROBLEMS ARE CAUGHT BEFORE SUBMISSION

An expired insurance certificate, a missing signature, an outdated paystub or a mismatched name on a deed gets flagged while there is still time to fix it.

NOTHING NEW TO LEARN

Your team works in Google Drive and email. There are no AI accounts or tools for you to manage.

EVERY CHECK IS TRACEABLE

Each item shows which document it came from and who approved it, so the package holds up to review.

INCOME LIMITS STAY CURRENT

AMI limits live in a dated table that is updated every year, never guessed.

ONE CASE FIRST

We prove it on a real case before it runs on every case.

KEEPING HOMEOWNER DOCUMENTS SECURE

ONE HOME FOR EVERY FILE

We recommend Google Drive on a Google Workspace business account, instead of splitting files across two systems.

BUSINESS-GRADE AI ONLY

AI providers are used under business terms that do not train on your data.

ONE FOLDER PER CASE

Access is limited to the staff who need it, with two-step login required.

YOUR RETENTION RULES

How long records are kept, and when they are deleted, is set to match your grant's requirements.

WORKING WITH DIRRT

Cases already start in DIRRT, and nobody should have to type the same case twice. If DIRRT can produce a report, we can pick it up automatically on a schedule and open new cases from it.

If that is not possible, staff simply enter the DIRRT case number when a case opens. We will confirm the best option together at kickoff.

AS WE START THE BUILD

These are working details, not decisions you need to make now. We will go through them together once the build begins.

01 **Shadow one case from start to finish on a screen share, so we can replicate your exact process**

02 Your grant's eligibility rules, required documents and application form

03 The most common reasons a package is sent back

04 Who signs at each step, to set up e-signatures

05 Which AMI source and year your grant uses

06 Google Drive setup, access and folder structure

07 Record-keeping and retention requirements from your grant or funder

08 How case data comes out of DIRRT

09 The format of your accountant's proof of payment

10 DocuSign or e-signature account setup

NEXT STEPS

01

ANSWER THE SIX QUESTIONS

By email or on a short call, whichever is easier.

02

RECEIVE A PHASED QUOTE

Clear scope, clear assumptions, and a timeline built around your deadline.

03

KICK OFF WITH ONE CASE

We shadow one case, build it, and prove it before it runs on every case.

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AI INFRASTRUCTURE & AUTOMATION