HOPE System Training

February 16, 2023

Agenda

- Welcome & Introductions
- Learning Objectives
- Context Setting
- Supporting Survivor Choice and Autonomy
- Hope System Training
  - Log in Page and Two Factor Authentication
  - Main Screen, Client Profile, Assigning a case manager
  - Managing Households
  - Location and Contact Information
  - Program Enrollment/Exit
  - Annual Assessment
  - Coordinated Entry Events
  - Access Roles
  - Running Reports
- Resources and Next Steps
- Questions

Learning Objectives

🔑Understand how to create a new client profile in the HOPE system

🔑Understand how to enroll a client in a program

🔑Understand how to conduct an annual assessment

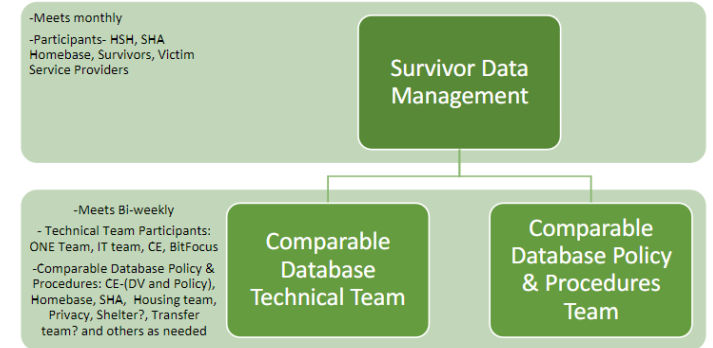🔑Understand how to run required reports

Context Setting

What is a comparable database?

- A Comparable Database is an alternative system that victim service providers use to collect client-level data over time and to generate aggregate reports based on the data. The CoC and victim service providers must work with the HMIS lead to determine if a system is a Comparable Database and document that the alternative system meets all HUD system requirements"[1].

- Gathered Comparable Database requirements from HSH and VSPs in July & August

- Comparable Database demonstrations in August and September.

- HSH is worked with its current vendor BitFocus to stand up a Comparable Database.

- Structure for design and implementation of the Comparable Database

- The goal is to launch the Comparable Database to generate Annual Performance Reports for HUD by March 2023.

-Meets monthly

-Participants- HSH, SHA Homebase, Survivors, Victim Service Providers

Survivor Data Management

-Meets Bi-weekly
- Technical Team Participants: ONE Team, IT team, CE, BitFocus
-Comparable Database Policy & Procedures: CE-(DV and Policy), Homebase, SHA, Housing team, Privacy, Shelter?, Transfer team? and others as needed

Comparable Database Technical Team

Comparable Database Policy & Procedures Team

What is the HOPE system?

- HOPE stands for:
- **H**ousing
- **O**pportunities for
- **P**eople
- **E**xperiencing Violence.
- Hope is defined as: (noun) the light at the end of the tunnel. Knowing that the best is yet to come

What is the HOPE system?

⚮ Like an apartment building with many units:

- Each VSP has their own environment to enter client data that is not accessible to other VSPs.
- All environments will exist in one building called the HOPE system.
- Similar to property management that maintains an apartment building, Bitfocus is the system administrator that will maintain the HOPE system.
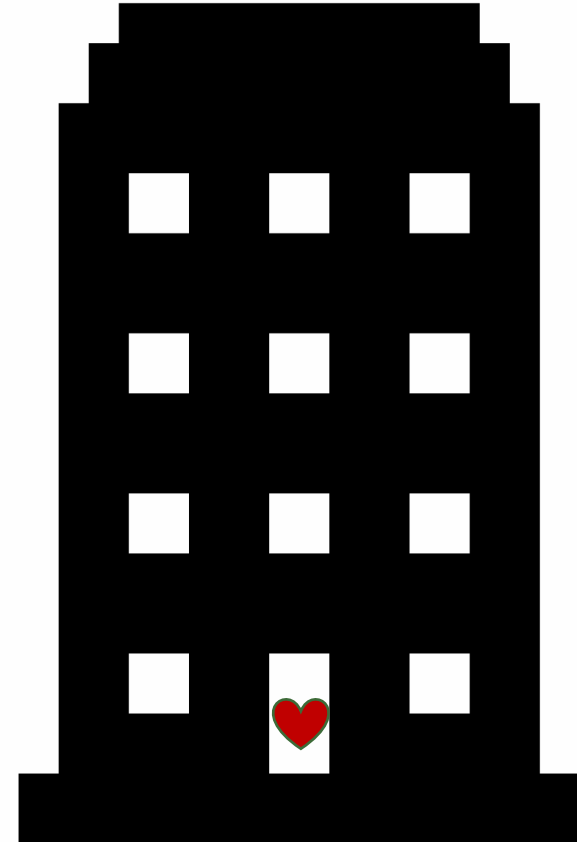
Supporting Survivor Choice and Autonomy

with Meaningful Inclusion of participant's lived experiences
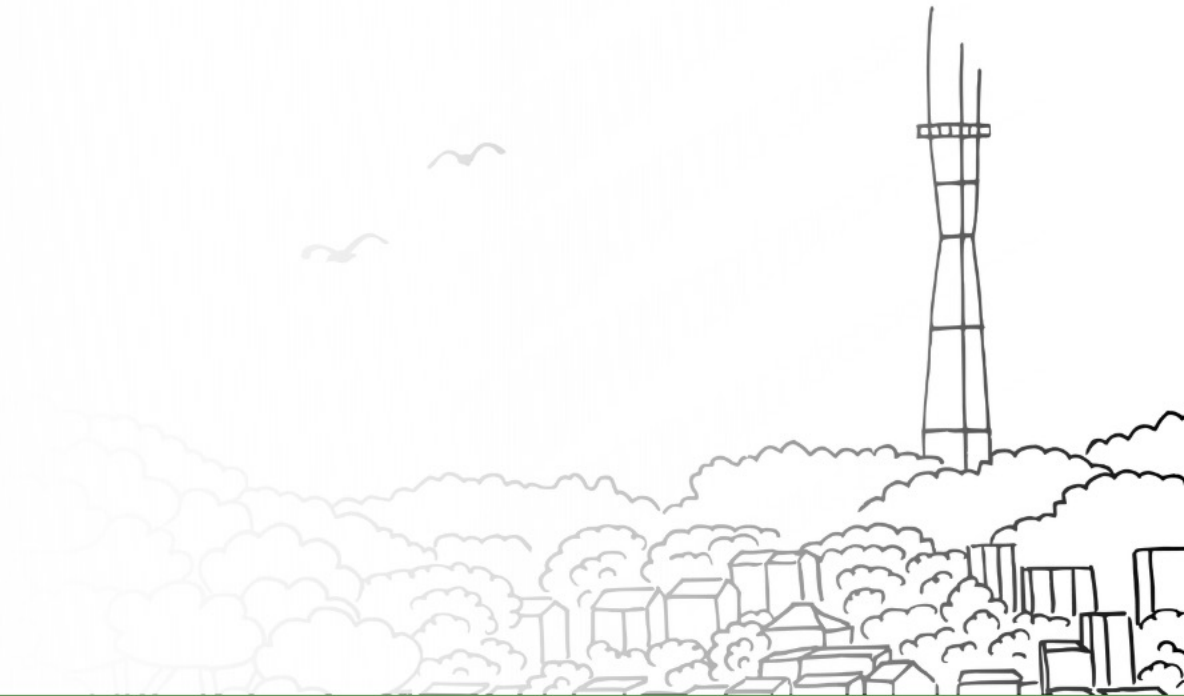
Supporting Survivor Choice and Autonomy

- Survivor autonomy is the belief that survivors possess their own sense of agency, and have the right to define their needs and to make their own choices about how to meet those needs.

- There is a unified responsibility to protect any notes or client level data from disclosure or theft, and to provide services in ways that center best practices of incorporating responsive, anti-oppressive, consistent, empathetic, mutually cooperative, and respectful communications, while also providing tools to promote personal power, and support survivors' right to be self-governing.

- We acknowledge that each victim service provider has their own unique approach to having these conversations and how services are provided based on mission, vision and strategic goals.

Supporting Survivor Choice and Autonomy

- When it comes to personal information survivors have certain rights whether visiting a mainstream access point or a VSP.
  - Participation in the Homeless Response System is voluntary
    - Survivors have the right to be treated with dignity in relationships with staff
    - Survivors have the right to be free from intellectual, emotional, and or physical abuse.
    - Survivors have the right to file a grievance without risk or retaliation.
    - Survivors have the right to turn down resources or services that are offered at any time.

Supporting Survivor Choice and Autonomy

☛When it comes to personal information survivors have certain rights whether visiting a mainstream access point or a VSP

- See or get an electronic or paper copy of their personal information
- Ask to correct personal information
- Get a list of those who have accessed their information
- Decline to state personal information
- Request confidential communication

Supporting Survivor Choice & Autonomy

- Prior to entering any program participant-level data into the HOPE system, inform the participant of how their information will be used and stored.

- Partner agency staff inform program participants in their **language of choice**, stopping to **check for understanding** and to allow for the participants to ask questions.

I/We have reviewed our agency's privacy practices with the client.

Select ⌄

Select
Yes
No - retroactive entry

Supporting Survivor Choice & Autonomy

- Program participants may ask that their information not be entered into an agency's HOPE system. This decision cannot be the basis for denying them assistance.

- If a program participant requests that their information be omitted from the database, they will be informed how their decision may limit the services they are able to receive from the Homelessness Response System

Q&A: Illustrating a survivor-centered approach from the Safe Housing Working Group

Q: "Did you feel that you could opt-out of answering questions that made you uncomfortable without harming your chance of receiving services?"

A: "No, it felt like I had to answer every question, and it was uncomfortable." *- participant*

A: "I think it's important to know if survivors can opt-out, and that it won't affect their benefits." *- participant*

Logging In

Account Setup

1. Complete the required trainings outlined below. Depending on your Access Role, additional trainings may be required.

   - **<u>Clarity Human Services General Training</u>**

2. Notify your Agency Lead of completion

3. Request your Agency Lead contact the Bitfocus Help Desk at onesf@bitfocus.com or (415) 429-4211 to request a new HOPE System user account for you. The Agency Lead will need to provide the following information:
   - Name of User
   - User email
   - Access role

https://onesf.bitfocus.com/new-user-info

Access Roles

- Access Roles designate on an individual user level what data and capabilities users can access.

HOPE system ACCESS ROLES	ACCESS ROLE FUNCTIONALITY	REQUIRED TRAINING
VSP Agency Lead	This role is designated for staff to have a higher level of access to the maintenance of their agency's data. Users in this role have the ability to delete and restore their agency data as needed to maintain data cleanliness for their agency.	· General Training
VSP Staff	This role is designated for staff that need access to their agency's client-level information. Users in this role can maintain their agency's client records, but are limited in their ability to help maintain their agency data cleanliness.	· General Training

Access Role*	Database Functions												
	Client Profile	History	Services	Events	Programs	Assessments	Notes	Files	Location	Referrals	Reports	Delete Rights	Delete Restore
VSP Agency Lead	x	x	x	x	x	x	x	x	x	x	x	x	x
VSP Staff	x	x	x	x	x	x	x	x	x	x	x		
*All access role permissions are limited to user's own agency. Users cannot access, edit, or delete client data under another agency.													
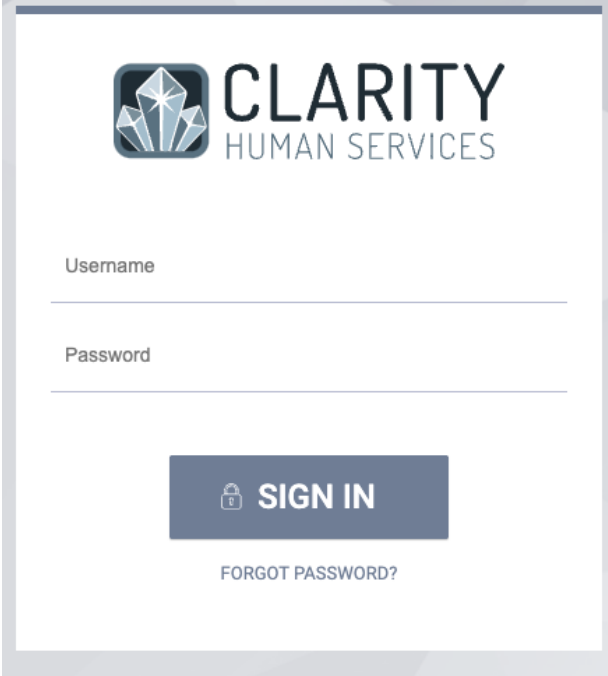
Getting Started

🔑 Passwords
- Keep your password private!
- [Tips when creating your password](#)

🔑 Two-Factor Authentication (2FA)
- Adds an extra layer of security
- Authenticator App needed
  - Android, iOS and Blackberry — **Google Authenticator**
  - Windows Phone — **Microsoft Authenticator**
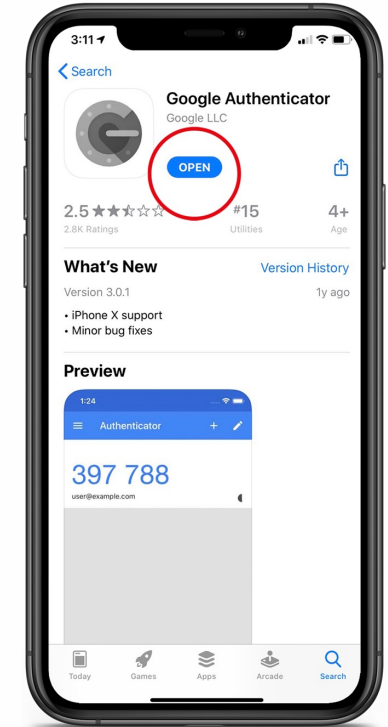
Client Profile

Looking up a household in ONE

👉Prior to creating a profile in the HOPE system, look up the household in ONE.

- Search for household/head of household
- Search by name, DOB and SSN

👉If there is a match for the household, enter their ONE ID onto their profile in the HOPE system.

SEARCH FOR A CLIENT   ADD CLIENT ⊕

🔍 **Search by name, partial name, DOB or SSN**   SEARCH

Use full name, partial name, date of birth or any combination.

Looking up a household in ONE

🔑 If there is match for the household, enter their ONE ID onto their profile in the HOPE system.

ONE ID

Middle Name   None ⌄

Alias

Looking up household in ONE

- We expect there to be duplicate profiles between the ONE system and the HOPE system.

- Households can choose to have their information in the ONE System <u>AND</u> the HOPE system of the VSP they are working with, or neither.

- If a household is working with multiple VSPs we anticipate that they will have a profile under each VSP agency in the HOPE system.

Knowledge Check

Survivors can choose to have their information in:

a) the ONE system

b) the HOPE system

c) none of the above

d) all of the above

Creating New Profiles in the HOPE system

- Search the client within the HOPE system to be sure that a profile for your agency doesn't already exist
  - Search for household/ head of household
  - Search by name, DOB and SSN
- Complete the fields that the client feels comfortable sharing. It helps tell their story and ensure that staff using the system know the appropriate information for the client.
  - If a client chooses not to answer a specific question, use **"Client refused"**
  - If the client does not know the answer, use **"Client doesn't know"**
  - **"Data not collected"** should only be used in the case that question was not asked

Privacy Prompt

I/We have reviewed our agency's privacy practices with the client.

Select

Select
Yes
No - retroactive entry

☛ You will see a prompt on the bottom of the client profile screen that says "I/We have reviewed our agency's privacy practices with the client"

☛ Select Yes - if you personally had the conversation with the client

☛ Select No - if you did not have the conversation because the data entry is retroactive

- If the entry is not retroactive, "No" should never be selected

Client Contact & Location Tabs
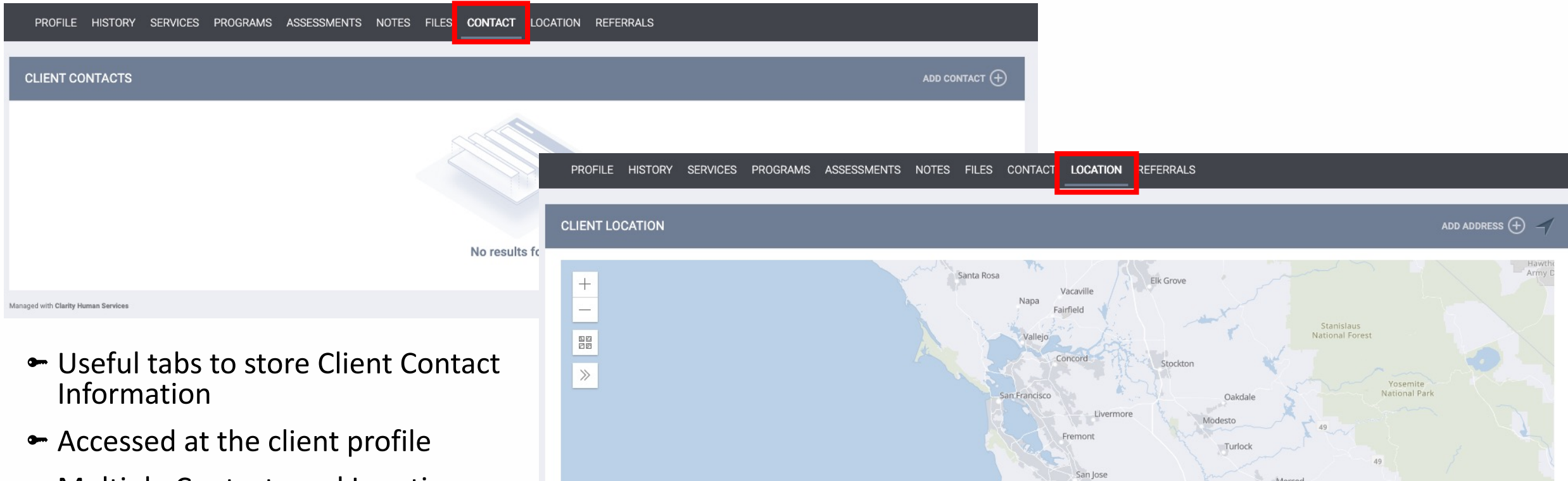
- Useful tabs to store Client Contact Information
- Accessed at the client profile
- Multiple Contacts and Locations can be stored at one time
- Collecting this information is not required

Managing Household Members
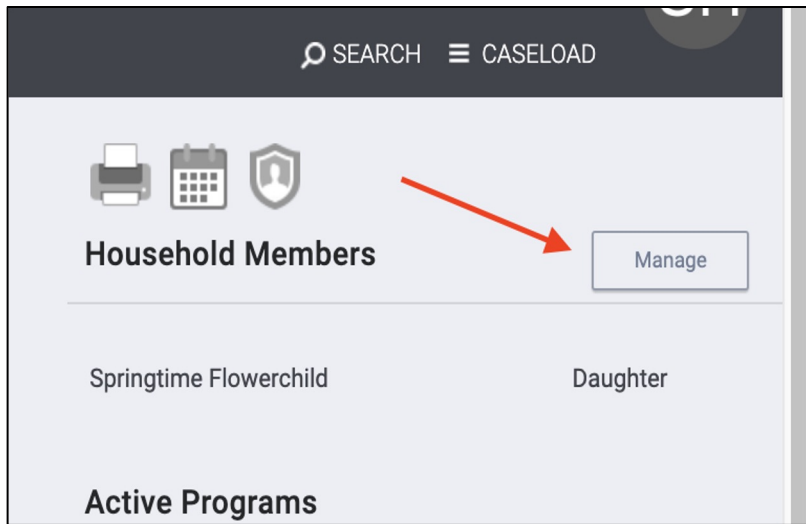
- You can add and remove household members on the client profile

- Especially helpful when enrolling households of 2 or more people into a program

- Be sure to indicate a Head of Household
  - Member Type should always reflect the relationship to the Head of Household

Managing Household Members (Cont.)

☛If the household is part of a family but is moving forward individually, you will need to remove the household member in the HOPE system

1

2

3

Assigning a Staff Person

- Useful to show responsible staff person and care team within your agency
- Can be managed from the client profile screen
  - View the Care Team on the sidebar at the profile screen and click 'Manage'
- *Note: This does not create a new account for a new user. Simply adds responsible staff person to client profile.*

Program Enrollments/Exits

Program Enrollments

To enroll a household:

1. Go to HoH profile

2. Select the Programs tab

3. Scroll down to 'Programs: Available' section

4. Select desired program for household enrollment

Program Enrollments (cont.)

6. For households of 2 or more, be sure to 'Include group members' by toggling on the appropriate members

7. Click 'Enroll'

Program Enrollments: Enrollment Form

- Project Start Date is the date that client enrolled into the program

- Housing Move-in Date is completed when client moves into permanent housing *(must always be the same as or occur after Project Start Date)*

- Be sure to...
  - Ask all questions and fill in answers as completely as the household is comfortable answering
  - Complete enrollment forms for all household members

Accessing a program enrollment

🔑After a client has been enrolled...

- Program enrollments are accessible in the Program Tab of the client profile. You can click the pencil icon next to the enrollment you wish to view.

Adding additional members to an enrollment

- ☛ You can add additional household members while within the client's program enrollment
  - *Need to be added as members at the client profile first*
- ☛ Be sure that each enrollment has a Head of Household designated

Program Exits

To exit a household:

1. Go to client enrollment

2. Click 'Exit' in the top righthand corner of enrollment

3. Include household members in exit if appropriate

4. Complete Exit form and click 'Save & Close'

Annual Assessments

How to complete an Annual Assessment

Within a program enrollment
1. Click on Assessments Tab
2. Click to START an Annual Assessment
3. Select household members for whom you'd like to complete the Annual Assessment

Annual Assessment Tips

- Important to ask every question start to finish, even if answers are prepopulated. Client information may have changed!

- Annual Assessment should be completed no more than 30 days before or after household enrollment anniversary date.
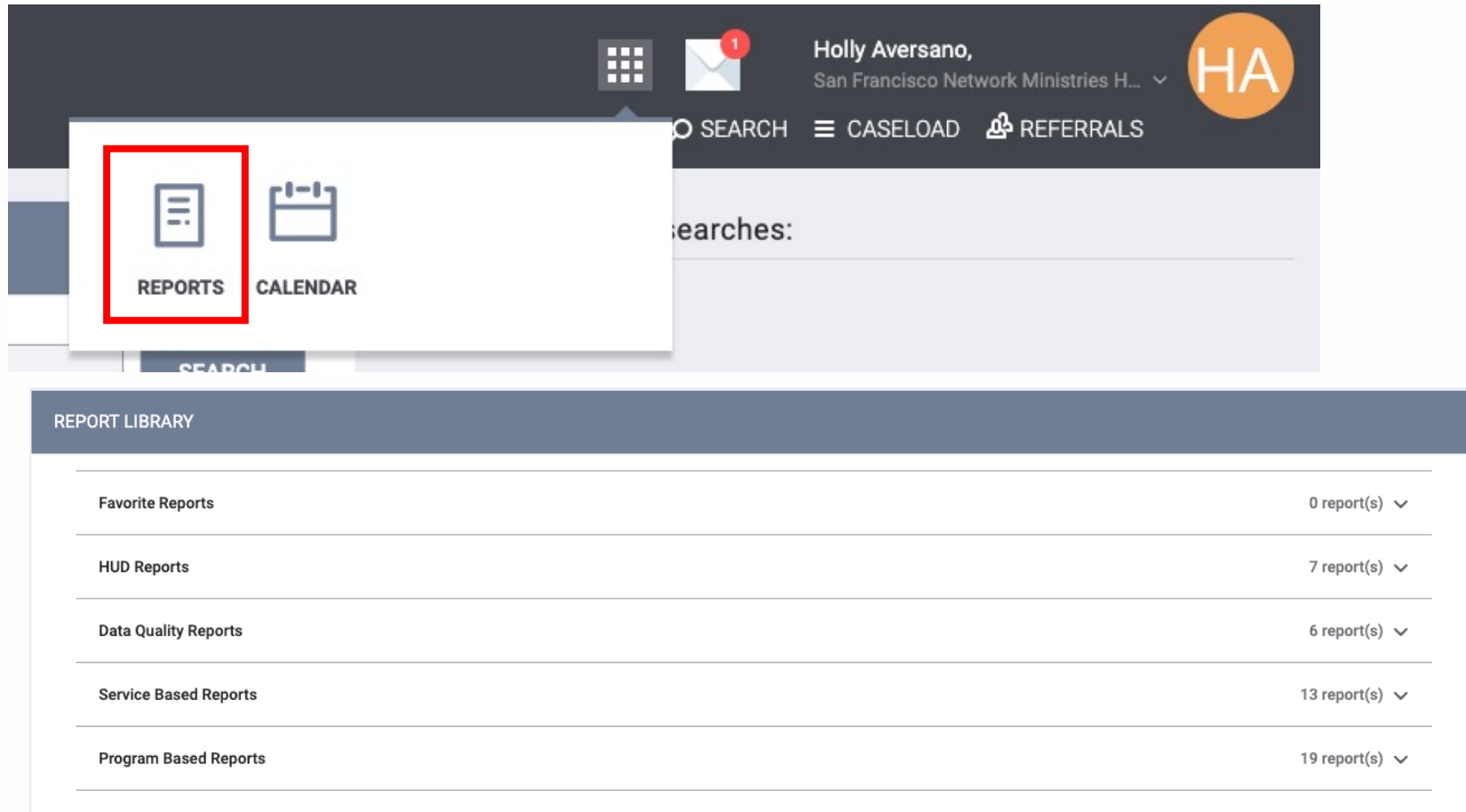
Reporting

Reports Library

- Contains ready made or "canned" reports
- To access, click the Reports icon from the Launchpad.
- Ability to "Favorite" reports

Required Reporting

🔑 [HUDX-227] Annual Performance Report

- Found in Reports Library under HUD Reports
- Useful for running HUD required APR reports
- Can be downloaded as a CSV-Upload file to be uploaded into SAGE

🔑 [HUDX-228] ESG CAPER

- Found in Reports Library under HUD Reports
- Useful for running HUD required ESG CAPER reports
- Can be downloaded as a CSV-Upload file to be uploaded to HUD

🔑 HUD – CE APR

- Coming soon…

REPORT LIBRARY

Favorite Reports

HUD Reports

v3.6 [HUDX-224] PATH Annual Report [FY 2022]

[HUDX-111] HUD CSV / XML Program Data Export [FY 2022]

[HUDX-225] HMIS Data Quality Report [FY 2023]

[HUDX-227] Annual Performance Report [FY 2023]

[HUDX-228] ESG CAPER [FY 2023]

[HUDX-231] LSA Export - Project-Focused LSA [FY 2022]

[HUDX-236] LSA - Project Descriptor HDX Upload Test [FY 2022]

[HUDX-227] Annual Performance Report

- Parameters:
  - CoC Filter Category: Agency CoC
  - CoC: CA-501 – San Francisco CoC
  - Program Type(s): user discretion; helps to filter programs for reporting by type
  - Program Status: user discretion; can filter by Active, Inactive, or all programs
  - Program(s): user discretion; option to choose one or multiple programs for reporting
  - Apply Client Location Filter: No
  - Funding Criteria: Not Based on Funding Source
  - Report Date Range: ability to customize date range of reporting
  - Report Output Format: CSV-Upload for official SAGE reporting

[HUDX-228] ESG CAPER

🔑Parameters

- CoC Filter Category: Agency CoC
- CoC: CA-501 – San Francisco CoC
- Program Type(s): user discretion; helps to filter programs for reporting by type
- Program Status: user discretion; can filter by Active, Inactive, or all programs
- Program(s): user discretion; option to choose one or multiple programs for reporting
- Apply Client Location Filter: No
- Federal Funding Source Criteria: user discretion; filters by funding sources
- Funding Criteria: Not Based on Funding Source
- Report Date Range: ability to customize date range of reporting
- Report Output Format: CSV-Upload for official SAGE reporting

Required Reporting

VSP	Asian Women's Shelter	Asian Women's Shelter	Asian Women's Shelter	Safe House	Safe House	Safe House	St. Vincent de Paul	St. Vincent de Paul	La Casa de las Madres (FY23)	La Casa de las Madres (FY24)
Program Type	DV Coordinated Entry	Rapid Rehousing	Housing for Survivors - EHV	DV Coordinated Entry	Housing for Survivors - RRH	Housing for Survivors - EHV	DV Coordinated Entry	Housing for Survivors - EHV	ESG	ESG
Project Type	Coordinated Entry	PH - Rapid Re-Housing	PH - Housing with Services (no disability required for entry)	Coordinated Entry	PH - Housing with Services (no disability required for entry)	PH - Housing with Services (no disability required for entry)	Coordinated Entry	PH - Housing with Services (no disability required for entry)	Emergency Shelter	Emergency Shelter
Type of Report	DV CE APR	APR	APR	DV CE APR	APR	APR	DV CE APR	APR	CAPER	CAPER
Reporting Period	Calendar Year: 01/01/22 - 12/31/22	Calendar Year: 01/01/22 - 12/31/22	18-month: 7/1/22 to 12/31/23	Calendar Year: 01/01/22 - 12/31/22	18-month: 7/1/22 to 12/31/23	18-month: 7/1/22 to 12/31/23	Calendar Year: 01/01/22 - 12/31/22	18-month: 7/1/22 to 12/31/23	Fiscal Year: 07/01/22 - 06/30/23	Fiscal Year: 07/01/23 - 06/30/24
Report Due Date	3/31/2023	3/31/2023	3/31/2024	3/31/2023	3/31/2023	3/31/2023	3/31/2023	3/31/2023	8/30/2023	8/30/2024
How reports will be generated?	Canned in HOPE	Canned in HOPE	Canned in HOPE	Canned in HOPE	Canned in HOPE	Canned in HOPE	Canned in HOPE	Canned in HOPE	Manual via template	Canned in HOPE
Who will generate the reports?	VSP submit to HSH	VSP submit to HSH	VSP submit to HSH	VSP submit to HSH	VSP submit to HSH	VSP submit to HSH	VSP submit to HSH	VSP submit to HSH	VSP submit to HSH	VSP submit to HSH

Other Useful Reports

🔑 [GNRL-106] Program Roster

- Found in Reports Library under Program Based Reports
- Lists program stay and relevant household information for selected program(s)
- Useful in ensuring program rosters are reflected accurately the database

🔑 [HUDX-225] HMIS Data Quality Report

- Found in Reports Library under HUD Reports
- Reviews data quality across a number of HMIS data elements
- Useful to ensure data cleanliness for reporting

Staff Client Data Activity Report

✏ Staff Client Data Activity Report can tell you which staff have interacted with a profile, showing details such as creation, editing, or deleting.

Agency Management	2 report(s) ⌃
[STFF-104] Staff Client Data Activity Report	☆ | ⊙ RUN | ☷ SCHEDULE | MORE INFO ⌄
[STFF-106] User Client Note Hours Tracked	☆ | ⊙ RUN | ☷ SCHEDULE | MORE INFO ⌄

Resources

Bitfocus Resources

Bitfocus Help Desk
- onesf@bitfocus.com
- 415.429.4211
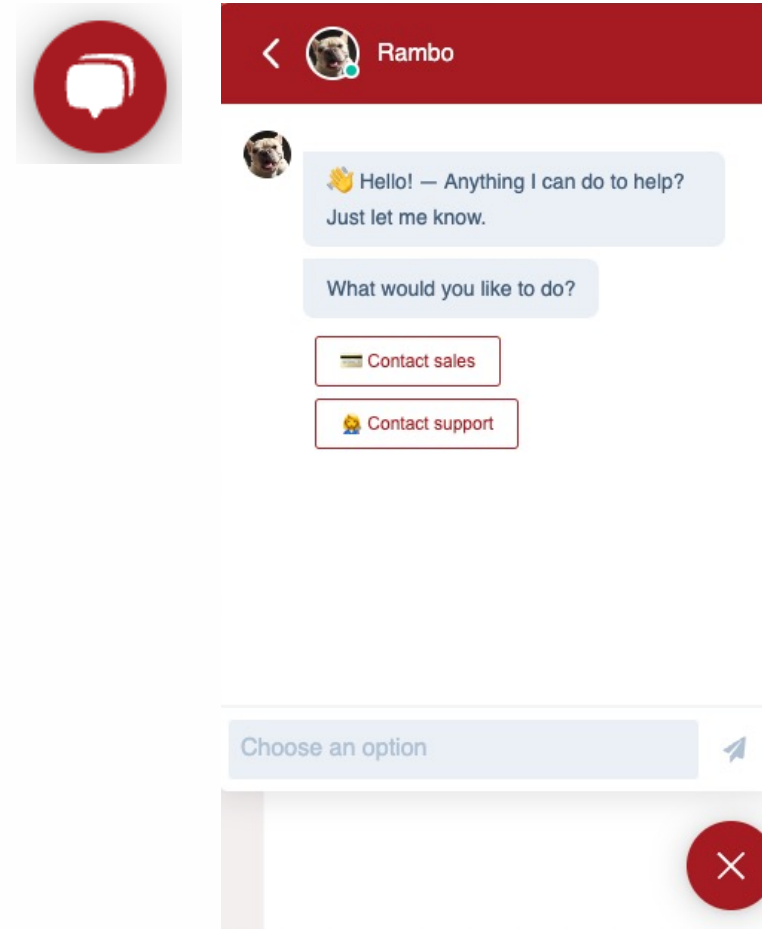- *Specify if your request is in regards to the HOPE System or the ONE System*

ONESF Help Center Site:
onesf.bitfocus.com

Bitfocus Help Site:
help.bitfocus.com

Questions?

Next Steps

- Sandbox Period- 2/21-2/24, a time for VSPs to enter test client data in the system ahead of the official launch.

- You will see a banner in the system to not enter real client data

- HSH will stop having access to the system on 2/24.

- All test client data will be deleted on 24th

- Official launch on 27th

- Office Hours 2/23- 9am and 3/2, time to be determined