



HOPE CE Training

Today's Agenda

Welcome!

Creating a profile in HOPE

Enrollments

Assessment and Queue

Coordinated Entry Events

Exits

Reporting

Resources/Questions & Wrap up

Creating a Profile in HOPE

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 prefers not to answer"**

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

SEARCH FOR A CLIENT

ADD CLIENT +

🔍 Enter search terms for a client

SEARCH

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

CREATE A NEW CLIENT

Social Security Number

Quality of SSN

Last Name

First Name

Quality of Name

Quality of DOB

Date of Birth

REQUIRED FORMAT FOR DATE OF BIRTH MM/DD/YYYY

ONE ID

Middle Name

Alias

What is the client's current gender identity?

What is the appropriate pronoun to use when addressing the client?

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

Program Enrollments

Program Enrollments

Samuel Test

[PROFILE](#) [HISTORY](#) [SERVICES](#) [PROGRAMS](#) [ASSESSMENTS](#) [NOTES](#) [FILES](#) [CONTACT](#) [LOCATION](#) [REFERRALS](#)

CLIENT PROFILE

PROGRAMS: AVAILABLE

Emergency Shelter Program

Housing for Survivors - EHV

Housing for Survivors - RRH

San Francisco Coordinated Entry for Survivors

Active Clients



42 % Families
58 % Individuals



Funding Source

HUD: CoC - Supportive Services Only

Availability

Full Availability

Include group members:

Sally Huffman

PRINT DIRECTIONS

ENROLL

→ Once you've identified that a household is eligible for Coordinated Entry, you can enroll them into your CE program by completing the following:

1. Go to the client profile
2. Click on the PROGRAMS tab
3. Scroll down to the Programs: Available section
4. Click on the San Francisco Coordinated Entry for Survivors program
5. Include group members (if applicable)
6. Clicking 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

Hope Smith

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES REFERRALS CONTACT LOCATION

Enroll 'Emergency Shelter Program' program for client Hope Smith

Program Date	02/16/2024	
TRANSLATION ASSISTANCE NEEDED		
Translation Assistance Needed	No	▼
PRIOR LIVING SITUATION		
Type of Residence	Emergency shelter, including hotel or motel paid for with emergency shel...	
Length of Stay in Prior Living Situation	One month or more, but less than 90 days	
Approximate date this episode of homelessness started	12/12/2023	
Number of times on the streets, in ES, or Safe Haven in the past three years	One Time	▼
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	Two Months	▼
LIFETIME LENGTH OF HOMELESSNESS IN SF		
Have you ever been homeless in SF?	Yes	▼
How many years:	0	

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.

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
 San Francisco Coordinated Entry for Survivors Coordinated Entry HOPE System Agency ⓘ	04/12/2024	Active	Individual

Assessment and Queue

How to complete the CE Assessment in HOPE

1. Click on the PROGRAMS tab from the client profile
2. Click to edit the client's enrollment in the **San Francisco Coordinated Entry for Survivors** program
3. Select the Assessments tab and click to **START** the assessment
4. Complete the assessment with the client/household
5. Click 'Save'

The screenshot displays the HOPE system interface for a client named Hope Smithson. The top navigation bar includes tabs for PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a red box), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, the PROGRAM HISTORY section shows the San Francisco Coordinated Entry for Survivors program, also highlighted with a red box. The main content area is titled "PROGRAM: SAN FRANCISCO COORDINATED ENTRY FOR SURVIVORS" and features a sub-navigation bar with tabs for Enrollment, History, Provide Services, Events, Assessments (highlighted with a red box), Notes, Files, and Forms. The Assessments section lists four assessment types, each with a START button: Status Update Assessment, Annual Assessment, HOPE CE Minimal Assessment, and HOPE Survivor CE Assessment (the START button for this assessment is highlighted with a red box). A "LINK FROM ASSESSMENTS" link is visible in the top right corner of the assessment list.

HOPE Survivor CE Assessment

PROGRAM: SAN FRANCISCO COORDINATED ENTRY FOR SURVIVORS

Enrollment History Provide Services Events **Assessments** Notes Files Forms

HOPE SURVIVOR CE ASSESSMENT

Assessment Date	04/18/2024 
Assessment Location	Asian Women's Shelter <input type="text"/>
Assessment Type	In person <input type="text"/>
Assessment Level	Housing Needs Assessment <input type="text"/>
Are you in a safe place for me to ask you some questions?	Select <input type="text"/>
How many people are in your household? (Including yourself)	<input type="text"/>
Are you or is anyone in your household in the following age ranges? (check all that apply)	Select <input type="text"/>
Last permanent zip code	94110 <input type="text"/>
Where are you currently staying?	Place not meant for habitation (e.g., a vehicle, an abandoned building, bu <input type="text"/>

---> Information from enrollment screen will cascade forward into the assessment, including:

- > Prior living situation information
- > Income
- > Disability
- > Survivor of DV question

---> Assessment Level should always be **Housing Needs Assessment**

---> Be sure to pay attention as certain responses may trigger more questions to pop up

How to add a client to the queue

Immediately after completing the assessment and clicking 'Save', you will be brought to the Program Eligibility Determination screen

1. Click the REFER DIRECTLY TO COMMUNITY QUEUE button
2. Click SEND REFERRAL on the next screen (*Do not mark Private*)

Note that you can only add a client to the queue after you've completed the HOPE Survivor CE Assessment

Changes successfully saved.

PROGRAM: SAN FRANCISCO COORDINATED ENTRY FOR SURVIVORS

Enrollment History Provide Services Events **Assessments** Notes Files × Exit

PROGRAM ELIGIBILITY DETERMINATION

REFER DIRECTLY TO COMMUNITY QUEUE

REFER TO PROGRAM

Referred Program	Community Queue
Referred to Agency	Community Queue
Referring Agency	Fake Testing Agency
Private	<input type="checkbox"/>

B **I** **U** **□**

SEND REFERRAL **CANCEL**

How to add a client to the queue (cont)

→ If you didn't add the client to the queue immediately after completing the assessment, not to worry! You can always add them later by following these steps:

1. Click on the Assessments tab within the client's CE for Survivors enrollment and view the client's completed CE Assessment under 'Assessment History'
2. Click on the Eligibility button on the CE Assessment, and be brought to the Program Eligibility Determination screen
3. Follow the steps of the previous slide

ASSESSMENT HISTORY			
Advanced search options View ▼			
Assessment Name	Completed	Details	
HOPE Survivor CE Assessment HOPE System Agency ⓘ	04/12/2024	SurvivorCE : 35	☰ ELIGIBILITY

Other Status Assessment

Community Queue Auto-exit Threshold

→ Auto-exit threshold determines how long a client can be on the queue with no qualifying action before being auto-exited

	Auto-exit Threshold
Community Queue	90 days



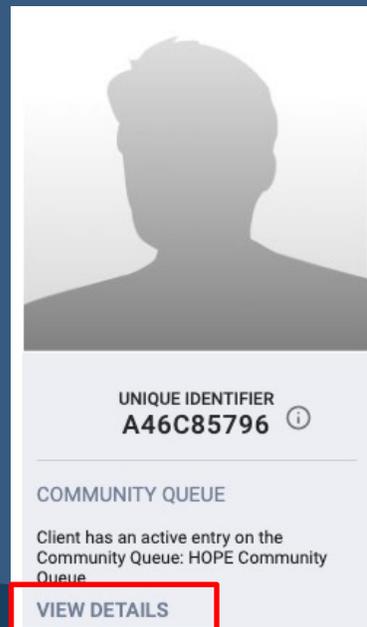
How to keep a client active on the community queue

- > Adding a Service (client level and program level)
- > Adding an Event
- > Adding an Assessment (client level and program level)
- > Adding a Status Assessment or Annual Assessment for a client
- > Adding a new contact to the Contact tab
- > Adding a location to the Location tab
- > Adding a File (client level and program level)
- > Adding a note (client level and program level)
- > Adding an alert
- > Enrolling a client into a program
- > Exiting a client from a program
- > Creating a direct program referral
- > Selecting the "CHECK-IN" button within the referral

Last Activity Date

All clients who are currently active on the community queue will have a blurb under their profile photo and UID

- > Click "View Details" to access information about the queue referral, including the **Last Activity Date**
- > **Last Activity Date** shows the last date a qualifying action to keep the client on the queue was performed
- > You can always use the CHECK IN button on this page to update this date and keep the client on the queue!



UNIQUE IDENTIFIER
A46C85796

COMMUNITY QUEUE
Client has an active entry on the Community Queue: HOPE Community Queue

VIEW DETAILS



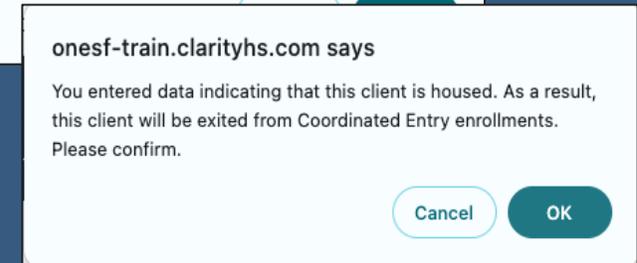
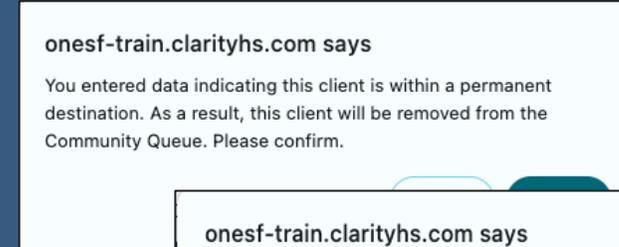
REFERRAL: ASSIGN

Client	Hope Smithson
Referred to	Community Queue
Referring Agency	HOPE System Agency
Referred Date	04/12/2024 
Days Pending	0 day(s)
Qualified	Yes
SurvivorCE score	35
Last Activity	04/12/2024 CHECK-IN
Referred by Staff	Holly Aversano 
Navigator	ASSIGN NAVIGATOR
Private	<input type="checkbox"/>

SAVE CHANGES **CANCEL**

Exits from Coordinated Entry and the Community Queue

- > The HOPE System will auto-exit a client from a CE program and the Community Queue after:
 - > A user saves a value for the Housing Move-In Date field in the enrollment screen of the Head of Household for any permanent housing program
 - > A user saves a permanent housing destination in the 'Destination' field for any program exit screen
- > Users can also manually exit the client from a program or from the Community Queue
 - > Program Exits will be covered in upcoming slides
 - > Can manually exit a client from the queue by clicking "View Details" under the client profile picture (as shown before), and scrolling to the 'Remove From Queue' section



REMOVE FROM QUEUE

Reason for Removal -- Select Reason --

Queue Removal Date 04/17/2024

SAVE CHANGES CANCEL

Coordinated Entry Events

Coordinated Entry Events

- Available for Coordinated Entry Programs
- Track referrals and other Coordinated Entry activities
- Important for reporting in the Coordinated Entry APR

PROGRAM: SAN FRANCISCO COORDINATED ENTRY FOR SURVIVORS

Enrollment History Provide Services **Events** Assessments Notes Files × Exit

Coordinated Entry Events

Referral to Prevention Assistance project	▼
Problem Solving/Diversion/Rapid Resolution intervention or service	▼
Referral to scheduled Coordinated Entry Crisis Needs Assessment	▼
Referral to scheduled Coordinated Entry Housing Needs Assessment	▼
Referral to post-placement/follow-up case management	▼
Referral to Street Outreach project or services	▼
Referral to Housing Navigation project or services	▼

How to Submit an Event

While within a program enrollment

1. Click on Events Tab
2. Click on Event Category
3. Click on the appropriate Event item
4. Adjust for appropriate date and write note
5. Include group members, if appropriate
6. Click Submit
7. Find Submitted Event in the Events tab under History

The screenshot shows the 'Events' tab in a software interface. At the top, there are navigation tabs: Enrollment, History, Provide Services, Events (selected), Assessments, Notes, and Files. Below the tabs is the title 'Coordinated Entry Events'. A dropdown menu is open, showing 'Referral to Prevention Assistance project' as the selected event, with a red box around it. To the right of this dropdown is a blue box labeled 'Event Category' with an arrow pointing to the selected event. Below the dropdown is a form for the 'Referral to Prevention Assistance project'. The form includes a 'Date' field set to '02/13/2023' with a calendar icon. Below the date is a section 'Include group members:' with a red box around it, containing a toggle switch and the text 'TestSFNMin Bitfocus'. Underneath is an 'Event Note:' field with a rich text editor toolbar (bold, italic, bulleted list, numbered list) and a large text area. At the bottom right of the form is a 'SUBMIT' button, also highlighted with a red box. A small dropdown arrow is visible in the top right corner of the form area.

Coordinated Entry Events

Referral to Emergency Housing Voucher (EHV) ▼

Referral to Emergency Housing Voucher (EHV) ▲

Date: 02/09/2023 

Referral Result: Successful referral: client accepted ▼ Result Date: __/__/__ 

Event Note:

Select
Successful referral: client accepted
Unsuccessful referral: client rejected
Unsuccessful referral: provider rejected

B *I*  

Client was offered an Emergency Housing Voucher and accepted

SUBMIT

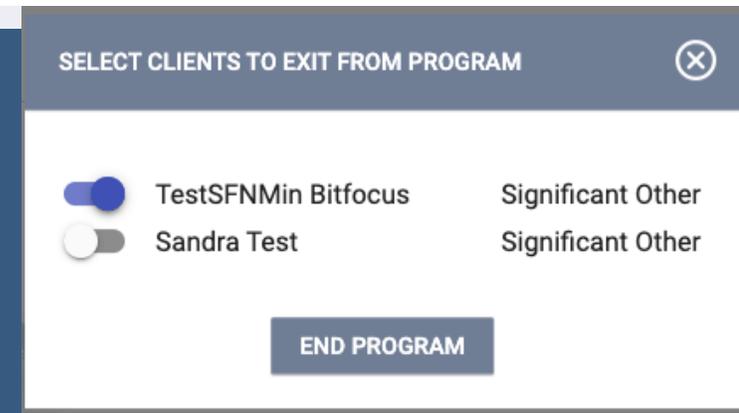
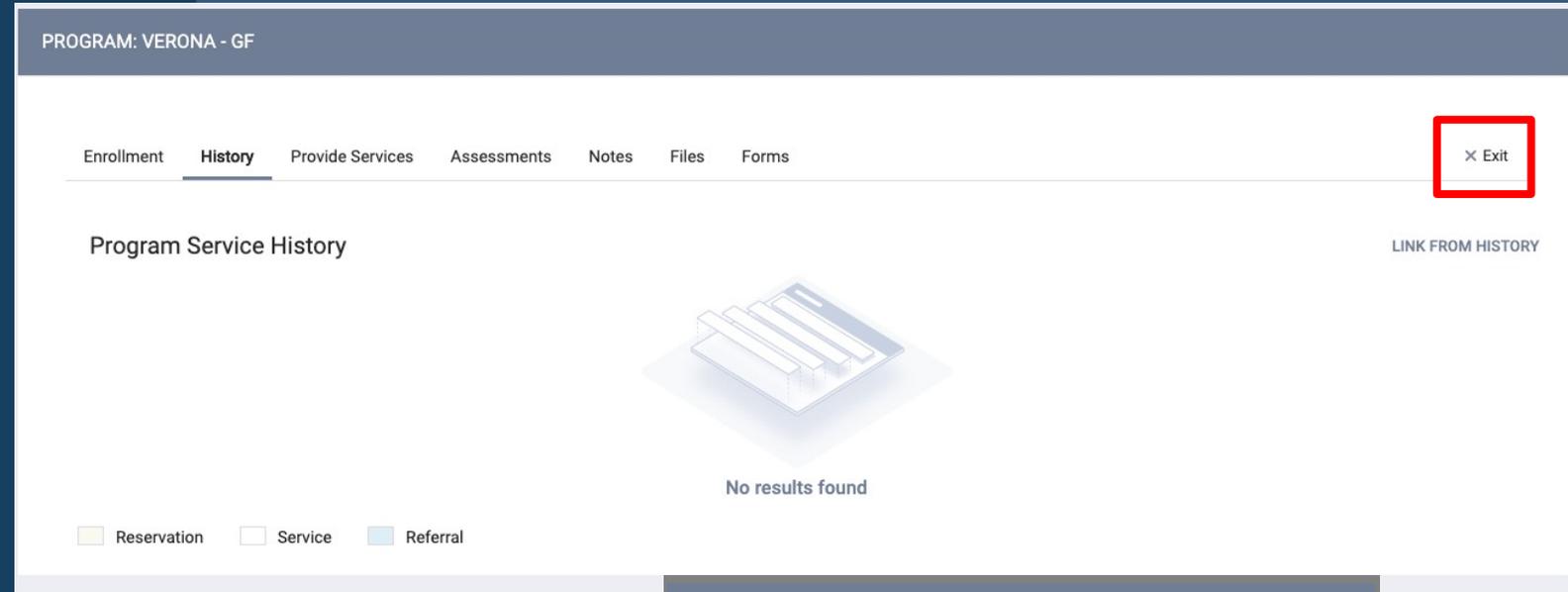
→ Be sure to enter any details that are relevant to a referral

Program Exits

Program Exits

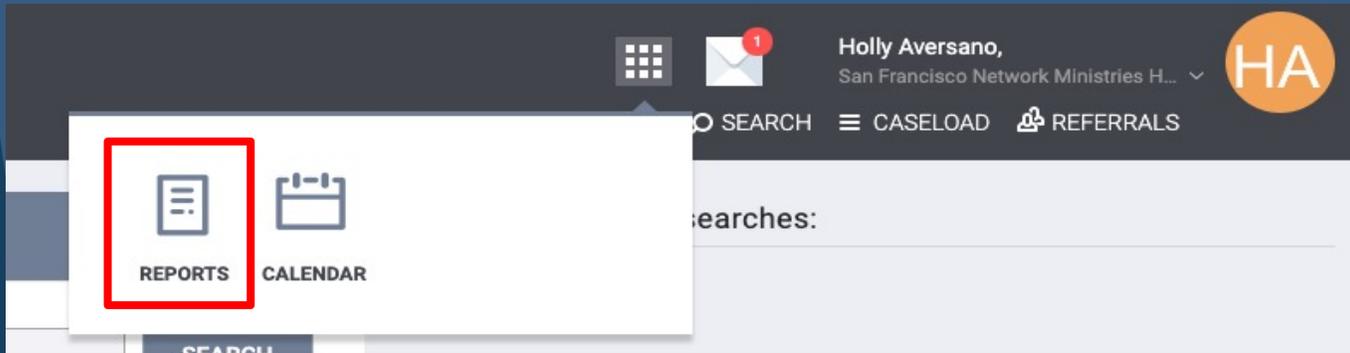
To exit a household:

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'



Reporting

Reports Library



REPORT LIBRARY	
Favorite Reports	0 report(s) ▼
HUD Reports	7 report(s) ▼
Data Quality Reports	6 report(s) ▼
Service Based Reports	13 report(s) ▼
Program Based Reports	19 report(s) ▼

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

Required Reporting for CE Programs

---> [\[HUDX-235\] CE APR](#)

- > Found in Reports Library under HUD Reports
- > Useful for running HUD required CE APR report
- > Can be downloaded as a CSV-Upload file to be uploaded to HUD
- > More information about how to run a CE APR [can be found here](#)

REPORT LIBRARY
Favorite Reports
HUD Reports
[HUDX-111] HUD CSV / XML Program Data Export [FY 2024]
[HUDX-224] PATH Annual Report [FY 2024]
[HUDX-225] HMIS Data Quality Report [FY 2024]
[HUDX-227] Annual Performance Report [FY 2024]
[HUDX-228] ESG CAPER [FY 2024]
[HUDX-231] LSA Export - Project-Focused LSA [FY 2023]
[HUDX-235] CE APR [FY 2024]
[HUDX-236] LSA - Project Descriptor HDX Upload Test [FY 2023]

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

Program Based Reports

[EMPL-101] Employment Report

[EMPL-102] Employment / Education Report

[EXIT-101] Potential Exits

[EXPS-103] Program Funding Source Financial Detail

[GNRL-105] Program Participation Summary

[GNRL-106] Program Roster

[GNRL-220] Program Details Report [2022]

HUD Reports

[HUDX-111] HUD CSV / XML Program Data Export [FY 2024]

[HUDX-224] PATH Annual Report [FY 2024]

[HUDX-225] HMIS Data Quality Report [FY 2024]

[HUDX-227] Annual Performance Report [FY 2024]

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*

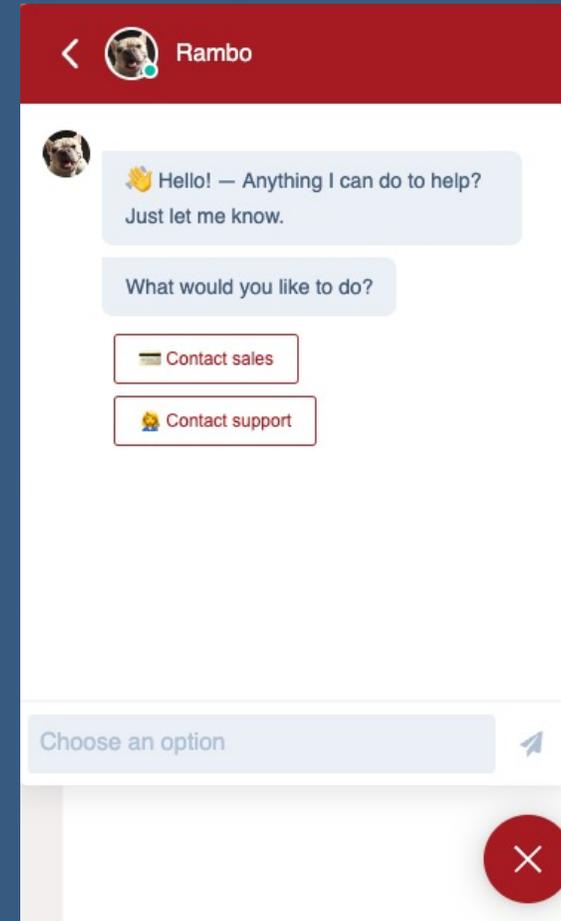
Help Center Site:

onesf.bitfocus.com/hope-system

Bitfocus Help Site:

help.bitfocus.com

Help Desk Widget (On ONESF Help Center Website and Bitfocus Help Site)



Questions?