Course: CS – 6150 – Computing for Good

Title: Housing and Savings (HandS) Initiative Portal – User Manual

Project Homepage: https://c4g-hands-app.vercel.app/

Team Homepage: https://github.gatech.edu/pages/ybai300/HandS-Project-Team-Page/

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Project description:

- United Way of Metro Atlanta runs several programs to address the problem of homelessness in the Metro Atlanta region. For some of their programs, they partner with local nonprofit organizations to provide funds to directly address the needs of the homeless families. One such partner organization is Frontline Housing Inc. Our project worked with this partner organization to build them an application to process, manage and track their 'Housing and Savings" Initiative (HandS).

- The Housing and Savings (HandS) portal will allow partners and households to track the progress as they participate in the program. This portal will be the place where they interact throughout the program and monitor activities that will help them achieve their goals.

User Personas and applicable process flows:

a) Public Page:

- ➢ Prior to any kind of authentication, the Project homepage should provide an insight into the Project Mission, information about the team, expectations etc.

- ➢ Provide a "SignIn" page to support user authentication.

- ➢ Users can be "United Way Staff", "Partner Staff" or "Household" personas.

b) UnitedWay Staff:

- ➢ UnitedWay Staff is the admin role provided to "United Way" organization users. These users have the highest level of privileges on the database

and should be able to create more UW Staff user accounts, create new Partner accounts, create Partner staff user accounts.

➢ To maintain the hierarchy, we have limited on the UI the actions the admin role can perform. However, if cascaded access and all functionality needs to be validated by the admin, they could create Partner Orgs, and create Households associated with the partner orgs as well.

➢ Flow of execution of events:

    i. Use the admin credentials to login as "United Way Staff" user.

    ii. Validate the profile page

        1. Profile page displays the logged in user information like the Name, Gender, race, Phone Number and user Type.

        2. It also provides an option to reset the password. UnitedWay Staff can reset their own password, or any other partner account staff as well.

        3. Please note that, since the user accounts are created with a default password, the users are expected to first reset their password upon successful authentication before they can perform any other function on the UI.

    iii. Click on the "Partners" link.

        1. Create a partner organization.

            a. As a UW User, they only create shell partner organizations in the database, with basic information like the PartnerName, Address and the budget that can be allocated. More details like the programs within the partner Org, how to separate the budget per program and the specific requirements per program are edited by the partner staff.

            b. Ensure a "Partner Staff" user is created.

        2. View the list of partner organizations. The Partner details, budgets allocated and how the money is being utilized/spent/remaining funds is shown in a tabular view.

        3. Export the tabular partner information as a CSV file

iv. Validate the content and the format of the downloaded CSV report file

v. Create the users

    1. Ensure a "Partner Staff" user is created.

    2. This user account is always created with the default password.

    3. Users are enforced to change the password upon logging in. They will not be able to perform other functions and will be prompted every time to reset the password until they do so.

vi. Sign out

c) <u>Partner Staff:</u>

➢ Partner Staff is the role provided to a specific partner organization users. For each of the partner organization, UW would create atleast one Partner Staff user. This user inturn should be able to create more partner staff user accounts, edit the partner information, add or modify the partner requirements, create partner programs and allocate funds per program, create household users, create household intakes, update household information, validate the reports etc.

➢ Flow of execution of events:

i. Use the credentials to login as "Partner Staff" user. For the very first partner staff account, the expectation is that the UnitedWay Staff user creates the partner account and provides the emailAddress and default password (*d3f@ult*) through offline communication. Upon first time successful login, the user should reset the password.

ii. Validate the profile page

    1. Profile page displays the logged in user information like the Name, Gender, race, Phone Number and user Type.

    2. It also provides an option to reset the password. Partner Staff can reset their own password, or any other partner account staff as well. They can also reset for household accounts associated to that partner.

3. Please note that, since the user accounts are created with a default password, the users are expected to first reset their password upon successful authentication before they can perform any other function on the UI.

iii. Click on the "Programs" link.

    1. Create a new Program with the partner organization.

        a. The information needed to create a new program is displayed as a form, and all fields are self-explanatory.

        b. For the purpose of HandS project, we had a requirement to create the Housing program, which has pre and post housing months and amounts, and configurable supporting requirements (upto a max of six).

        c. The app however supports creation of other programs, and can be enhanced as needed (more forms can be created or customized)

        d. Ensure more "Partner Staff" users are created, with appropriate user_types.

            i. Partner Staff can only create other Partner staff or household users.

            ii. They can select their partner organization from the drop down list, and pass as an input parameter. * *- There is scope for improvement here. We should not allow the user to select a partner, instead we should default to the same partnerOrg that the logged in user belongs to*.

    2. View the list of programs. Details can be viewed by clicking the "View Details" icon. Program can be further edited from the tabular view screen or from the detailed view screen.

    3. View Details → This also displays the household users assigned to the specific program. Expanding the household entry can show more details about the household. Clicking the Edit (aka pencil) icon allows the user to edit the household information.

4. There is additionally a "Filter" option provided, which helps to narrow down the search results, when the household intakes become larger in number. This "Filter" is designed to be applied on any field on the household user data.

==To-Do: << We are working on including a report to export this data if possible>>. Also, working on computing the nextPayDate, based on lastSubsidyDT and the date when the receipts were uploaded by the household user. These requirements were provided to us a little later and we are validating how much can be implemented.==

iv. Create the users

1. Before creating a household intake, create a "household" user. This emailAddress used to create the household user should be the same used as part of the household intake process, and uniquely identifies the household family.

2. This user account is always created with the default password.

3. Users are encouraged (enforced) to change the password upon logging in the first time.

v. Create the household intake account, and associate it with the program

1. Fill the "Household Intake" form → self explanatory fields, and modeled based on the excel sheet currently used as part of household onboarding process. Certain fields have enumerations which have been taken from the existing excel sheet. Few examples are listed below:

   a. Gender – Male/Female/Other

   b. Intake_Location: Motel/Hotel/Family/Airbnb/NA/Referral/Shelter

   c. Marital Status: Married/Divorced/Single/Living w partner/Widowed/Unknown

   d. Military Status: Never Served/Retired/Unknown

   e. Sure Impact Status: In-progress, Unhoused, Graduated, Early exit but housed, M2H/Housed, Housed

2. Save the household details

3. Click on the "View Details" inside the Programs, to check if the household information is displayed.

vi. Sign out

d) Household:

➢ Household users are households who use the portal to check their details, validate their checklists, update their checklists, check the classes and register for classes, be able to talk to others in the forums (partner's social platform handles).

➢ They would still send the receipts through offline communication means like whatsapp/Email to "Partner Staff"

➢ Once the receipts are validated, Partner Staff updates the household account and updates the "ReceiptsSubmitted" date.

➢ Flow of execution of events:

i. Use the credentials to login as "Household" user. For every household user account, the Partner Staff user creates the household account and provides the emailAddress and default password (*d3f@ult*) through offline communication. Upon first time successful login, the user should reset the password.

ii. Validate the profile page

1. Profile page displays the logged in user information like the Name, Gender, race, Phone Number and user Type.

2. It also provides an option to reset the password. Household accounts can only reset their own passwords.

iii. Click on the "My Intake details" link.

1. Be able to View and Validate the details.

iv. Click on the "Checklist" link. The requirements for the program are displayed as check boxes, and the user should be able to update them.

v. Click on the "Classes" link → Show the available classes per month (or provide a link to frontlinehousing's portal) and show the link to classes.

vi. Click on the "Social Handles". User should be redirected to the social handle link. This is a "To-Do" item that needs to be included into the codebase, and can leverage OAuth, once implemented.

vii. Sign out