



GOING DIGITAL: HOW THE ALLOTMENT MANAGER REDUCED PAPER-BASED APPROVALS

Congressionally appropriated money must be properly distributed, or allotted, before it can be spent by agencies. Allotments are used to fund HUD's numerous housing programs, community development grants, salaries, and expenses. HUD used to accomplish this critical task by using a manual-entry system and paper-based approvals. On May 7, 2019, HUD digitalized this process by launching its new Allotment Manager Tool. The Tool discontinued dated paper-based processes and has allowed employees to focus more effort on higher-level, non-administrative duties.

What was the challenge?

Historically, HUD relied on a manual, paper-based process for setting allotments. This process lacked both speed and transparency. To ensure it maintained a strong 21st Century footing, HUD needed to develop a system which could accurately, transparently, and efficiently process its allotments.

What was the solution?

HUD partnered with the Department of Education's Budget Line of Business (BLoB) to address the challenges posed by the paper-based allotment process. Together, the Departments automated HUD's allotment management cycle through a jointly developed Microsoft Access application. The new, Access-based Allotment Manager Tool is powered by thousands of rows of data – each detailing the source years, codes, and line items for HUD's many funding accounts. New features also include data standardization, electronic tracking, and remote accessibility for teleworkers. These improvements have increased the quality, efficiency, and overall timeliness of HUD's financial management activities.

What were the results?

The Allotment Manager has freed up hours of HUD employees' time. Staff can now refocus their effort towards higher-value activities that further strengthen HUD's program delivery.

Specifically, the new Allotment Manager Tool is estimated to save hundreds of hours of staff time per year compared to the prior, paper-based process. Benefits and features include:

- *Standardization among program, salaries, and expenses allotments* – Language used to identify allotment types, HUD programs, dates, etc. has been standardized, for consistency.
- *Central storage for all allotments and supporting documentation* – Required documents and information are now easily accessible in one digital location.
- *Reductions of manual entry error* – Pre-populated drop-down menus ensure higher accuracy data entry.
- *A web-based platform* – The Tool can be accessed by authorized employees who are remotely connected into HUD's network while teleworking.
- *Email notifications* – Employees are immediately notified when changes are made, and signatures are needed.
- *An audit trail* – Clear records are kept for all approvals and steps within the allotment process.
- *Urgency indicators* – Time-sensitive allotments are flagged as the highest priorities for managers and employees.



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Future Steps

HUD will continue to provide employees with training and support to ensure the Allotment Manager is fully utilized.

The Allotment Manager has helped pave the way forward by demonstrating HUD's continued commitment to streamlining processes. The Department will continue to develop digital tools and resources as part of its broader efforts to automate repetitive administrative functions.