



## New CRM Synchronization Onward Israel and Masa Israel Journey 12/7/20

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### **Background**

As many of you already know, Onward Israel and Masa Israel Journey have been working for over a year to build a new synchronization ("Sync") system for participants that will forward data from Onward Israel to Masa. This Sync will also update said data back to Onward Israel in specific cases.

- The Onward Israel - Masa Sync is a mechanism that is built from two components: Onward Israel applications are synced to Masa's database when an application is established and/or updated, and from Masa to Onward Israel's database when data is updated.
- The Sync will begin running from the Summer 2021 application season forward and is not relevant for Winter 2020-21 programs.
- At the moment, the Sync is focused on applicants' data only. It does not transfer any information that is documented in either Masa program pages or Masa sessions pages on the Masa CRM. It does not transfer information from Onward Israel program or session pages. This note is important to understand that any data that appear on Onward Israel program pages (such as program fee per participant and per organizer) does not connect to the information on the Masa CRM.

The participant Sync was designated for two main targets:

1. Perform an additional Masa internal check, on the Masa CRM, on all Masa-eligible applicants in order to make sure that they did not participate on another Masa program or have been approved for payment by Masa on another Masa program.
2. To forward to Masa applicants' relevant data for Onward Israel - Masa programs.

Please note:

- You might have already noticed in several programs that there are some changes in the status of applicants. If you have come across such a case, do not return the records to their previous application status.
  - Onward Israel suggests that you wait half a day for the records to be updated to their previous status. If the records are not updated, send an email directly to Liad Shahar-Gefen at [liadg@onwardisrael.org](mailto:liadg@onwardisrael.org) so that she can advise. For the time being, we ask partners to continue to not accept anyone on their programs until further notice.
- If you have test records that are still needed for the purpose of checking acceptance letters, make sure they are not in "Application Received" status. This status will send them to the Masa CRM for a check. We would like to prevent tests from being Synced.

### **What to expect on the CRM?**

The Masa Sync will work as follows:

On every new application for an Onward Israel - Masa program, when an applicant on the application status "Application Received" is marked as Masa-eligible (see screen shot from CRM application form), they will be automatically sent to the Masa CRM for an internal check.



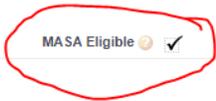
▼ MASA Eligibility

I am Jewish

I have new immigrant status in Israel

I have Israeli citizenship

I was born in Israel/immigrated age 14



This additional check, makes sure that this applicant...

- ...did not participate in a previous Masa program (an Onward Israel-Masa program or just Masa program)
- ...was not approved for payment by Masa in a concurrent program
- ...was not marked on the Masa CRM as "Not Eligible" for Onward. A likely reason that this could happen is if Masa already has internal information about an applicant which indicates ineligibility because they previously registered for Masa in the past and were found to be Not Jewish or above age limit for Masa.

The new indication will appear on a new section on each application page called **iBOLT with MASA**

▼ iBOLT with MASA

MASA Participation #

Masa Internal Eligibility Check

Masa Internal Eligibility Reason formula

MASA Session Status

Masa External Status

**Masa Participation #** indicates the number of that specific record on the Masa side. This allows us to search by this detail if we have an inquiry on Masa side.

**Masa Internal Eligibility Check** occurs automatically when a new application form that belongs to a Masa eligible applicant is established on Onward Israel's CRM. The result will be inserted into a new YES/NO field on that same day (barring technological errors).  
YES answer - Move forward with the applicant.  
NO answer -This applicant was found as not eligible for Masa.

**Masa Internal Eligibility Reason formula** lists the reason for the NO answer, which is sent to Onward Israel by Masa.

**Masa Session Status** will be shown as "closed" when session is closed on the Masa CRM.

**Masa External Status** shows the current status for the applicant as it appears on Masa the CRM once the status is established on Masa's end.

**How to proceed with the screening process**

As a partner, you are now expected to halt the screening process until the Masa Internal Eligibility Check lists a **Yes** result.

If you get a **NO** result, you should go back to the applicant in order to examine the case. This **NO** result means that on the Masa questionnaire, the applicant was determined to be Masa Eligible but did not pass the Masa Internal Eligibility Check.



**If an applicant is found eligible** after conferring with them “offline,” and you believe there is a mistake based on Masa’s internal check (or if in general you have questions about a specific case), please write to your Account Manager with the details.

If an applicant is determined to not be eligible based on Masa’s internal check, partners can proceed in one of two ways:

1. Update the applicant’s application status as "Ineligible" and inform the applicant of their status
2. If the partner decides to pay the additional cost to cover the Masa funding, the **partner must check “Yes” in the CRM, in the new field: MASA Ineligible Paid by Partner.**

### **Notes for future work**

- ✓ All work is going to be done in Onward Israel’s CRM as usual. Now more than ever, it is important that organizers update Onward Israel’s CRM with any update on a participant/applicant record.
- ✓ Changing programs for a single applicant on the same application is not allowed. Every program change for an applicant requires them to submit a new application form for the new program.
- ✓ Payment process and approving participant lists for payments will be now also managed by the organizer in the Masa portal. Further information about this process will be delivered at a future date. After we will finalize the process with Masa, this information will be delivered in the future, directly to the organizers.