

Paperwork, Bridge, and human handoffs.

The operating guide for safe AI assistance, deterministic crisis routing, human review, official filing handoffs, and partner training.

Rules decide. AI explains. The person reviews. The agency decides.

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1. Operating model

HOPE is the translator, checklist, packet builder, and traffic controller. Government agencies, courts, and benefit systems remain the official systems of record. HOPE does not determine eligibility, authenticate evidence, issue credentials, decide cases, or guarantee acceptance.

HOPE may

- Explain a process or notice.
- Identify requested documents and deadlines.
- Prepare a checklist and draft packet.
- Suggest source-linked fields.
- Check image presentation and completeness.
- Open the official portal and record a local receipt.

HOPE may not

- Invent missing facts.
- Choose sworn answers.
- Sign or impersonate.
- Promise approval or predict a court result.
- Use an agency password.
- Submit without the person's final review.

2. Bridge Navigator

Bridge is surrounded by deterministic gates. The order is mandatory.

1. **Crisis pre-gate:** checks the user's words before any model call. When it fires, fixed crisis information is shown and the model is never called.
2. **Human-referral gate:** legal, immigration, and disputed-benefit language is tagged. Bridge may explain, but the answer always ends with a real person or agency referral.
3. **AI or offline explanation:** Bridge answers from HOPE's Rhode Island data.
4. **Post-gate:** any invented phone number, eligibility promise, diagnosis, court prediction, professional-role claim, or false verification claim causes the model answer to be discarded.

Bridge modes

Mode	Meaning	Bridge behavior
Solo	No human worker is assigned.	Navigates, sequences steps, and points to verified contact information.
Co-op	A human worker is actively leading.	Prepares, remembers one priority, and defers. It never overrules the worker.
Handback	The worker relationship is closed or inactive.	Says so plainly, resumes navigation, and can help reconnect if contact information is saved.

Only the worker name, organization, optional phone, and one priority are stored locally. No case file is created. "Forget" deletes the local record.

Connection architecture: the browser calls only HOPE's same-origin Netlify proxy. The backend remains sealed unless HOPE_BRIDGE_ENABLED=true and a server-side AI key are configured. When disabled, offline, timed out, or blocked by a safety gate, Bridge uses HOPE's saved guidance instead.

3. Paperwork Bridge (Manual Private Mode)

Manual Private Mode is the default, and it is the mode most people should use. It runs entirely inside the browser. It sends nothing anywhere: the page is served with a network deadbolt, it contains no upload and no submit, and it stores nothing on any HOPE server.

Tool	What it does
First Rhode Island State ID	Readiness wizard for a state ID or REAL ID: identity document, Social Security requirement, name-change chain, credential type, and two Rhode Island residency documents. Scores five readiness areas, names what is missing, and prints a Readiness Packet. Also covers the quick DMV lanes: replacement, renewal, address change, REAL ID preparation, and the official directory.
Shelter Residency Letter	Printable, signature-ready residency letter using the shelter's own facility and administrator details. The DMV requires it to be dated within the previous 30 days; HOPE enforces that in whole calendar days. A letter dated today is accepted at any hour. A future date is refused separately.
HealthyRhode & DHS Navigator	Choose the job (document request, apply, renew, appeal), then the program (SNAP, Medicaid, cash, child care, or the documents this notice asked for). Prints the matching checklist and hands off to the official portal.
Explain My Notice	Paste the non-sensitive wording of a letter. HOPE surfaces a possible deadline and the categories of document the notice appears to request. A reading aid, never a determination.
Document photo check	How to photograph a document so an agency portal accepts it: flat, all four corners, no glare, no fingers, readable at full size.
Submission Receipt Locker	A minimal local receipt after an official submission: agency, category, submitted date, deadline, confirmation number, a date to check again, a short note. Stored in that browser only. Exportable, deletable, and convertible to a calendar reminder. Not a case file.

The shelter administrator signs the letter. HOPE does not sign, does not certify residency, and does not decide what the DMV will accept.

Never paste a case number, a Social Security number, or a full name into Explain My Notice.

4. AI Copilot workflow

Crisis routing runs first (RI S 2195). The crisis pre-gate runs before the request leaves the browser, and again on the server, using the same phrase list and the same fixed response as Bridge, from one shared module. When it fires the request stops, the model is never called, and the person sees 988, BH Link, Crisis Text Line, Samaritans RI, Sojourner House, and 911. Their paperwork is still there afterwards. No helper, person, consent form, agency lane, or model can switch this off.

Twelve agency lanes: Housing and RIHousing; Vital Records; Social Security; DLT (unemployment, TDI, TCI); Courts and eviction; Child Support and family; Energy and utilities; Disability, ORS and LTSS; Veterans; Taxes; DMV and State ID; HealthyRhode and DHS. Each lane carries its own scope and its own official handoff links.

Eight AI jobs: explain a notice or form; extract fields and deadlines; suggest field-by-field answers; find missing documents; compare documents for conflicts; translate and simplify; build a deadline action plan; draft a response or request letter.

Redaction: Social Security numbers, anything labelled password, passcode, or PIN, and long digit runs including payment-card numbers written with spaces or dashes are stripped in the browser and again on the server. Redaction is a safety net, not a licence.

The Copilot is dormant by default. It requires `HOPE_PAPERWORK_AI_ENABLED=true` and a server-side AI key. When it is off, Manual Private Mode still works.

1. Choose the privacy lane

Manual Private Mode stays on the device. **AI Copilot Mode** sends only the selected text or files after explicit consent. Manual mode must remain available.

2. Minimize the material

Use only the pages or images needed for the task. Never enter agency passwords. Avoid unrelated medical, financial, immigration, or family records.

3. Let AI organize, not decide

AI may classify the document, extract deadlines, identify requested items, suggest fields, translate, draft plain-language explanations, and flag contradictions.

4. Review the worksheet

Every proposed field must show a source, confidence, editable value, and confirmation control. Unsupported fields are deleted, not guessed.

5. Handoff officially

Open the official government or court system. The person reviews and submits. HOPE never presses the final submit button without the user's immediate action.

6. Save the minimum receipt

Store only the submission date, category, deadline, confirmation number, and optional confirmation screenshot on the person's device. Then clear the temporary workspace.

5. Human review standard

Confidence is not evidence. A high-confidence field can still be wrong. A field is ready only when the source is visible and the person confirms it against the original.

Required checks

- Name spelling and suffix.
- Date of birth and dates in notices.
- Address and residency period.
- Household members and relationships.
- Income period and units: hourly, weekly, monthly, annual.
- Case, claim, or notice identifiers.
- Deadline, hearing date, and time zone.
- Signature blocks remain blank for the applicant.
- Every attachment corresponds to a specific request.
- No contradiction between the form and supporting documents.

6. Privacy and consent

Partner operations and AI paperwork are separate lanes. Do not copy sensitive paperwork into partner status, exchange, listing, or activity tools.

Never store centrally in HOPE

SSNs, driver-license numbers, agency passwords, benefit case files, birth certificates, immigration files, bank statements, medical records, complete applications, or photographs of government notices.

Before AI processing

- Explain exactly what material will leave the device.
- Explain that hosting, network, and AI-provider systems process the request.
- Explain that AI may be wrong and the person must review.
- Obtain affirmative consent.
- Provide Manual Private Mode as an alternative.

7. User acknowledgment, limited release, and indemnity

The acknowledgment should state that HOPE is informational software, not a government agency or professional adviser; AI output may be incomplete or incorrect; the user controls what is uploaded; official agencies decide; and the user is responsible for reviewing and submitting.

The limited indemnity applies to intentional misuse, unlawful impersonation, knowingly false submissions, or documents uploaded without authority. It must not claim to waive non-waivable rights, gross negligence, fraud, willful misconduct, unlawful conduct, or duties that cannot legally be disclaimed.

Operational instruction: staff may explain the acknowledgment in plain language, but may not tell a person that it eliminates all legal rights or guarantees HOPE cannot be liable. Rhode Island counsel should review public deployment language.

8. Deadline escalation

These topics require same-day human escalation when a deadline or penalty appears:

- Eviction, court summons, hearing, subpoena, restraining order, or foreclosure.
- Benefits denial, termination, sanction, recoupment, or appeal deadline.
- Immigration filing, removal, asylum, status, or ICE contact.
- Utility shutoff or loss of medically necessary service.
- Safety, abuse, trafficking, or immediate danger.
- Loss of housing, insurance, medication, income, or custody.

HOPE may prepare the call, checklist, and document summary. A qualified human handles legal interpretation, representation, eligibility decisions, medical judgment, or agency discretion.

9. Partner Academy

The Academy now includes ten modules: Orientation, Resource Updates, Bed Practice, Privacy, Explain This Letter, Bridge Navigator, Paperwork Bridge + AI Copilot, Shift Packs, Scenario Drills, and Certificate.

The Paperwork module walks a helper through the State ID wizard, the Shelter Residency Letter and its 30-day rule, the HealthyRhode and DHS checklist, Explain My Notice, the document photo check, and the local receipt locker, and then through consent, crisis routing, the human review worksheet, and the official handoff in AI Mode.

Paperwork certification exercise

1. Choose a fictional notice.
2. Identify the agency and deadline.
3. Choose Manual or AI Mode.
4. Review the consent statement.
5. Reject one unsupported AI field.
6. Build the official handoff checklist.
7. Record a fictional receipt.
8. Delete the workspace.

10. Field checklists

Before the session

- Private place or headphones if possible.
- Battery, charger, and network plan.
- Official portal links opened from HOPE.
- Printer or secure sharing method if needed.

Before submission

- Every answer reviewed by the applicant.
- Every field has a source or is intentionally blank.
- All deadline warnings addressed.
- Original documents used where the agency requires originals.
- No HOPE or helper signature in the applicant's place.

After submission

- Confirmation saved locally.
- Next follow-up date set.
- Trusted helper copy shared only with permission.
- Temporary files deleted.
- Person reminded to watch for agency follow-up.

Key links

Paperwork Bridge

AI Copilot

Acknowledgment

Privacy

Partner Academy