

CASE STUDY 01 · GOVERNMENT · PUBLIC HOUSING AUTHORITY · HUD

From uncollected receivables to a *fully compliant, trackable program.*

A Public Housing Authority was operating without trackable billing infrastructure. Portability cases moved across multi-state jurisdictions with no automated oversight, no deadline enforcement, and hundreds of thousands in receivables going unprotected every month.

THE KEY ISSUE

THE PROBLEM

No governance system existed for portability case management. Three departments — Portability, Finance, and Compliance — operated in silos. Data entry errors cascaded across the organization. Billing was reactive and inconsistent, leaving \$185K+ per month at risk. No real-time visibility into case status, no escalation protocols, no audit trail.

THE ORGANIZATION NEEDED

- A unified, cross-departmental compliance tracking system
- Real-time visibility into portability case status
- Automated deadline enforcement with escalation logic
- An auditable billing-cycle process tied to HUD regulatory windows
- Standardized data entry eliminating inter-department silos

OUR SOLUTIONS

WHAT WAS BUILT

- End-to-end intake-to-delivery governance system
- SharePoint tracker with automated workflow stages & deadline enforcement
- Standardized cross-dept. forms eliminating data silos
- Real-time escalation protocols and compliance dashboards
- Accounts receivable billing-cycle system with automated procedures
- Biweekly leadership review cadence for portfolio prioritization
- HUD regulatory compliance framework with change control protocol

AI WORKFLOW EXTENSION

This compliance infrastructure was extended using AI-powered document processing workflows built in the Claude ecosystem and Cowork — enabling automated obligation extraction, deadline monitoring, and structured register outputs from unstructured regulatory documents.

- Automated extraction of compliance obligations from HUD notices
- Structured obligation registers with clause-level attribution
- Tiered deadline logic with owner assignment fields
- Output formatted for integration into master compliance register

VALUE ADDED — OUTCOMES DELIVERED

\$184K+

**Monthly Receivables
Safeguarded**

Automated billing procedures
protecting revenue monthly.

95%

On-Time Billing Rate

Transformed from 0% — a
complete operational
turnaround.

40%

**Reduction in Data Entry
Errors**

Three-dept. data silo resolved
through standardized forms.

200+

Cases Managed Annually

Multi-state portability cases with
real-time escalation.

0% On-Time Billing



95% On-Time Billing