

HIIFS



HOMELESS INDIVIDUALS AND FAMILIES
INFORMATION SYSTEM

USER GUIDE

VERSION 1.0

REACHING HOME | VERS UN
CHEZ-SOI



Employment and
Social Development Canada

Emploi et
Développement social Canada

Canada

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GLOSSARY OF TERMS

Term	Definition
Admissions	The process of admitting an individual or family that is homeless or at-risk of homelessness into a service provider.
At-risk of Homelessness	Individuals or families who are not homeless, but whose current economic and/or housing situation is precarious or does not meet public health and safety standards.
Bed Selection	A graphical display of a shelter's rooms and beds.
Bulletin	A message that can be read by users who are logged in to HIFIS.
Case Management	<p>Refers to intentional and collaborative service planning between service providers and their clients. The “intent” of the interactions differentiates various forms of case management. For example, case managers can specialize in the following:</p> <ul style="list-style-type: none">■ Service Navigation: Connecting clients to appropriate services using information gathered through triage and assessment. Includes completing paperwork for various waiting lists and following up on referrals.■ Housing-Based Case Management: Helping clients to reduce acuity in the areas of life that present risks to a tenancy. Includes arranging and coordinating a range of services to meet client needs.

Term	Definition
Chronic Homelessness	<p>People who are currently experiencing homelessness and meet at least one of the following criteria:</p> <ul style="list-style-type: none"> ■ have a total of at least six months (180 days) of homelessness over the past year; or ■ have recurrent experiences of homelessness over the past three years, with a cumulative duration of at least 18 months (546 days).
Client	An individual or family that is experiencing homelessness or at-risk of homelessness who has accessed or is currently accessing services provided by a service provider.
Client Consent Form	An agreement between the client and the service provider that provides the service provider consent on the collection, retention, and sharing of an individual's data.
Cluster	A functionality in HIFIS allowing the data of clients from specific service providers to be isolated. Service providers in clusters can only view data within their designated cluster.
Community Advisory Board (CAB)	Local organizing committee responsible for approving the Community Plan and recommending projects for funding to the Community Entity.
Community Data- Sharing Agreement (CDSA)	An agreement signed by service providers that governs data-sharing within a community. The CDSA outlines a common understanding of what information is to be shared and why, detailing privacy and security protocol decisions, the quality of data to be provided, data entry protocols and relevant data management practices.
Contributing Factors	Life events that have played a role in leading the client to requiring assistance from a service provider.

Term	Definition
Coordinated Access	A way for communities to bring consistency to the process by which people experiencing or at risk of homelessness access housing and related services within a geographic area. Core components of a strong Coordinated Access system include a Housing First approach; real-time data about the supply of and demand for housing resources; and a streamlined service-delivery approach with access points to service, a standardized workflow for triage and assessment; prioritization and vacancy matching and referral.
Custom Tables	HIFIS module that is used to create customized records for service providers whose needs exceed the defaults of the application. Custom tables are used to gather information on clients with user-created fields.
Data Provision Agreement (DPA)	An agreement between ESDC and a HIFIS Lead organization that authorizes ESDC's quarterly collection of the non-directly identifiable data-fields in exchange for HIFIS.
Family Head	Where individuals are part of a family, the Family Head is the person who has been identified as the lead for the family as a whole (e.g., the primary parent or guardian responsible for dependents).
HIFIS Administrator	The role that is responsible for the administrative functions within HIFIS (e.g., configuration, data integrity, backups).
Homeless Individuals and Families Information System (HIFIS)	Developed by ESDC in collaboration with communities, HIFIS is a comprehensive data collection, reporting and case management system that supports the day-to-day operations of housing and homelessness response service providers. HIFIS is designed to support the implementation of Coordinated Access by allowing multiple service providers from the same community to access real-time data and refer clients to the appropriate services at the right time.
HIFIS Host	Organization that has the servers on which HIFIS is installed and where client information is stored.

Term	Definition
HIFIS Lead	Depending on the context, refers to the organization or dedicated staff responsible for the initial set-up, implementation and ongoing maintenance of HIFIS.
HIFIS Program	A label or tag created by the community to group client transactions by category. For example, <i>HIFIS Programs</i> can be used to track similar kinds of services (e.g., shelter stays, youth programming or assistance provided during a natural disaster) or goods and services funded by the same source (e.g., certain supportive housing units in a building). Reports can be generated using <i>HIFIS programs</i> , summarizing service transactions either within or across HIFIS service providers.
HIFIS Service Provider	Organized and logical "set of services" that is available to individuals and families. HIFIS Service Providers share client information based on their individualized access rights, which are assigned to specific staff roles in the housing and homelessness response system.
Homelessness Management Information System (HMIS)	A tool that captures records client-level data and manages service provider information over time within a housing and homelessness response system. The Homeless Individuals and Families Information System (HIFIS) is one type of HMIS.
Housing First	An approach that involves moving people experiencing homelessness — particularly people experiencing chronic homelessness — rapidly from the street or emergency shelters into stable and long-term housing, with supports.
Housing and Homelessness Response System	Refers to all the service providers within a geographic boundary that help individuals and families with their housing challenges. In an integrated system with Coordinated Access, service providers most often use the same Homeless Individuals and Families Information System (HIFIS) installation.

Term	Definition
Life Events	Life Events are defined as discrete experiences that disrupt an individual's usual activities causing a substantial change and readjustment.
Local Help Desk	A service established by a community that supports HIFIS users to manage the system and resolve technical issues, including incident management, service requests, problem management, advance support, and release management.
Look-up Tables	A functionality that is used to add, edit, or remove values that appear in the drop-down menus throughout HIFIS.
Modules	Key components of HIFIS organized by functions or similar types of service transactions (e.g., Case Management, Housing Placement, Directory of Services, Food Bank).
Person(s) with Lived Experience	Individual or family that has experienced homelessness.
Primary Service Provider	A service provider with the ability to modify the mandatory fields and look-up table values of service providers placed underneath it.
Privacy Assessment	Process used to determine how service delivery could affect the privacy of an individual or family, with the goal of ensuring that privacy issues are identified and resolved or mitigated.
Rights Templates	Functionality that allows an administrator to apply the same user rights to multiple HIFIS users depending upon their roles and/or responsibilities.
Service Provider	Organization in the housing and homelessness response system that has staff who directly interact with clients to help them address their housing challenges.
Service Prioritization Decision Assistance Tool (SPDAT)	An assessment tool for frontline workers developed by OrgCode Consulting to inform prioritization in a Coordinated Access system and also support case management.

Term	Definition
Super-user	A service provider's HIFIS specialist with special privileges needed to administer and maintain the system as well as train HIFIS users.
User Rights	Govern ways by which a user can access HIFIS modules and view information. Rights specify if a user can see, edit, and/or delete data.
Violence Against Women shelter (VAW)	A service provider that caters specifically to women and their children who are fleeing violence, or the threat of violence.
Vulnerability Index Assessment (VAT)	An assessment tool for frontline workers developed by Downtown Emergency Service Centre to measure a person's vulnerability, which could be used to prioritize who should receive service first.
Vulnerability Index – Service Prioritization Decision Assistance Tool (VI-SPDAT)	Self-reported survey used to quickly determine a client's acuity. This triage tool is not designed to provide extensive detail about a client's vulnerability. Results can be confirmed or refined through a full SPDAT assessment.

THE HIFIS TOOLKIT

Over the last two decades, the ways to measure the extent of homelessness have significantly evolved in Canada. The dedication of service providers and municipal and provincial governments to collect and share data through the [Homeless Individuals and Families Information System \(HIFIS\)](#) and [Point-in-Time counts](#) is at the centre of this success. When used jointly, these data collection efforts provide a comprehensive local and national picture of homelessness. For the first time in history, Canadians have quality data that supports policy and program development, as well as strategic planning in the homelessness sector.

As Canada is moving forward with the [National Housing Strategy](#) and [Reaching Home: Canada's Homelessness Strategy](#), collecting, managing and sharing data becomes more important than ever to advance the collective understanding of homelessness and to support decision-making. In particular, Reaching Home emphasizes coordinated access and introduces a data-driven, client-centred approach to serve individuals and families experiencing or at risk of homelessness.

In this context, the Government of Canada is committed to continuously enhance HIFIS in order to support communities in their data collection and

efforts to eliminate homelessness. Recognizing that HIFIS modernization is driven by the homelessness sector's needs, a National HIFIS working group was created in 2018 to leverage the expertise of communities and experts and help guide HIFIS enhancements.

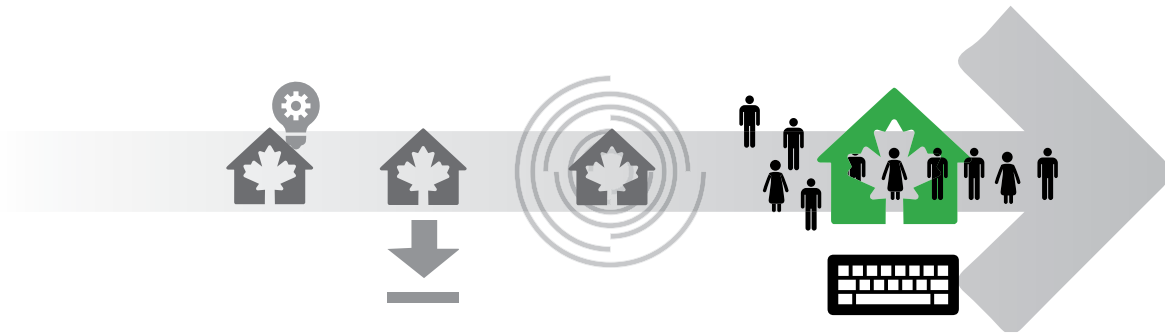
HIFIS is designed to support coordinated access by allowing multiple service providers from the same community to access real-time homelessness data through a community-wide system available via web-enabled devices, such as laptops, smartphones and tablets. HIFIS also allows communities to document the number, characteristics, and needs of homeless individuals and families, as well as the number of people receiving services.

To meet Reaching Home requirements and implement coordinated access systems, communities have to adapt their business model, which encompasses developing and adopting new governance frameworks and data management strategies. Doing so requires planning, committing resources and training to promote data literacy and instill a data-driven culture.

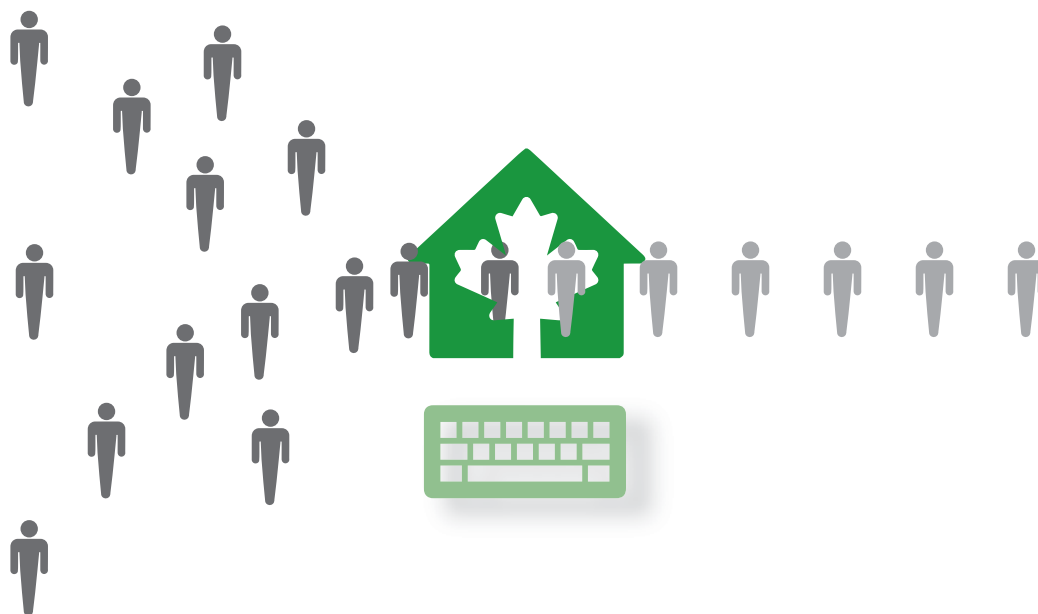
To assist communities in this transformation, ESDC has developed a HIFIS Toolkit composed of four guides. These guides cover the following topics:

1. **Implementation** – Provides guidance from planning to the deployment and maintenance of HIFIS.
2. **Installation** – Describes the technical requirements, architecture and installation procedures.
3. **Configuration** – Explains the configuration procedures to align with community's business needs.
4. **User instruction** – Gives a description of each function and how to use it.

Communities using HIFIS become part of a pan-Canadian movement that is building a data-driven culture to advance the understanding of homelessness in Canada. By working together, we can support the most vulnerable Canadians in providing access to safe, stable and affordable housing and reduce chronic homelessness nationally by 50% by 2027-2028.



ABOUT THE HIFIS USER GUIDE



The User Guide is intended to provide assistance to HIFIS trainers or front-line workers on how to use HIFIS. Each module covered in the User Guide includes a description and HIFIS screen captures to help users navigate the system. This is followed by a step-by-step process for each function within the module.

The User Guide begins with the Client Information module, in which HIFIS users enter the information of new clients. It is followed by the Client Management module sections, where users enter or modify information on existing clients. The User Guide also includes a section on Other HIFIS Functions and a section on the Administration modules that cover other aspects of the system.

As communities are expected to configure HIFIS to allow users to only view and access

the modules and information they need to do their job (see Implementation and Configuration Guides), only certain sections of this User Guide may be relevant to users. For this reason, communities are invited to modify and tailor this guide to their employees' needs.

For more information to support the implementation and management of HIFIS, you can visit the [Homelessness Learning Hub](https://www.hifis.ca/homelessness-learning-hub).

To stay connected and get the latest updates on HIFIS, please confirm your interest by sending your consent at support@hifis.ca.

For any questions or enquiries, you can contact the HIFIS Clients Support Centre at **1-866-324-2375** or support@HIFIS.ca

Commons Icons in HIFIS

	Add		Export to Excel
	Add Reservation		Express Book In
	Add Book In or Log In		Filter
	Admissions		Get Help
	Book Out		Layout
	Book Out Selected Clients		Manage
	Calendar		Next or Merge
	Cancel		Preview and End Export
	Client has Active Watch Concern		Refresh
	Data Export or Information or Client Activity Log		Required Field
	Delete		Run Report
	Deselect All		Save
	Display		Search
	Download		Select All
	Enable Field Description		Send
	Edit or Fields or Table		Time/Hour
	Expand/Collapse Categories		User Account

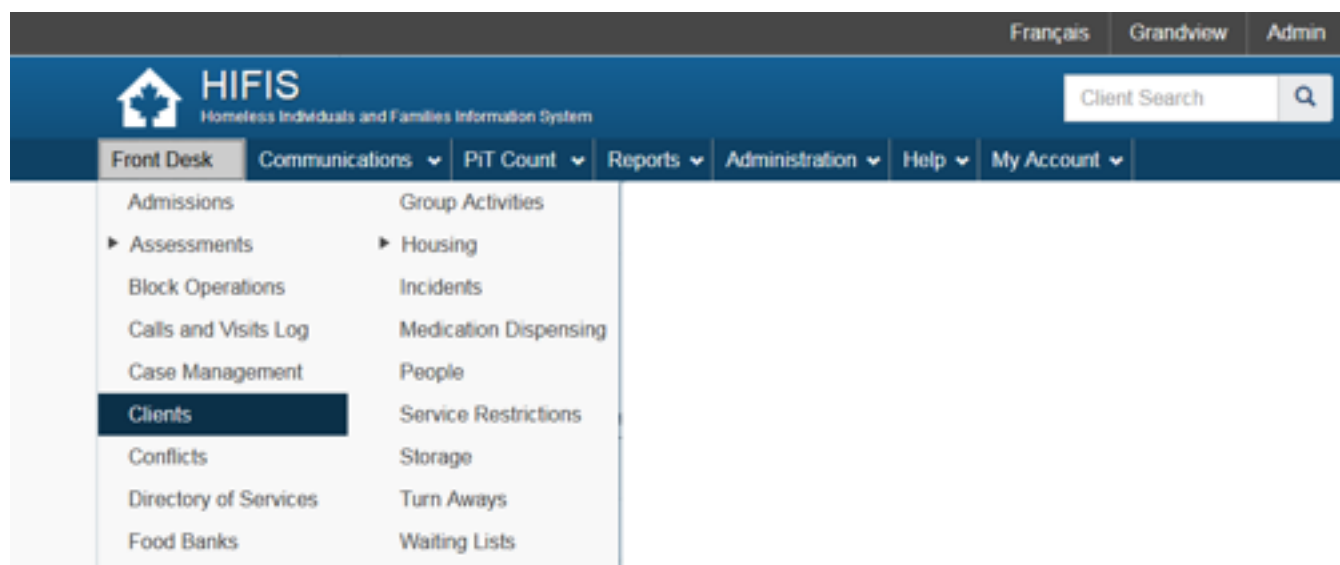
Note: All information pertaining to service providers found in the guide's illustrations are fictional and for demonstration purposes only.

Hint: Sections of this guide can be customized according to the configuration and modules used by service providers. The customized guide can then be used as a tailored training tool.



CLIENT INFORMATION

Tasks in the following section can be performed under Clients from the Front Desk menu. The Client List page allows you to add a new client into the system or select an existing client to add or edit information.



Tip: There are three ways to access the Client List.

- 1) From the Front Desk menu, select Clients;
- 2) Enter the client's name, file number or ID number in the search box in the top right of the screen;
or,
- 3) Select the magnifying glass icon next to the search box at the top right of the screen.

Client List

[All](#)
[Active](#)
[Inactive](#)
[Deceased](#)

Showing 1 to 10 of 28 entries | Show entries

ID	Full Name	Gender	Alias	Date of Birth	Age	File Number	Action
480	Anderson, Aaron	Male		1950-02-07	69	1016651	
481	Anderson, Louisa	Female	Lou	1955-06-25	64	1016652	
1	Anonymous, Anonymous	Unknown		1930-01-01	89		
473	Baker, Olivia	Female	Liv	1980-06-11	39	1015874	
758	Bear, Pablo (Inactive)	Other		1967-03-14	52	1012764	
955	Beaulieu, Jean	Male		1990-05-06	29	1011347	
672	Breida, Matthew	Male	Matt	1985-07-23	34	1015254	
757	Castle, Deidre	Female		1989-04-05	30	1010874	
732	Connor, James (Inactive)	Male		1995-05-05	24	1010030	
482	Costello, George	Male		1978-01-01	41	1010482	

1 2 3 Next →

Add Client


The Client - Vitals page allows you to edit a client's personal information.

CLIENT CONTACT INFO

Client Information
▾

Client Management
▾

+



Louisa Anderson

Consent Status	Active
File Number	1016652
Current Stay	Main Shelter - Room 101 : 101-1
Gender	Female
Date of Birth	1955-06-25 (63)
Family	Yes
Alias 1	Lou

Client Information
▾

[Indigenous Status](#)
[Consent](#)
[Contacts](#)
[Documents](#)
[Education](#)
[Family](#)
[Financial Profile](#)
[Health Information](#)
[Housing History](#)
[Identification](#)
[Various Factors](#)
[Vehicles](#)
[Veteran](#)
[Client Details](#)

Indigenous Status
+

Geographic Region
+

Consent State
+

Consent is
+

Edit
+

Client - Vitals

Vitals

Contact Info

Physical Appearance

Languages

Comments

Consent Type	Explicit
Full Name	Louisa Anderson
Gender	Female
Alias 1	Lou
Alias 2	
File Number	1016652
Date of Birth	1955-06-25
Date of Birth Known	Yes
Approximate Age	63
Information Verified	Yes
Country of Birth	Canada
Province/Territory of Birth	Prince Edward Island
City of Birth	Kensington
Disability	No
MedicAlert	No
Veteran Status	Not a Veteran
Citizenship/Immigration	Canadian Citizen - Born in Canada
Indigenous Status	Non-Indigenous
Geographic Region	This Region / County
Consent State	Active
Consent is	Visible

Created by: Smith, Marc
Created: 2018-08-16

Updated by: Smith, Marc
Date Updated: 2019-02-28

Edit

Display Vitals History

CLIENT CONTACT INFORMATION

The Contact Information module is used to record the client's personal contact information, such as phone number or email address..

How to Record a Client's Contact Information

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add contact information by clicking the name of the client.
3. On the Client - Vitals page, click the Contact Info tab and select Add Contact Information.
4. Under Add Contact, select the means of communication. Depending on the value selected, different fields will appear.
5. Enter the primary information, such as the phone number or email address, in the Value field and additional information in any other fields that have appeared.
6. Click the Save button.

Note: The contact information will now appear under the Contact Info tab.

CLIENT PROFILE PICTURE

The Profile Picture module allows users to add and modify the picture associated to the client's profile.

How to Assign a Profile Picture to a Client's Profile

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a profile picture to by clicking the name of the client.
3. On the Client - Vitals page, click the Add Profile Picture button located above the gray silhouette.
4. On the Edit Profile Picture page, click the Browse button.
5. Browse for the picture you want to assign to the client's profile, and click the Open button to select it.
6. Click the Save button.

HELPFUL HINT:



When the Browse button is selected, HIFIS will automatically recognize if a camera is available and prompt you to use your camera or select a picture from a list. This means that if you are accessing HIFIS from a mobile device, you can take a picture of the client with the device's built-in camera. Or, if accessing HIFIS from your computer, you can use a webcam to take a picture of the client.

CLIENT VITALS

The Client - Vitals page is the landing page when accessing a client's profile. From this page, you can view or edit the client's vitals - the basic information about a client that is required when creating a Client record, add a comment about the Client's file and access all information and activities linked to the client record.

When accessing activities linked directly to the client, two menus will always be available: Client Information and Client Management. The Client Information menu is where detailed information about the client can be entered whereas the Client Management menu allows direct access to the HIFIS modules where you can track the activities done with a client. Some of the HIFIS modules in the Client Information and Client Management menus have a Plus button next to them. This button is a shortcut that allows you to add a corresponding record immediately. Please note that this feature should only be used if you know that the record does not already exist.

How to Add a Client Record

1. From the Front Desk menu, select Clients.
2. From the Client List page, click the Add Client button.
3. Enter the client's last and first name, and, if applicable, their middle name.

Note: After entering the client's last name, in order to avoid client duplication, HIFIS checks the database in real time to see if an existing Client record matches the inputted information. If a match is found, the result will be shown on the right-hand side of the page.

4. If applicable, enter any known aliases (i.e. nicknames, other names) in the Alias fields.
5. Select whether or not the client's date of birth is known. Depending on the option selected, different fields will become available.
6. If the client's date of birth is known, enter it in the Date of Birth field. If the date of birth is not known, enter the client's approximate age.
7. Select their gender.
8. If applicable, indicate whether the client has a disability or MedicAlert information.
9. Indicate whether the Client record should be hidden or visible when performing a client search.
10. Select the client's veteran status, citizenship/immigration status and Indigenous status.
11. If applicable, select the Geographic Region that the client lives in or has most recently lived in.
12. Once a client's record has been created, HIFIS will automatically generate an ID number. If your community has a different file number structure, enter it in File Number.
13. Click the Save button or click the Save and go to Book In button to immediately book the client into the service provider.

How to Edit a Client's Vital Information

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the appropriate Client record by clicking the name of the client.
3. At the bottom of the Vitals tab, click the Edit button.

- On the Client – Edit Vitals page, you can edit the existing information or add any missing or additional information.
- When modifying a client's vital information, the Client State field appears. By default, the client is 'Active'. To remove a client from the Client List, choose inactive or deceased. If Deceased is selected, enter information in the additional fields.
- Click the Save button.

HELPFUL HINT:

A log of every interaction between a HIFIS users and the client record can be displayed by clicking the Client Activity Log button next to the client's name in the client sidebar.

How to Add a Comment to a Client Record

- From the Front Desk menu, select Clients.
- On the Client List page, select the appropriate Client record by clicking the name of the client.
- From the Comments tab, click the Add Comment button.
- Enter a subject and comments.
- Click the Save button.

HELPFUL HINT:

Users can view client comments and reply to them in order to add additional information.

CONSENT

The Consent module is used to record any consent given or denied by the client related to service provider services. You can indicate if the consent was given, at which date and even attach signed documents.

How to Record a Client's Consent

- From the Front Desk menu, select Clients.
- On the Client List page, select the Client record which you want to add a consent record.
- On the Client - Vitals page, click the Client Information menu and select Consent.
- On the Client – Consent List page, select the Add Consent button.
- On the Client – Add Consent page, select the type of consent that applies.
- Confirm the start date and, if applicable, enter the end date.
- If applicable, click the Browse button to select a file you want to upload. Browse for the document you want to add to the record, and click the Open button to select it.

8. If applicable, add any additional information concerning the client's consent in the Comment field.
9. Select the Save button.

CONTACTS

The Contacts module is used to record individuals that the service provider may need to contact on behalf of a client. This might include, for example, an emergency contact, a landlord or a parole officer. The Contact record must be linked to either another client or a People record.

How to Record a Client's Contacts

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a contact person by clicking the name of the client.
3. From the Client - Vitals page, click the Client Information drop-down list and select Contacts.
4. Click the Add Contact button.
5. From the Client - Add Contact page, type to search for an existing client or an existing person in the Contact Name field then select them from the search results.
6. Select the relationship between the client and the contact.
7. Click the Save button.

COUNTRY OF BIRTH

The Country of Birth module is used to record where the client was born. Use this module to record details on those who were born outside of Canada.

How to Record a Client's Country of Birth

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the appropriate Client record by clicking the name of the client.
3. On the Client - Vitals page, click the Vitals tab.
4. From the Vitals tab, select the Edit button.
5. From the Client - Edit Vitals screen, select the country of birth from the Country of Birth drop down list. If Canada is selected, choose the province or territory and the city. If United States is selected, choose the state and enter the city.
6. Click the Save button.

DIETARY REQUIREMENTS

The Dietary Requirements module allows users to track any food items that a client should avoid, or any food item that is essential to their diet.

How to Add a Dietary Food Item

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a dietary requirement by clicking the name of the client.

3. On the Client - Vitals page, click the Client Information menu, select Health Information and go to the Dietary Requirements tab.
4. From the Dietary Requirements tab, click the Add Dietary Requirement button.
5. Select the reason that the client has a dietary requirement in the dietary requirement category.
6. Select the food item.
7. Indicate if the food item must be avoided or must be consumed.
8. If the dietary requirement is not necessary at the moment, change Active to 'No.'
9. Click the Save button.

How to Edit a Dietary Requirement

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the appropriate Client by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu, select Health Information and go to the Dietary Requirements tab.
4. From the Dietary Requirements tab, locate the food item you want to modify. Click the Edit button or click the Delete button to remove the food item from the list.
5. On the Edit Dietary Requirement Item page, you can edit the existing information or add any missing or additional information.
6. Click the Save button.

DOCUMENTS

The Documents module allows users to attach any relevant documents to a client's profile, such as a scanned driver's licence, letters from professionals and consent letters. If a piece of identification has been added in the Identification module for the client, it will appear on the Document list as well.

How to Add a Document to a Client Record

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a document by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Documents.
4. Click the Add Document button.
5. Click the Browse button to select which file you want to upload.
6. If applicable, enter the document name.
7. Indicate whether the document is confidential.

Note: Documents that are made confidential will only be seen by users who have the ability to view confidential documents.

8. If applicable, enter a description of the document.
9. Click the Save button.

EDUCATION

The Education module allows users to track a client's current or highest level of schooling.

How to Add an Education Record

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add an Education record by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Education.
4. Click the Add Education button.
5. From the Client - Add Education page, select a school from the drop-down list.
6. Select the education level and indicate whether it was completed.
7. Confirm the start date and, if applicable, enter the end date.

8. If applicable, add any additional information concerning the client's education in the Comments field.
9. Click the Save button.

How to Edit an Education Record

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record for which you want to modify the Education record by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Education.
4. On the Client - Education page, locate the record you want to modify then click the Edit button.
5. On the Client - Edit Education page, you can edit the existing information or add any missing or additional information.
6. Click the Save button.

FAMILY

The Family module is used to keep track of a client's family members and the role each member has in the family. Family roles include any dependents, family head and partner. When a client is linked to a family, they can be managed as a family unit for certain activities, such as book-ins.

How to Create a Family Unit

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record of one of the clients that will be part of the new family unit by clicking the name of the client.
3. From the Client - Vitals page, click the Client Information drop-down list and select Family.

Note: The selected client is automatically assigned as the family head, but this can be changed after adding additional family members.

4. On the Client - Family page, click the Add Member button.
5. From the Add Member page, type to search for an existing client in the Family Member Name field then select the client from the search results.

Note: If the client is not already in the HIFIS database, click the Close button and click the Create and Add Member button instead. Fill in the mandatory fields in the Create and Add Member page, then click the Save button.

6. Select their family role and their relationship to the family head.
7. Confirm the start date of the relationship and, if applicable, the end date.
8. Click the Save button.
9. To add additional family members, repeat steps 4 through 9.

How to Edit a Family Unit

1. From the Front Desk menu, select Clients.
2. On the Client List page, select a Client who is a member of the family unit you want to modify by clicking the name of the client.
3. From the Client - Vitals page, click the Client Information drop-down list and select Family.

4. On the Client - Family page, you can edit the details of a family member by clicking the Edit button. To remove the member from the family unit, enter an End Date to the relationship within the family.
5. Click the Save button.

How to Add a Family Member

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client who is already a member of the family unit by clicking the name of the client.
3. From the Client - Vitals page, click the Client Information drop-down list and select Family.
4. On the Client - Family page, click the Add Member button.
5. From the Family Member Details page, type to search for an existing client in the Family Member Name field, then select the client from the search results.

Note: If the client is not already in the HIFIS database, click the Add Client button to add them. Fill in the mandatory fields in the Add Client pop-up window, then click the Save button.

6. Select their family role and their relationship to the family head.
7. Confirm the start date of the relationship and, if applicable, enter the end date.
8. Click the Save button.
9. To add additional family members, repeat steps 4-8.

How to Join a Family

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record that you want to join to an existing family unit by clicking the name of the client.
3. From the Client - Vitals page, click the Client Information drop-down list and select Family.
4. On the Client - Family page, click the Join a Family button.
5. In the Search field, type the name of the family head of the family unit to which

you want to join this client and select the Search button.

6. From the search results, select the Join a Family button to join the client to the appropriate family.
7. On the Family Member Details page, select the client's family role and their relationship to the family head.
8. Confirm the start date of the relationship and, if applicable, the end date.
9. Click the Save button.

FINANCIAL PROFILE

The Financial Profile module allows users to help clients manage their finances by tracking their income, expenses, assets and debts. Once values are added, visual representations of the client's financial profile will appear.

How to Add an Income

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a source of income by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Financial Profile.
4. On the Client - Financial Profile page, select the Incomes tab, then click the Add Income button.
5. Select the income type.

6. If Employment is selected, select the employment and employer type, then enter the employer's name.
7. Select the pay frequency.
8. If Hourly or Daily is selected, either Hours or Days per Month will appear. Enter the number of hours or days worked per month, if applicable.
9. If applicable, enter the wage for the pay frequency selected (i.e. if Hourly was selected, enter the hourly wage).
10. Confirm the start date. If necessary, you can change this date manually. If applicable, enter the end date.
11. Indicate whether this is the client's primary income.
12. Click the Save button.
13. To add additional sources of income, repeat steps 4-12.

How to Add an Expense

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add an expense by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Financial Profile.
4. On the Client - Financial Profile page, select the Expenses tab then click the Add Expense button.
5. Select the expense type.
6. Enter the monthly amount. Confirm the start date of the expense. If needed, you can change this date manually. If applicable, enter the end date.
7. Indicate whether or not the expense is essential.
8. Click the Save button.
9. To add additional expenses, repeat steps 4-8.

How to Add an Asset

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add an asset by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Financial Profile.
4. On the Client - Financial Profile page, select the Assets tab then click the Add Asset button.
5. Select the asset type.
6. Enter the amount.

7. Select the country where the asset is located. If Canada is chosen, select the applicable province.
8. Confirm the start date. If needed, you can change this date manually. If applicable, enter the end date.
9. If applicable, enter a description of the asset.
10. Click the Save button.
11. To add additional assets, repeat steps 4-10.

How to Add a Debt

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a debt by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Financial Profile.
4. On the Client - Financial Profile page, select the Debts tab, then click the Add Debt button.
5. On the Add Financial Debt page, select the debt type.
6. Enter the amount.
7. Select the country where the debt is located. If Canada is chosen, select the province where the debt was incurred.
8. Confirm the start date. If needed, you can change this date manually. If applicable, enter the end date.
9. If applicable, enter a description of the debt.
10. Click the Save button.

How to Edit a Client's Financial Profile

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record for which you want to modify the financial profile by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Financial Profile.
4. On the Client - Financial Profile page, select the Income, Expenses, Assets or Debts tab.
5. Locate the record you want to modify from the applicable list and click the Edit button.
6. On the Edit page, you can change the existing information or add any missing or additional information.
7. Click the Save button.

HEALTH

The Health module is used to log any health issues a client has. It is important to note that HIFIS is not a medical database and any health information entered can be difficult to confirm and should be reported on with caution.

How to Record a Health Issue

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to record a health issue by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Health Information.
4. On the Client - Health page, click the Add Health Record button.
5. Select the client's health issue.
6. Confirm the start date. If needed, you can change this date manually.
7. If applicable, add an end date.
8. If applicable, add a description about the client's health issue and indicate whether or not the health issue is self-reported, suspected, diagnosed and/or contagious.
9. If applicable, enter the client's symptoms and the name of any medication and/or treatments the client needs to receive for the health issue.
10. Click the Save button.

Note: Track detailed information regarding the client's medication in the Medication module.

HOUSING HISTORY

The Housing History module is used to keep track of the client's past and present housing situation. Once a Housing History record has been added to a client's profile, you can record rent subsidies given to the client in the Subsidies tab.

Once a housing placement has been confirmed and the client has moved into the housing unit, a Housing History record is automatically created to help track the client's housing history.

How to Record a Client's Housing

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add housing by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Housing History.
4. From the Client - Housing History page, click the Add Housing button.
5. Select the type of housing.
6. Confirm the start date. If needed, you can change this date manually. If applicable, enter the end date.
7. If applicable, enter the building name and the housing's address.
8. Enter the Country where the housing is located.
9. If applicable, enter the geographic region, the rent amount and contact information for the location in the Telephones, Mobile Phone and Email Address fields.
10. Click the Save button.

How to Edit a Client's Housing

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record whose Housing record you want to modify by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Housing History.
4. On the Client - Housing History page, locate the housing you want to modify and click the Edit button.
5. On the Client - Edit Housing History page, you can edit the existing information or add any missing or additional information.
6. Click the Save button.

How to Record a Rent Subsidy

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record whose Housing record you want to modify by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Housing History.
4. On the Client - Housing History page, click the Add Housing Loss Prevention button.
5. From the Add Housing Loss Prevention page, select a reason for the service.
6. Confirm the start date. If needed, you can change this date manually.
7. Select the caseworker assigned to the case.
8. If applicable, select the program that is funding the subsidy.
9. If applicable, enter a date for the first follow-up.
10. Click the Save button.

11. From the Housing Loss Prevention Details page, go to the Subsidies tab and click the New Subsidy button.
12. From the New Subsidy page, select the program funding the rent subsidy.
13. Confirm the start date. If needed, you can change this date manually.
14. Select a reason for the service.
15. If applicable, select an end date for the subsidy.
16. Enter the amount of the subsidy.
17. If applicable, enter the date on which the subsidy is paid.
18. If applicable, select the frequency of the subsidy.
19. If applicable, enter any additional information about the rent subsidy in the Comment box.
20. Click the Save button.

HELPFUL HINT:

The information found in the Income and Rent fields is taken from other HIFIS modules. The Income amount is generated from the client's financial profile and calculates the client's total income. The Rent amount is the amount entered when the Housing record was created.

IDENTIFICATION

The Identification module allows users to add multiple pieces of identification to a client's profile, such as their Health Card or Driver's Licence number. Once a piece of identification has been added, they will be listed in the Documents module as well.

How to Add a Client's Piece of Identification

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record that you want to add a piece of identification to by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Identification.
4. On the Client - Identification List page, click the Add Identification button.
5. Select the type of identification.
6. Enter the relevant identification number.
7. If applicable, add a description of the piece of identification being added.
8. If applicable, click the Browse button to add an attachment to the record. Browse for the document you want to add to the record, and click the Open button to select it.
9. Click the Save button.

INDIGENOUS STATUS

The Indigenous Status module is used to record further details about the client's Indigenous status, such as the band name and treaty number, or to change the status entered.

How to Record Details about a Client's Indigenous Status

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record for which you want to change the indigenous status details by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Indigenous Status.
4. On the Indigenous Status page, the client's current Indigenous status will be indicated. If the client is non-Indigenous, click the Add button to change it and select another status in the drop-down list. Otherwise, click the Edit button to add additional information.
5. If applicable, select the province or territory.
6. Depending on the value selected, different values will appear on the Band Name and Home Reserve drop-down lists.
7. If applicable, select the band name.
8. If applicable, enter the treaty number.
9. If applicable, select the name of the home reserve.
10. Click the Save button.

LANGUAGES

The Languages module is used to record any languages spoken or understood by a client.

How to Record Languages Spoken by a Client

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a language by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Languages.
4. On the Languages tab, click Add Language.
5. Select the language.
6. Indicate whether or not the language is the language in which the client wishes to be served.
7. Click Save. The language will now appear in the Languages tab.

MEDICATION

The Medication module is used to record which medication a client is taking. Track when and which medication was dispensed to the individual client, or use the Medication Dispensing module to dispense medication to multiple clients at once.

How to Add a Medication Record

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a Medication record by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Health Information.
4. Under the Medication tab, click the Add Medication button.
5. Enter the name of the medication.
6. If applicable, select the related health issue from the list of health issues entered in the Health module for the client.
7. Select the pharmacy from which the medication was dispensed.
8. In the Prescriber field, type to search for an existing person, then select the person from the search results.
9. Select when the medication can or should be dispensed in the Recurrence field.
10. Enter the dosage.
11. If applicable, enter the maximum number of doses allowed per day.
12. Confirm the start date. If needed, you can change this date manually. If applicable, enter the end date.
13. If applicable, enter the initial pill count, the fulfilment date and refill date.
14. If applicable, add any additional information concerning the medication in the Comments field.
15. Click the Save button.

Note: If the pharmacy is not already in the HIFIS database, click the Add Pharmacy button to add it. Fill in the mandatory fields in the Add Pharmacy pop-up window, then click the Save button.

PHYSICAL APPEARANCE

The Physical Appearance module is used to record a client's physical appearance and distinguishing features.

How to Record a Client's Physical Appearance

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add physical characteristics by clicking the name of the client.
3. On the Client - Vitals page, go to the Physical Appearance tab.
4. To enter the client's height and weight, hair and eye colour, click the Edit button.
5. If applicable, enter the client's height in centimetres or in feet and inches. If the height is entered in centimetres, HIFIS will

record to which you want to add physical characteristics by clicking the name of the client.

3. On the Client - Vitals page, go to the Physical Appearance tab.
4. To enter the client's height and weight, hair and eye colour, click the Edit button.
5. If applicable, enter the client's height in centimetres or in feet and inches. If the height is entered in centimetres, HIFIS will

automatically convert the height into inches, and vice versa.

6. If applicable, enter the client's weight in kilograms or in pounds. If the weight is entered in kilograms, HIFIS will automatically convert the weight into pounds, and vice versa.
7. Select the client's hair and eye colour.
8. Click the Save button.

9. To add distinguishing features such as a tattoo or piercing, click Add Distinguishing Feature.
10. From the expanded content, select the distinguishing feature.
11. If applicable, add any additional information concerning the distinguishing feature in the Description
12. Click the Save button.

VARIOUS FACTORS

The Various Factors module allows service providers to indicate factors that may have led to the client's need for service. There are four types of factors:

1. Contributing Factors are factors that have, in some way, played a role in the client's life and led to them using the service provider's facilities. These can be factors such as Anger Management, Substance Abuse, and Refugee Status.
2. Behavioural Risk Factors are Client behaviours about which HIFIS users may need to be aware for the safety of the client, other clients and staff members. Behavioural factors include Drug use, Vandalism, Theft, and Staff Dependency.
3. Watch Concerns is a client's perceived risk of homelessness. If the Status changes, a new entry can be made for the client in order to track a client's risk of homelessness throughout time.

4. Life Events are events that are not necessarily related to a client's reasons for using a service provider's facilities, but are nonetheless important to completing a client's profile. Life Events include events such as marriage, and childhood trauma.

How to Add a Contributing Factor

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a contributing factor by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Various Factors.
4. On the Client - Various Factors page, select the Contributing Factors tab then click the Add Contributing Factor button.
5. On the Client - Add Contributing Factor page, select a contributing factor.

6. Confirm the start date. If needed, you can change this date manually. If applicable, enter the end date.
7. If applicable, add any additional information concerning the contributing factor in the Comments field.
8. Click the Save button.

How to Add a Behavioural Risk Factor

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a behavioural risk factor by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Various Factors.
4. On the Client - Various Factors page, select the Behavioural Risk Factors tab then click the Add Behavioural Risk button.
5. On the Client - Add Behavioural Factor page, select a behavioural risk factor.
6. Confirm the start date. If needed, you can change this date manually. If applicable, enter the end date.
7. If applicable, select the severity of the behavioural factor.
8. If applicable, add any additional information concerning the behavioural factor in the Comments field.
9. Click the Save button.

How to Record a Watch Concern

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record for which you want to record a watch concern by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Various Factors.
4. On the Client - Various Factors page, select the Watch Concerns tab, then click the Add Watch Concern button.
5. On the Client - Add Watch Concern page, select the watch concern.
6. Confirm the start date. If needed, you can change this date manually. If applicable, enter the end date.
7. If applicable, select the severity of the watch concern.
8. If applicable, add any additional information concerning the watch concern in the Comments field.
9. Click the Save button.

How to Record a Life Event

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a life event by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Various Factors.
4. On the Client - Various Factors page, select the Life Events tab, then click the Add Life Event button.

5. On the Client - Add Life Event page, select the life event. If a 'Legal' value is selected, a section with more fields will appear.
6. Confirm the start date. If needed, you can change this date manually. If applicable, enter the end date.
7. If any of the Legal values were chosen, enter information in the Legal fields.
8. Click the Save button.

How to Edit a Client's Various Factors

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record whose Various Factors record you want to modify.
3. On the Client - Vitals page, click the Client Information menu and select Various Factors.
4. On the Client - Various Factors page, select the appropriate tab.
5. Find the factor you want to modify and click the Edit button.
6. You can edit the existing information or add any missing or additional information.
7. Click the Save button.

VEHICLES

The Vehicles module is used to record information about the client's vehicle.

How to Record a Client's Vehicle

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a vehicle by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Vehicles.
4. On the Client - Vehicles page, click the Add Vehicle button.
5. Enter the make of the vehicle.
6. If applicable, enter the model, year, colour and licence plate of the vehicle.
7. Enter the start date and, if applicable, the end date.
8. Click the Save button.

VETERAN

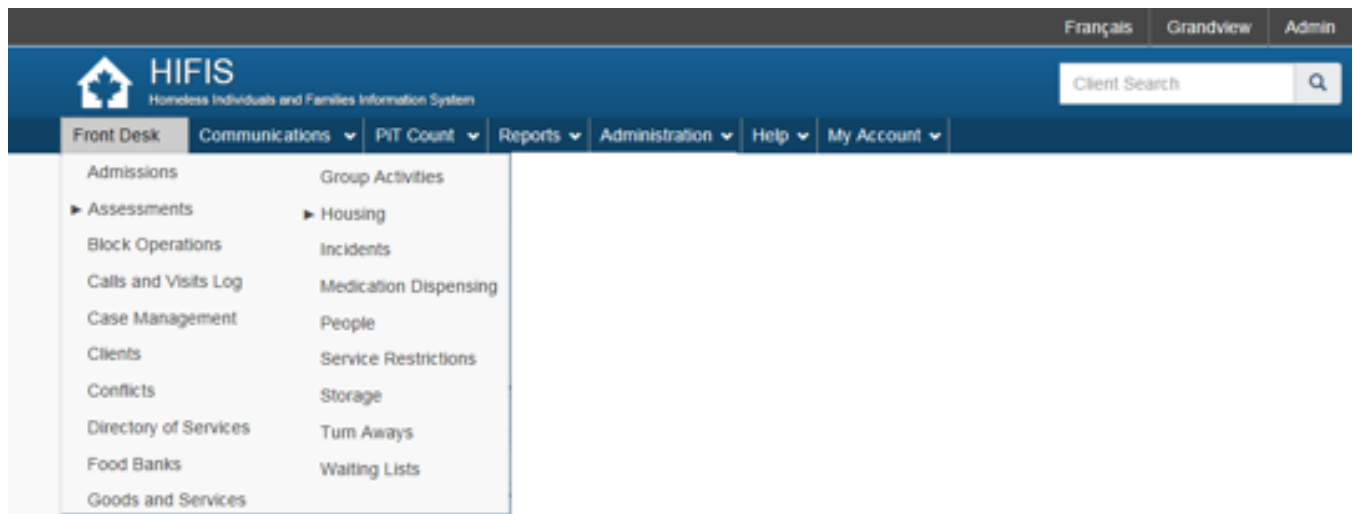
The client's veteran status is entered when the Client record is first created. More details of their service can be entered in the Veteran module.

How to Document a Client's Veteran Service

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the appropriate Client record by clicking the name of the client.
3. If the client does not have a Veterans Service Number, go to Step 4. On the Client - Vitals page, click the Client Information menu and select Identification. Click the Add Identification button and select Veterans Service Number for the Identification Type and enter the identification number. If applicable, enter a description for the Identification or an attachment. Click the Save button.
4. Click the Client Information menu and select Veteran.
5. Select the appropriate Status and click the Save button.
6. On the Client - Add Veteran Service page, enter the dates that the client was in the service.
7. Select which element of the armed forces applies to the client's service.
8. Select the client's rank within the armed forces.
9. Select the reason the client was discharged from the armed forces.
10. Select the armed conflict in which the client took part.
11. If applicable, select the role the client had in the armed conflict.
12. If applicable, select other details of a client's service, such as awards won, or injuries received, in the Other Service Details field.
13. If applicable, enter the name of the VAC caseworker.
14. If a Veterans Service Number was provided at Step 3, it will appear in the Veterans Service Number field.
15. If applicable, add any additional information concerning the veteran service in the Comments field.
16. Click the Save button.



Tasks in the following section can be performed by selecting the appropriate module from the Front Desk menu.



ADMISSIONS

The Admissions module encompasses the Stays, Reservations and Bed Availability features. The Stays feature allows users to see who is currently booked into their service provider, as well as book clients or families in and out. Select the Manage Rooms and Beds button under the Booked In tab for a visual representation of those that are currently booked in. Use this feature to move clients from one bed to another and to manage details of the rooms and beds within the service provider.

The Reservations feature is used to reserve a specific room and bed for a client's future stay at the service provider. Reservations remain valid until the client is booked in, the reservation is deleted, or the date has passed.

By selecting the Bed Availability tab, users can view information regarding the bed availability across all shelters in the HIFIS database. This includes occupancy rate, available beds, total number of beds and total number of reservations for today. Select the Information button in the Action column to view the service provider's contact information and client visibility.

To book in a client, make a reservation or to consult information on bed availabilities, you can navigate through the respective tabs:

How to Book in a Client

1. From the Front Desk menu, select Admissions.
2. On the Admissions page, the Booked In tab will display. Click the Add Book In button.
3. On the Book In page, type to search for an existing client in the Client Name(s) field, then select the client from the search results. To book in additional clients under the same stay record, start typing the next name in the Client Name(s) field and select it or click Book In Family to select all family members.
4. Confirm the start date and time. If needed, you can change this date and time manually.
5. If applicable, enter a departure date in the Expected Book Out Date field. This value is used as a reference; it does not force a book out on this date.
6. Select the reason for service from the drop-down list. The reason for service should reflect the main reason the client is staying at the service provider.
7. If applicable, select the program that is funding the stay.
8. If applicable, indicate whether or not Evacuation Assistance is required.

Admissions

Booked In

Reservations

Bed Availability

9. If applicable, select where they are being Referred From and who they are being Referred By.
10. If applicable, enter a time in the Late Pass Time and Wake Up Time fields.
11. If applicable, indicate whether or not the client is intoxicated at book in.
12. If applicable, add any additional information concerning the stay in the Comments field.
13. Select the Next button to go to the Book In - Bed Selection page.
14. On this page, the service provider layout appears at the bottom of the page with the client's name located at the top. To assign a bed to a client, simply click on the client's name (it will turn orange), then click on the appropriate bed icon. When a client is successfully placed into a bed, the bed icon will turn green. A blue pop-up window will appear at the top right of the page to indicate that the selection was saved successfully. Repeat this step for all clients.

HELPFUL HINT:



When on the Book In - Bed Selection page, you can select or deselect filters on the Control Panel side bar menu to modify the view. For example, if the Hide Occupied Beds checkbox is selected, only the unoccupied beds will appear in the service provider's layout.

How to Add a Reservation

1. From the Front Desk menu, select Admissions.
2. On the Admissions page, select the Reservations tab, then select the Add Reservation button.
3. From the Reservation page, type to search for an existing client in the Client Name(s) field, then select the client from the search results. To make a reservation for additional clients under the same stay record, start typing the next name in the Client Name(s) field and select it.
4. Confirm the start date and time. If needed, you can change this date and time manually.
5. If applicable, enter the expected book out date.
6. Select the reason for service from the drop-down list. The reason for service should reflect the main reason the client is staying at the service provider.
7. If applicable, enter who the client was referred from and/or select who the client was referred by.
8. If applicable, add any additional information concerning the reservation in the Comments field.
9. Select the Next button to go to the Reservation - Bed Selection page.

10. The service provider layout appears at the bottom of the page with the client's name located at the top. To assign a bed to a client, simply click on the client's name (it will turn orange), then click on the appropriate bed icon. When a client is successfully placed into a bed, the bed icon will turn green. A blue pop-up window will appear at the top right of the page to indicate that the selection was saved successfully. Repeat this step for all clients.

11. Click the Save button.

How to Book out a Client

1. From the Front Desk menu, select Admissions.
2. From the Admissions page, locate the customer whose departure you want to register and click the Book Out button.
3. Check the accuracy of the date and time of departure. If necessary, it is possible to change the date and time manually.
4. Select the reason the customer is leaving the service provider.
5. In this case, select the location where the client is referred.
6. If so, add any comments you may have regarding the departure of a customer in the Comments field.
7. Click the Book Out button.

HELPFUL HINT: UNDO A BOOK OUT



If you need to cancel a recent book out, there's no need to book the client in again. Simply go to the client's Admissions page from the Client Management menu and select the Undo Latest Book Out button.

How to Book in a Family

1. From the Front Desk menu, select Admissions.
2. From the Admissions page, select the Booked In tab then click the Add Book In button.
3. On the Add Book In page, type to search for a family member in the Client Name(s) field, then select their name from the search results.

Note: Any member of the family can be selected at first, as long as they are all part of the same family unit. It does not have to be the family head.

4. Click the Book In Family button. All family members will be added. If applicable, deselect those that should not be included in the book in.
5. Confirm the start date and time. If needed, you can change this date and time manually.
6. If applicable, enter a departure date in the Expected Book Out Date field.
7. Select the reason for service from the drop-

down list. The reason for service should reflect the main reason the client is staying at the service provider.

8. If applicable, select the program that is funding the stay.
9. If applicable, indicate whether or not evacuation assistance is required.
10. If applicable, select where they are being Referred from and who they are being Referred by.
11. If applicable, enter a time in the Late Pass Time and Wake Up Time fields.
12. If applicable, indicate whether or not a member of the family is intoxicated.
13. If applicable, add any additional information concerning the stay in the Comments field.
14. Select the Next button to go to the Book In - Bed Selection page.
15. On this page, the service provider layout appears with the clients' names located at the top. To assign a bed to a client, simply click on the client's name (it will turn orange), then click on the appropriate bed icon. When a client is successfully placed into a bed, the bed icon will turn green. A blue pop-up window will appear at the top right of the page to indicate that the selection was saved successfully. Repeat this step for all clients.
16. Click the Save button.

How to Edit Stay Details

1. From the Front Desk menu, select Clients.
2. On the Client List page, locate the Client record whose stay information you want to modify.
3. Click the Client Management menu and select Admissions.
4. From the Client - Admission List page, locate the stay and select the Edit button.
5. On the Client - Edit Stay page, you can edit the existing information or add any missing or additional information.

HELPFUL HINT:



If modifying a current stay, you can also modify it by selecting the Edit button from the Booked In tab of the Admissions module.

How to Add a Program to a Stay Record

1. From the Front Desk menu, select Clients.
2. On the Client List page, locate the Client record whose stay program information you want to modify.
3. Click the Client Management menu and select Admissions.
4. From the Client - Admissions page, locate the stay you want to modify and select the Edit button.
5. On the Client - Edit Stay page, select the Programs button.
6. In the Programs section, select the Add Programs button.
7. On the Change Programs page, select the program that will be associated with the client's stay.

Note: A program must have been previously added from the Administration menu (see the “How to Add a Program” help topic).

8. Select the Add Programs button.

How to Edit a Program Associated with a Stay Record

1. From the Front Desk menu, select Clients.
2. On the Client List page, locate the Client record whose stay program information you want to modify.
3. Click the Client Management menu and select Admissions.
4. From the Client - Admissions page, locate the stay and select the Edit button.
5. On the Client - Edit Stay page, select the Programs button.

6. In the Programs section, locate the program you want to modify and select the Edit button.
7. On the Edit Program Details page, you can change the start and end dates.
8. Select the Save button.

How to Delete a Program Associated with a Stay Record

1. From the Front Desk menu, select Clients.
2. On the Client List page, locate the Client record whose stay program information you want to delete.
3. Click the Client Management menu and select Admissions.
4. From the Client - Admissions page, locate the stay and select the Edit button.
5. On the Client - Edit Stay page, select the Programs button.
6. In the Programs section, locate the program you want to delete in the Programs section and select the Delete button.
7. Confirm by selecting the Delete button in the pop-up notification.

How to Add Payments to a Program Associated with a Stay Record

1. From the Front Desk menu, select Clients.
2. On the Client List page, locate the Client record whose stay program information you want to modify, and select the Admissions button.
3. Click the Client Management menu and select Admissions.
4. From the Client - Admissions page, locate the stay and select the Edit button.

5. On the Client - Edit Stay page, select the Programs button.
6. In the Programs section, locate the program you want to modify in the Programs section and select the Payments button.
7. In the Payments For section, select the Add Payment button.
8. On the Add Payment page, select the payment method.
9. Confirm the payment date. If needed, you can change this date manually.
10. Select the payment amount.
11. If applicable, enter the receipt number.
12. If applicable, add any additional information concerning the payment in the Comments field.
13. If applicable, enter the beginning and the end of the payment period in the From and To fields.
14. Select the Add button.

How to Perform a Block Book Out

1. From the Front Desk menu, select Block Operations.
2. Select the service provider out of which you want to book clients.
3. Enter the name of the client in the Search List field and press the Enter key to perform the search, or select the Expand/Collapse List button to see the full list of clients currently booked in at the selected service provider.
4. Select the checkbox located next to the client's name to select the clients you want to book out.

Note: Select the checkbox next to the service provider or the room, to select all associated clients.

5. Click the Book Out Selected Clients button to save.

How to Add a Reservation

1. From the Front Desk menu, select Admissions
2. On the Admissions page, select the Reservations tab then select the Add Reservation button.
3. From the Reservation page, type to search for an existing client in the Client Name(s) field, then select the client from the search results. To make a reservation for additional clients under the same stay record, start typing the next name in the Client Name(s) field and select it.
4. Confirm the start date and time. If needed, you can change this date and time manually.
5. If applicable, enter the expected book out date.
6. Select the reason for service from the drop-down list. The reason for service should reflect the main reason the client is staying at the service provider.
7. If applicable, select the program associated with the reservation.
8. If applicable, enter where the client was Referred From or select who the client was Referred By.
9. If applicable, add any additional information concerning the reservation in the Comments field.

10. Select the Next button to go to the Reservation - Bed Selection page.
11. The service provider layout appears at the bottom of the page with the client's name located at the top. To assign a bed to a client, simply click on the client's name (it will turn orange), then click on the appropriate bed icon. When a client is successfully placed into a bed, the bed icon will turn green. A blue pop-up window will appear at the top right of the page to indicate that the selection was saved successfully. Repeat this step for all clients.
12. Click the Save button.

APPOINTMENTS

The Appointments module can be used to schedule appointments for services provided by the service provider or to record appointments with external organizations.

How to Add an Appointment

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want add an appointment by clicking the name of the client.
3. On the Client - Vitals page, click the Client Management menu and select Appointments.
4. On the Client - Appointments List page, select the Add Appointment button.
5. Select the appointment type.

6. Select the location of the appointment.
7. If applicable, add a description of the appointment.
8. If applicable, select the person with whom the client is meeting.
9. If applicable, indicate whether or not the client attended the appointment in the Followed Through field.
10. Confirm the start date and time and, if applicable, the end date and time.
11. If applicable, add any additional information concerning the appointment in the Comments field.
12. Click the Save button.

How to Edit an Appointment

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record for whom you want to edit an appointment by clicking the name of the client.
3. On the Client - Vitals page, click the Client Management menu and select Appointments.
4. On the Client - Appointments List page, locate the appointment you want to modify and click the Edit button.
5. On the Client - Edit Appointment page, you can edit the existing information or add any missing or additional information.
6. Click the Save button.

CALLS AND VISITS LOG

The Calls and Visits Log module is used to record the contacts and communications a client makes and/or receives during their stay at the service provider. The correspondences that are recorded may be used to monitor the level of external communication a client has while they are involved with the service provider.

How to Add a Calls and Visits Log

1. From the Front Desk menu, select Calls and Visits.
2. From the Calls and Visits Log page, click the Add Log button.
3. From the Add Calls and Visits Log page, type to search for an existing client in the Client Name field, then select the client from the search results.
4. Select the type of interaction.
5. Indicate whether the interaction is incoming or outgoing.
6. Select the nature of the interaction.
7. Enter the subject, date and time of the interaction.
8. Enter the name of the individual visiting the client.
9. For an outgoing interaction, indicate whether the contacted individual was an ex-client.
10. If applicable, enter, in hours and minutes, the duration of the contact.
11. If applicable, select the location of the interaction.
12. If applicable, add any additional information concerning the interaction in the Comments field.
13. Click the Save button.

How to Edit a Calls and Visits Log

1. From the Front Desk menu, select Calls and Visits.
2. From the Calls and Visits Log list, locate the log you want to modify and click the Edit button.
3. On the Edit Calls and Visits Log page, you can edit the existing information or add any missing or additional information.
4. Click the Save button.

CASE MANAGEMENT

The Case Management module allows the service provider to keep records of the activities done with a client to reach pre-determined goals. Each goal (desired outcome) that a caseworker and client work towards is a separate record in the Case Management module. For example, if a client has a mental health issue on which they would like to work and would also like to find employment, two Case Management records would be created for the client.

To perform most tasks in the Case Management module, select a record from the Case Management List page.
















How to Add a Case Management Record

1. From the Front Desk menu, select Case Management.
2. From the Case Management List page, click the Add Case button.

Case Management List

Filter Options

Showing 1 to 10 of 11 entries | Show 10 entries

Client Name	Caseworker	Start Date	Goal	Status	Actions
Baker, Olivia	Gaus, Rob	2019-02-26	Housing Retention	Open Target Date: N/A	 
Anderson, Aaron	Gaus, Rob	2019-02-08	Housing Placement	Open Target Date: N/A	 
Anderson, Aaron	Gaus, Rob	2019-02-05	Obtain I.D.	Open Target Date: 2019/03/31	 
Connor, James	Gladstone, Gary	2019-01-04	Housing Placement	Open Target Date: 2019/10/31	 
Castle, Deidre	Bond, Nancy	2018-12-19	Violence Against Women	Open Target Date: N/A	 
Connor, James	Arlington, Adam	2018-12-06	General Health	Open Target Date: N/A	 
Costello, George	Bond, Nancy	2018-09-20	General Health	Open Target Date: N/A	 
Costello, George	Arlington, Adam	2018-08-17	Employment	Open Target Date: N/A	 
Anderson, Aaron	Gladstone, Gary	2018-08-16	Housing Placement	Closed - Goal(s) not met Target Date: 2018/10/31	 
Baker, Olivia	Gladstone, Gary	2018-08-16	Mental Health	Open Target Date: N/A	 

1 2 Next →

Add Case



3. From the Client - Add Case Management page, type to search for an existing client in the Client Name field, then select the client from the search results.
4. If there are any family members associated with this case, choose the family members involved by selecting them in the Family Members field or clicking on the Select All button.

Note: The Family Members will only display if the selected client has family members.

5. Select the caseworker assigned to the case.
6. Select the goal.
7. Select the case status.
8. Confirm the start date. If needed, you can change this date and time manually.
9. If applicable, select the target date.
10. If applicable, select the program funding the case.
11. If applicable, in the Contributing Factors field, select any contributing factors that are already included in the Client's profile and are related to the selected goal.
12. Click the Save button.

How to Edit a Case Management Record

1. From the Front Desk menu, select Case Management.
2. From the Case Management List page, locate the record you want to modify and click the Edit button.

3. On the Edit Case Management page, you can edit the existing information or add missing information.
4. Click the Save button.

How to Add Session Details to a Case Management Record

1. From the Front Desk menu, select Case Management.
2. From the Case Management List page, locate the record to which you want to add session details and click the Edit button.
3. Select the Sessions tab, then click the Add Session button.
4. Select the session's activity.
5. If applicable, enter a description.
6. Confirm the start date and time. If needed, you can change this date and time manually.
7. If applicable, indicate, in hours and minutes, how much time has been spent on the session in the Expended Hours and Expended Minutes fields.
8. Select the caseworker assigned to the session.
9. If applicable, select who was responsible for the session; either the client or caseworker.
10. If applicable, select the agency or the referral involved with the case session.
11. If applicable, indicate whether or not the client and/or family were present.
12. Click the Save button.

How to Create a Session with Multiple Goals

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record that has existing case management goals recorded.
3. From the Client Management menu, select Case Management.
4. Click the Client - Multiple Goal Session button.
5. In the Goals field, select the relevant goals from the drop down list or click the Select All button to select all the goals created for a client.
6. Enter the session's activity.
7. If applicable, enter a description.
8. Confirm the start date and time. If needed, you can change this date and time manually.
9. Indicate, in hours and minutes, how much time was spent on the session in the Expended Hours and Expended Minutes fields.
10. Select the caseworker assigned to the session.
11. If applicable, select who was responsible for the session; either the client or caseworker.
12. If applicable, select the agency or the referral involved with the case session.
13. Indicate if the client and/or family were present.
14. Click the Save button.

How to Add a Document to a Case Management Record

1. From the Front Desk menu, select Case Management.
2. From the Case Management List page, locate the record to which you want to add a document and click the Edit button.
3. Select the Documents tab, then click the Browse button.
4. Browse for the document you want to add to the record, and click the Open button to select it.
5. Click the Save button.

Note: The document will now appear in the Existing Attachments table under the Documents tab.

How to Add Comments to a Case Management Record

1. From the Front Desk menu, select Case Management.
2. From the Case Management List page, locate the record you want to add comments to and click the Edit button.
3. Select the Case Comments tab, then click the Add Comment button.
4. Enter a subject for the case's comment.
5. Add case notes concerning the Case Management record in the Comments field.
6. Click the Save button.

CHORES

How to Add a Chore to a Client's Stay

1. From the Front Desk menu, select Clients.
2. On the Client List page, select a booked in client to whom you want to assign a chore by clicking the name of the client.
3. On the Client - Vitals page, click the Client Management menu and select Chores.
4. On the Client - Chores List page, click the Add Chore button.
5. Select the stay for which the chore is assigned and the type of chore.
6. Confirm the start. If needed, you can change this date manually. If applicable, enter the end date.
7. If applicable, enter a description of the chore.
8. If applicable, enter how many hours and minutes the client spent on the chore in the Expended Hours and Expended Minutes fields.
9. Click the Save button.

CONFLICTS

The Conflicts module is used to record conflicts that have taken place between two individuals. A conflict must include a client, but can also include staff or other people. A conflict in HIFIS can have two aggressors, but not two victims. Record a specific incident resulting from a conflict in the Incidents module.

How to Record a Conflict

1. From the Front Desk menu, select Conflicts.
2. On the Conflict List page, click the Add Conflict button.
3. From the Add Conflict page, type to search for an existing client in the Client Name field, then select the client from the search results.
4. Select the conflict type.
5. Indicate whether the client was the victim or the aggressor.
6. Type to search for the counterpart's name then select their name from the search results. When looking for the counterpart's name, HIFIS searches the Client, People and User lists to find a match.
7. Indicate whether the counterpart was the victim or the aggressor.
8. Select the intensity of the conflict.
9. Confirm the start date. If needed, you can change this date manually.
10. If applicable, enter the end date.
11. If applicable, select the probability of the conflict reoccurring and the relationship between the client and the counterpart.
12. If applicable, select the type of location where the conflict took place, and where the conflict was referred from or to.
13. If applicable, add any additional information concerning the conflict in the Comments field.
14. Click the Save button.

How to Edit a Conflict

1. From the Front Desk menu, select Conflicts.
2. On the Conflict List page, locate the conflict you want to modify and click the Edit button.
3. On the Edit Conflict page, you can edit the existing information or add any missing information.
4. Click the Save button.

FOOD BANKS

The Food Banks module is used to record any food items provided to clients. A client does not need to be booked into a service provider to receive Food Bank services. It is important to note that Food Bank transactions are tracked in the Food Bank module, but food bank items themselves are added from the Administration menu.

How to Add a Food Bank Transaction

1. From the Front Desk menu, select Food Banks.
2. On the Food Banks List page, click the Add Food Bank Transaction button.
3. From the Add Food Bank Transaction page, type to search for an existing client in the Client Name field, then select the client from the search results.
4. Confirm the start date and time. If needed, you can change this date and time manually.

5. Select the reason for service from the drop-down list. The reason for service should reflect the main reason the client is at the service provider.
6. If applicable, select the program that is funding the Food Bank transaction.
7. If applicable, type the name of the person who is referring the client to the Food Bank.
8. If applicable, select the organization that the client was referred from or to.
9. If applicable, select an existing case to which this transaction is linked.
10. If applicable, enter the number of individuals included in this transaction.
11. Click the Save button.

HELPFUL HINT:



If the client has visited the Food Bank in the past and has a Food Bank Transaction record, Last Visit Information will appear on the page. This function allows you to view and use the client's last visit details for the new Food Bank transaction. Click Last Visit Information to expand the content in order to review the information. If you want to duplicate the details of their last visit, select the Use Last Visit Details button. The Food Bank transaction will automatically save.

How to Add a Food Bank Item to a Food Bank Transaction

1. If a Food Bank Transaction has just been added, the Food Item tab will be visible at the bottom of the page. Go to step 4.
2. To add a food bank item to an existing Food Bank Transaction, from the Front Desk menu, select Food Banks.
3. On the Food Banks List page, locate the Food Bank transaction to which you want to add a food bank item and select the Edit button.
4. Under the Food Item tab, select Add a Food Bank Item for the content to expand.
5. To select a food bank item, enter the item code or select the item from the Food Bank Item field.
6. Enter the quantity.

Note: The Item Value field will be filled automatically, since the amount is entered when creating the food bank item in the Administration menu.

7. Click the Save button.

How to Edit a Food Bank Transaction

1. From the Front Desk menu, select Food Banks.
2. On the Food Bank List page, locate the Food Bank transaction you want to modify and click the Edit button.
3. On the Edit Food Bank Transaction page, you can edit the existing information or add any missing information.
4. Click the Save button.

GOODS AND SERVICES

The Goods and Services module is used to record all goods and services provided at your service provider. A client does not need to be booked into a service provider to receive goods or services.

How to Add a Goods and Services Transaction

1. From the Front Desk menu, select Goods and Services.
2. On the Goods and Services List page, click the Add Goods and Services Transaction button.
3. From the Client - Add Goods and Services Transaction page, type to search for an existing client in the Client Name field, then select the client from the search results.
4. Select the reason for service from the drop-down list. The reason for service should reflect the main reason the client is at the service provider.
5. Confirm the start date and time. If needed, you can change this date and time manually.
6. If applicable, select the program with which the transaction is associated, who is referring the client, and the location from which the client was referred.

7. If applicable, select an existing Case Management activity that is linked to this transaction.
8. If applicable, enter the number of individuals included in this transaction.
9. If applicable, enter where the clients were referred from, where the clients are referred to and by whom.
10. Click the Save button.

How to Add a Good

1. If a Goods and Services Transaction has just been added, the Goods and Services tabs will be visible at the bottom of the page. Go to step 4.
2. From the Front Desk menu, select Goods and Services.
3. On the Goods and Services List page, locate the Goods and Services Transaction to which you want to add a good and click the Manage button.
4. On the Goods and Services page, select the Goods tab and click Add Good.
5. Select the type of good provided to the client.
6. Select the unit of measure.
7. If applicable, enter the quantity, the unit cost and unit price of the good.
8. Click the Add Good button.

How to Add a Service

1. If a Goods and Services Transaction has just been added, the Goods and Services tabs will be visible at the bottom of the page. Go to step 4.
2. From the Front Desk menu, select Goods and Services.
3. On the Goods and Services List page, locate the Goods and Services Transaction to which you want to add a service and click the Manage button.
4. On the Goods and Services page, select the Services tab and click Add Service.
5. Select the type of service provided to the client.
6. Confirm the start date and time. If needed, you can change this date and time manually.
7. If applicable, enter the end date and time, the hours and minutes spent on the service, the unit cost and unit price of the service.
8. Click the Add Service button.

How to Edit a Goods and Services Transaction

1. From the Front Desk menu, select Goods and Services.
2. On the Goods and Services List page, locate the Goods and Services transaction you want to modify. If you want to modify the transaction information itself, click the Edit Goods and Services Details button. If you want to modify either the Goods or Services records within the transaction, click the Manage button and go to step 5.

3. From the Client - Edit Goods and Services page, you can add or modify the existing information.
4. Click the Save button.
5. To modify either the Goods or Services records within the transaction, go to the Goods or Services tab and click the Edit button next to the item you want to edit.
6. Add or modify the existing information and click the Save button.

How to Add an Express Goods Transaction

1. From the Front Desk menu, select Goods and Services.
2. On the Goods and Services List page, click the Add Express Good button.
3. From the Add Express Goods Transaction page, type to search for an existing client in the Client Name field, then select the client from the search results.
4. Select the good offered to the client.
5. If applicable, select the program with which the transaction is associated.
6. Select the unit of measure.
7. If applicable, enter the unit price.
8. Select the reason for service from the drop-down list. The reason for service should reflect the main reason the client is at the service provider.
9. Click the Save button.

How to Add an Express Services Transaction

1. From the Front Desk menu, select Goods and Services.
2. On the Goods and Services List page, click the Add Express Service button.
3. From the Add Express Services Transaction page, type to search for an existing client in the Client Name field, then select the client from the search results.
4. Select the service offered to the client.
5. If applicable, select the program with which the transaction is associated.
6. Select the reason for service from the drop-down list. The reason for service should reflect the main reason the client is at the service provider.
7. If applicable, enter the amount of time in minutes that was spent providing the service to the client, to whom the client was referred and any additional Comments about the service offered.
8. Click the Save button.

GROUP ACTIVITIES

The Group Activity module allows users to record group activities conducted at the service provider, such as a hot meal or support group. A client does not need to be booked into a shelter to attend a group activity.

How to Add a Group Activity

1. From the Front Desk menu, select Group Activities.
2. On the Group Activity List page, click the Add Group Activity button.
3. On the Add Group Activity page, select the group activity.
4. If applicable, select the program associated with the group activity.
5. If applicable, select the location where the group activity will take place.
6. Confirm the start date and time. If needed, you can change this date and time manually.
7. If applicable, enter the number of expended hours and minutes.
8. If applicable, enter a description of the group activity.
9. Select the reason for service.
10. If applicable, enter where the clients were referred from and where the clients are referred to.
11. Select the Save button.

How to Edit a Group Activity

1. From the Front Desk menu, select Group Activities.
2. On the Group Activity List page, locate the group activity you want to modify and click the Manage button.
3. On the Manage Group Activity page, select the Edit button.
4. You can now edit the existing information or add any missing or additional information.
5. Click the Save button.

How to Manage a Group Activity

1. From the Front Desk menu, select Group Activities.
2. On the Group Activity List page, locate the group activity you want to manage and click the Manage button.
3. On the Manage Group Activity page, select the Attendees tab.
4. Type to search for existing clients in the Client Name(s) field, or enter the number of anonymous attendees in the Anonymous Attendees field.
5. Select the Add button to add the attendees to the group activity.
6. Select the Organizers tab.
7. Type to search for staff members in the Staff field or external contacts in the External Contacts field.
8. Select the Add button to add the organizers to the group activity.

9. If applicable, select the Demographics tab to demographically distribute the anonymous attendees added earlier, then select the Save button.
10. If applicable, add any additional information concerning the group activity in the Comments tab.
11. If you want to set up a recurring group activity, select the Replicate tab.
12. Indicate whether you want to keep the same attendees and organizers in the Keep Attendees and Keep Organizers fields.
13. Select the dates at which the group activity will reoccur in the calendar.
14. Once all the dates have been chosen, select the Replicate button.

HOUSING LOSS PREVENTION

Housing Loss Prevention records are created to record activities that help clients who have housing maintain it. In order to create a Housing Loss Prevention Record, the client must currently have housing, as indicated by an open Housing History record that does not have an End Date.

Similar to housing placements, once a Housing Loss Prevention Record is created, users can record follow-ups and subsidies related to the record.

How to Add a Housing Loss Prevention Record

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record to which you want to add a Housing Loss Prevention Record by clicking the name of the client.
3. On the Client - Vitals page, click the Client Information menu and select Housing History.
4. On the Client - Housing History page, click Add Housing Loss Prevention.

Note: If the Add Housing Loss Prevention button does not appear on the page, it means that either a current Housing History record does not exist for the client, or that a Housing Loss Prevention record has already been created for the current Housing History record.

5. Select the reason for service from the drop-down list. The reason for service should reflect the main reason the client is at the service provider.
6. Confirm the start date. If needed, you can change this date manually.
7. Select the caseworker responsible for the housing loss prevention.
8. If applicable, select the program that is funding the housing loss prevention.
9. If applicable, enter the date of the next scheduled follow-up appointment.
10. Click the Save button.

How to Edit a Housing Loss Prevention Record

1. From the Front Desk menu, click on Housing then select Housing Loss Prevention.
2. On the Housing Loss Prevention List page, locate the Housing Loss Prevention record you want to modify and click the Edit button.
3. On the Edit Housing Loss Prevention page, you can edit the existing information or add any missing information.
4. Click the Save button.

How to do a Follow-up on a Housing Loss Prevention Record

1. From the Front Desk menu, click on Housing, then select Housing Loss Prevention.
2. On the Housing Loss Prevention List page, locate the Housing Loss Prevention record on which you want to follow up and click the Manage button.
3. From the Housing Loss Prevention Details page, click the Add Follow-up button on the Follow-ups tab.
4. Confirm the date of the follow-up. If needed, you can change this date manually.
5. Indicate the number of months since the last follow-up or since the Housing Loss Prevention record was created.
6. Indicate whether this is the final follow-up.
7. Indicate whether you want to enter an exact date for the next follow-up.
8. If applicable, enter the date or number of months until the next follow-up.

9. Indicate whether the client(s) is/are still living in the housing unit.
10. If applicable, enter any other information about the follow-up in the Comments field.
11. Click the Save button.

How to Add a Document to a Housing Loss Prevention Record

1. From the Front Desk menu, click on Housing then select Housing Loss Prevention.
2. On the Housing Loss Prevention List page, locate the Housing Loss Prevention record to which you want to add a document and click the Manage button.
3. From the Housing Loss Prevention Details page, select the Documents tab and click the Add Document button.
4. Click the Browse button to select the file you want to upload.
5. Browse for the document you want to add to the record, and click the Open button to select it.
6. If applicable, enter the name of the document.
7. Indicate whether or not the document is confidential.

Note: Documents that are made confidential will only be seen by users who have the ability to view confidential documents.

8. If applicable, add a description of the document.
9. Click the Save button.

HOUSING PLACEMENT

Tasks in the following section can be performed by selecting Housing Placement under the Housing module from the Front Desk menu.

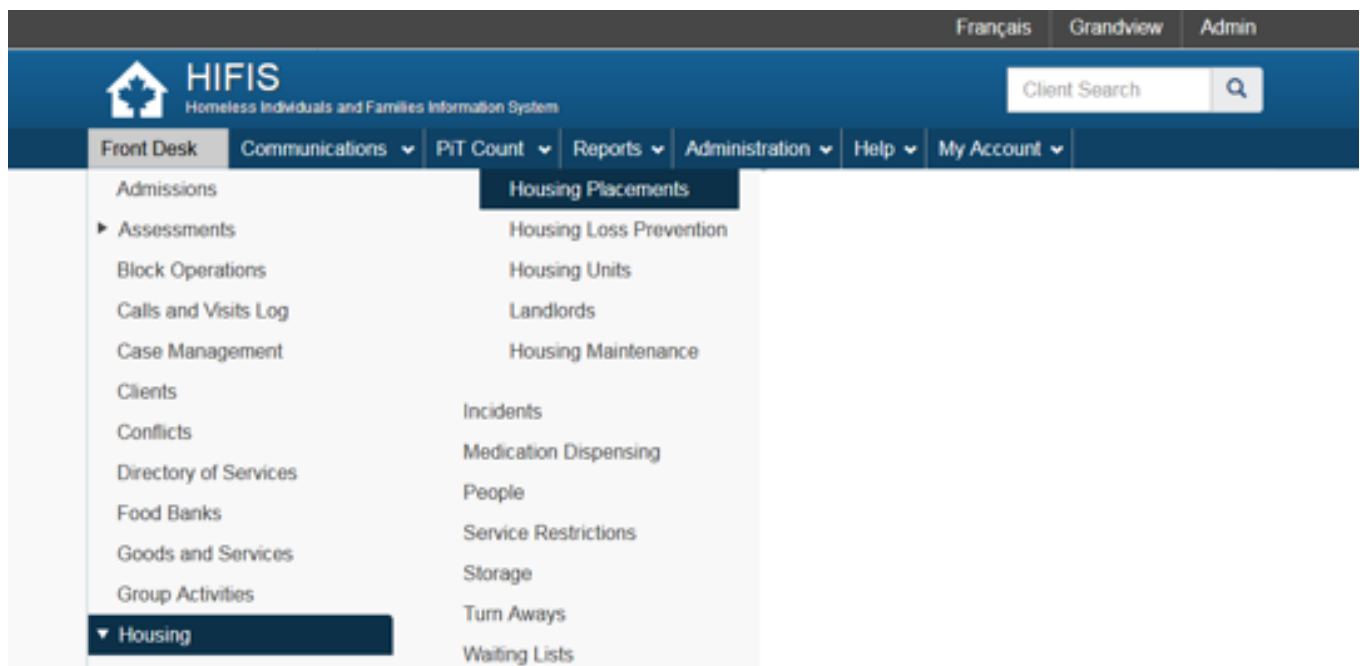
Housing Placement module is used to track efforts made by a caseworker, or other staff members, in placing a client into housing. Once the housing placement is complete, and a client moves into the housing unit, a Housing History record is automatically created in the client's profile.

When accessing the Housing Placement module, there are two additional lists that assist users with accessing records in a timely manner: Follow-Ups Due this Month and Past Target Date for Housing Placement. Click the name of the list to expand it and view the records.

On the Housing Placement Details page, the status at the top of the page indicates the stage at which the client is in a placement attempt: from housing not secured, to moving into their house. This page also lets you see and record details on housing searches and follow-ups performed after a client has moved in.

How to Add a Housing Placement Record

1. From the Front Desk menu, click on Housing then select Housing Placements.
2. On the Housing Placement List page, click the Add Housing Placement button.
3. On the Add Housing Placement page, type to search for an existing client in the Client Name field, then select the client from the search results.



Note: If a family member is selected, more fields will appear. If applicable, select the family members or enter the number of adults and children included in the housing placement.

4. Select the caseworker responsible for the housing placement.

Note: HIFIS will automatically enter the name of the user entering the record if they have Caseworker as a role. Select a different user if you are adding the record on behalf of someone else.

5. Select one or more types of housing in the Housing Type(s) Sought field.
6. Confirm the search start date. If needed, you can change this date manually.
7. If applicable, enter the target date by which the housing should be found.
8. If applicable, select the program involved with the housing placement.
9. Click the Start Housing Placement.

How to Edit a Housing Placement Record

1. From the Front Desk menu, click on Housing then select Housing Placements.
2. On the Housing Placement List page, locate the Housing Placement record you want to modify and click the Edit button.

3. On the Client - Edit Housing Placement page, you can edit the existing information or add any missing information.
4. Click the Save button.

How to Move a Client into a Housing Unit

1. From the Front Desk menu, click Housing then select Housing Placements.
2. On the Housing Placement List page, locate the appropriate Housing Placement record for the client and select the Manage button.
3. Click the Move In button.
4. If applicable, enter the rent of the housing unit.

Note: If a rent amount is entered, it will replace the rent amount entered when the housing unit was created.

5. Confirm the date that the client moved into the unit.
6. If applicable, enter the contact information of the housing unit in the Telephone 1/2, Mobile and Email Address fields.
7. Indicate whether or not you want an exact date for the housing placement follow-up. Depending on the value selected, different fields will appear.
8. If Yes was selected in the Use Exact Follow-up Date field, enter the date of the next scheduled follow-up appointment. If No was selected in the Use Exact Follow-up Date field, enter the number of months until the next follow-up appointment.
9. Click the Move In button.

Note: The Status will have changed to Moved Into Housing.

How to Record Housing Placement Attempts

1. From the Front Desk menu, click on Housing, then select Housing Placements.
2. In the Housing Placement List page, locate the Housing Placement record where a housing attempt was made and click the Manage button.
3. From the Housing Placement Details page, select the Attempts tab and click the Add Housing Placement Attempt button.
4. Confirm the date attempted. If needed, you can change this date manually.
5. Select the reason why the housing was not secured.
6. Select the caseworker.
7. If applicable, indicate whether this is the final housing placement attempt.
8. If applicable, add any additional information concerning the housing placement attempt in the Comments field.
9. Click the Save button.

How to Search for and Secure a Housing Unit

1. From the Front Desk menu, click on Housing then select Housing Placements.
2. On the Housing Placement List page, locate the Housing Placement record for which you are searching for a housing unit and select the Manage button.

3. From the Housing Placement Details page, click the New Housing Search button to perform a housing unit search.
4. On the Housing Unit Search page, click on Filter Options to display the search parameters.
5. Modify or add to the existing parameters based on the client's needs.
6. Click the Apply Filters button.
7. HIFIS will display the housing unit(s) matching your parameters, locate the housing unit you want to secure and select the Secure Unit button.
8. On the Secure Unit page, confirm the date that the housing was secured and the expected move in date and click the Secure Unit button. The Housing Placement Details page will appear and the Status will have changed to Housing Secured.

HELPFUL HINT:



When accessing the Housing Unit Search page, all of the existing housing units are listed at the bottom of the page. Browse through the list to select a housing unit, perform a housing unit search or select the Map View button to see the location of the housing units on a map. While looking at the Map View, click on a House icon to see the housing unit details and follow the legend to see which units are available for occupancy.

How to Add a Document to a Housing Placement Record

1. From the Front Desk menu, click on Housing then select Housing Placements.
2. On the Housing Placement List page, locate the Housing Placement record to which you want to add a document and click the Manage button.
3. From the Housing Placement Details page, select the Documents tab and click the Add Document button.
4. Click the Browse button to select the file you want to upload. Browse for the document you want to add to the record, and click the Open button to select it.
5. If applicable, enter the name of the document.
6. Indicate whether or not the document is confidential.

Note: Documents that are made confidential will only be seen by users who have the ability to view confidential documents.

7. If applicable, add a description of the document.
8. Click the Save button.

How to do a Follow-up on a Housing Placement Record

1. From the Front Desk menu, click on Housing then select Housing Placements.

2. On the Housing Placement List page, locate the Housing Placement record you want to follow up on and click the Manage button.
3. From the Housing Placement Details page, click the Add Follow-up button on the Follow-ups tab.

Note: The Follow-ups tab will only appear if the client has moved in to the housing placement.

4. Confirm the date of the follow-up. If needed, you can change this date manually.
5. Indicate the number of months since the last follow-up or since the client moved in.
6. Indicate whether this is the final follow-up.
7. Indicate whether you want to enter an exact date for the next follow-up.
8. Enter the date or number of months until the next follow-up.
9. Indicate whether the client(s) is/are still living in the housing unit.
10. If applicable, add any additional information about the follow-up in the Comments field.
11. Click the Save button.

How to End a Housing Placement

1. From the Front Desk menu, click on Housing then select Housing Placements.
2. On the Housing Placement List page, locate the Housing Placement record you want to end and click the Manage button.
3. From the Housing Placement Details page, click the End Housing Placement button.

4. Confirm the date attempted. If needed, you can change this date manually.
5. Select the reason housing was not secured.
6. Select the caseworker.
7. The record will default to yes in the Final Attempt field.
8. If applicable, add any additional information concerning the housing placement attempt in the Comments field.
9. Click the Save button.

INCIDENTS

The Incidents module is used to record incidents involving clients, other people and/or staff. Incidents refer to a specific event, whereas a Conflict record can be created if the problem is ongoing.

How to Record an Incident

1. From the Front Desk menu, select Incidents.
2. From the Incident List page, click the Add Incident button.
3. In the Involved field, type to search for existing clients or persons who were involved in the incident. To add additional clients or people to the same incident, start typing the next name.
4. If applicable, in the Witnesses field, type to search for existing clients or persons who witnessed the incident. To add additional clients or people to the same incident, start typing the next name.
5. If applicable, select any emergency service responders who came to the service provider by clicking in the field and selecting all applicable options.

Note: If Police is selected, more fields will appear. Indicate whether or not charges were laid, and enter the police badge and police report number.

6. Select the nature of the incident.
7. Confirm the start date and time. If needed, you can change this date and time manually.
8. Enter the location of the incident.
9. If applicable, select how the incident was resolved from the Disposition drop-down list and add any additional information concerning the incident in the Comments field.
10. If applicable, add a document by clicking the Add Attachment button and selecting Browse. Select the document you want to attach to the record and click the Open button to select it.
11. If applicable, add any additional information about the incident in the Comments field.
12. Click the Save button.

How to Edit an Incident

1. From the Front Desk menu, select Incidents.
2. From the Incident List, locate the incident you want to modify and click the Edit button.
3. On the Edit Incident page, you can edit the existing information or add any missing or additional information.
4. Click the Save button.

MEDICATION DISPENSING

The Medication Dispensing module is used to dispense medication to multiple clients at once. It displays a list of all booked-in clients who require medication at a specific time, either morning, noon, evening, bedtime or PRN (as need), and allows you to check off who has received their medication.

How to Dispense Medication

- From the Front Desk menu, select Medication Dispensing.
- From the Medication Dispensing page, confirm the date.
- The Dispensed By field defaults to the current user. If someone else dispensed the medication, type to search for the staff member's name.
- Select the time of day the medication was dispensed.
- Use the By Client or By Room tabs to see a list of clients that need medication, including their birth date and the room and bed in which they are currently booked.
- Once the client is located, click the client's name for the content to expand, then select the checkbox for the correct medication and dispensing time. This will automatically save the medication dispensing.

SERVICE RESTRICTIONS

The Service Restrictions module records services from which a client is restricted, which service providers have restricted them and for how long. It also records the reason the services were restricted. Clients can be restricted from the following modules: Stays, Food Banks and Goods and Services. When a client is restricted from service, a Client Alert appears under their profile.

How to Add a Service Restriction Record

- From the Front Desk menu, select Service Restrictions.
- On the Service Restrictions List page, click the Add Service Restriction button.
- From the Add Service Restriction page, type to search for an existing client in the Client Name field, then select the client from the search results.
- Select who the service restriction was requested by.
- Confirm the start date. If needed, you can change this date manually.
- The end date will default to the current date. If needed, you can change this date manually.
- Select the service provider(s) where the service restriction is effective.
- Select the services from which the client is restricted in the Modules field.
- Select the reason for the service restriction.
- Add any additional information concerning the Service Restriction record in the Comments field.
- Click the Save button.

How to Edit a Service Restriction Record

1. From the Front Desk menu, select Service Restrictions.
2. On the Service Restrictions List page, locate the service restriction you want to modify and click the Edit button.
3. On the Client - Edit Service Restriction page, you can edit the existing information or add any missing or additional information.
4. Click the Save button.

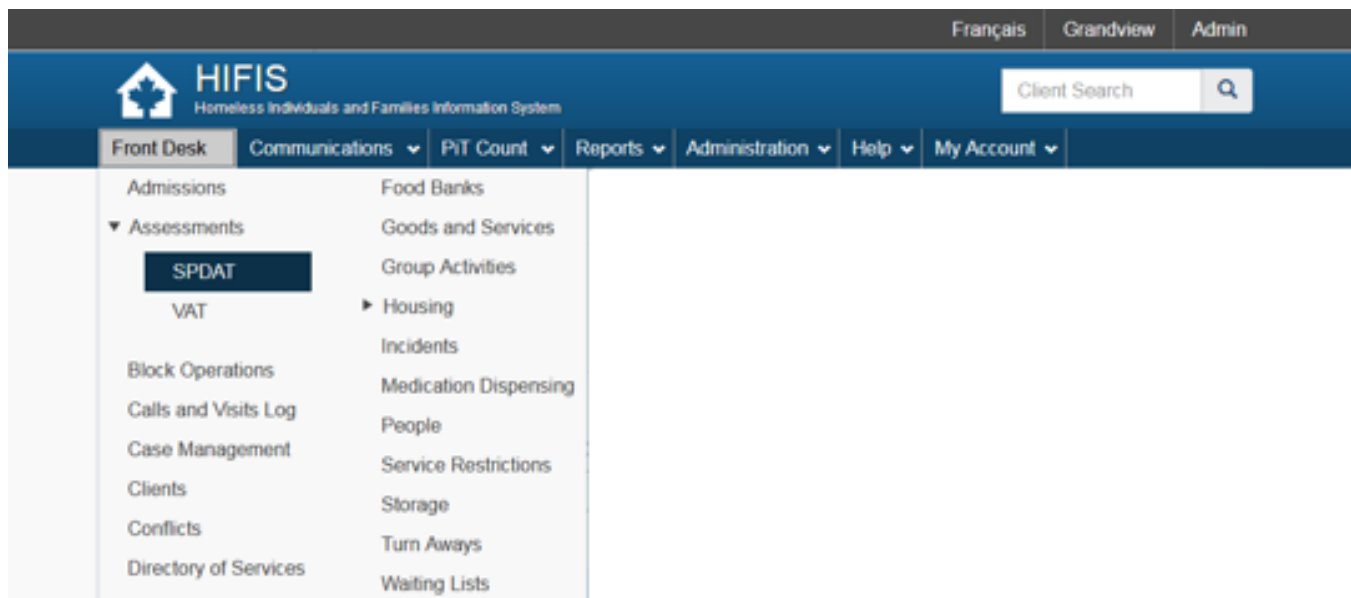
SPDAT

Tasks in the following section can be performed by selecting SPDAT under the Assessments module from the Front Desk menu.

The Service Prioritization and Decision Assistance Tool (SPDAT) was developed by a

third-party organization called OrgCode. This tool helps organizations prioritize their service delivery based on standardized assessments given to individuals and families who are homeless or at-risk. The different versions of this tool have been implemented in the HIFIS application to give HIFIS users an easy and efficient way to record SPDAT assessments and to make decisions based on the results.

On the Intake List page, the tabs represent the different assessments available in SPDAT; the Vulnerability Index (VI), the main SPDAT assessment, and the Family versions of both. Within each assessment tab, the different versions supported by OrgCode are available. For the main SPDAT assessment, this is Version 3 and the updated Version 4. For more information on SPDAT, visit <http://www.orgcode.com/product/spdat/>.



How to Complete a SPDAT Assessment

1. From the Front Desk menu, select Assessments, then select SPDAT.
2. On the SPDAT Intake List page, select the tab for the type of test you wish to use (VI-SPDAT or SPDAT).
3. Make a selection depending on the type of client and version of the test you would like to use.
4. On the New Intake page, type to search for an existing client in the Client Name field, then select the client from the search results.
5. Select the caseworker conducting the evaluation.
6. Confirm the start date and time.
7. Select the assessment period or pre-screen period, depending on whether it is a VI-SPDAT or SPDAT assessment.
8. Indicate whether the client has given consent.
9. If applicable, select the program.
10. If applicable, add any additional information concerning the SPDAT assessment in the Description field.
11. Begin the assessment.
12. To see the full description of the question, click the arrow beside the title to expand it.
13. Hover over the numbers in the answer column to see the description of what that number indicates. This way, you can ensure the assessment is being answered in a standardized way.

14. If applicable, you can add additional comments about the answer in the field below the question descriptions.
15. Once the assessment has been completed, click the Save button.

HELPFUL HINT:



The Progress Panel on the left side of the page allows you to keep track of your progress through the SPDAT assessment. Hovering over the panel will expand it, revealing more details about your progress.

How to Edit a SPDAT Assessment

From the Front Desk menu, select Assessments, then select SPDAT.

1. On the SPDAT Intake List page, select the SPDAT assessment you want to modify and click the Edit button.
2. On the Edit Intake page, you can edit the existing information or add any missing or additional information.
3. Click the Save button.

STORAGE

The Storage module can be used to record items that are being stored at the service provider for a client.

How to Add a Storage Item

1. From the Front Desk menu, select Storage.
2. On the Storage List page, click the Add Storage Item button.
3. From the Add Storage Item page, type to search for an existing client in the Client Name field, then select the client from the search results.
4. Enter the item name and, if applicable, the location of where it is being stored.
5. Confirm the start date. If needed, you can change this date manually.

6. If applicable, enter the end date.
7. If applicable, add any additional information concerning the storage item in the Comments field.
8. Click the Save button.

How to Edit a Storage Item

1. From the Front Desk menu, click Storage.
2. On the Storage List page, locate the storage item you want to modify and click the Edit button.
3. On the Edit Storage Item page, you can edit the existing information or add any missing or additional information.
4. Click the Save button.

SURVEYS/QUESTIONNAIRES

The Questionnaires module can be used by service providers who want the ability to design their own custom surveys and questionnaires. These can be used to collect additional information about clients, or to obtain client feedback on the services they received.

How to Complete a Survey

1. From the Front Desk menu, select Clients.
2. On the Client List page, select the Client record for which you want to complete a survey.

3. From the Client - Vitals page, click the Client Management menu and select Surveys.
4. Select Complete New Survey for the content to expand, then select the survey you want to complete and click the Begin Survey button.
5. On the Take Survey page, enter the date the survey was taken and respond to the question(s).
6. Once all the questions have been answered, click the Save button.

TURN AWAYS

The Turn Aways module is used to record when a client is denied service and the reasons they were denied.

How to Record a Turn Away for a Client

1. From the Front Desk menu, select Turn Aways.
2. On the Turn Away List page, click the Add Turn Away button.
3. From the Add Turn Away page, type to search for an existing client in the Client Name field, then select the client from the search results.
4. If applicable, select the family members who are included in the turn away.
5. Confirm the effective date and time. If needed, you can change this date and time manually.
6. Enter the number of adults and children being turned away if it is different from the default.
7. Select the reason for the turn away. This should reflect the main reason the client is being denied service at the service provider.
8. Select the staff member who turned away the client in the Requested By field.
9. If applicable, enter who the client was referred by or select where the client was referred from or to.
10. If applicable, add any additional information concerning the turn away in the Comments field.
11. Click the Save button.

How to Record a Turn Away for an Anonymous Client

1. From the Front Desk menu, select Turn Aways.
2. In the Turn Away List page, click the Add Anonymous Turn Away button.
3. From the Add Anonymous Turn Away page, indicate whether the client is presumed Indigenous.
4. Indicate whether the client has an observable disability.
5. Select the age group to which the client belongs.
6. Select the gender.
7. Confirm the effective date and time of the turn away. If needed, you can change this date and time manually.
8. Enter the number of adults and children being turned away.
9. Select the reason for the turn away. This should reflect the main reason the client is being denied service at the service provider.
10. Select the staff member who turned away the client in the Requested By field.
11. If applicable, enter who the client was referred by or select where the client was referred from or to.
12. If applicable, add any additional information concerning the turn away in the Comments field.
13. Click the Save button.

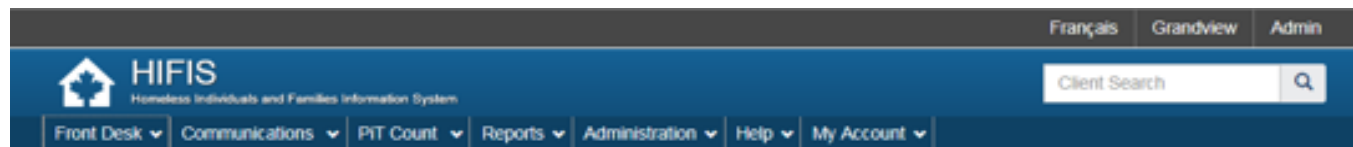
How to Edit a Turn Away

1. From the Front Desk menu, click Turn Away.
2. On the Turn Aways List page, locate the turn away you want to modify and click the Edit button.
3. On the Edit Turn Away page, you can edit the existing information or add any missing or additional information.
4. Click the Save button.

VAT

Tasks in the following section can be performed by selecting VAT under the Assessments module from the Front Desk menu.

The Vulnerability Assessment Tool (VAT) was developed by a third-party organization. This tool helps service providers to prioritize their service delivery based on standardized assessments given to individuals and families who are homeless or at-risk of becoming homeless.



How to Complete a VAT Assessment

1. From the Front Desk menu, select Assessments, then select VAT.
2. On the Vulnerability Assessment Tool List page, click the VAT button
3. On the New VAT Intake page, type to search for an existing client in the Client Name field, then select the client from the search results.
4. Select the caseworker conducting the assessment.
5. Confirm the start date and time.
6. Indicate whether the client has given consent to perform the assessment intake questionnaire.
7. If applicable, select the program.
8. If applicable, add any additional information concerning the VAT assessment in the Description field.
9. Begin the assessment.
10. To see the full description of the question, click the arrow beside the title to expand it.

11. Hover over the numbers in the answer column to see the description of what that number indicates. This way, you can ensure the assessment is being answered in a standardized way.
12. If applicable, you can add additional comments about the answer in the field below the question descriptions.
13. Once the assessment has been completed, click the Save button.

How to Edit a VAT Assessment

1. From the Front Desk menu, select Assessments, then select VAT.
2. On the Vulnerability Assessment Tool List page, select the VAT assessment you want to modify and click the Edit button.
3. On the Edit VAT Intake page, you can edit the existing information or add any missing or additional information.
4. Click the Save button.

WAITING LIST

The Waiting List module is used to keep track of clients who are currently waiting for a service from the service provider.

How to Add a Client to a Waiting List

1. From the Front Desk menu, select Waiting Lists.
2. On the Waiting Lists page, locate the waiting list to which you want to add a client and click the Manage Clients button.
3. On the Manage Clients page, click the Add Client to Waiting List button.
4. From the Client - Add Client to Waiting List page, type to search for an existing client in the Client Name field, then select the client from the search results.
5. Confirm the start date. If needed, you can change this date and time manually.
6. If applicable, enter the date that the client will be removed from the waiting list in the End Date field.
7. Select the priority level, the reason the client is on the waiting list and the client's status on the waiting list.
8. Confirm the date the status was attributed to the client or change it manually.
9. If applicable, add any additional information concerning the client being added to the waiting list in the Comments field.
10. Click the Save button.

OTHER HIFIS FUNCTIONS



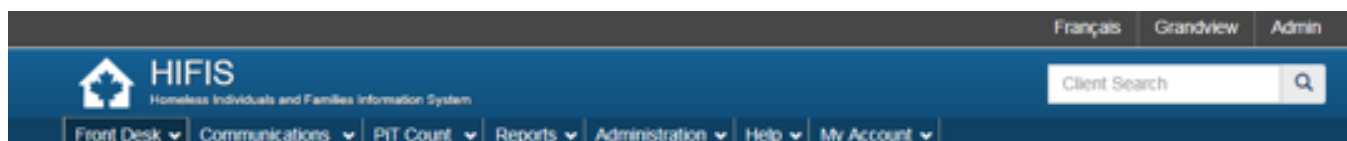
SEARCH

A client's record can be searched at any time using the Client Search field at the top right of the screen.

1. Enter some or all of the client's name, alias, or client ID in the Client Search field at the top right of the screen.
2. Click the search button (magnifying glass icon).

BULLETINS

The Bulletins module is an electronic bulletin board system used to advise staff of important information, such as team meetings, fire drills or incidents concerning a specific client. Use the Bulletins module when you want your message to be relayed to all HIFIS users at the selected service provider(s). When logging into HIFIS, the current bulletins are automatically displayed on the main page and will remain there until the user has viewed and acknowledged the bulletin.



How to View and Acknowledge a Bulletin

1. From the main menu, click Communications, then select Bulletins.
2. From the Bulletin List page, click the Display button to display the bulletin.
3. When you are done reading the bulletin's content, click the Close button at the bottom right of the message.
4. Back on the Bulletin List page, you can now click the Delete button to remove it from your bulletin list.

DIRECTORY OF SERVICES

The Directory of Services module is used to record the location and contact information for various places used in multiple HIFIS modules, such as a pharmacy for when you're adding Medication records or a school for Education records.

For those familiar with HIFIS 3.8, the Referrers module found in the Localised Tables menu has been implemented into the Directory of Services module.

How to Add a Place

1. From the Front Desk menu, select Directory of Services.
2. On the Directory of Services page, click the Add Place button.
3. Enter the place's name.

4. Select the type of place.
5. If applicable, select services offered at this place.
6. Indicate whether or not the place is active.
7. If applicable, type to search for the contact of the place.
8. If applicable, select the referrer category type.
9. If applicable, indicate whether clients can be referred from and/or to this place.
10. If applicable, add any additional information concerning the place in the Comments field.
11. If applicable, add the address.
12. Select the Country and Geographical Region the place is located.
13. Click the Save button.

How to Edit a Place Record

1. From the Front Desk menu, select Directory of Services.
2. On the Directory of Services page, locate the place you want to modify and click the Edit button.
3. On the Place Details page, you can edit the existing information or add any missing information.
4. Click the Save button.

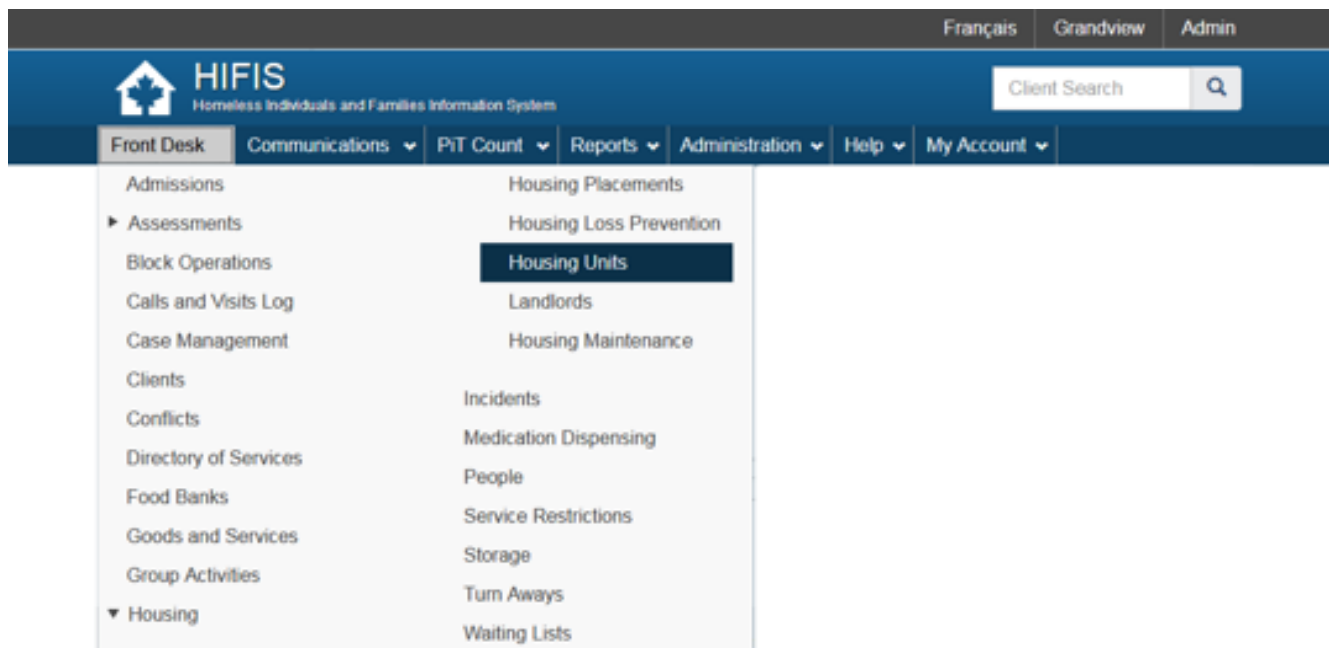
HOUSING UNITS

Tasks in the following section can be performed by selecting Housing Units under the Housing module from the Front Desk menu.

The Housing Units, Landlords and Housing Maintenance module are all used to store information on the Housing Units that are used for Housing Placements. The Housing Units module allows you to add specific details of a housing unit in which a client lives, or can be placed. View a list of the maintenance work done on housing units from the Housing Maintenance module and view which landlord has been linked to which housing unit from the Landlords module.

How to Add a Housing Unit

1. From the Front Desk menu, click on Housing then Housing Units.
2. On the Housing Unit List page, click the Add Housing Unit button.
3. In the Add Housing Unit page, under the Address tab, enter the building name, if applicable and the housing unit's address.
4. If applicable, enter the unit/apartment number.
5. Select the Country, Province/Territory/State, City and enter the Postal Code.
6. Select the geographic region.
7. Go to the Details tab and select the housing type and the status of the housing unit.



8. Confirm the date that the status was observed. If needed, you can change this date manually.
9. If applicable, select the occupancy status, enter the date the occupancy status was attributed to the housing unit and add any additional information concerning the occupancy status in the Comments field.
10. If applicable, select the landlord and service provider.
11. If applicable, select the features of the housing unit.
12. Indicate whether the housing unit can be shared with more than one client.
13. If applicable, select or enter the housing unit's attributes in the Area, Year Built, Bedrooms, Floors, Floor Number and Rent fields.
14. Indicate whether or not the housing unit is active.
15. If applicable, add any additional information concerning the housing unit in the Comments field.
16. Click the Save button.

How to Record Maintenance Work

1. From the Front Desk menu, click on Housing, then select Housing Units.
2. On the Housing Unit List page, locate the housing unit to which you want to add maintenance work and click the Edit button.
3. On the Edit Housing Unit page, select the Maintenance tab.
4. Click the Add Maintenance Work button.

5. On the Add Maintenance Work page, select the maintenance work being done.
6. If applicable, add a description of the work being done.
7. If applicable, select the contractor. The contractor must already be entered in the People module to appear in this field.
8. Indicate whether or not the work has been completed.
9. If applicable, enter the name of the company performing the work.
10. If applicable, add any additional information concerning the maintenance work in the Comments field.
11. Select the date when the work is scheduled to start and, if applicable, the date when the work is scheduled to end.
12. If applicable, enter the estimated cost of the work.
13. Select the actual dates the work started and, if applicable, the actual date when the work ended.
14. If applicable, enter the actual cost of the work.
15. Click the Save button.

MESSAGING

The Messaging module is used to send confidential messages between specific users. Messages are similar to email in that they can only be viewed by the individuals who receive them. A count of the number of unread messages will display next to Messaging on the Communications menu.

How to Compose a Message

1. From the Communications menu, select Messaging.
2. In the Messaging List page, select the Add Message button.
3. On the Add Message page, select the User(s) to whom the message will be sent.
4. If applicable indicate whether a mailing list should be used and find the mailing list by typing the first 3 letters of the name of the list.
5. Select the priority level.
6. If the message is about a client, type to search for an existing client in the Regarding field then select the client from the search results.

7. Confirm the delivery date for the message. If the message should be delivered on a day other than the current date, change this manually in the Deliver On field.
8. Enter the subject of the message.
9. Enter the text of the message in the Message Content field.
10. Click the Send button.

How to Reply to a Message

1. From the Communications menu, select Messaging.
2. On the Inbox tab on the Messaging List page, locate the message to which you want to reply and click the subject line to open it.
3. On the Display Message page, click the Reply button to reply to the sender of the message, click the Reply All button to reply to the sender and all of the other recipients, or click the Forward button to forward the message to another user.
4. Confirm that the information in the Send To, Priority, Regarding, Deliver On and Subject fields is correct.
5. Enter the message of your reply in the Content field.
6. Click the Reply button.

REPORTS

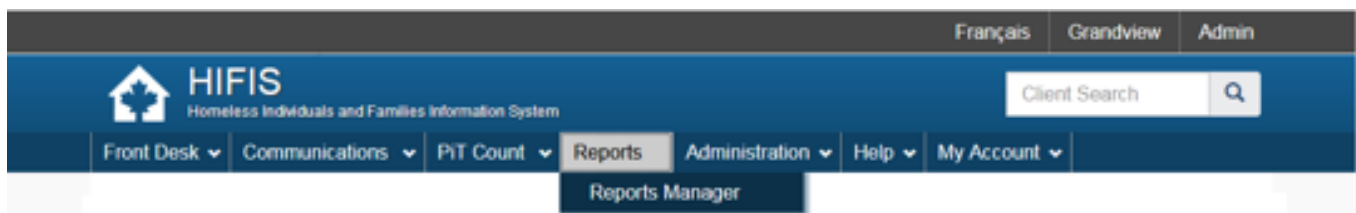
Tasks in the following section can be performed by selecting Reports Manager from the Reports menu.

The Reports module is used to generate or edit existing reports or create new ones. You can also select any report and read its description. Producing reports from HIFIS helps the Administrator at your shelter or service provider to make decisions about day-to-day operations.

The Report Manager page shows you the list of reports available in HIFIS.

How to Generate a Report

1. From the Reports menu, select Report Manager.
2. On the Report Manager page, locate the report you want to generate and click the Run Report button.



Report Manager

HIFIS Reports Custom Reports Add Report

Show entries Filter items

Report Name	Type	Date Created	Last Edited	Description	Action
Bed List.rpt	Crystal Report	11/06/2017	02/25/2019	2019/02/19 13:39Version 1.01	
Bed Nights Monthly.rpt	Crystal Report	02/15/2019	02/15/2019	2019/02/12 09:32	
Booked-in Client List.rpt	Crystal Report	11/05/2017	11/05/2017		
Case Management Clients.rpt	Crystal Report	02/15/2019	02/15/2019	2019/02/14 10:07	
Case Management Goals Activities Summary.rpt	Crystal Report	11/06/2017	02/15/2019	2019/02/11 15:39	
Caseworker List	Crystal Report	11/06/2017	02/07/2019	Report identifies the case-workers	

Note: The report may be sorted under the HIFIS Reports tab, the Custom Reports tab or the Archived Reports tab, depending on the report.

3. On the Report Generator page, depending on the report, different parameters will need to be filled out.
4. If applicable, enter the report dates.

Note: If the dates are already entered, confirm their accuracy.

5. If applicable, enter the service providers that will be included in the report.
6. Select the Run Report button.
7. From the Report Display page, you can export the report results using the Export this report button, or print them using the Print this report button.

MY ACCOUNT

How to Modify Your User Account Password

1. From the My Account menu, select Change Password.
2. Enter your old password.
3. Enter your new password, then enter it again to verify that it is exact.
4. Click the Save button.

How to Log into HIFIS

1. Navigate to the HIFIS Log In page.
Depending on your organization, you may do this by selecting a shortcut on your desktop, entering the HIFIS 4 URL in the address bar of your internet browser, or selecting a previously created bookmark.
2. From the Log In page, enter the user name.

Note: This will generate the Service Provider drop-down list.

3. Enter the user's password.
4. Select the service provider to which you require access.
5. Select the Log In button.

HELPFUL HINT:



The link to the HIFIS application will be different for each service provider. If you don't know the URL address for your organization, please contact your HIFIS administrator or technical support.

How to Log out of HIFIS

1. From the My Account menu, select Log Off.

PEOPLE

The People module allows users to record and update the contact information for all people in the HIFIS database.

The term “People” refers to individuals who do not have a direct role at your service provider, but are linked indirectly. For example, track the contact information of a client’s landlord or physician. When selecting People from the Front Desk menu, it will bring users to the People List page where you can search for a person, add a new person, or edit existing information.

How to Add a People Record

1. From the Front Desk menu, select People.
2. On the People List page, click the Add Person button.
3. Enter the person’s last and first name, and, if applicable, enter their middle name.
4. Select the gender of the person.
5. If applicable, enter the person’s aliases.
6. Indicate whether or not the person’s date of birth has been verified. Depending on the option selected, different fields will become available.
7. If the person’s date of birth has been verified, enter it in the Date of Birth field. If the date of birth has not been verified, enter the person’s approximate age.
8. If applicable, select the person’s role. If the person has more than one role, begin typing additional roles in the same field and select them from the list.
9. Indicate whether or not the People record is active.
10. Click the Save button.

How to Record a Person’s Address

1. From the Front Desk menu, select People.
2. On the People List page, select the People record to which you want to add housing by clicking on the person’s name.
3. From the People - Vitals page, click the People Information menu and select Address History.
4. On the People - Housing History page, click the Add Address button.
5. From the People - Add Housing page, if applicable, confirm the start and end date. If needed, you can change this manually.
6. If applicable, enter the name of the building.
7. Enter the address of the housing, including the country, province, territory or state, the city and postal code.
8. Select the geographic region.
9. Click the Save button.

How to Assign a Profile Picture to a Person’s Profile

1. From the Front Desk menu, select People.
2. On the People List page, select the People record to which you want to add a profile picture by clicking the person’s name.
3. From the People - Vitals page, click the Add Profile Picture button.
4. Click the Browse button.
5. Browse for the picture you want to assign to the person’s profile, and click the Open button to select it.
6. Click the Save button.

HELPFUL HINT:

When the Browse button is selected, HIFIS will automatically recognize whether a camera is available and prompt you to use your camera or select a picture from a list. This means that if you are accessing HIFIS from a mobile device, you can take a picture of the client with the device's built-in camera. Or, if accessing HIFIS from your computer, you can use a webcam to take a picture of the client.

How to Record a Person's Vehicle

1. From the Front Desk menu, select People.
2. On the People List page, select the People record to which you want to add a vehicle by clicking the person's name.
3. From the People - Vitals page, click the People Information menu and select Vehicles.
4. On the People - Vehicles page, click the Add Vehicle button.
5. Enter the make of the vehicle.
6. If applicable, enter the model, year, colour and licence plate of the vehicle.
7. If applicable, enter the start and end dates.
8. Click the Save button.

How to Record a Person's Contact Information

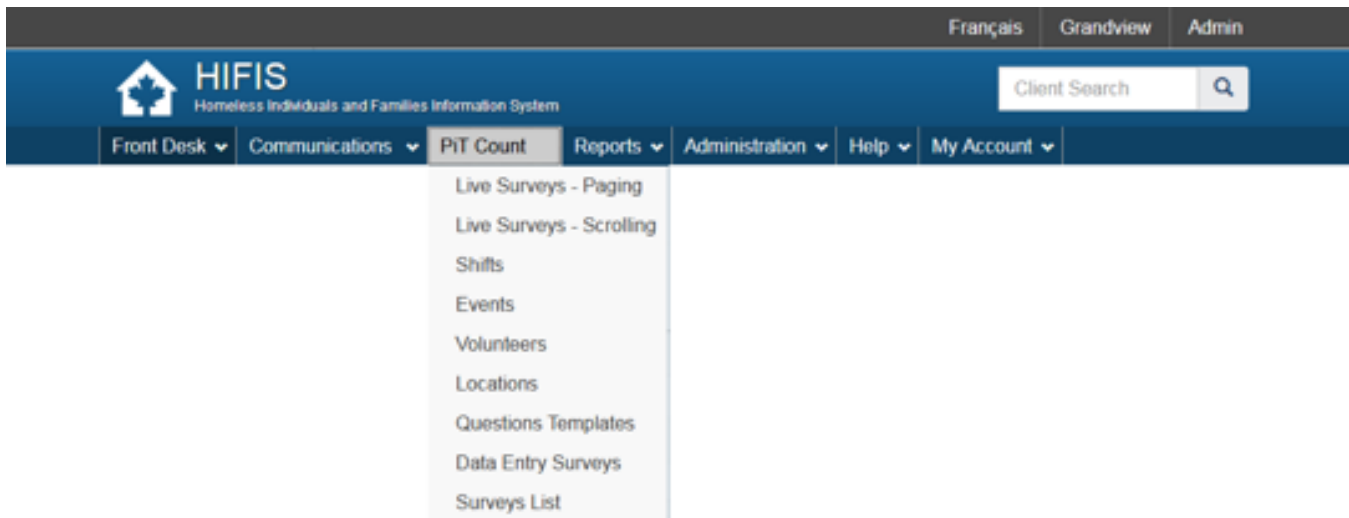
1. From the Front Desk menu, select People.
2. From the People List, select the appropriate People record by clicking the person's name.
3. Click the Contact Info tab and enter the means of communication. Depending on the value selected, different fields will appear.
4. Enter the information, such as the phone number or email address, in the Value field and additional information in any other fields that have appeared.
5. Click the Add button.

How to Add a Role to a People Record

1. From the Front Desk menu, select People.
2. On the People List page, select the People record to which you want to add a role by clicking the person's name.
3. From the Vitals tab, click the Edit button.
4. On the People - Edit Vitals page, click the Roles field to select a new role.
5. Click the Save button.

How to Edit a Person's Vital Information

1. From the Front Desk menu, select People.
2. On the People List page, select the appropriate People record by clicking the person's name.
3. In the Vitals tab, click the Edit button.
4. You can edit the existing information or add any missing or additional information.
5. Click the Save button.



POINT-IN-TIME (PiT) COUNT

Tasks in the following section can be performed by selecting the appropriate module from the PiT Count menu.

A PiT Count is a method used to measure homelessness, at a given time, by counting and surveying people sleeping in shelters and on the streets.

PiT Counts include a survey that can provide communities with information on the demographics of their homeless population (e.g. age, gender, veteran status, Indigenous identity). This information can be used by communities to direct resources to areas of greatest need, and to connect people with targeted supports to help them achieve stable housing. It can also be used in the future, to track changes in the homeless population and measure progress in reducing it.

The PiT Count Module was developed to help communities easily, safely and securely upload their PiT Count data into HIFIS, and export the data for further analysis. The

Module can also help you manage volunteers, for example, by creating shifts and generating distribution lists.

How to Define the PiT Count Event

Note: a community is only allowed one PiT event

1. From the PiT Count menu, select Events.
2. Select Add PiT Event.
3. Enter your community (province/territory; city), and your event date information (mandatory fields are marked with a red star). You may decide the minimum age for survey participants, or keep the default minimum age of 16.
4. Under Live Survey Offset No., write the number of paper surveys you plan to use during your PiT count. Then your mobile surveys will have different identification numbers from the paper surveys. If you don't plan to use paper surveys, enter 0.

5. Click the Save button.
6. If applicable, use the drop-down lists to edit your event details and survey questions.
7. To activate or deactivate optional Canadian Observatory on Homelessness (COH) questions from your survey, click on Select COH Questions.
8. Click on Add Local Questions from your Event Setting screen.

How to Create Volunteer Profiles Using Quick-Add

Using Quick-Add to add volunteers, you can easily create several volunteer profiles with minimal information. Volunteers added using this method will automatically have surveyor status, which will allow them to enter PiT count data.

1. Select Volunteers from the PiT Count menu. Your User List will open.
2. Select Add PiT Live Volunteers.
3. Fill out the spreadsheet. Add a username if you would like to create a user profile; if you do not add a username, the information will be entered into the software as a “Person”— someone who exists in the software but does not have any login information to access it. You’ll want you volunteers to have full user profiles.
4. Save your document.
5. Click File to Upload to import it into HIFIS.
6. Select the Rights template you would like to use.

Note: HIFIS has three templates from which to choose: PiT Admin Volunteer, PiT Data Entry Volunteer, and PiT Live Volunteer. You may edit these templates, or create your own, under Rights Templates under the Administration tab.

How to Create Volunteer Profiles Using Add a New User

Using “Add a New User” to add volunteers allows you to create detailed volunteer profiles.

1. Click on New User on the main Volunteers page.
2. To create a profile, list the role (or function) of the volunteer. This will allow you to select them as a surveyor, so that they can enter PiT Count data.

Note: The basic volunteer profile is called PiT Volunteer.

3. If you have the two-factor authentication for HIFIS pre-configured, enter a security key.
4. After entering the volunteer’s information, click the Save button.
5. To add more volunteers, repeat steps 1 - 4, as required.

How to Create PiT Count Locations

1. From the PiT Count menu, select Locations.
2. Click the Add Place button.
3. Complete the form.

Note: From the Locations page, you can:

- edit or add information on a shelter (e.g. target clientele or address), by choosing the record you want to edit and selecting Edit the Current Record.
- delete a shelter by highlighting the shelter on the List tab and selecting "Delete the Current Record."

How to Create Shifts

1. From the PiT Count menu, select Shifts.
2. Click the Add PiT Shift button.
3. To assign a volunteer to a shift, select the volunteer from the Surveyor field. The list will contain the volunteers that you entered earlier.
4. Click on the Place button to bring up the list of survey locations already entered in the Module.
5. After entering all the information for a shift, click the Save button.

How to Enter Data from a Mobile Device

Once your volunteers are set up with user profiles, they will be able to log into the software from any device connected to the internet.

1. From the PiT Count menu, there are two Live Survey options: paging and scrolling.
2. The Paging format shows the survey with one question per page. Navigate through with the Previous and Next buttons.
3. The Scrolling format has the survey question accessible from one page by drop-down menus.

Note: The survey remains the same, but the volunteer can choose the format they prefer. As your volunteers enter surveys during the PiT count, the surveys will appear in real time on the PiT Surveys landing page.

How to Enter Data from Paper Surveys

1. From the PiT Count menu, select Survey List.
2. Click on Add PiT Data Entry Survey.
3. Under Survey Details enter the survey number from the paper survey.
4. At the PiT Shifts question, select the matching PiT Count shift from the shifts already entered.
5. Enter each response from the paper survey into the corresponding box.
6. Move through the questions using the Questions tabs.
7. Once all the information has been entered, click the Save button.

Note: You can edit or delete a survey at any time by selecting the survey from the main PiT Surveys landing page.

HELPFUL HINT:



If you cannot save, review each tab to check all mandatory fields are completed.

How to Export PiT Data

1. From the PiT Count menu, select Events.
2. Hover your mouse over the icons next to the PiT Event and select the Data Export button.
3. On the PiT Export page, the View and Send HPS Export button at the bottom of the page allows you to view and export data to Reaching Home. Other data sets can be created from data in HIFIS. Select the ones applicable.

HELPFUL HINT:



The Create Full Data Set button allows you to extract all your data from HIFIS into files that can then be exported and the Create Registry Week Data Set button allows you to create data files to analyze your Registry Week data.

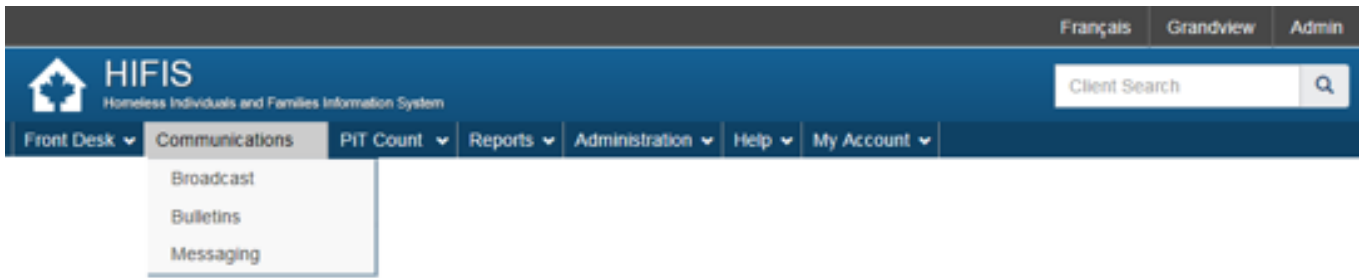
For communities located in Ontario, the Create Ontario Export button allows you to create your files to provide your data requirements for the Ontario's Homeless Enumeration Approach.

ADMINISTRATION

Tasks in the following section can be performed by selecting the appropriate module from the Administration or Communications menu.

Administration

- Application Settings
- Client Merge
- Client Service Delete
- Custom Tables
- Data Export
- Express Goods and Services Templates
- Food Bank Items
- Housing Continuum
- Look-up Tables
- Programs
- Questionnaires
- Rights Templates
- Service Provider
- Users
- Registration
- Database Maintenance



BROADCAST MESSAGE

The Broadcast module allows HIFIS users to send an immediate message to all other HIFIS users who are logged in to HIFIS at that time.

The Broadcast module is used when a message needs to be seen by every user who is logged in to HIFIS at that time. A broadcast displays an urgent message by showing an orange notification on the top right corner of the page. The notification is displayed as long as the user does not hover the mouse cursor over it. The notification can also be seen by users who weren't logged in at the time up to two hours after the broadcast has been sent.

A broadcast can be used to notify users of an imminent system shutdown for maintenance or an emergency at a shelter. The broadcasted messages are not saved in the HIFIS application.

How to Send a Broadcast Message

1. From the Communications menu, select Broadcast.
2. On the Broadcast Message page, enter a subject, if applicable.
3. Enter the content of the broadcast message in the Message field.
4. Click the Send button. All logged on users will immediately receive an orange pop-up window displaying the message.

BULLETINS

The Bulletins module is an electronic bulletin-board system used to advise staff of important information, such as team meetings, fire drills or incidents concerning a specific client. Use the Bulletins module when you want your message to be relayed to all HIFIS users at the selected service provider(s). When logging into HIFIS, the current bulletins are automatically displayed on the main page and will remain there until the user has viewed and acknowledged the bulletin.

How to Create a Bulletin

1. From the Communications menu, select Bulletins.
2. On the Bulletin List page, select Add Bulletin.
3. On the Add Bulletin page, enter the subject of the bulletin.
4. Select the priority.
5. If applicable, type to search for an existing client in the Client Name field, then select the client from the search results if this bulletin concerns a client. Additional clients can be added by repeating this step.
6. If applicable, select the User on whose behalf the bulletin was created in the Requested By field.

7. Select which service providers will be able to view the bulletin.
8. Confirm the start and end dates for the bulletin. If needed, these dates can be changed manually.
9. Enter the bulletin's message in the Bulletin Content field.
10. Click the Save button.

How to Edit a Bulletin

1. From the Communications menu, select Bulletins.
2. From the Bulletin List, locate the bulletin you want to modify and click the Edit button.
3. On the Edit Bulletin page, you can edit the existing information or add any missing or additional information.
4. Click the Save button.

CLIENT MERGE

The Client Merge module is used to merge two client records together in a situation where duplicate client records have been entered into HIFIS.

How to Merge Two Clients

1. From the Administration menu, select Client Merge.
2. On the Client Merge page, select the Client from whom you want to merge data and delete.
3. Select the Client to whom you want to merge data.
4. Make sure you correct all the merge conflicts, otherwise the Merge button will not appear.
5. Select the Merge button. The changes will automatically be saved.

Client Merge ? !

→ Merge ✕ Cancel

Select the Client you want to merge data from and delete

Select the Client you want to merge data to *

Merge from and delete
Select Client

Merge to
Select Client

CUSTOM TABLES

The Custom Tables module is used to create customized pages within HIFIS for service providers whose needs exceed the defaults of the application. Custom tables are used to gather information on clients with user-created fields. The following modules found on the Client Information menu can have custom tables attached to them: Indigenous, Financial Profile, Health, Identification and Vitals. The following modules found on the Client Management menu can have custom tables attached to them: Appointments, Calls and Visits Log, Case Management, Chores, Conflicts, Food Bans, Goods and Services, Housing Placement, Incidents, Service Restrictions and Waiting Lists.

Before creating a custom table, it is recommended that the service provider contact the HIFIS Support Desk to ensure that the desired fields are not currently in development. The data in custom tables will not be included in HIFIS reports and there is limited ability to provide support for issues with custom tables as the situation is different for each site.

For a user to enter information into a custom table, they will need to select the Custom Table tab, or the name of the Custom Table tab determined by the service provider, in the applicable module.

How to Create a Custom Table

- From the Administration menu, select Custom Tables.
- On the Custom Table List page, select the Add Custom Table button.
- On the Add Custom Table page, select the module in which you want the custom table to be created.
- Select the service providers that will have access to the custom table.
- Enter the English and French name of the custom table.
- If applicable, indicate whether the table can allow more than one record and whether the table is active.
- Click the Save button.
- From the Add Custom Table Field page, enter the English and French name of the field.
- Select the type of field.

Note: Depending on the value selected, different fields will appear.

- Indicate whether or not the field is mandatory.
- If applicable, enter information in the fields that may have appeared after selecting the type of field.
- Indicate whether or not the field is active.
- Click the Save button to continue adding fields to the new custom table or select the Save and Go To Layout button to stop adding new fields and go see the layout of the new custom table.

Note: Select the Discard and Go To Layout button to discard the field that has been created and proceed to the layout view of the custom table.

How to Add a Field to an Existing Custom Table

1. From the Administration menu, select Custom Tables.
2. On the Custom Table List page, locate the custom table to which you want to add a field, then select the Fields button.
3. On the Custom Table Field List, click the Add Custom Table Field button.
4. Enter the English and French name of the field.
5. Select the type of field.

Note: Depending on the value selected, different fields will appear.

6. Indicate whether or not the field is mandatory.
7. Enter information in the fields that may have appeared.
8. Indicate whether or not the field is active.
9. Click the Save button to continue adding fields to the new custom table or select the Save and Go To Layout button to stop adding new fields and go see the layout of the new custom table.

Note: Select the Discard and Go To Layout button to discard the field that has been created and proceed to the layout view of the custom table.

How to Edit a Custom Table

1. From the Administration menu, select Custom Tables.
2. On the Custom Table List page, locate the table you want to modify and click the Table button.
3. On the Edit Custom Table page, you can edit the existing information or add any missing information.
4. Click the Save button.

How to Edit a Field of a Custom Table

1. From the Administration menu, select Custom Tables.
2. On the Custom Table List page, locate the table you want to modify and click the Fields button.
3. On the Custom Table Field List page, locate the field you want to modify and click the Field button.
4. On the Edit Custom Table Field page, you can edit the existing information or add any missing information.
5. Click the Save button to continue adding fields to the new custom table or select the Save and go to Layout button to stop adding new fields and go see the layout of the new custom table.

Note: Select the Discard and Go To Layout button to discard the field that has been created and proceed to the layout view of the custom table.

How to Edit the Layout of a Custom Table

1. From the Administration menu, select Custom Tables.
2. On the Custom Table List page, locate the table you want to modify and click the Layout button.
3. On the Custom Table Layout page, modify the order of the fields by selecting and dragging the fields up and down the list.
4. Click the Save button once the modifications to the layout are complete.

DATA EXPORT

Part of the objective of Reaching Home is to gather information on the use of shelters from HIFIS and other sources to develop a national portrait of homelessness. The collection of data will contribute to the development of policies and measures to reduce and prevent homelessness across Canada. Through HIFIS, Reaching Home collects up to 38 fields of non-directly identifiable personal information.

How to Export Data to Employment and Social Development Canada

1. From the Administration menu, select Data Export.
2. Click Preview and Send Export.
3. If applicable, review the data to be sent.
4. Indicate whether you want an email confirmation that the data has been sent.
5. Indicate whether you want warnings to be ignored.
6. Click the Send button.

DELETE CLIENT RECORDS

The HIFIS System Administrator has the ability to delete some client transaction records that cannot be deleted by any other user. This is done from a module in the Administration menu called Client Record Delete.

How to Delete Client Transaction Records using the Client Service Record Delete Module

1. From the Administration menu, select Client Service Delete.
2. Type to search for an existing client in the Client Name field, and then select the client from the search results.
3. Select the service or services that include the transaction that you want to delete.
4. Locate the transaction you want to delete and select the Delete button.
5. Confirm by selecting the Delete button in the pop-up notification.

EXPRESS GOODS AND SERVICES TEMPLATES

The Express Goods and Services Templates module is used to create models of pre-set goods or services that can be used to create goods and services records in a quick and efficient way. Your service provider might want to set up express goods and services to save time if it offers the same goods or services often to clients. If you want to be able to customize the goods and services records to a further degree while creating them, you can use the non-express Goods and Services.

How to Add an Express Goods Template

1. From the Administration menu, select Express Goods and Services Templates.
2. On the Goods and Services Templates List page, select the New Good Template button.
3. On the New Express Good page, select the good off which the express good is based.
4. Enter what the good will be referred to as in the Item Name field.
5. Select the service providers to which the express good will be available.
6. If applicable, select the owner of the express good.

Note: Only the owner will be able to modify the express good after it is saved.

7. Select the unit of measure.
8. If applicable, enter the quantity.
9. If applicable, enter the cost and price.
10. If applicable, indicate whether the express good is active.
11. Select the Save button.

How to Add an Express Service Template

1. From the Administration menu, select Express Goods and Services Templates.
2. On the Goods and Services Templates List page, select the New Service Template button.

3. On the New Express Service page, select the service off which the express service is based.
4. Enter what the service will be referred to as in the Item Name field.
5. Select the service providers for which the express service will be available.
6. If applicable, select the owner of the express service.

Note: Only the owner will be able to modify the express service after it is saved.

7. If applicable, enter the expended hours and minutes.
8. If applicable, enter the cost and price.
9. If applicable, indicate whether the express service is active.
10. Select the Save button.

How to Edit an Express Goods or Service Template

1. From the Administration menu, select Express Goods and Services Templates.
2. On the Goods and Services Templates List page, locate the template you want to edit and select the Edit button.
3. On the Edit page, you can edit the existing information or add any missing information.
4. Select the Save button.

FOOD BANK ITEMS

The Food Bank Items module is where the food items used in the Food Banks module are created.

How to Add a Food Bank Item

1. From the Administration menu, select Food Bank Items.
2. At the bottom of the Food Bank Item List page, click the Add Food Bank Item button.
3. Select the behaviour type the food item will have.
4. Enter the English and French name of the item.
5. Select the number of days for which the item is covered.
6. If applicable, enter the cost of the item for the service provider.
7. Enter the number of adults and children that the item can feed.
8. Indicate whether or not the food bank item is active.
9. If applicable, enter a product code for the food bank item.
10. Click the Save button.

How to Edit a Food Bank Item

1. From the Administration menu, select Food Bank Items.
2. On the Food Bank Item List page, locate the food bank item you want to modify and click the Edit button.
3. On the Edit Food Bank Item page, you can edit the existing information or add any missing information.
4. Click the Save button.

LOOK-UP TABLES

The Look-up Tables module is used to add, edit or remove any of the look-up values that appear in the drop-down lists throughout HIFIS. Only values can be modified by users, not the tables themselves.

How to Add a Look-up Value

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Table List page, locate the table to which you want to add a value and click the Customize Look-up Table Values button.
3. On the Customize Look-up Table Values page, select the Add Look-up Value button.
4. Enter the English and French name of the look-up value.
5. Select the roll-up value and desired outcome of the look-up value.
6. Indicate whether or not the look-up value is active.
7. If applicable, select other service providers to subscribe to the look-up value.
8. Click the Save button.

Note: The look-up value will now appear in the Existing Look-ups table.

How to Deactivate a Look-up Value

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Tables List page, locate the table you want to modify and click the Customize Look-up Table Values button.
3. On the Customize Look-up Table Values page, locate the look-up you want to deactivate and select the Unsubscribe button.

Note: Once a selection is made, the changes are automatically saved.

How to Edit a Look-up Table Value

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Tables List page, locate the table in which the field you want to modify is found and click the Customize Look-up Table Values.
3. On the Customize Look-up Table Values page, locate the look-up you want to modify and click the Edit button.

Note: Users can only edit look-up values that have been added at the service provider level.

4. On the Edit Look-up Value page, you can edit the existing information or add any missing information.
5. Click the Save button.

How to Edit the Look-up Table Order

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Tables List page, locate the table for which you want to modify the order and click the Customize Look-up Table Values button.
3. On the Customize Look-up Table Values page, click the Sort Look-up Table Values button.
4. From the Sort Look-up Table Values page, modify the order of the fields by selecting and dragging the fields up and down the list or click the Alphabetical Order button to sort the values alphabetically.
5. Click the Save button once the modification to the look-up table order is complete.

PROGRAMS

The Programs module is used to define the programs used by the service provider to fund services received by a client. Programs can be linked to stay or non-stay activities, such as Goods and Services or Food Bank records. In addition, fixed costs can be associated with programs.

How to Add a Program

1. From the Administration menu, select Programs.
2. On the Programs List page, click the Add Program button.
3. On the Add Program page, enter the name of the program.
4. Select the program type.

5. Select the services to which the program may be linked.
6. Confirm the accuracy of the start date and, if applicable, enter the end date.
7. If applicable, enter the maximum amount of funding per period.

Note: If Stay was selected in the Services field, enter the maximum number of beds per period, if applicable.

8. If applicable, enter the time unit.
9. If applicable, enter the rate of the program.
10. If applicable, indicate whether the program is active.
11. If applicable, add any additional information concerning the program in the Comments field.
12. Click the Save button.

How to Edit a Program

1. From the Administration menu, select Programs.
2. On the Program List page, locate the program you want to modify and click the Manage button.
3. On the Display Program page, select the Details tab and click the Edit button.
4. On the Edit Program Details page, you can edit the existing information or add any missing information.
5. Click the Save button.

How to Add a Fixed Cost to a Program

1. From the Administration menu, select Programs.
2. On the Program List page, locate the program to which you want to add a fixed cost and click the Manage button.
3. On the Display Program page, select the Fixed Costs tab, then click the Add Fixed Cost button.
4. If applicable, in the Add Fixed Cost window, enter the fixed cost amount.
5. Enter a description of the fixed cost.
6. If applicable, enter the start and end dates.

Note: If the start date is already entered, confirm its accuracy.

7. If applicable, indicate if the fixed cost should be shown on reports or not.
8. Click the Save button.

How to Add a Service Provider to a Program

1. From the Administration menu, select Programs.
2. On the Program List page, locate the program you want to add a service provider to and click the Manage button.
3. Select the Service Providers tab, then click the Add Service Provider button.
4. On the Add Service Provider window, select the service provider.
5. Enter the start date and, if applicable, the end date.

Note: If the start date is already entered, confirm its accuracy.

6. If applicable, indicate the allocated funding and beds per period, the time unit and rate paid.
7. If applicable, enter any other additional information about the service provider in the Comments field.
8. Click the Save button.

How to Edit a Program's Fixed Cost

1. From the Administration menu, select Programs.
2. On the Program List page, locate the program with the fixed cost you want to modify and click the Manage button.
3. Select the Fixed Costs tab, then locate the fixed cost you want to modify and click the Edit button.
4. On the Edit Fixed Cost page, you can edit the existing information or add any missing information.
5. Click the Save button

QUESTIONNAIRES

The Questionnaires module can be used by service providers who want the ability to design their own custom surveys and questionnaires. These can be used to collect additional information about clients, or to obtain client feedback on the services they received.

How to Create a Questionnaire

1. From the Administration menu, select Questionnaires.
2. On the Questionnaires List page, click the Add Questionnaire button.
3. Enter the name of the questionnaire.
4. Select the service providers who'll have access to the questionnaire.
5. Indicate whether or not the questionnaire is active.

6. If applicable, select the owner of the questionnaire.
7. Click the Next button.
8. On the Add Question page, enter the first question of the questionnaire.
9. Indicate if the question is active or not.
10. Select the question type.

Note: After clicking the Add Question button, if Single Selection Drop-down or Multiple Selection Drop-down was selected from the Question Type field, then you will be redirected to the Add Drop-down Value page to provide the values of these drop-downs. On the Add Drop-down Value table, enter the drop-down value, then indicate whether or not the value is active. You can then click the Add Drop-down Value button to add another drop-down value or move onto the next question by clicking the Save Value and Finish Questionnaire button.

- Click the Add Question button to enter another question.

Note: Repeat steps 7 through 9 until all questions have been entered.

- When all questions have been entered, click the Save Question and Finish Questionnaire button.

How to Edit or Add a Question in an Existing Questionnaire

- From the Administration menu, select Questionnaires.
- On the Questionnaires List page, locate the questionnaire you want to edit and click the Edit button.
- On the Edit Questionnaire page, locate the question you want to edit and click either Edit Question or Edit Drop-down Values, or click the Add Question button to add a new question.
- Click the Save Question and Finish Questionnaire button.

REPORTS

The Reports module is used to generate or edit existing reports or create new ones. You can also select any report and read its description. Producing reports from HIFIS helps the Administrator at your shelter or service provider to make decisions about day-to-day operations.

How to Add a Report

- From the Reports menu, select Reports Manager.
- On the Report Manager page, select the Add Report tab.
- Enter the report name.
- Enter a description of the report, a report category and the Service Provider(s) to which the report applies.
- To upload your report, click the Browse button, select the file to upload and click the Open button.
- Click the Upload button.

How to Edit a Report

- From the Reports menu, select Reports Manager.
- On the Report Manager page, locate the report you want to edit and click the Edit button.

Note: The report may be sorted under the HIFIS Reports tab, the Custom Reports tab or the Archived Reports tab, depending on the report.

- On the Report Generator page, you can edit the existing information or add any missing information.
- Click the Save button.

RIGHTS TEMPLATES

The Rights Templates module is used to create models of pre-set rights that can be applied to users in a quick and efficient way when creating a new user profile.

How to Add a Rights Template

1. From the Administration menu, select Rights Templates.
2. On the Rights Template List page, select the Add Template button.
3. On the Add Template page, enter the name of the template.
4. Select the owner of the template. Only the owner of the template can modify it once it is saved.
5. If applicable, select additional Service Providers to which the template will be available. By default, the owner appears in this field, but can be removed.
6. If applicable, select report categories.
7. If applicable, select the template you wish to copy as a base for the new template.
8. Indicate whether or not the template is active.
9. If applicable, add any additional information concerning the template in the Description field.
10. Click the Save button.
11. On the Edit User Template page, click in the Template Rights tab.
12. Locate the rights you want to add or remove to the template on the rights list by clicking the Expand/Collapse Tree button.
13. Click the checkbox to add or remove a right.

Note: Once a selection is made, the changes are automatically saved.

How to Edit a Rights Template

1. From the Administration menu, select Rights Templates.
2. On the Template List page, locate the template you want to edit and select the Edit button.
3. On the Edit User Template page, select either the Template Details tab or the Template Rights tab to edit the existing information or add any missing information.
4. Click the Save button if making changes to the Template Details tab. Once a selection is made in the Template Rights tab, the changes are automatically saved.

ROOMS AND BEDS

How to Add Rooms

1. From the Administration menu, select Service Provider.

Note: If you are adding rooms for the Service Provider you are logged in as, clicking Service Provider on the Administration menu will bring you directly to that service provider's details page. If you are trying to add rooms for another service provider, expand the Service Provider Management menu and select List of Service Providers. On the Service Provider List page, type to search for a service provider or click the Expand/Collapse Tree button to see the whole service provider hierarchy. Locate the service provider for which you want to edit the details and click on the service provider name. Open the Service Provider menu and select Rooms and Beds.

2. On the Service Provider Details page, click the Service Provider Management menu and select Rooms and Beds.
3. From the Rooms and Beds page, click the Add Rooms button.
4. From the Add Multiple Rooms page, enter the name of the room.
5. Enter the start index number that will appear next to the room name.
6. Enter the total number of rooms to be added in this transaction.

Note: If adding multiple rooms in one transaction, where the Room Name is "A", the Start Index is "101", and 3 additional rooms are to be added; these rooms will be A101, A102 and A103.

7. Indicate whether or not the room is active.
8. Click the Save button.

How to Add Beds to a Room

1. From the Administration menu, select Service Provider.

Note: If you are adding beds for the Service Provider you are logged in as, clicking Service Provider on the Administration menu will bring you directly to that service provider's details page. If you are trying to add beds for another service provider, expand the Service Provider Management menu and select List of Service Providers. On the Service Provider List page, type to search for a service provider or click the Expand/Collapse Tree button to see the whole service provider hierarchy. Locate the service provider for which you want to edit the details and click on the service provider name. Open the Service Provider menu and select Rooms and Beds.

2. From the Rooms and Beds page, locate the room to which you want add a bed and select the Manage Beds button.
3. From the Manage Beds page, select the Add Beds button.

4. From the Add Multiple Beds page, enter the name of the bed.
5. Enter the start index number that will appear next to the bed name.
6. Enter the total number of beds to be added in this transaction.

Note: If adding multiple beds in one transaction, where the Bed Name is “A”, the Start Index is “1”, and three beds are to be added; these beds will be A1, A2 and A3.

7. Select the type and status of the bed.
8. If applicable, indicate whether it is an overflow or mobile bed.
9. Indicate whether or not the bed is active.
10. Click the Save button.

Note: Click the Back button to return to the Rooms and Beds page.

HELPFUL HINT:



Note that multiple beds can have the same bed number if the beds are located in different rooms. For example, room number 101 can have a bed numbered 001, and room number 202 can have a bed with the same bed number, although these are two separate beds.

How to Mark a Bed as Unavailable and Modify a Bed Status

1. From the Administration menu, select Service Providers.

Note: If you are marking a bed as unavailable for the Service Provider you are logged in as, clicking Service Providers on the Administration menu will bring you directly to that service provider's details page. If you are trying to mark a bed as unavailable for another service provider, expand the Service Provider Management menu and select List of Service Providers. On the Service Provider List page, type to search for a service provider or click the Expand/Collapse Tree button to see the whole service provider hierarchy. Locate the service provider for which you want to mark a bed as unavailable and click on the service provider name. Open the Service Provider menu and select Rooms and Beds.

2. On the Service Provider Details page, click the Service Provider Management menu and select Rooms and Beds.
3. From the Rooms and Beds page, locate the room whose bed you want to modify and select the Manage Beds button.
4. Locate the bed and click the Edit button.
5. Under the Edit Bed section, select the reason the bed is being marked as unavailable from the Bed Status drop-down list.
6. Indicate that the bed is no longer active.
7. Click the Save button.

USERS

The Users module is used to view, edit and create user accounts at your service provider. The users are the individuals who do the daily tasks at your service provider. Users need an account in order to input data.

How to Add a User

1. From the Administration menu, select Users.
2. On the User List page, select the New User button.
3. On the Add User Profile page, enter the user name that will be used when logging into HIFIS.
4. Enter the user's first and last name.
5. If applicable, enter the user's email address.
6. Select the user's gender.
7. Select the language that HIFIS will launch in.
8. Indicate whether concurrent logins are allowed for this user.
9. Select the service provider the user has access.
10. If applicable, select a report category for this user.
11. Select the user's role.

Note: If the user is a caseworker, selecting Case Worker will cause their name to appear in the Caseworker field throughout HIFIS.

12. If applicable, add any additional information concerning the user in the Comments field.
13. If applicable, enter a security key for the user.
14. Click the Save button.

HELPFUL HINT:



When a user account is created, a new unique password will be generated automatically and sent by email. The user will be invited to finish the set-up of their account and change their password through a link sent to their email address. If the user does not have an email address, the administrator will be able to generate a password for them through the User Administrator.

How to Edit a User Profile

1. From the Administration menu, select Users.
2. From the User List page, locate the user profile you want to modify and click the User Account button.
3. On the User Account page, you can modify the user's information under the User Profile tab.
4. Click the Save button.

How to Add Contact Information to a User Profile

1. From the Administration menu, select Users.
2. From the User List page, locate the user for whom you want to add contact information and click the User Account button.
3. On the User Account page, click on the Contact Info tab.
4. Select the means of communication.

Note: Depending on the value selected, different fields will appear.

5. Enter information in the Value field and any other field that may have appeared.
6. Click the Save button.

Note: The contact information will now appear on the Existing Contact Information table.

How to Assign Rights to a User

1. From the Administration menu, select Users.
2. From the User List page, locate the user to whom you want to assign rights and click the User Account button.
3. On the User Account page, click on the Rights tab then select which service provider will be affected by those rights.
4. Select the rights template assigned to the user.

Note: You can also assign individual rights by searching for a specific HIFIS module or by expanding the rights tree manually and then clicking the checkbox to give or take away rights. Giving rights this way does not require you to use the save button, as changes will be recorded immediately.

5. Click the Save button.

How to Modify a User's Rights

1. From the Administration menu, select Users.
2. From the User List page, locate the user whose rights you want to modify and click the User Account button.
3. On the User Account page, click on the Rights tab.
4. Select which service provider will be affected by the rights changes.
5. Locate the rights you want to change on the rights list.

Note: If the client is linked to a rights template, you need to select the Un-Link User Organization from Template button to be able to modify the user's rights.

6. Click the checkbox to activate or deactivate a right, or select a new rights template.

Note: Once a selection is made by clicking a checkbox, the changes are automatically saved. If a selection is made by selecting a rights template, click the Select a Rights Template button.

How to Activate or Deactivate a User Account

1. From the Administration menu, select Users.
2. From the User List page, locate the user profile you want to activate or deactivate and click the User Account button.

3. On the User Account page, click the Quick Access Buttons tab, then select Activate/Deactivate Account.
4. The user profile's status will appear under Activate/Deactivate Account, click the Deactivate Account button if the account is active, or the Activate Account button if the user profile is currently not active.

How to Reset a User Account Password

1. From the Administration menu, select Users.
2. From the User List page, locate the user profile for which you want to reset the password and click the User Account button.
3. On the User Account page, click the Quick Access Buttons tab, then select Reset User Credentials.
4. Click the Reset User Credentials button.

WAITING LIST

The Waiting List module is used to keep track of clients who are currently waiting for a service from the service provider.

How to Create a Waiting List

1. From the Front Desk menu, select Waiting Lists.

2. On the Waiting Lists page, click the Add Waiting List button.
3. Enter the name of the waiting list.
4. Select the waiting list type.
5. Select the service provider(s) to which the waiting list applies, if applicable.
6. Confirm the start date. If needed, you can change this date manually.
7. If applicable, add any additional information concerning the waiting list in the Comments field.
8. Click the Save button.

How to Edit a Waiting List

1. From the Front Desk menu, select Waiting Lists.
2. On the Waiting Lists page, locate the waiting list you want to modify and click the Edit button.
3. On the Edit Waiting List page, you can edit the existing information or add any missing or additional information.
4. Click the Save button.



