ROLLOUT PLAN

EIGHT WEEKS TO A WORKING SYSTEM

Grant document system for Recovering Oklahomans After Disaster · both grant programs

> **IN SHORT**
>
> We build one system that turns the documents families send into finished grant paperwork, saved in SharePoint. Your team reviews and approves every case. We handle the hosting, the AI and the upkeep, so your team just uses the tool.

WHAT WE'RE BUILDING

01 **Photos to clean PDFs**
Driver's licenses, paystubs, deeds and titles, SSA, SSDI and VA letters, referral letters and inspection forms sent from a phone.

02 **Documents read, AHP Excel workbooks filled in**
Names, income, dates and household details pulled from each document. Anything unclear is flagged for staff.

03 **Files saved to SharePoint, named the same way every time**
Each case in its own folder, using your naming convention.

04 **Funding documents generated as signed PDFs**
CCBHC and other funding documents filled in from your Word templates.

05 **FCC and third-party documents with ROAD signatures**
Prepared for review, signed only after staff approve.

WHO DOES WHAT

■ AUTOMATION

MOVES THE PAPERWORK

- Photos to PDFs
- SharePoint filing and naming
- Building each document
- Applying approved signatures

● AI

READS & CHECKS

- Reads every document
- Fills the AHP workbooks
- Flags unclear or missing items

▲ YOUR TEAM

DECIDES & SIGNS

- Reviews each case
- Approves eligibility
- Signs or authorizes signatures

THE STAGES

	WHEN	WHAT HAPPENS	WHAT WE NEED FROM YOU
01	**MAP** Week 1 Nov 30 – Dec 4	We walk through one past case with your team, collect the blank templates, set up SharePoint access, and confirm your naming convention and who signs what.	A one-hour walkthrough, blank templates, and your Microsoft 365 admin contact
02	**BUILD THE CORE** Weeks 2–3 Dec 7 – 18	Photos to PDFs, document reading, the AHP Excel workbooks and SharePoint filing. The first pieces are working before the holidays.	A 20-minute weekly check-in
03	**BUILD THE DOCUMENTS** Weeks 4–5 Dec 21 – Jan 1	CCBHC and funding PDFs, the FCC and third-party documents with signatures, and the staff approval step.	Very little over the holidays
04	**TEST** Weeks 6–7 Jan 4 – 15	We run one or two real families through the system alongside your current process, and fix anything we find.	One or two real cases and quick feedback
05	**LAUNCH** Week 8 Jan 18 – 22	Training for your team, handoff, and go live.	A one-hour training session

START THE WEEK OF NOVEMBER 23

LIVE BY JANUARY 15

START THE WEEK OF NOVEMBER 30

LIVE BY JANUARY 22

AFTER LAUNCH

- We host and monitor the system
- Anything that stops working is fixed within 2 business days
- One round of changes every quarter
- Income limits and grant forms updated every year

NOT INCLUDED

- Contractor scheduling
- A connection to DIRRT
- Uploading packages into funder portals
- New grant programs or forms after Week 1

Any of these can be added later as a separate, quoted request.

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