HIFIS 4.0 USER MANUAL

For Durham Region

The purpose of this Training Manual is to familiarize new users on the basic functions of the HIFIS database.

CDCD
Community Development Council Durham

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INTRODUCTION

What is HIFIS?

The Homeless Individuals and Families Information System (HIFIS) software helps agencies better support people who are homeless or at risk of becoming homeless. HIFIS helps manage support services provided to clients, and allows for agencies to collect data in a manner that contributes to a better understanding of housing and homelessness within a community.

Purpose of the User Manual

This user manual is intended to provide all necessary information for the user to make full use of the database. This manual includes functions and capabilities, contingencies and alternate modes of operation and step-by-step procedures for system access and use. This manual will be reviewed and updated periodically in order to keep up-to-date with the changes of the database and its capabilities. For further information on key concepts please see Durham Region's HIFIS 4 Data Dictionary.

For additional information on the HIFIS modules please access the links below for further training.

https://attendee.gotowebinar.com register/ 2210164999004811523- Session 1

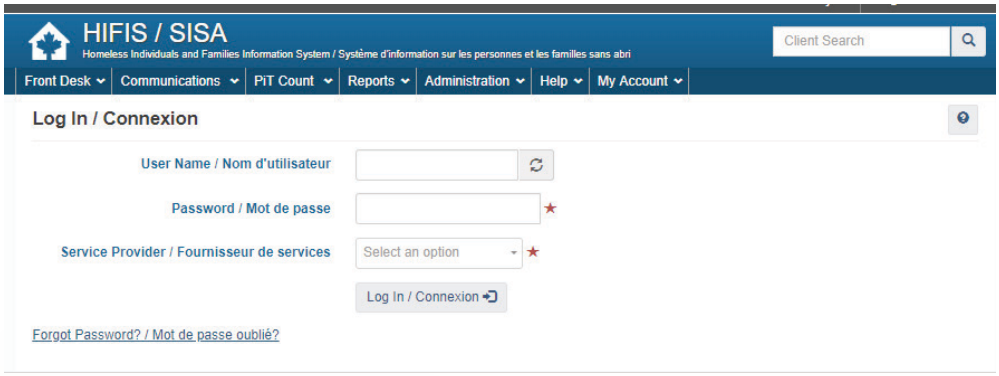
https://attendee.gotowebinar.com/register/ 4747561858803951873- Session 2

ACCESSING THE HIFIS DATABASE

HIFIS 4 is a web-based application. In order to run HIFIS, users must have an internet connection. Enter the following URL into the address field of the browser to access the HIFIS database.

http://hifis.durham.ca/applications/social/hifis.web

HOW TO LOG INTO HIFIS



1. From the HIFIS Log in screen enter your **User Name**
2. Enter your **Password**
3. Select the **Service Provider** from the drop down list

Note

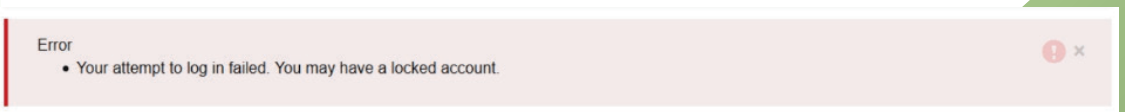
If nothing appears in the Service Provider drop down list, click on the **refresh** button next to the user name field.

4. Select **Log In**

If you have forgotten your password, you can request to have it reset by selecting **Forgot Password?**

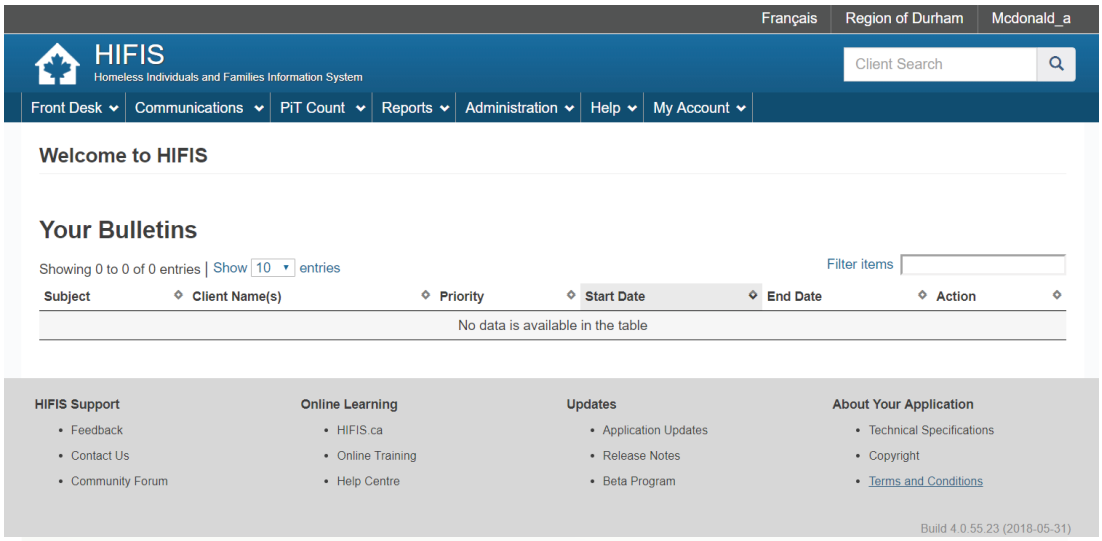
Note

After 5 unsuccessful attempts to log in the account will become locked. Once an account is locked a Manager or HIFIS Administrator must unlock it.



HIFIS 4.0 WELCOME SCREEN

After logging in Users are taken to the HIFIS 4.0 Welcome screen.



The first thing users may notice is the HIFIS Logo on the top left. Users can click on this logo at any location in the database to be brought back to the home screen.

To the right of the logo is the Client search box. This feature is helpful as there are several hundred clients in the HIFIS database.

Next users will notice that the Main Menu is made up of several drop down options.

Note

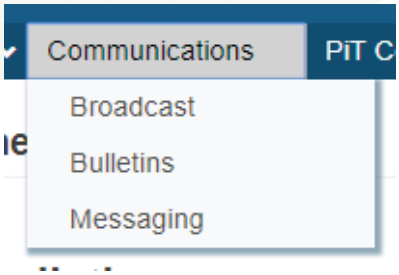
Depending on the rights of the user they may or may not see all of the options shown in this manual.

FRONT DESK

The front desk menu is used to access modules that show services that clients have received from service providers. Users can also record new service transactions in these modules.

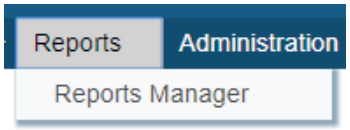
COMMUNICATION

The communications menu is used for communication between HIFIS users. Much like e-mail, users are able to communicate with one another through messaging. Managers are able to send important information to all the users by using the Broadcast and Bulletins features.



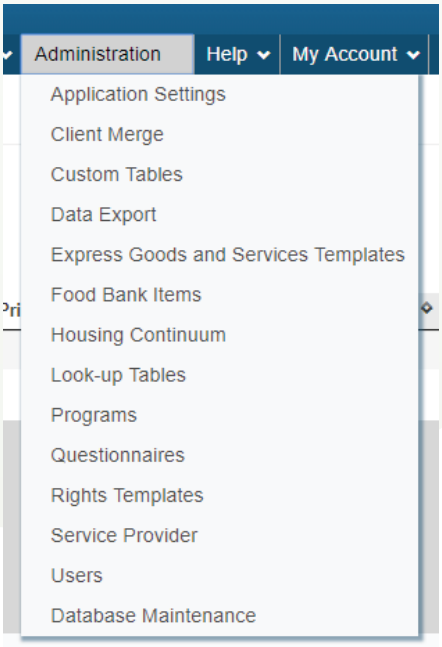
REPORTS

This drop down brings users to the Reports Manager screen. Here users have access to several reporting options.



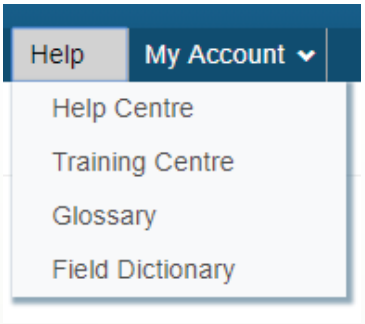
ADMINISTRATION

The Administration drop down menu is primarily used for database maintenance options. Users may find features such as the client merge helpful. This drop down menu is mainly used by managers and administrators.



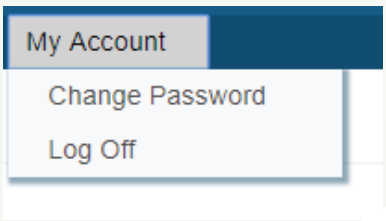
HELP

The Help drop down menu is where users can access resources such as Extra Training, or Glossary and Field Dictionary. In these modules users will find descriptions of what client information needs to be entered into specific fields also the definitions for common terms seen throughout the HIFIS database.



MY ACCOUNT

This drop down menu is where users change their password or Log Off the HIFIS database.

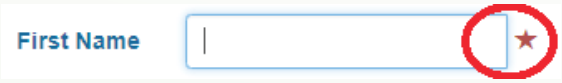


ENTERING THE DATA INTO HIFIS

It is important that before users enter data onto HIFIS they are able to identify the difference between mandatory and option fields, recognize different field types, and know when data has been saved and when it has not.

MANDATORY FIELDS

Users are not required to enter information in all fields, however fields with a red star beside them are mandatory fields. Information must be entered into mandatory fields before the user is able to save.



TYPES OF FIELDS

There are several different types of fields in the HIFIS database where users enter information. Users should be aware of the type of field that they are entering information into. Examples of the types of fields users will see are:

- Text Fields

These are fields where users can type information into.

- Numerical Fields

These are fields where the user must enter a number. Entering a client's approximate age is an example of a Numerical Field.

- Date Fields

These are fields where users must enter an applicable date. An example of a Date Field is when a user is entering in a date of occupancy for a unit the client is renting.

- Select Drop Down Fields

These fields already have pre-set information in them. Users will select the applicable answer.

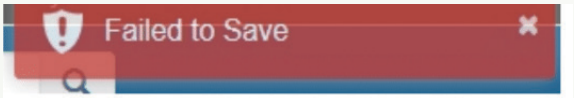
- Upload fields

These are fields in which the user is able to upload information. An example of this would be if a user uploaded the client's ID into the documents module.

SAVING DATA

After entering data in the fields there will be a **SAVE** button. After users click on the save button a green box will appear in the top right hand corner of the screen notifying users that the data has been saved.

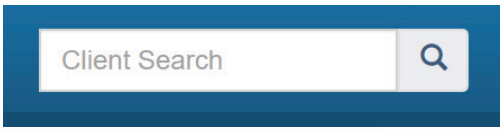
Sometimes the data fails to save. In many of these cases the user has not completed a mandatory field. When the data fails to save a red box will appear in the top right hand corner of the screen notifying users that the data has not been saved.



SEARCHING FOR A CLIENT

There are two ways to search for a client profile on the HIFIS database. One is by using the *Client Search Box* and the other is looking at the list of clients in the *Client List Screen*.

The easiest way to search a client's profile is by typing their name in the *Client Search Box*.



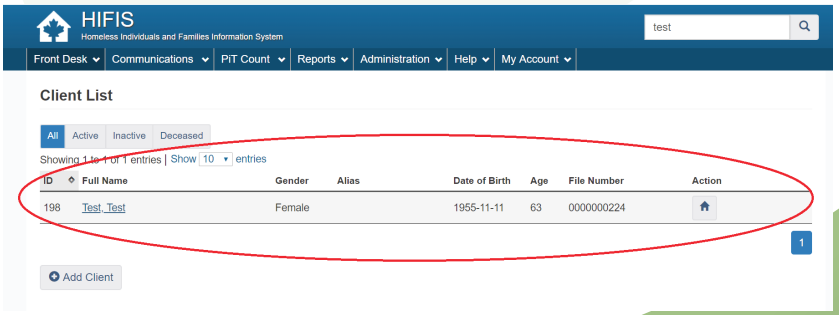
Note

The client search box can be found at the top *right hand side* of the page. You can access the box from all modules within the database.

1. Enter *Clients Name* or *Client ID* into the **Client Search Box**.

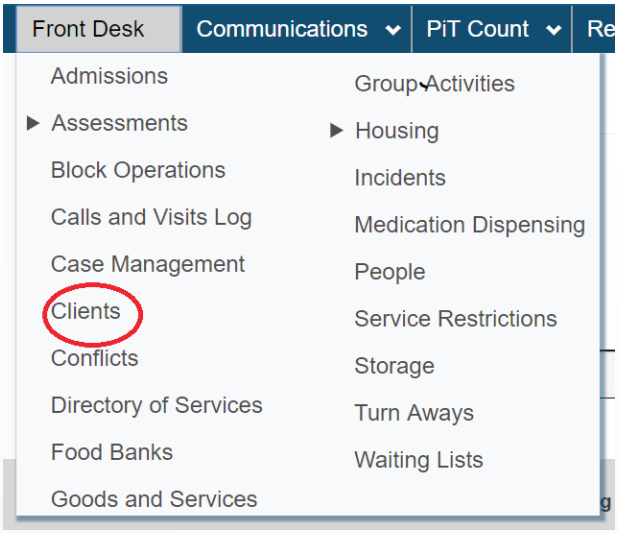
2. Select the **Search** button to find the client.

3. This will bring you to the Client List screen where the client profiles can be accessed. If the name exists in the system it will be shown here along with the Gender, Date of Birth, Age and File Number. The client's profile can be accessed by double clicking on the person's name.

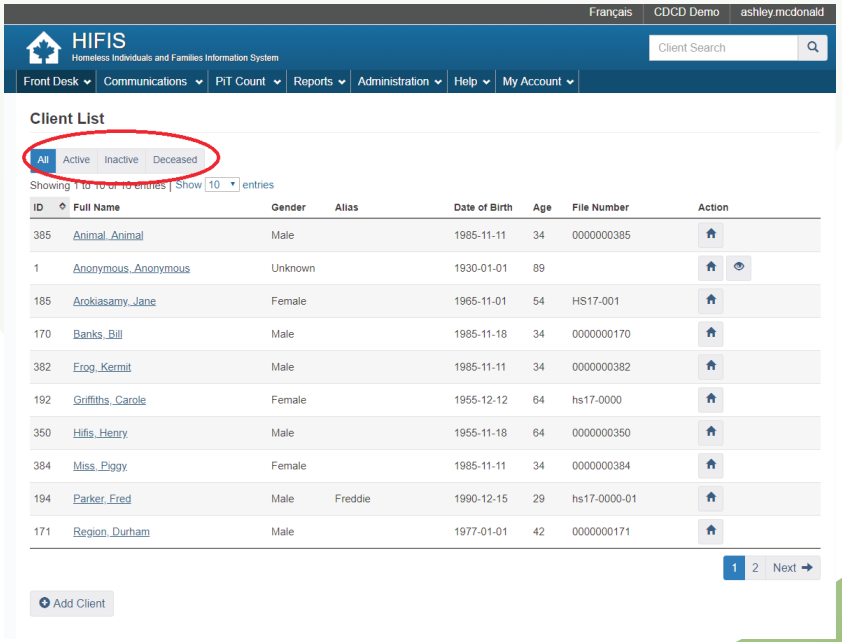


Another way that users can search for a client's profile is by looking at the *Client List Screen*.

1. From the *Front Desk* drop down click on *Clients*.



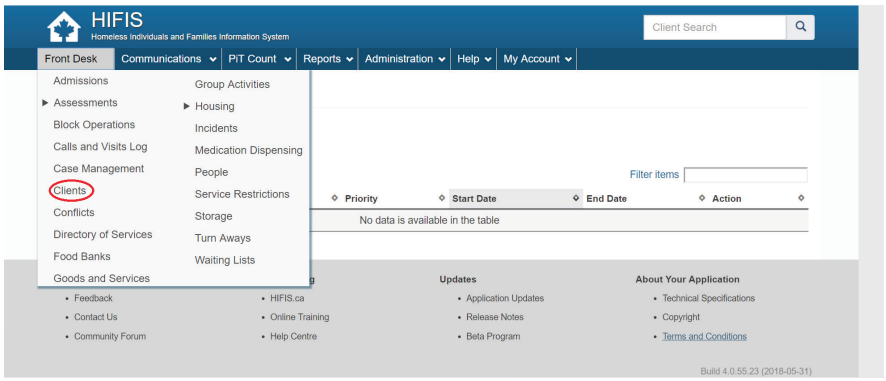
This will bring up the Client List page.



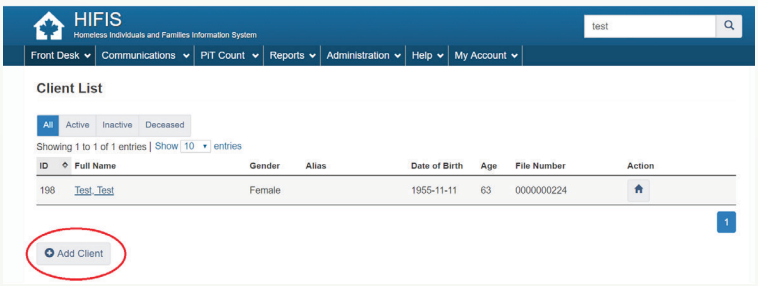
2. Users can filter down the list by selecting only Active, Inactive or Deceased clients. If the name exists in the system it will be shown here along with the Gender, Date of Birth, Age and File Number. The client's profile can be accessed by double clicking on the person's name.

ADDING A CLIENT RECORD

1. From the front desk drop down select on **Clients**.



2. This will bring up the Client List Screen where a list of clients will be visible. If the client's name does not appear on the list this means that the client does not have a record in the HIFIS Database. Users can add a record by clicking on the **Add Client** box on the bottom left hand corner of the screen.



This will bring up the **Add Client** screen.

3. The Add Client Screen is where pertinent information about the client is entered. A green box will appear on the right hand side of the screen if there is a client profile existing in the database that has similarities to the profile that is being entered.

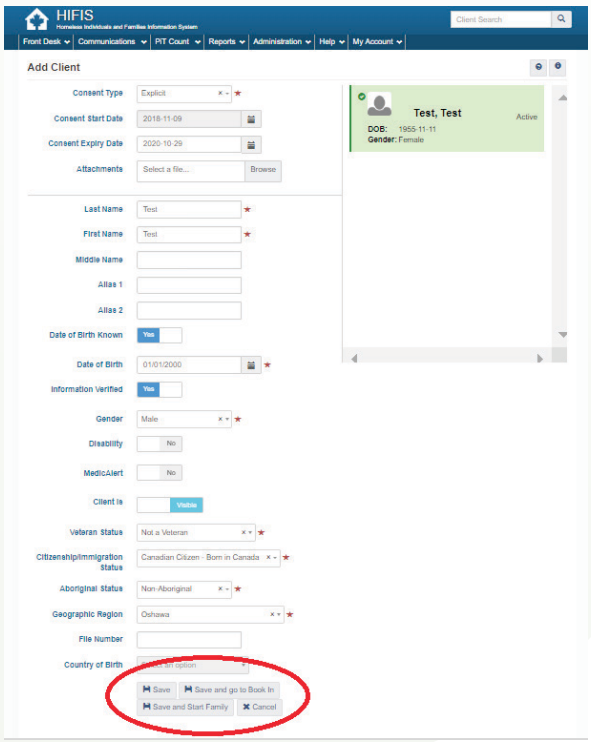
When users have finished entering the data they will have 4 options:

Save: This will bring users to the client's vitals screen.

Save and go to book in: This will bring users to the admissions page where they can book the client into a shelter bed.

Save and Start a Family: This will bring users to a family management page where they can add in other members of the family and include important details such as family roles.

Cancel: This will bring you back to the main HIFIS page and your work will not be saved.



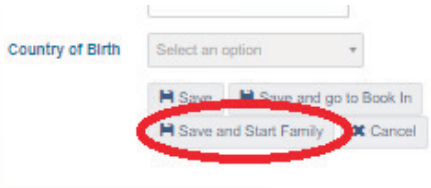
Note

Consent must be signed for all clients over the age of 18 years of age. If client refuses consent, select denied from the drop down menu.

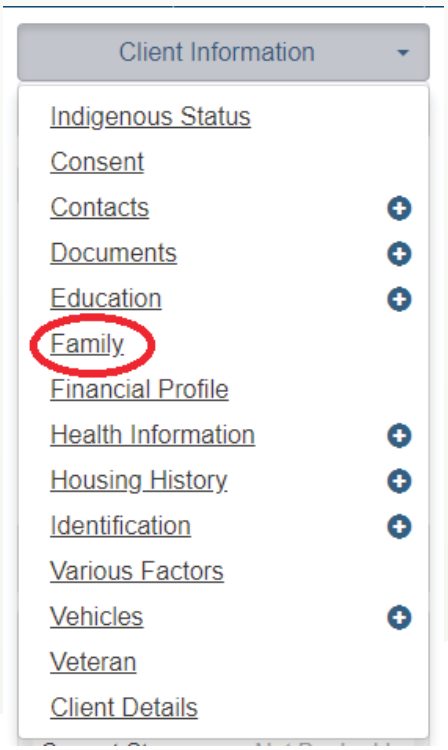
ADDING FAMILY MEMBERS

There are two ways to access the family's module in a client's profile.

The first is after entering in basic information into the **Add Client** screen click on *save and start a family*.



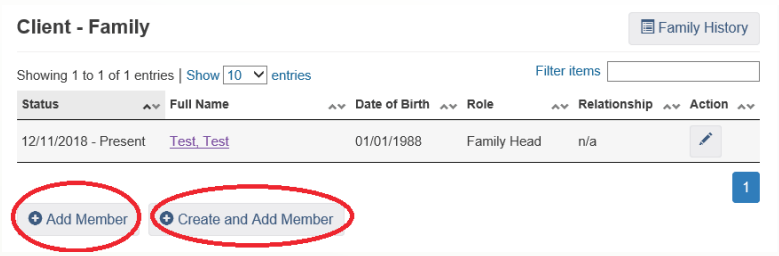
The next is to click on the **Family** module under the **Client Information** drop down in the client's profile.



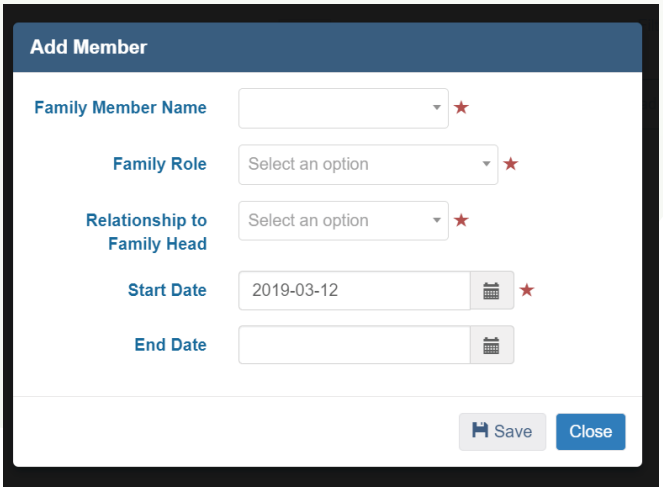
This brings users to the Family page. Here users have two options.

1. **Add Member:** This means that the family member *has an existing profile* in the HIFIS database and is now being linked as a family member to this client.

2. **Create and Add Member:** This means that the family member does not have an existing profile and the user needs to create a profile for members of the family.

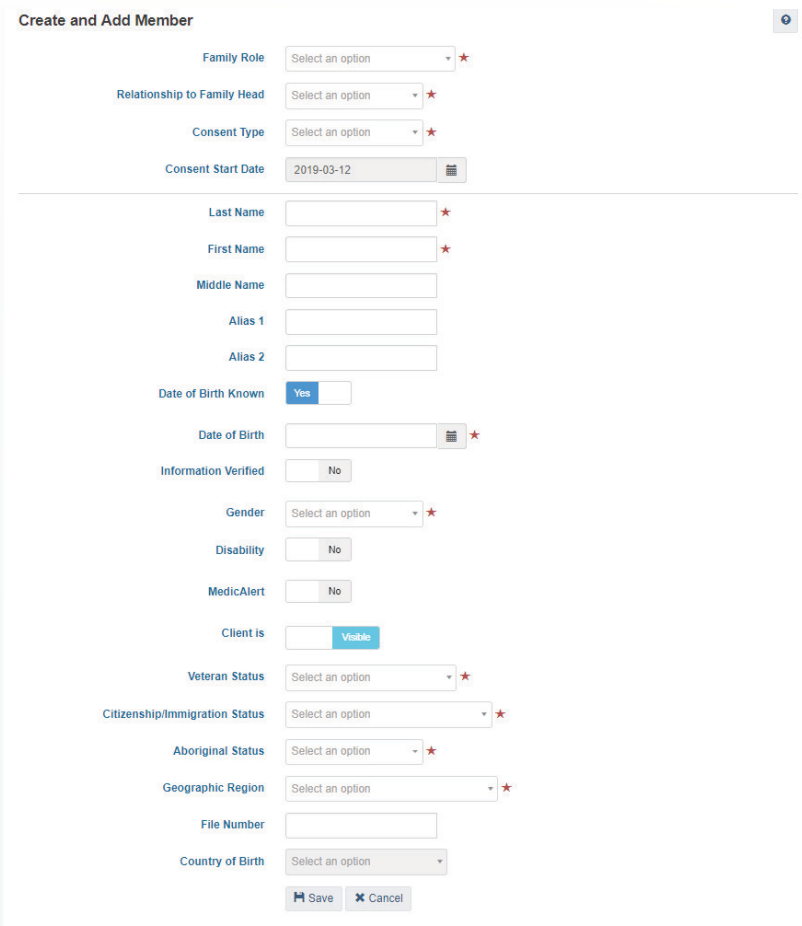


To link an existing HIFIS profile to this client's family unit the user will need to click on **Add Member**.



Here the user will be able to find the family member's profile by entering their name into the *Family Member Name box*. Users will also be required to enter the *Family Role, Relationship to Family Head* and the *Start Date* of the relationship.

If the member of the family does not already have an existing HIFIS profile, then the user must create a client profile for the family member. This is done by clicking on **Create and Add Member**.



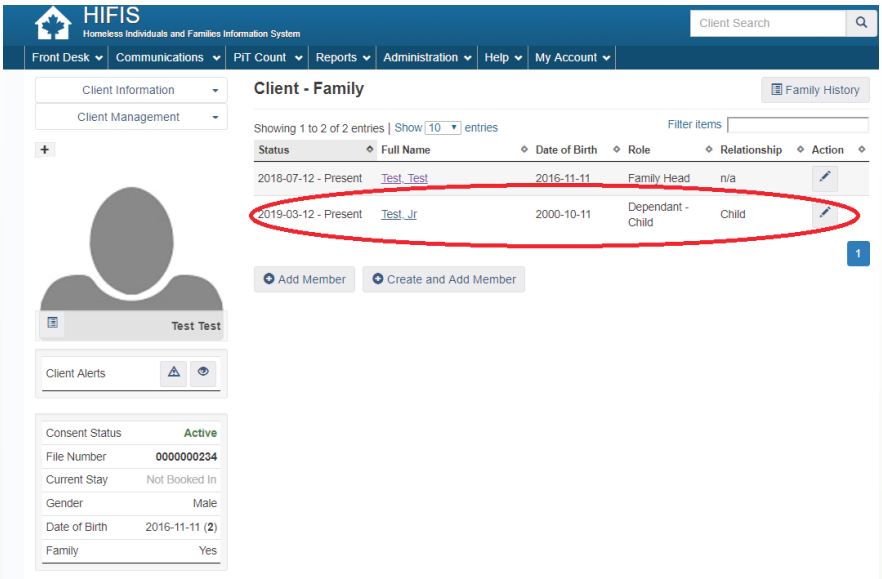
Here the user will be asked for the Family Role, Relationship to the Family Head, Consent type and will be asked to enter the vitals for the family member.

Note

All family members above 18 years of age must have consent signed. If the family member is under the age of 18 they can have inherited consent.

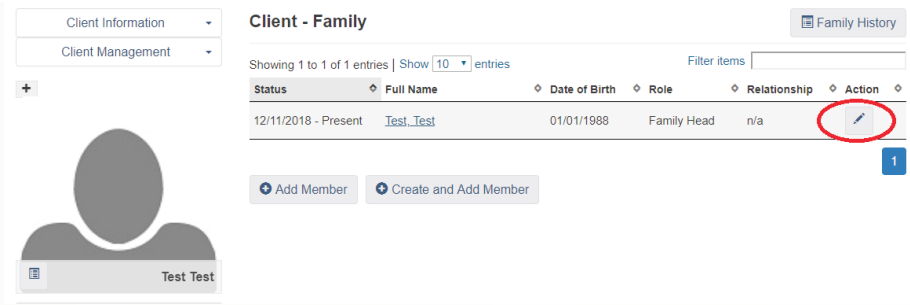
Repeat these steps for every family member.

Once a family member is added they will appear on the family management screen.

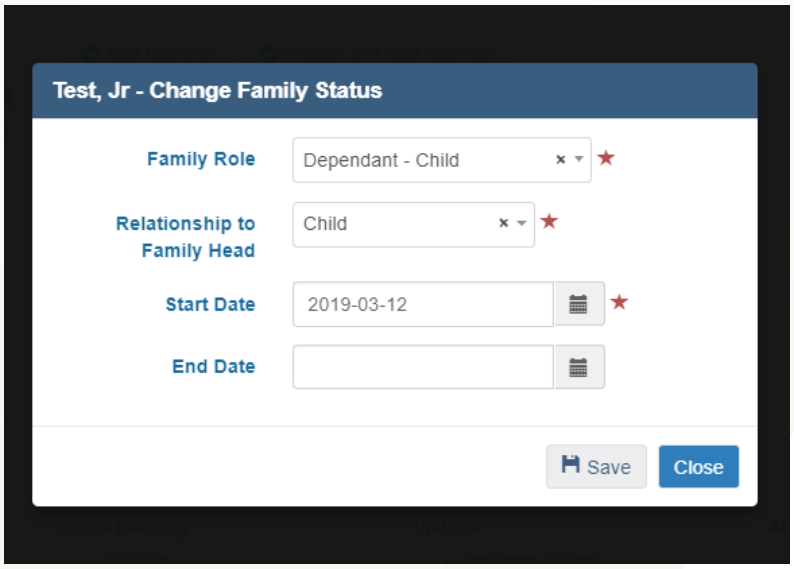


EDITING FAMILY MEMBERS

1. Click on the edit button to the right of the family member's name.



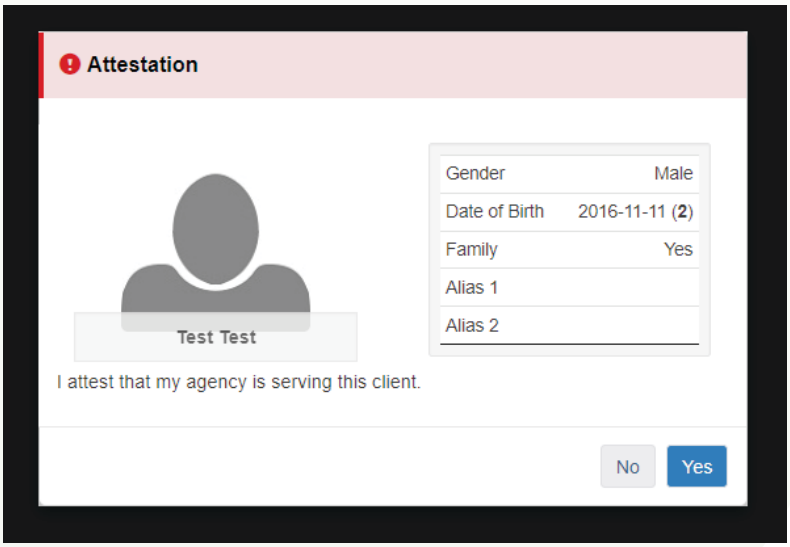
2. Make appropriate changes to the family status. Finish by clicking on Save.



ATTESTATION AND CONSENT

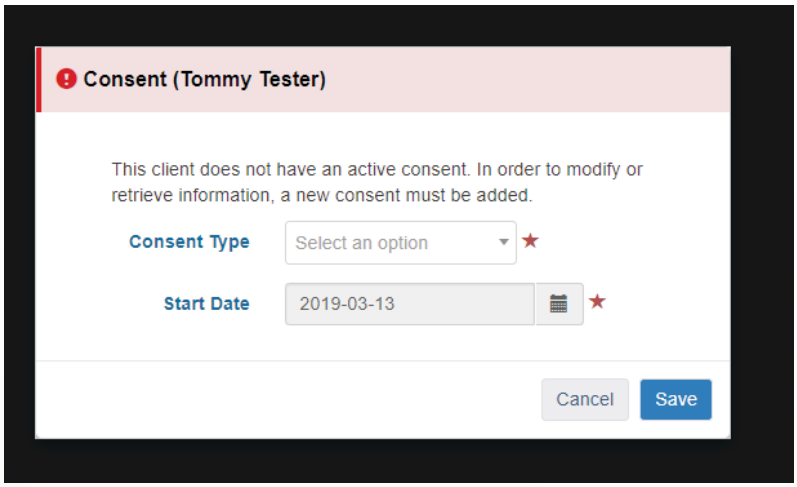
Prior to viewing and working on a client record, the user will have to attest that they have a valid reason to access the client's profile.

If a user has not accessed a particular client's profile in the past, an attestation box will appear when they attempt to access the profile.



The user has the option of selecting *yes* or *no*. If the user selects *yes*, they will be allowed to continue to access the client's profile. If the user selects *no*, they will be brought back to the HIFIS main screen.

Client consent means that clients are aware that their information will be shared among agencies who use the HIFIS database. Before a client's profile can be shared the client must first give consent. If a client has not given consent and the user tries to access their profile they will receive a consent notification.



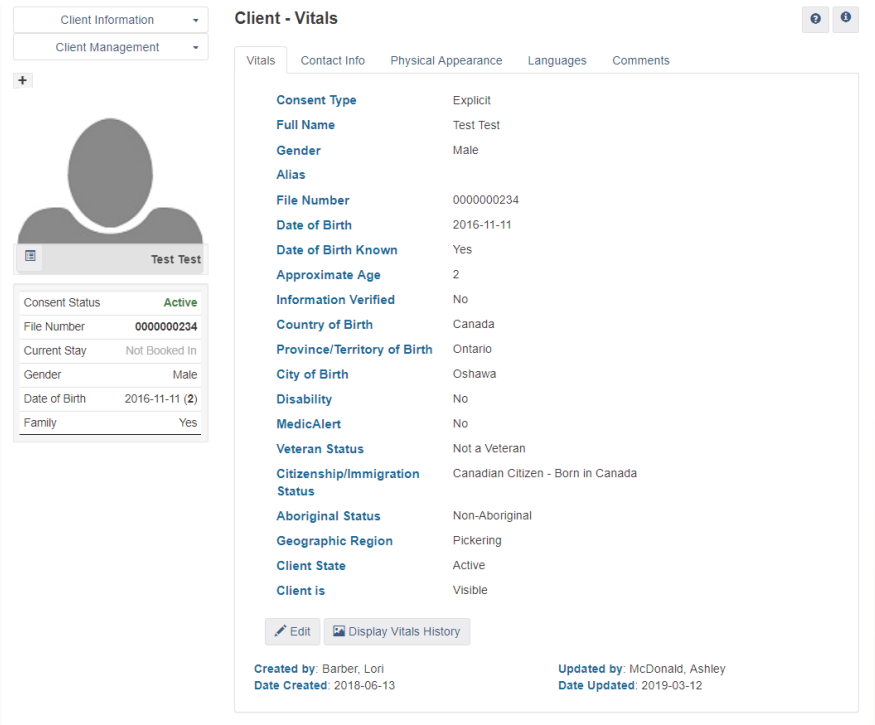
In order to proceed the user must enter a consent type and start date. If the client has denied consent a new client profile must be created using the consent type as declined/anonymous.

Note

If a client is under 18 years of age and has a legal guardian who is family head, they can inherit consent as long as the guardian has given consent.

CLIENT VITALS SCREEN

The client vitals screen is the first screen that users will see when accessing a client's profile.

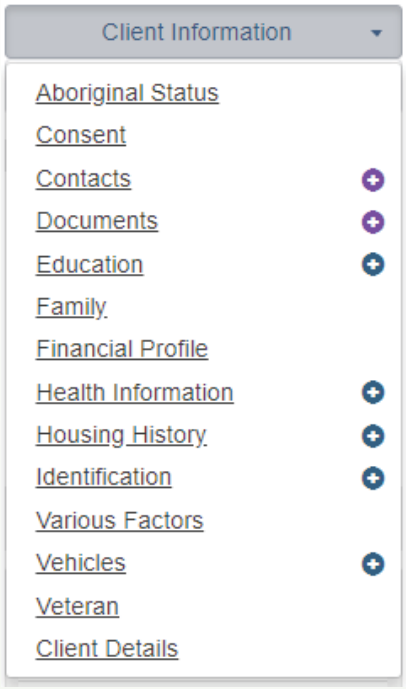


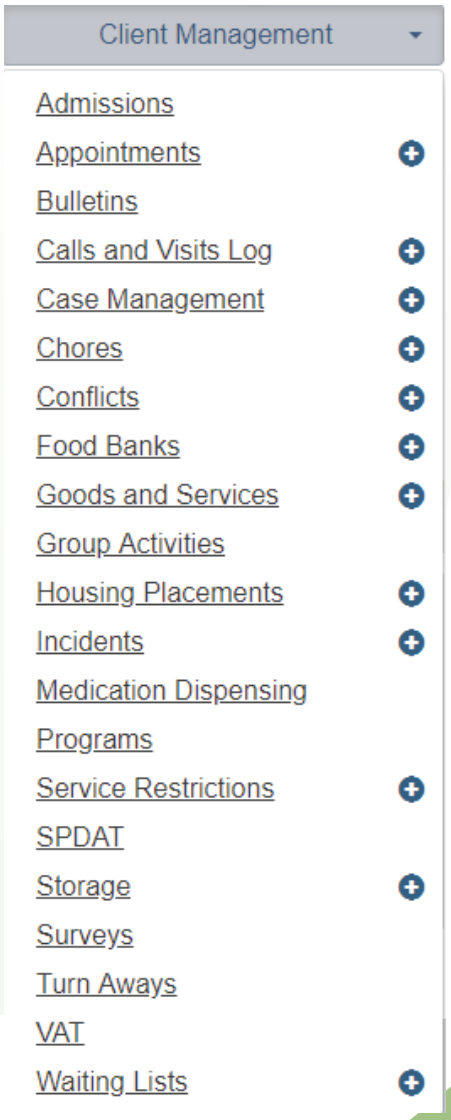
From this screen the user can toggle through the tabs to view the client's Vitals, Contact Information, Physical Appearance, Languages and Comments.

Users can access client information and add service transactions through the Client Information drop down menu and the Client Management drop down menu located at the top left hand corner of the screen.

CLIENT INFORMATION AND CLIENT MANAGEMENT DROP DOWN MENUS

The *Client Information* menu is where users can enter detailed information about the client. The *Client Management* menu provides users direct access to HIFIS modules where they can track the activities preformed with the client.





ABORIGINAL STATUS

1. From the Client Information Drop down menu click on Aboriginal Status.

2. This will bring up the client aboriginal page where users can see the client's status. Adding or Editing a status can be done by clicking on the add button at the bottom left of the page.

3. This brings up the Add Aboriginal Status page where users can use the drop down to select the applicable status and then click on save.

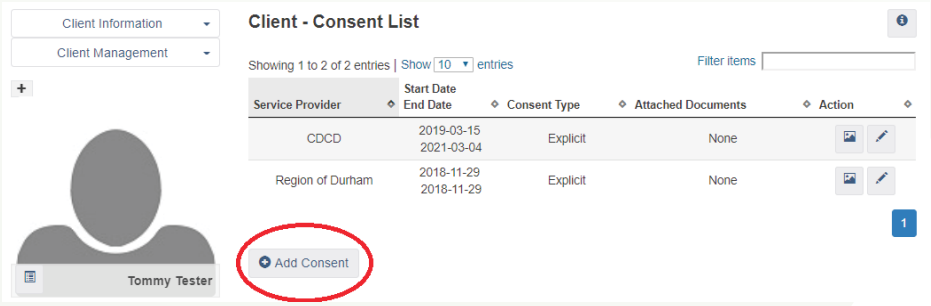
CONSENT

Users will be asked to add consent for a client when initially entering a client profile into the HIFIS database. However, there are times when the user may need to edit the consent or add a new consent. This can be done by:

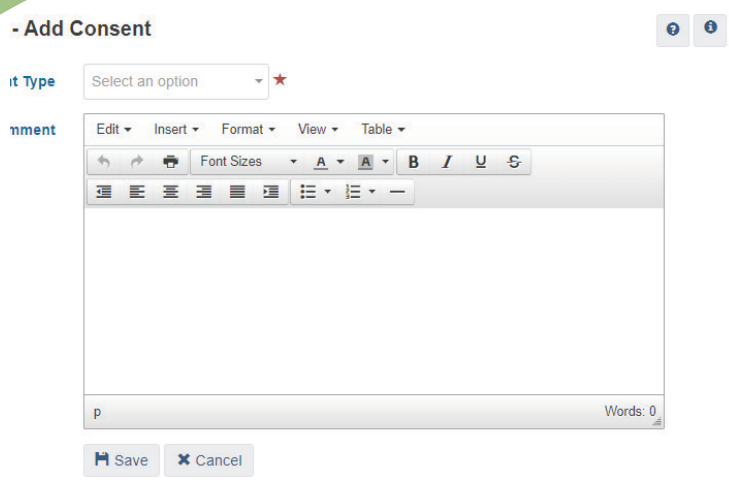
1. Click on *Consent* under the *Client Information* drop down. This will bring users to the Client Consent page.

ADDING CONSENT

1. Adding consent can be done by clicking Add Consent at the bottom left of the client consent page.

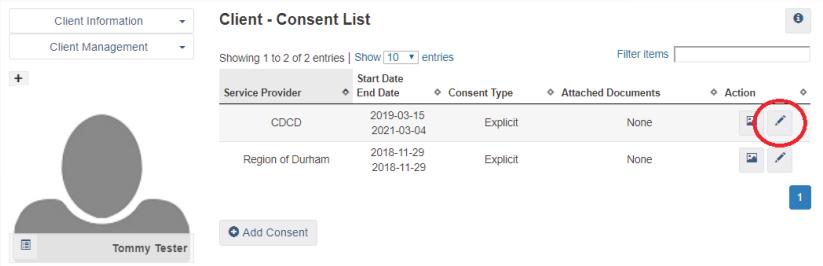


2. This will bring up the add consent page, users can add the type of consent and any comments.

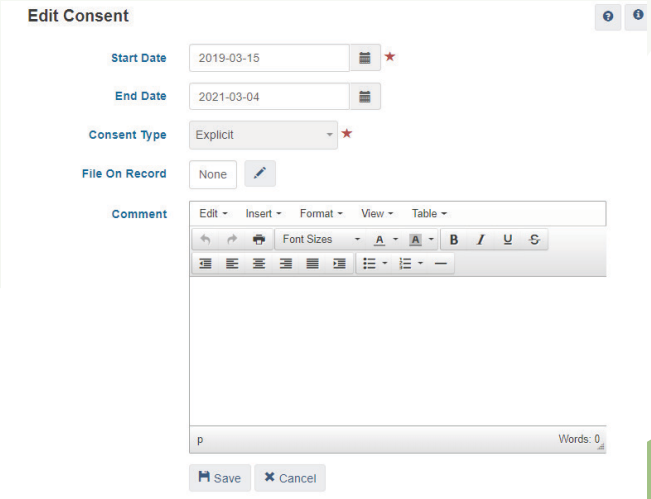


EDITING CONSENT

1. Click on the edit button to the right of the consent needing to be edited.



2. Edit consent and when finished click on the *Save* button.



CONTACTS

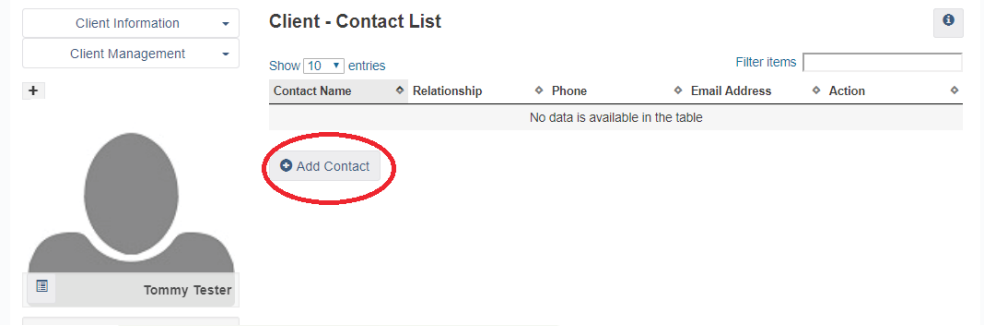
The contacts module is used to record important contacts for the client.

Note

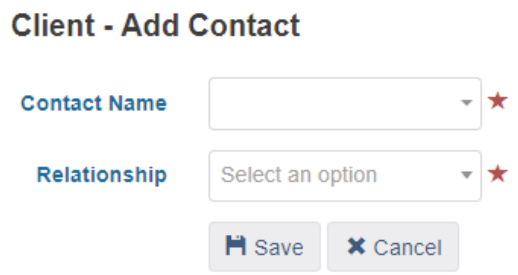
Due to confidentiality reasons Durham Region will be using the contacts module for professional contacts only. Example: Doctor, Social Worker Etc. Private contacts such as friends and family members should not be added into the contacts module.

1. From the Client Information Drop down click on contacts. This will bring users to the Client Contact List

2. Click on Add Contact button located at the bottom of the Client-Contact List



3. Add Contact Name and Relationship and then click on the save button.



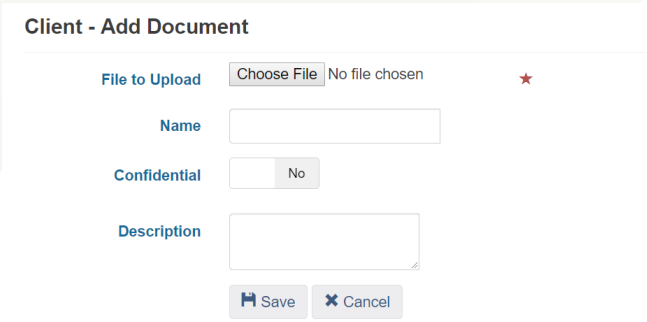
DOCUMENTS

The documents module is used to record important documents regarding a client.

1. From the Client Information drop down click on Documents. This will bring users to the Client - Documents List.

2. To add a document click on the Add Document button on the bottom left corner of the page.

4. The add document page will appear. On this page users can choose to Upload a file, Name the document, Make the document confidential (meaning that only the user will be able to access this document), and give a description of the document. When finished click on the Save button.

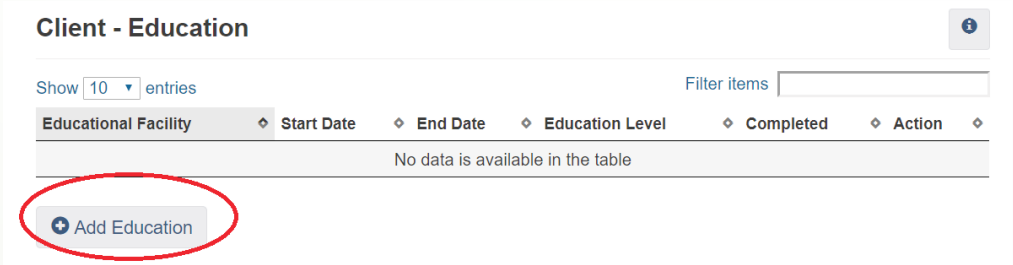


EDUCATION

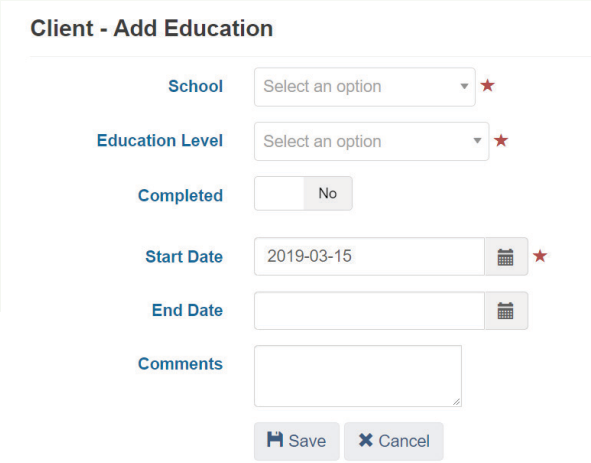
The Education Module is used to track the clients highest level of education.

1. From the Client Information drop down menu click on Education. This will bring users to the Client Education Page.

2. Click on Add education



3. Users may now enter the client's Education information such as Educational Facility attended, Start and End Dates and the Highest Education Level completed. When finished click on Save.

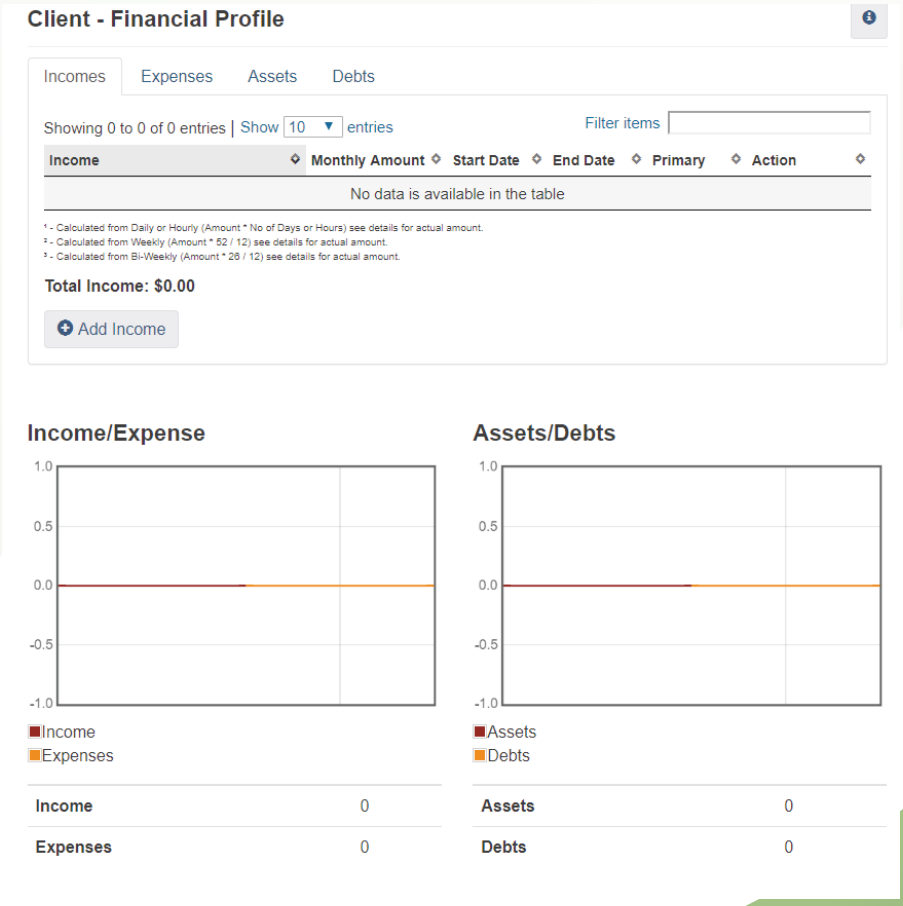


FINANCIAL PROFILE

The financial profile module allows the users to help clients manage their finances by tracking their income, expenses, assets and debts.

1. From the Client Information drop down click on Financial Profile. This will bring users to the Client's Financial profile page.

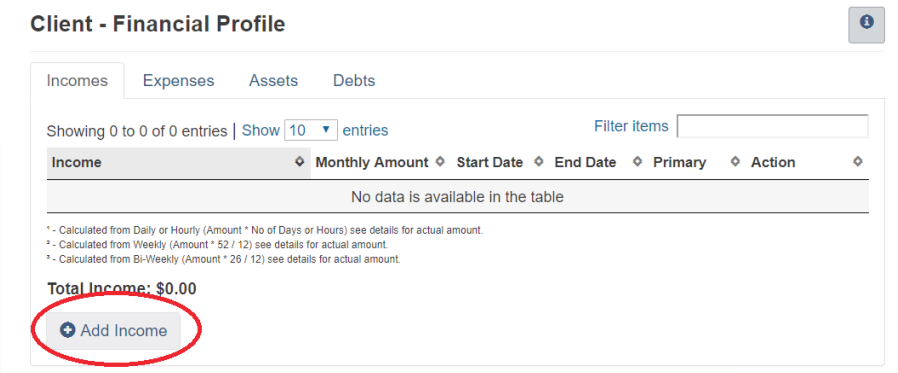
At the top of the Financial Profile Screen users can toggle over to Income, Expenses, Assets and Debts. Once the information is added onto the database a bar chart will appear showing the difference between the client's income verses expenses and assets verses debts.



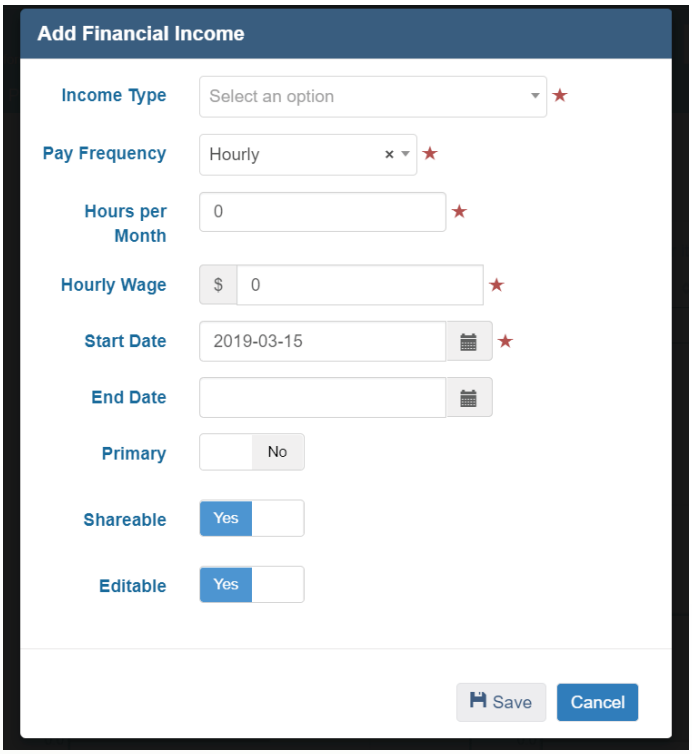
ADDING INCOME

1. Toggle onto the income tab.

2. Click on Add income button



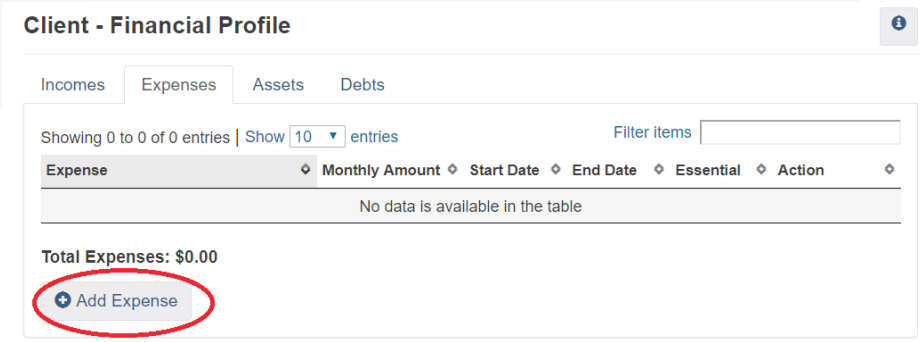
3. A box will appear that will allow users to enter the client's income. Users can specify if the income entered is the clients primary source of income. Users can also decide with the client whether or not they would like to make their financial information shareable with other servicer providers and allow other users to be able to edit the client's financial information.



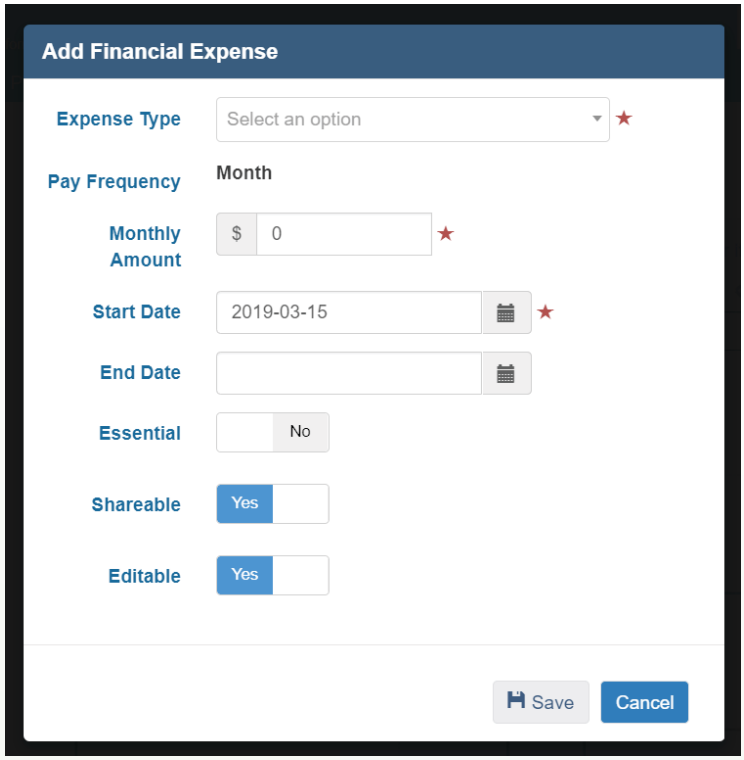
ADDING EXPENSES

1. Toggle onto the Expenses tab.

2. Click on the add expense button at the bottom left hand corner of the screen.



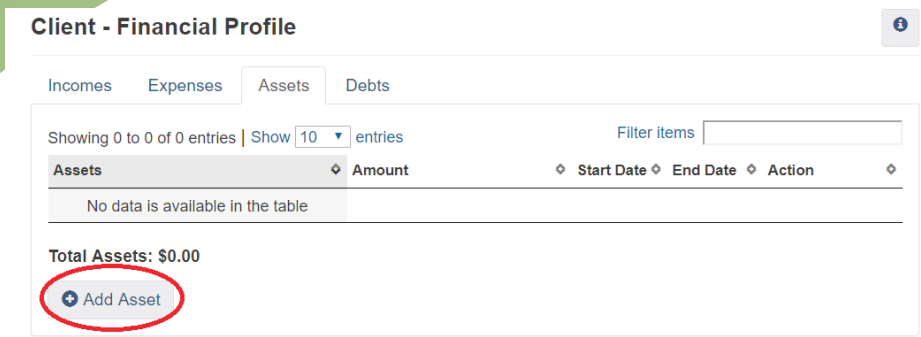
3. A box will appear that will allow users to enter the client's expenses. The user can specify the type of expense, the amount and if this expense is essential for the client. Users can also decide with the client whether or not they would like to make their financial information shareable with other Service Providers and allow other users to be able to edit the client's financial information.



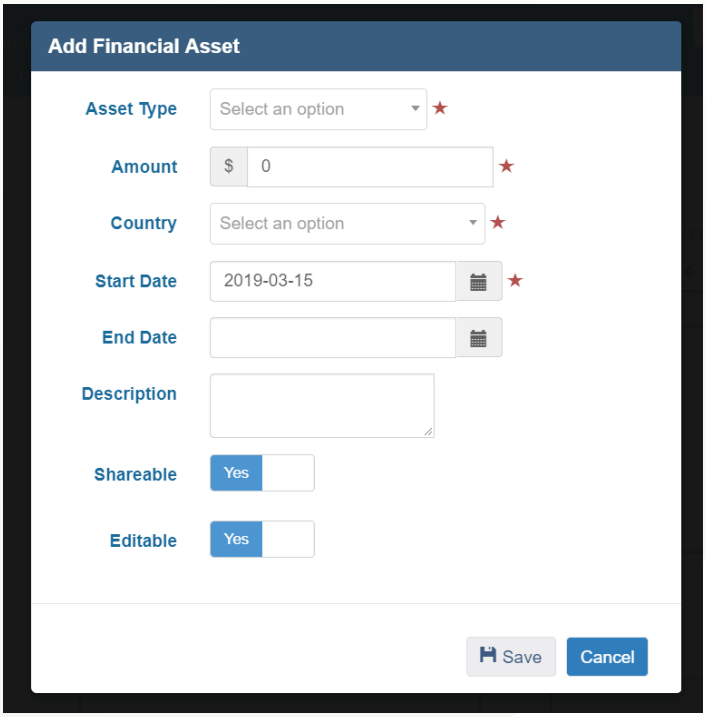
ADDING ASSETS

1. Toggle onto the assets tab.

2. Click on add assets button at the bottom left hand corner of the screen.



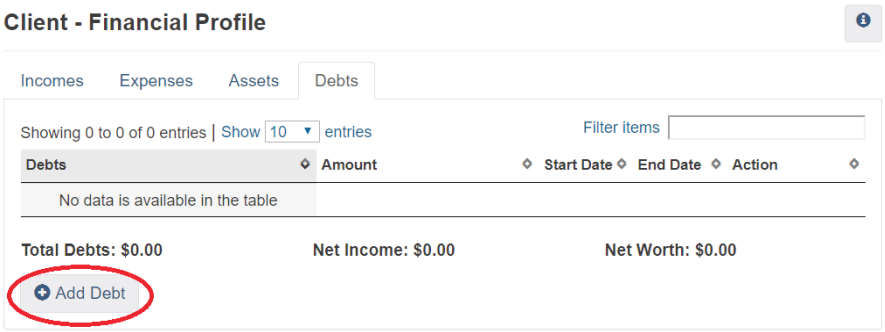
4. A box will appear that will allow users to enter the Client's Assets. Users can specify the type of asset, amount, and give a description of the asset if needed. Users can also decide with the client whether or not they would like to make their financial information shareable with other Service Providers and allow other users to be able to edit the client's financial information.



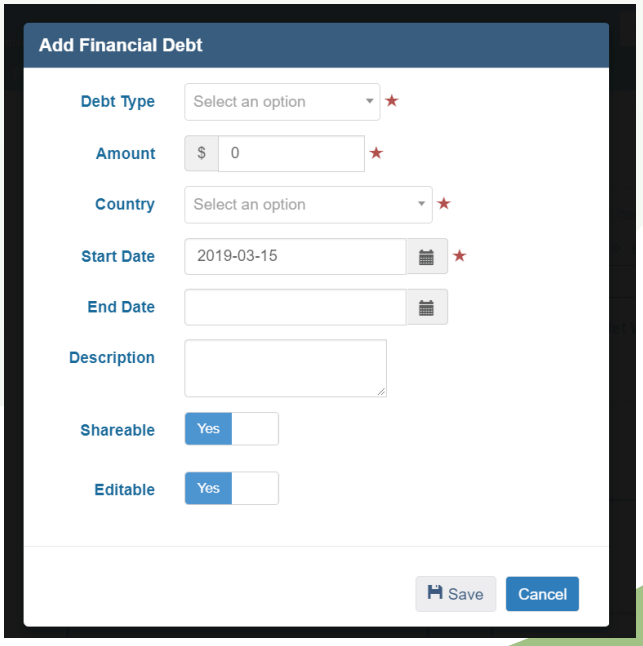
ADD A DEBT

1. Toggle over to the debt tab

2. Click on the Add Debt button at the bottom left of the screen.



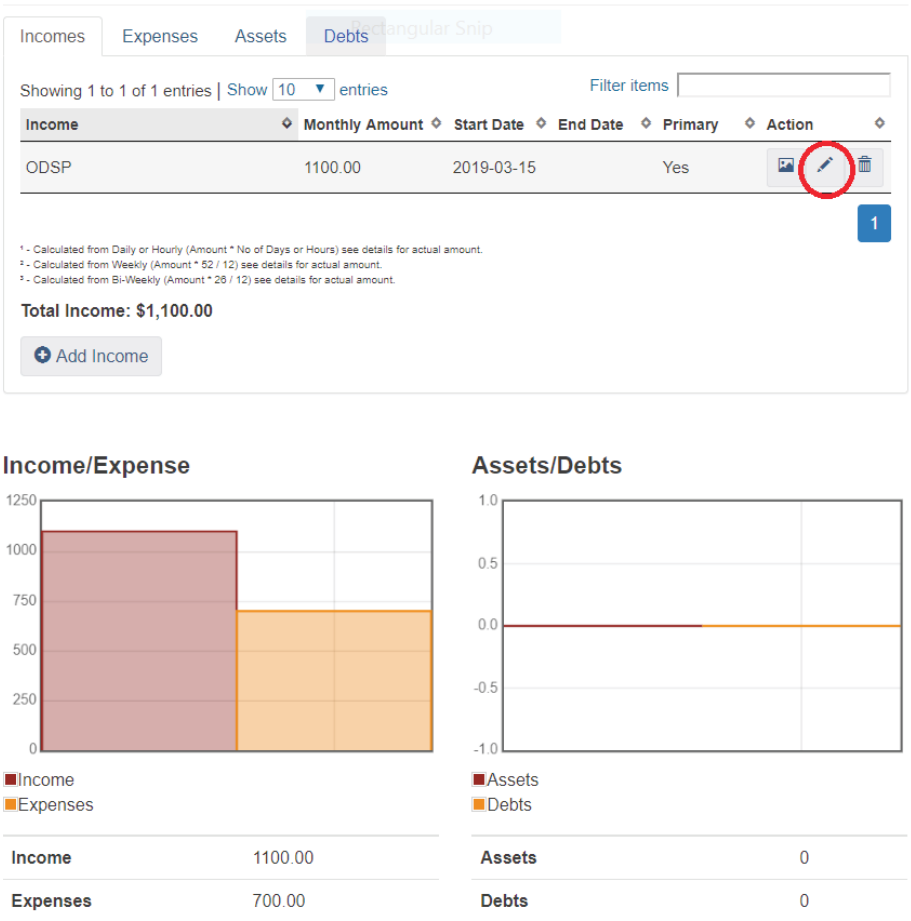
5. A box will appear that will allow users to enter the Client's Debts. Users can specify the type of debt, amount, and give a description of the debt if needed. Users can also decide with the client whether or not they would like to make their financial information shareable with other Service Providers and allow other users to be able to edit the client's financial information.



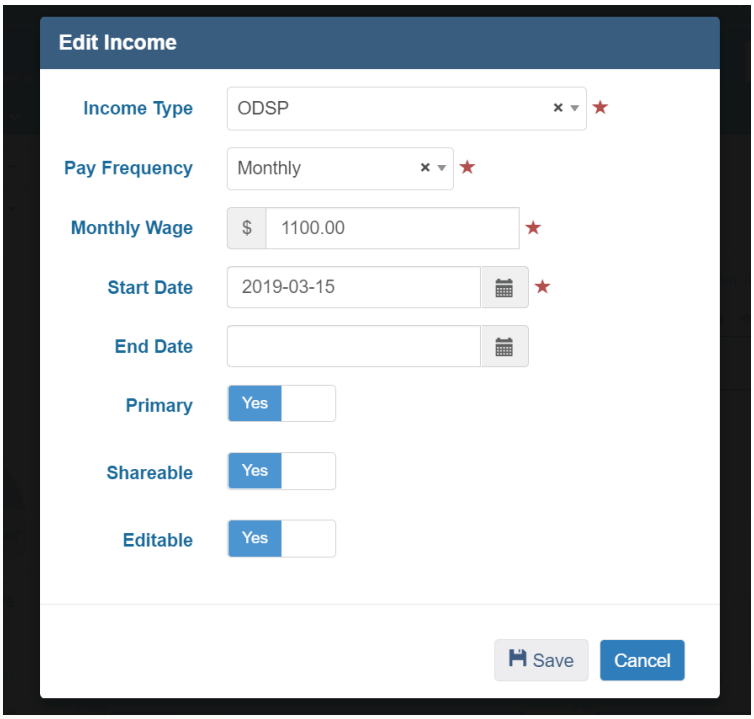
EDITING FINANCIAL PROFILE

To edit client profiles users will need to toggle over to the information they would like to edit (Income, Expenses, Assets or Debts).

1. Click on the edit button to the right of the information that needs to be edited.



2. The box will appear again allowing the user to edit the information provided.

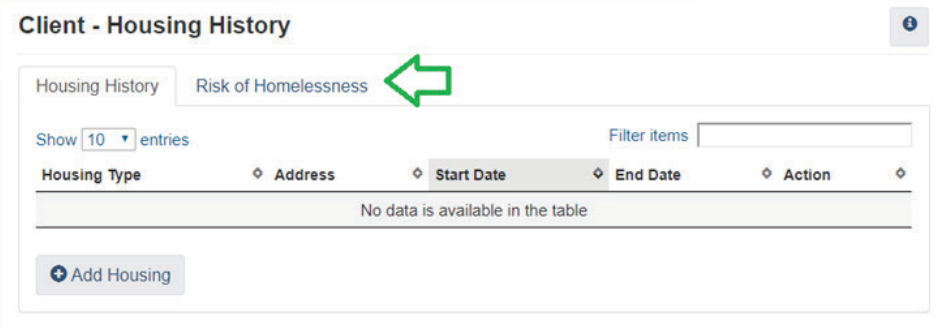


HOUSING HISTORY

The housing history module is used to keep track of the client's past and present housing situation.

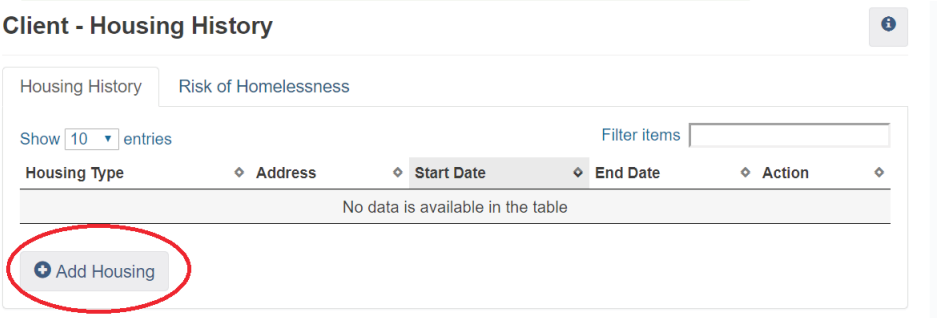
1. From the Client Information Drop down select Housing History. This will bring users to the client's Housing History Page.

On this screen the users can toggle between Housing History and Risk of homelessness.

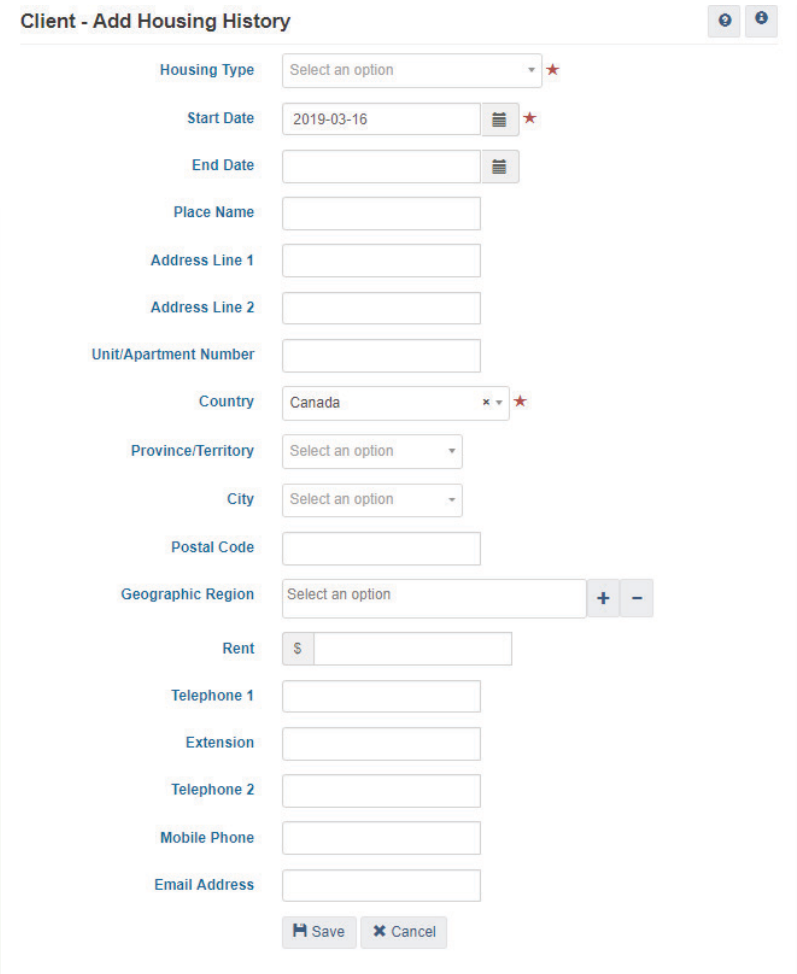


ADDING HOUSING HISTORY

1. Click on the add housing button at the bottom left hand corner of the screen.



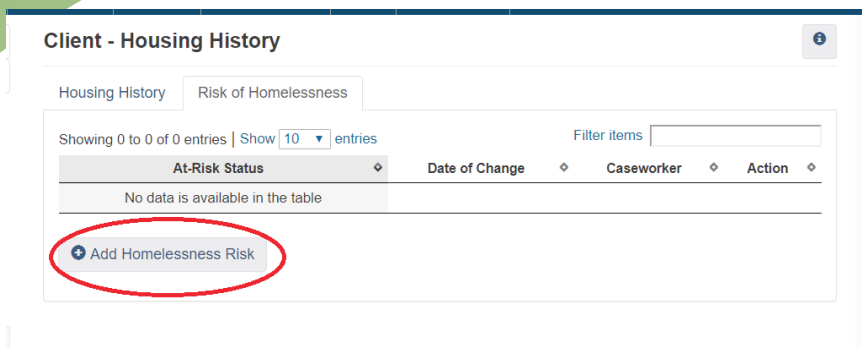
2. This will bring users to the Add Housing History page. Users can specify the type of housing, address, and how much the client pays for rent at that particular residence. When finished click Save.



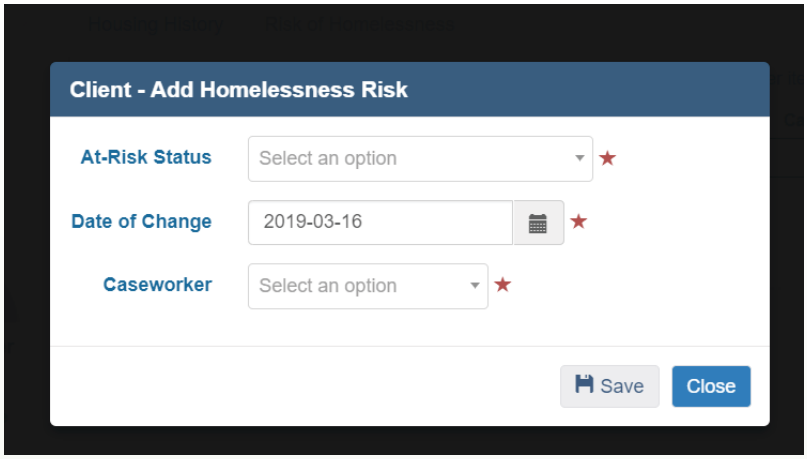
ADDING RISK OF HOMELESSNESS

Risk of homelessness is used to determine how much risk a client is at of losing their accommodations.

1. Toggle over to Risk of Homelessness tab. Click on Add Homelessness Risk Button at the bottom left corner of the screen.



2. A box will appear that will ask the user to specify the At-Risk Status, Date and the Caseworker's name.

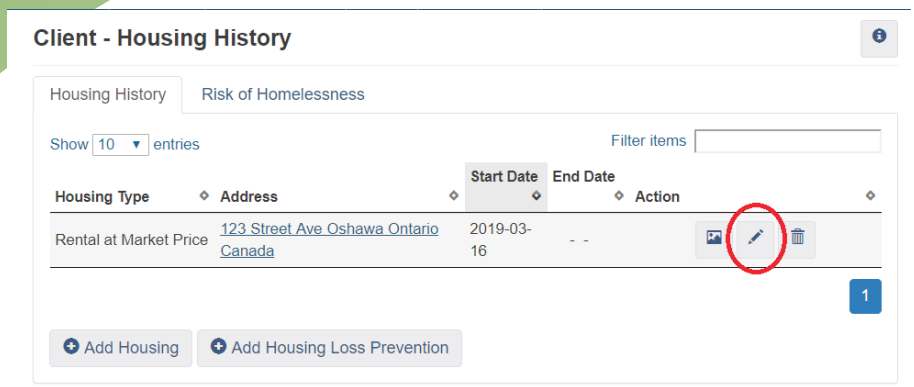


EDITING HOUSING

When a client's housing situation changes the user must edit the housing history page.

1. Toggle onto the Housing History Tab.

2. Click on the edit button to the right of the accommodation that needs to be edited.



3. This will bring up the Add Housing History page that users first see when entering the accommodation. From there the user can make any changes and click on save.

ADD HOUSING LOSS PREVENTION

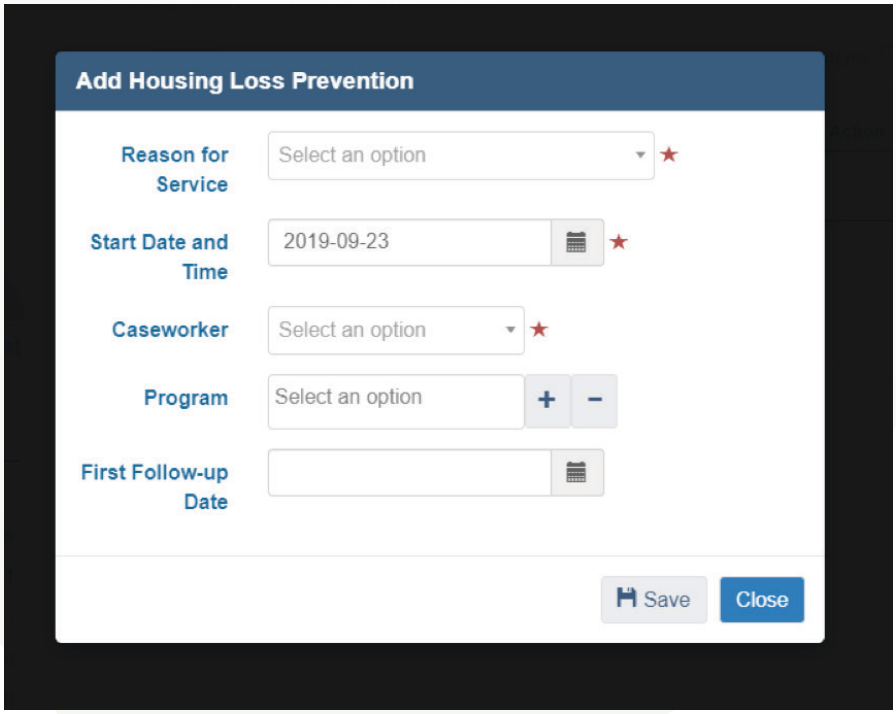
The purpose of the housing loss prevention module is to track the number of households who are at-risk of homelessness that are now stabilized.

Note

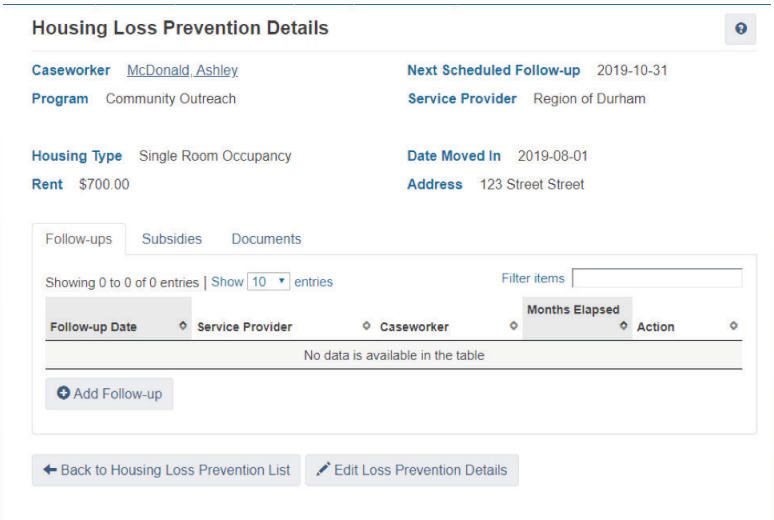
Adding a housing loss prevention activity is done from the Housing History Module. Housing information must be added to the module before the option of creating a housing loss prevention record will be available.

1. From the Housing History module click on Add Housing Loss Prevention.

2. A box will appear that will allow users to add important information such as reason for service, caseworker, and date of follow up.



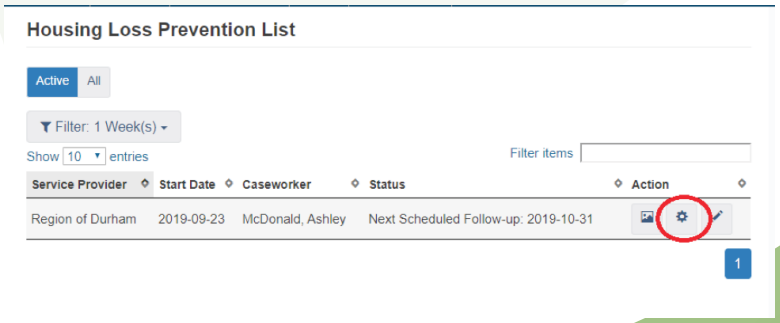
3. This will bring users to the housing loss prevention page where they will see information for the client such as the case worker's name, the type of housing the client has secured, the date the client moved into housing, and lastly the date of the next scheduled follow up.



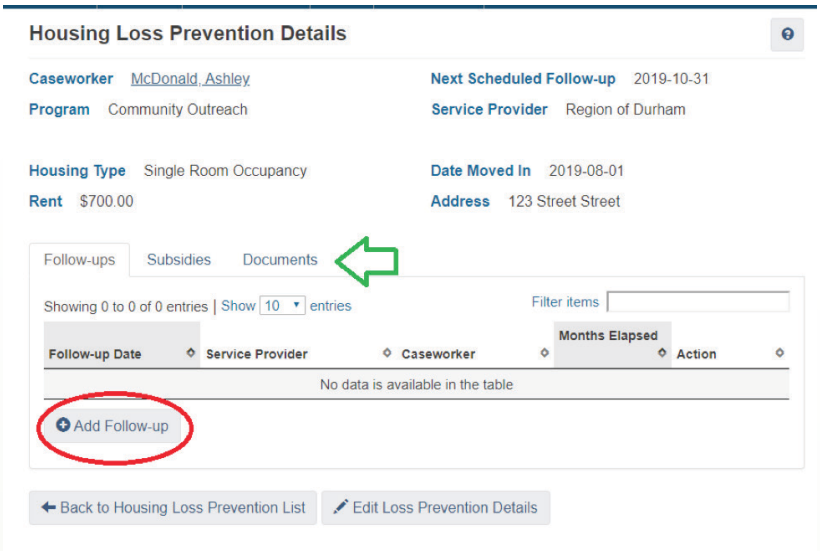
ADDING A HOUSING LOSS PREVENTION FOLLOW UP

1. From the Client Management drop down click on Housing Loss Prevention.

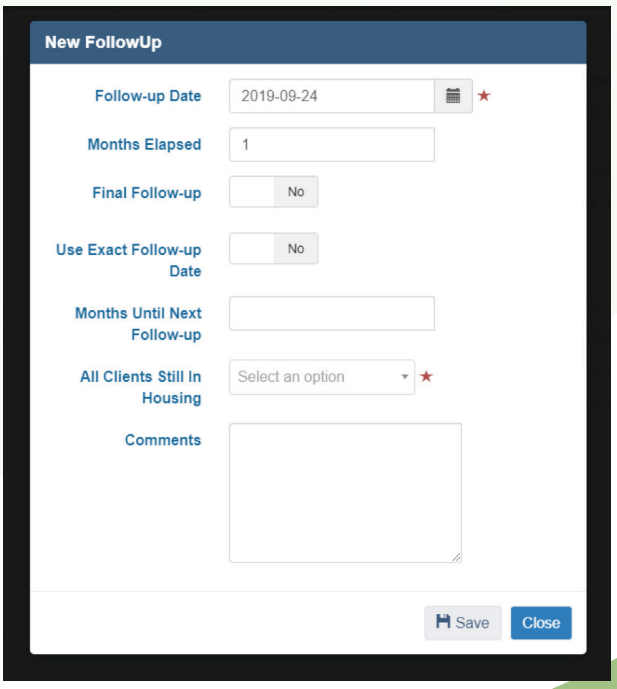
2. This will bring users to the housing loss prevention list. Click on the Manage button to the right of the file.



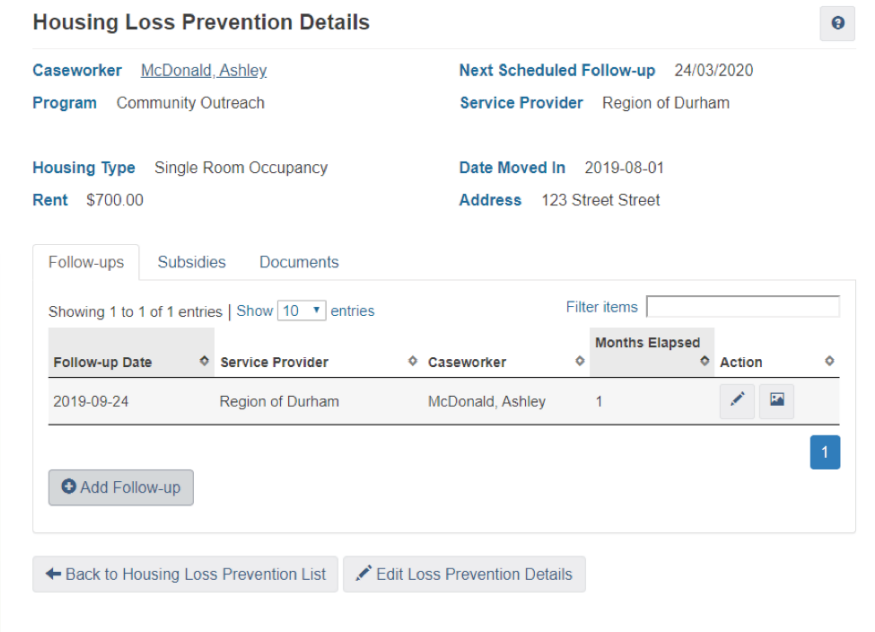
3. Here users can see the information on the client's housing such as the housing type, rent amount and date of move in. Users can toggle through the tabs to enter follow-up, subsidies or documents. To enter a follow up click on the Add follow-up button.



4. This will bring up a box where users can add information about the follow up. Once finished click on the save button.



5. Users will now see their follow up information listed. They can edit or display information by clicking on the buttons to the left.



CLIENT IDENTIFICATION

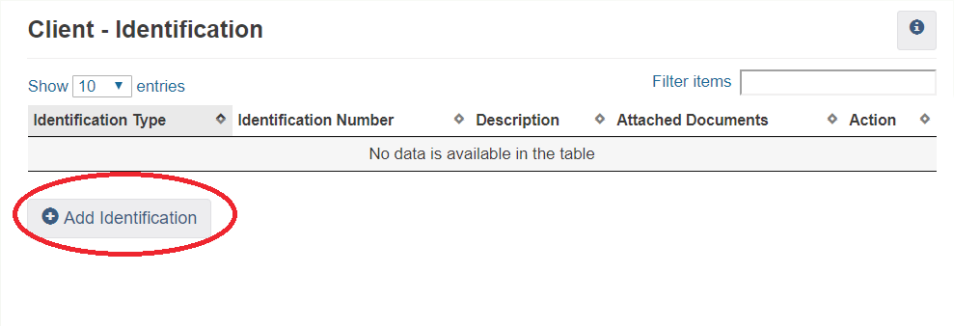
The client identification module is used to manage the client's identification.

Note

Health card and SIN numbers cannot be entered into HIFIS. If client is using these documents as identification, then the numbers must be blacked out before scanning the card into the database.

Click on identification from the Client Information drop down.

2. Click on the Add Identification button at the bottom left hand corner of the page.



This will bring users to the Add Identification page where users can specify the identification type, and upload a copy of the clients ID.

Client - Add Identification

Identification Type	Select an option ★
Identification Number	★
Description	
Attachments	Select a file... Browse

Save Cancel

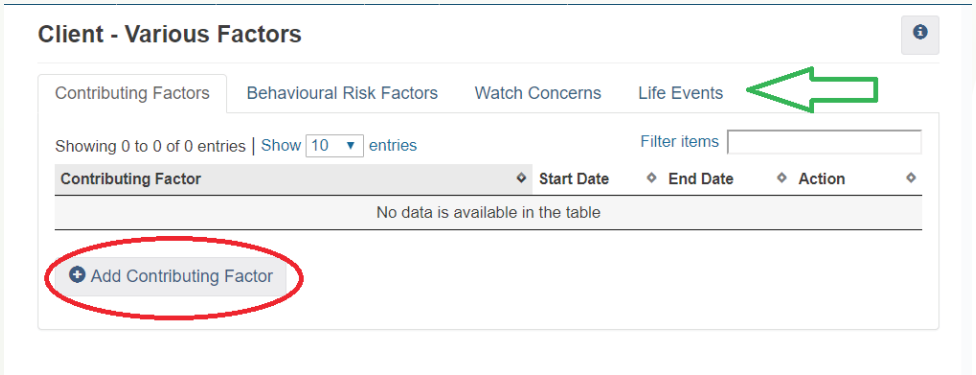
VARIOUS FACTORS

The Various Factors module allows service providers to indicate factors that may have led the client to needing services. There are four types of factors: Contributing Factors, Behavioural Risk Factors, Watch Concerns and Life Events. All factors are added into the database the same way.

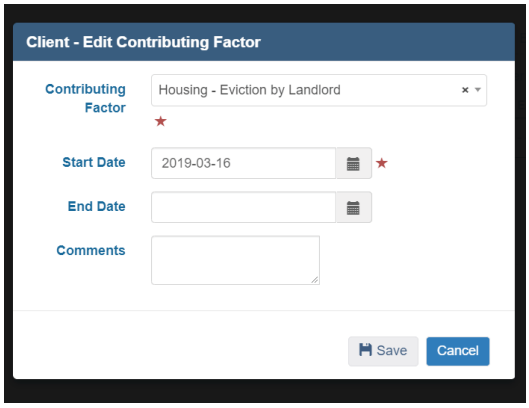
1. From the Client Information drop down click on Various Factors. This will bring users to the various factors page.

2. Toggle between the factor table until the user is on the appropriate factor type.

3. Click on Add Factor at the bottom left hand corner of the page.

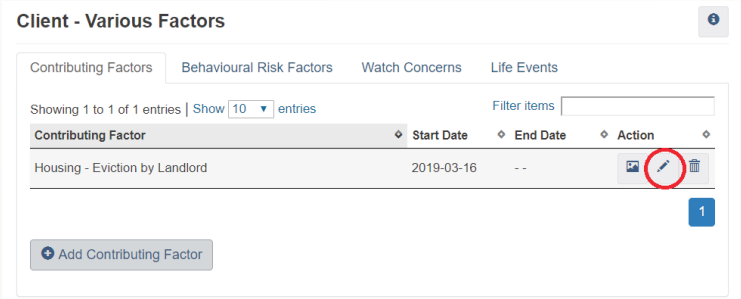


4. A box will appear that will allow the users to specify the type of the factor, as well as add any comments if needed. When finished click save.

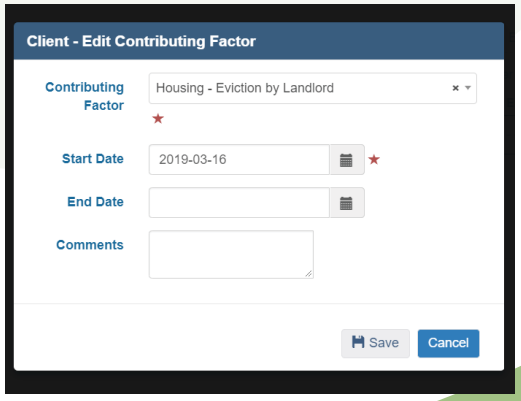


EDITING VARIOUS FACTORS

1. Click on the edit button to the right of the Various Factors that needs to be edited.



This will bring users to the Edit Various Factors page. Similar to adding a various factor, they can specify the factor and add any comments.

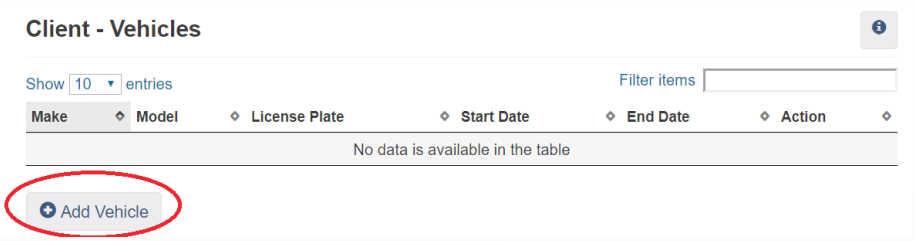


VEHICLES

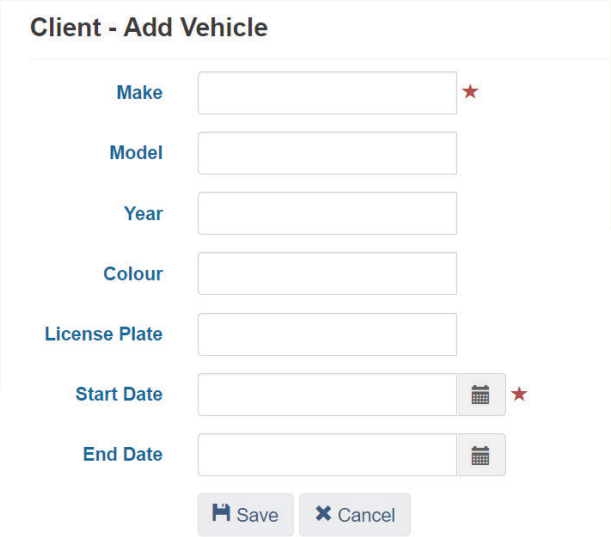
The vehicles module is used to keep track of the client's vehicle.

1. From the Client Information Drop down click on Vehicles. This will bring users to the vehicles module.

2. To add a client's vehicles information, click on the "Add Vehicle" button at the bottom of the page.



This will bring users to the Vehicles page where they can add information about the client's vehicle. When completed click "Save".

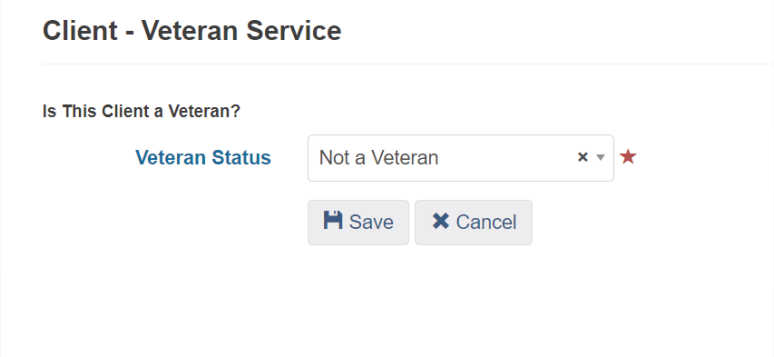


VETERAN STATUS

The Client's veteran status is entered when the Client Record is first created. The veteran's status module is used to edit the clients existing veteran's status.

1. From the Client Information drop down click on Veteran. This will bring users to the Client's Veteran Service module.

2. To edit the client's Veteran status, use the drop down to select the appropriate status.



3. When completed click "Save".

BOOKING A CLIENT IN AND OUT OF A SHELTER

ADMISSIONS MODULE

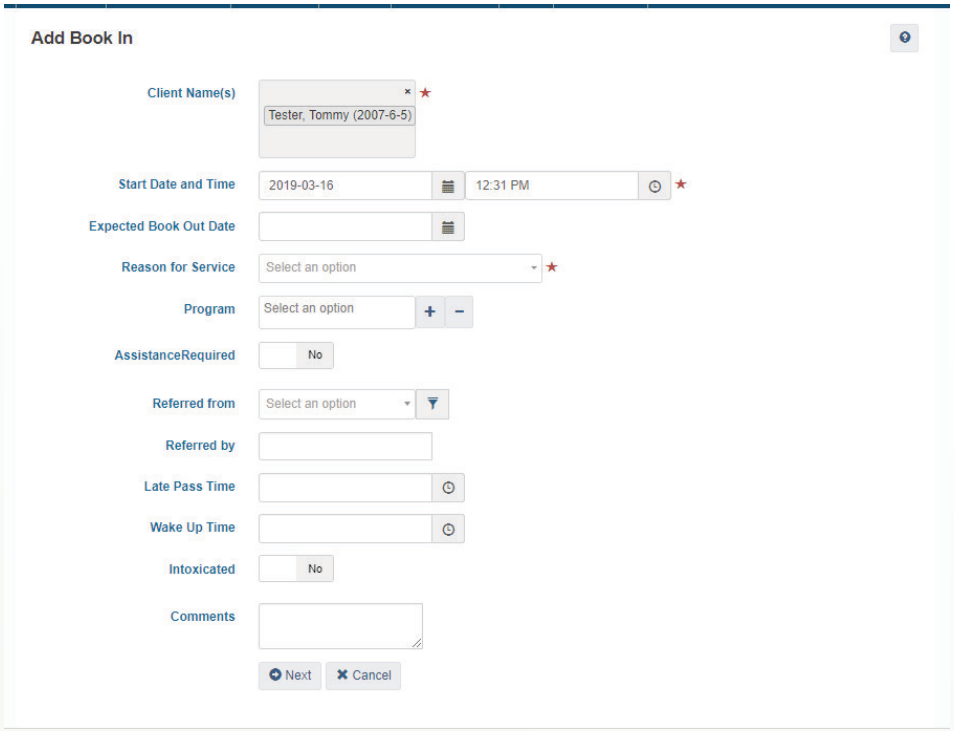
The admissions module allows users to see who is currently booked into their shelter as well as book clients and families in and out.

BOOKING A CLIENT INTO THE SHELTER

1. From the Client Management Tab click on Admissions. This will bring up the admissions page.

2. Users can determine whether they would like to book in a single individual or family. They can do this by either selecting the Book In box or Book In Family box on the bottom left hand side of the screen.

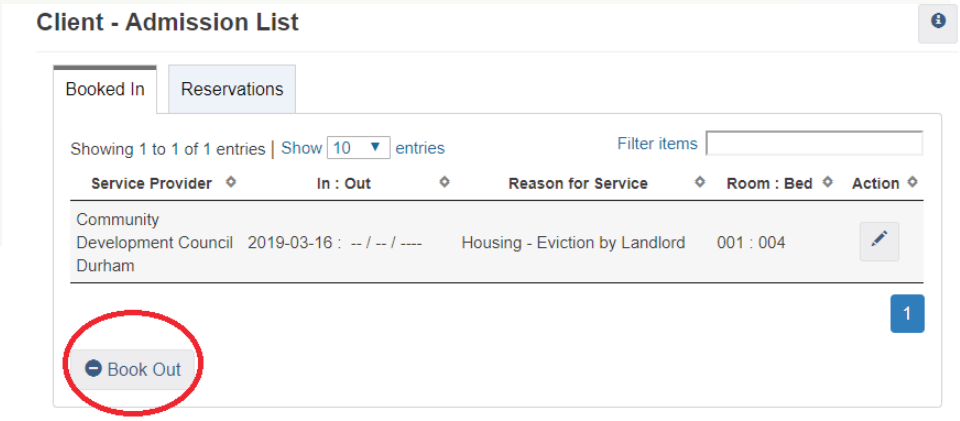
3. This will bring users to the Add Book In page where they can enter important information such as the program the client is utilizing, the reason for service. or if any referrals were made. Once all the information is entered users will click next.



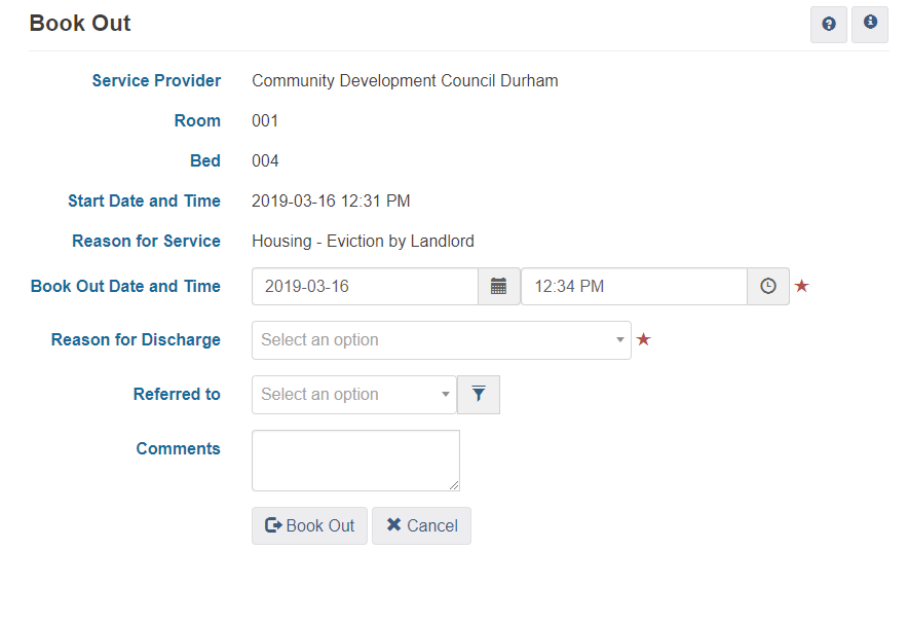
4. This will bring users to the Book in Bed Selection page. Here the user will click on the client's name and drag then into the bed they would like them to occupy. Once this is completed the user will click on the Save button.

BOOKING OUT A CLIENT

1. From the Client Admissions page click on the Book Out button at the bottom left hand corner of the screen.



2. This will bring up the Client Book Out Screen. Users can specify Date and Time the client was booked out, Reason for Discharge, as well as document any referrals that were made and add any comments.

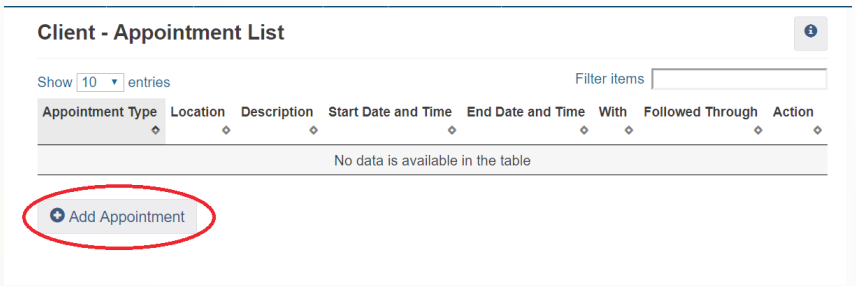


APPOINTMENTS

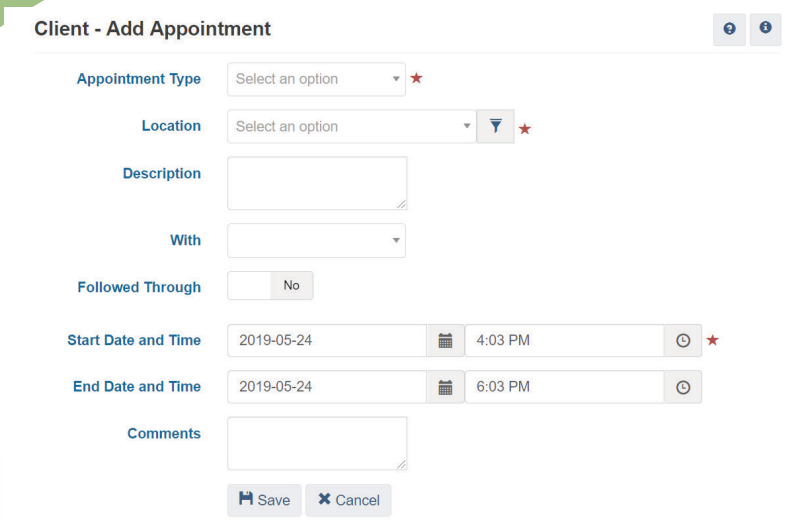
The Appointments module can be used to schedule appointments with clients or to record appointments that clients may have with external organizations.

1. From the Client Management drop down click on Appointments. This will bring up with Appointments module.

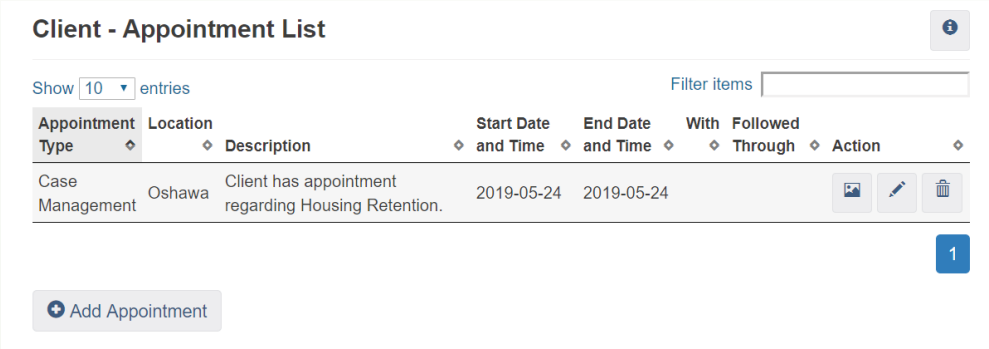
2. To add an appointment, click on the "Add Appointment" button at the bottom of the screen.



3. This will bring users to the Add Appointment page where they can add important information such as Appointment Type, Location, who the appointment is with and the date and time of the appointment. Users are also able to add any relevant comments. When finished click on save.



4. This will bring users back to the Appointments main page where they will see the appointment listed. If needed users can display, edit or delete the appointment from this page.

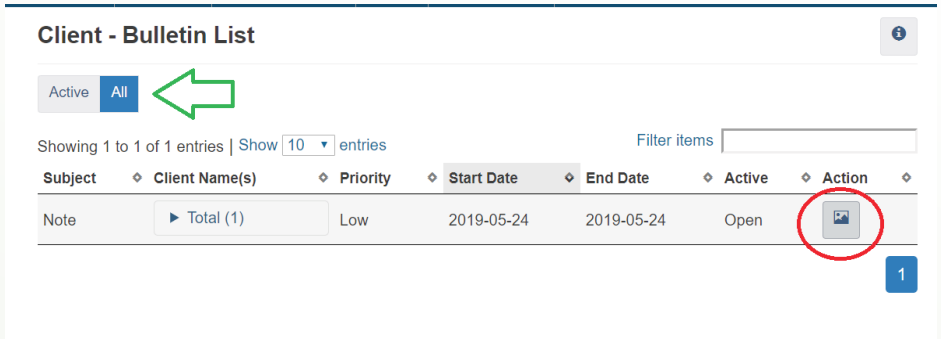


BULLETINS

The bulletins module is found in the Communications tab and is used to pass on important information to staff. Sometimes this information pertains to a specific client. When a client is linked to a bulletin, the bulletin will show in the bulletins module under the client's profile.

1. From the Case Management drop down menu click on Bulletins.

A list of client Bulletins will appear.



Users can toggle between Active Bulletins and All Bulletins. Active Bulletins will show the bulletins where the end date has not yet come. All Bulletins will show all bulletins pertaining to the clients even if the end date has passed.

To view the Client Bulletin users can press on the view button located to the right of the screen.

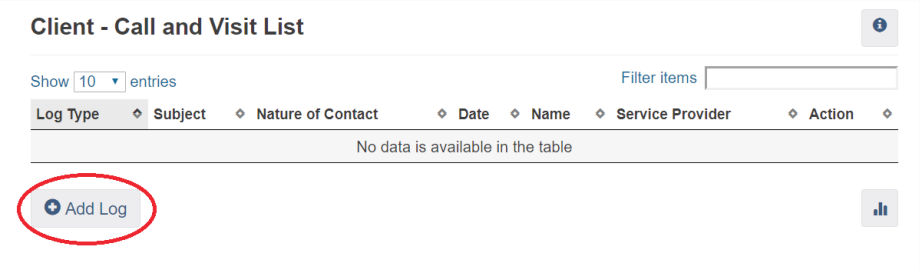
CALL AND VISIT LOG

The Call and Visit Log module is used to record the connections a client makes/receives during their stay at the service provider.

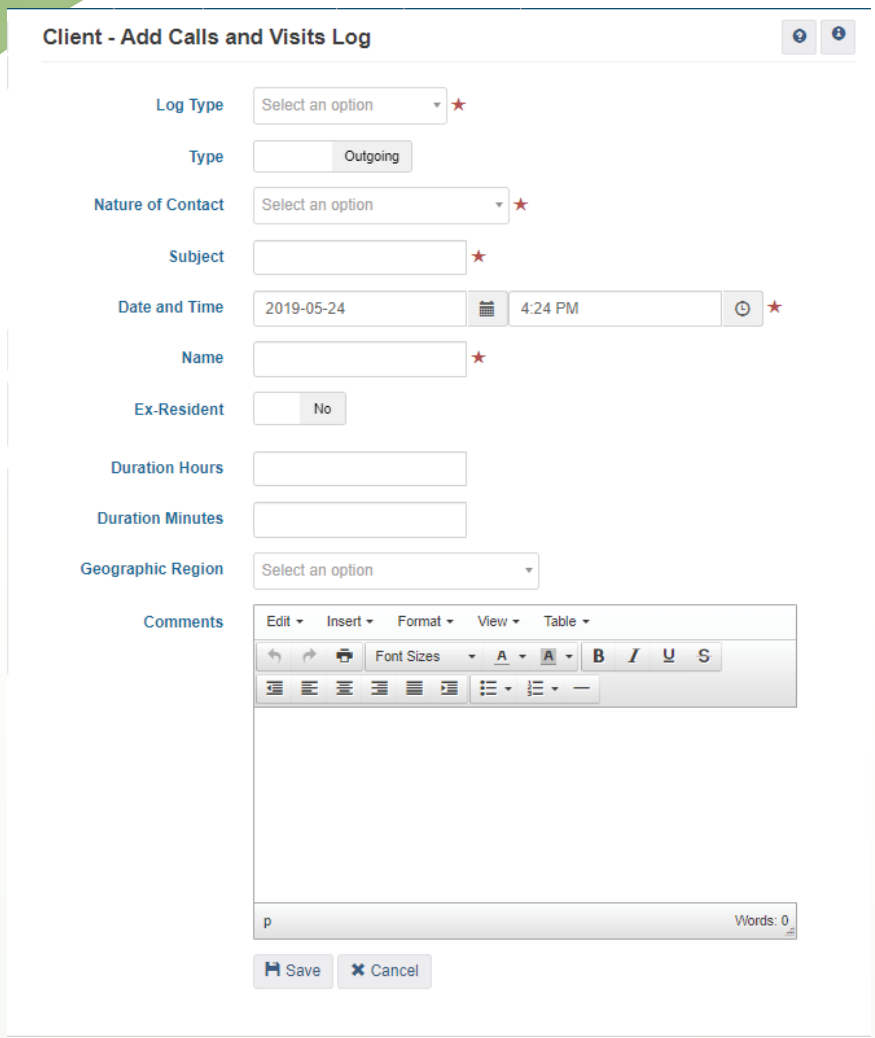
ADDING A CALL AND VISIT LOG

1. From the Case Management drop down click on Call and Visit log.

The clients record will appear.



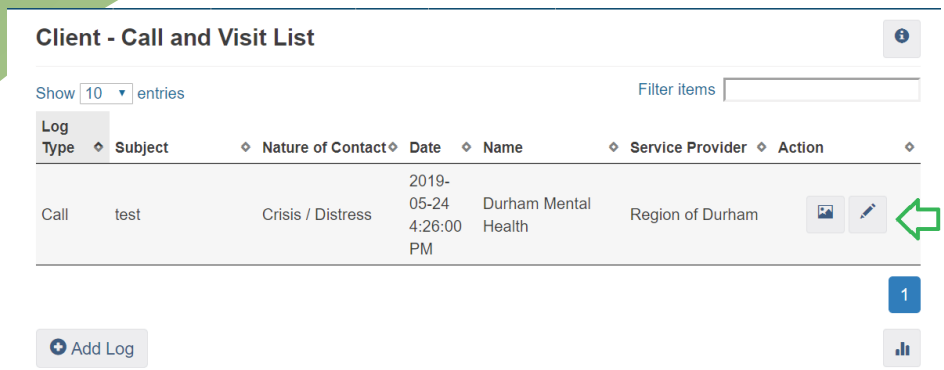
2. Click on the Add Log button located at the bottom left of the screen.



This will bring users to the page where they can add information regarding the contact that the client has made. Users can add information such as Nature of the contact, Name of contact, and also make notes on important details.

3. Once finished click on the save button.

Once saved the user is now able to see the clients log in the Call and Visits page.



Call and Visit logs can be viewed or edited by clicking on the icons to the right of the applicable log.

CASE MANAGEMENT

The Case Management module allows service providers to keep record of the activities preformed with a client to reach the client's pre-determined goals.

Note

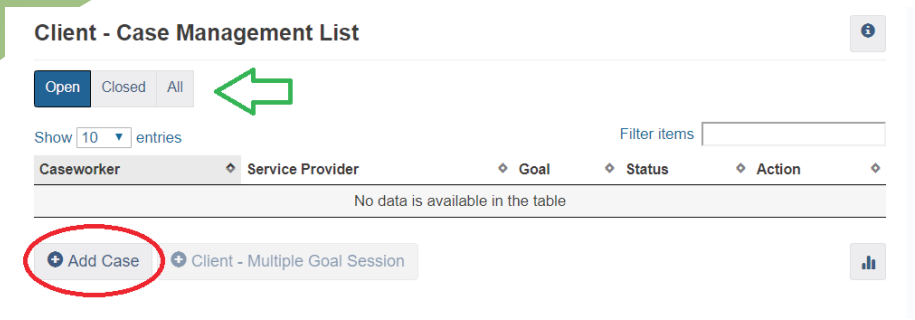
Each goal that a case worker and client work towards is a separate record in the Case Management module. For example: If a client would like to find housing but also has a mental health issue that they would like to work on, two case management records would be created for the client.

1. From the Client Management drop down click on Case Management.

This will bring users to the Case Management module. Here users can choose to toggle through and view open, closed or all cases, or they can add a case.

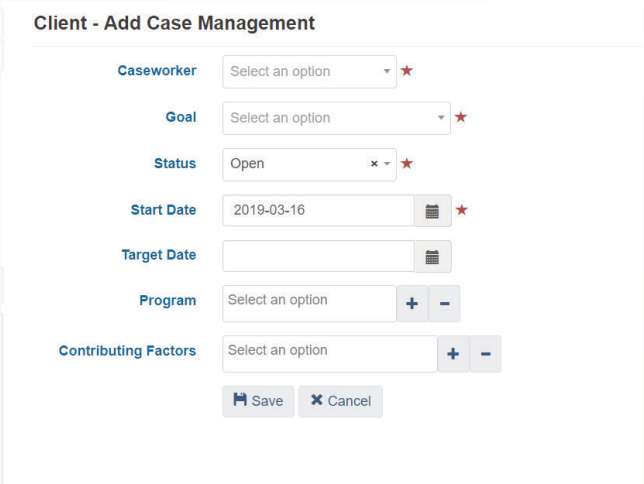
ADDING A CASE MANAGEMENT RECORD

1. Click on the Add Case button at the bottom left of the screen.

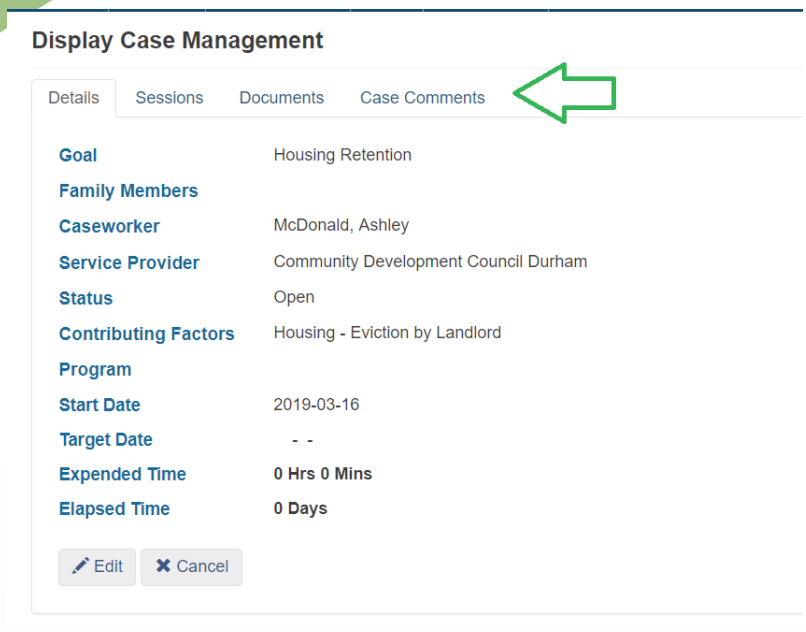


2. This will bring users to the page where they are able to add a Case Management File. Users can add information such as the goal the client would like to work on, the start date and target date.

3. Once completed click on the Save Button.



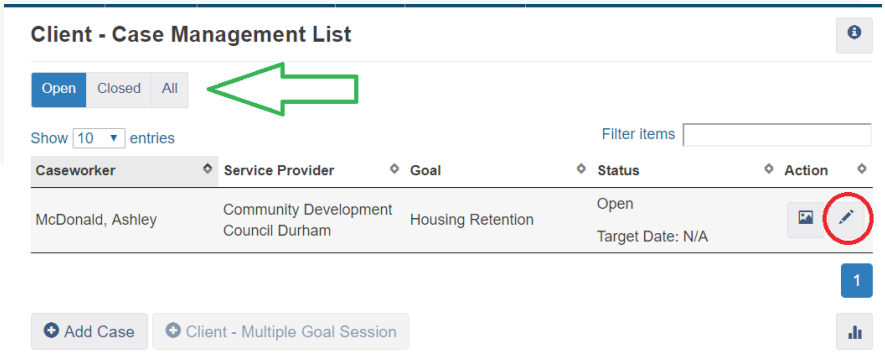
This will now bring users to the Display Case management page. Here users can use the tabs at the top of the screen to add information such as Session notes, Related documents or Case Comments.



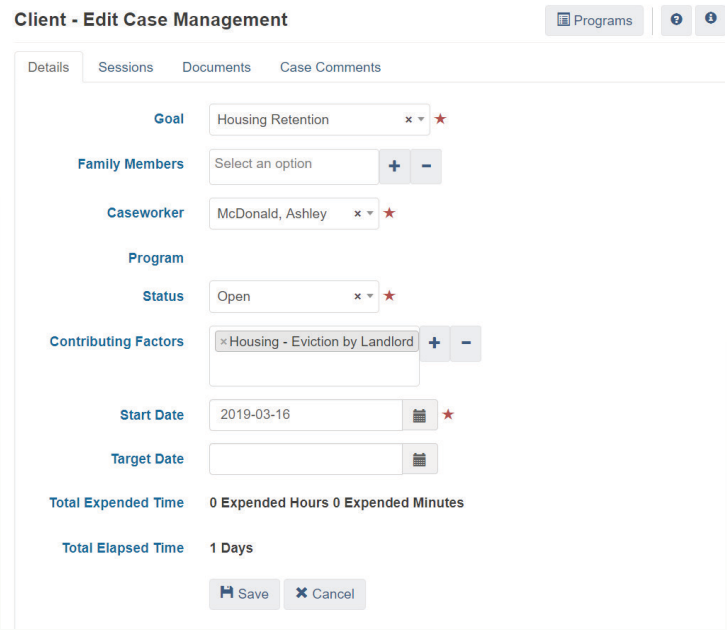
EDITING CASE MANAGEMENT RECORDS

1. Use the Open, Closed and All tabs to find the Case Management Record that needs to be edited.

2. Once the Record has been located click on the edit icon on the right hand side of the Case you would like to edit.



3. Edit existing information or add missing information. When completed click on the save button.



CONFLICTS

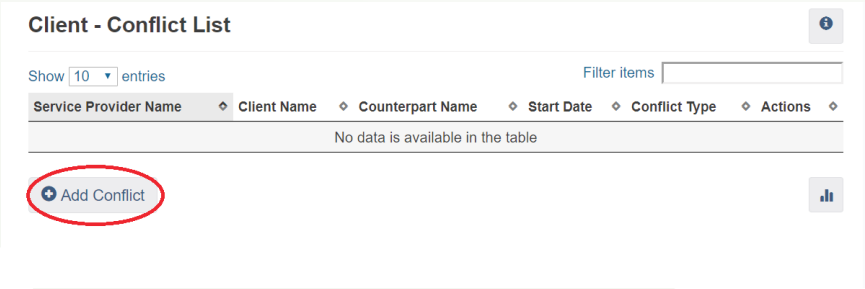
The Conflicts Module is used to record conflicts that have taken place between two individuals. The conflict can include clients and staff members. In the conflicts module users can specify whether the client was an aggressor or a victim in the incident.

1. From the Client Management drop down click on Conflicts.

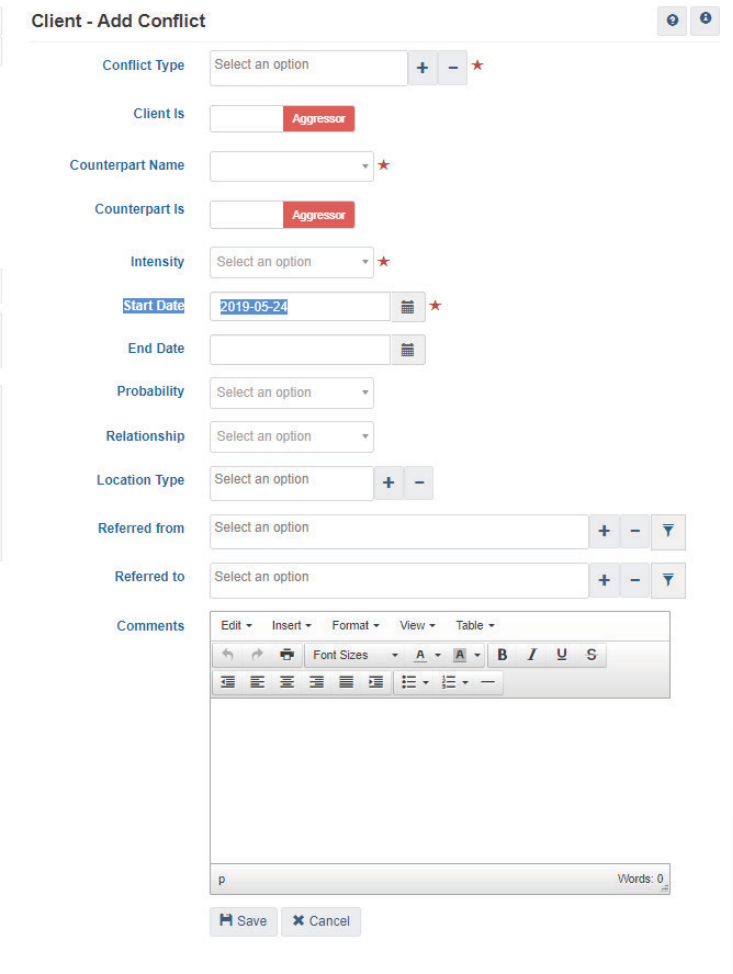
This will bring users to the Conflicts page. Here users can view past conflicts that the client has experienced as well as add a new conflict.

ADDING A CONFLICT

1. To add a new conflict, click on the Add Conflict button at the bottom left of the page.

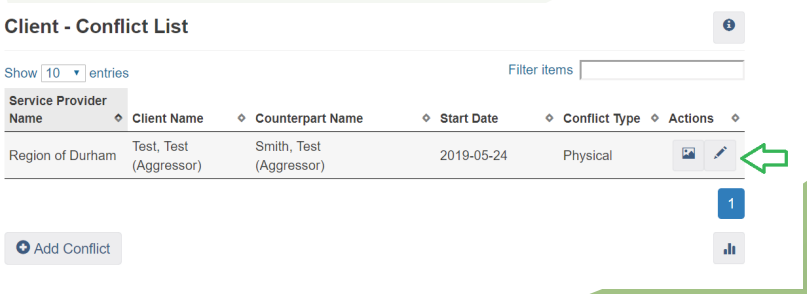


2. This will bring users to the page where they will be able to enter details about the conflict that the client was involved in.



3. Once all the details about the conflict have been entered click on the Save button at the bottom of the screen.

This will bring users back to the Conflicts main page where they can view the conflict. They can view or edit details regarding the conflict by clicking on the view or edit button to the right of the conflict information.



GOODS AND SERVICES

The Goods and Services module is used to keep track of Goods and Services transactions that a service provider has provided to a client.

1. From the Case Management drop down select Goods and Services. This will bring users to the Goods and Services module where they will be able to enter information such as the Reason for Service and any Goods or Services that the client received.

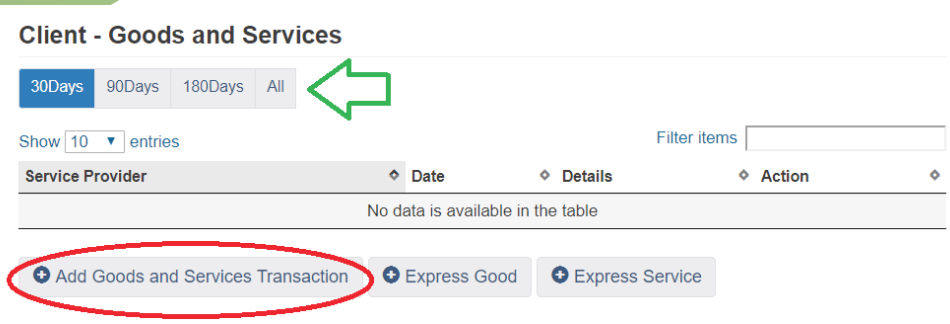
Once users are on the Goods and Services Module page they can use the days filter to toggle through past goods and services that they client has received.

Note

There are two ways to enter goods and services on the HIFIS database. The first is to start a Goods and Services Transaction. Alternatively, for faster workflow users can utilize the Express Goods and Express Services options.

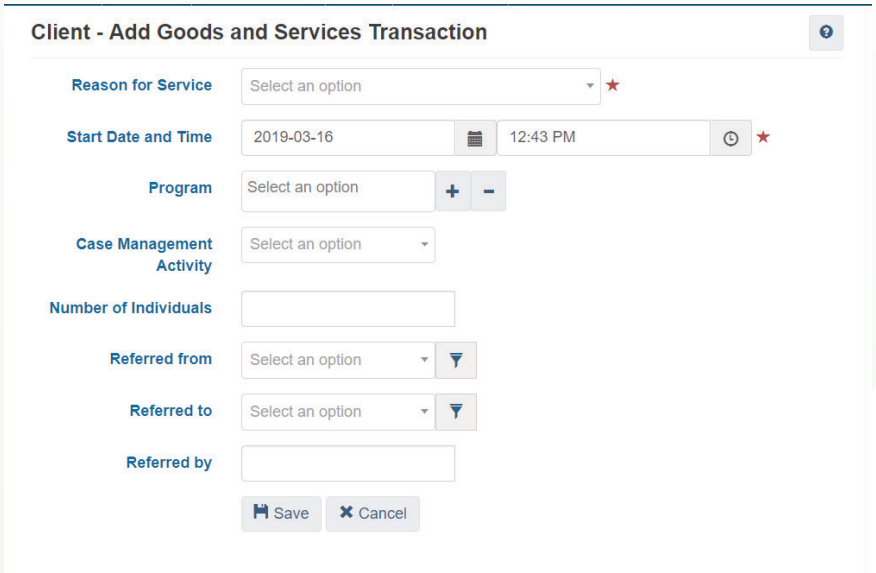
ENTERING A GOODS AND SERVICES TRANSACTION

1. Click on the Add Goods and Services Transaction located at the bottom left of the screen.



2. Add information such as the Reason for Service, the Program that has provided the good or service, and if the client was referred to or from any other Service Providers.

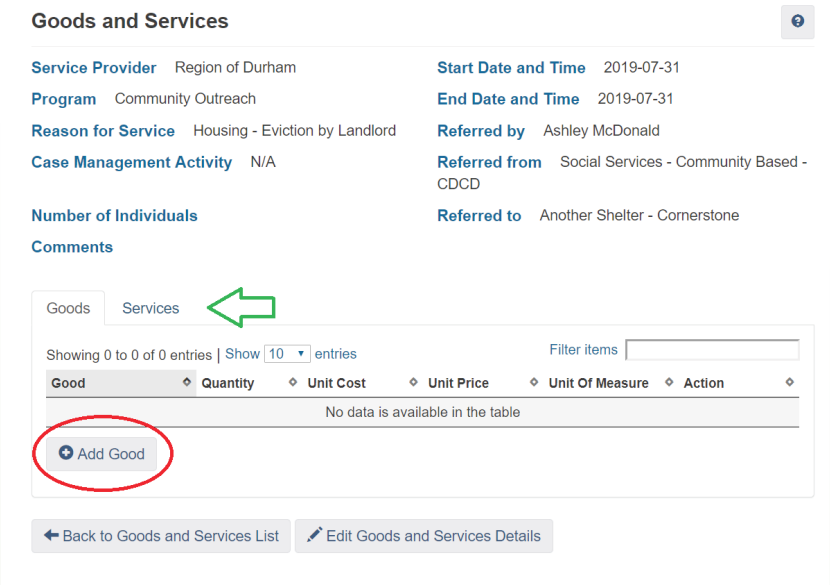
3. Once finished click on the Save button at the bottom of the screen.



Once the transaction is completed users can now enter Goods and Services by toggling to the goods or services tab.

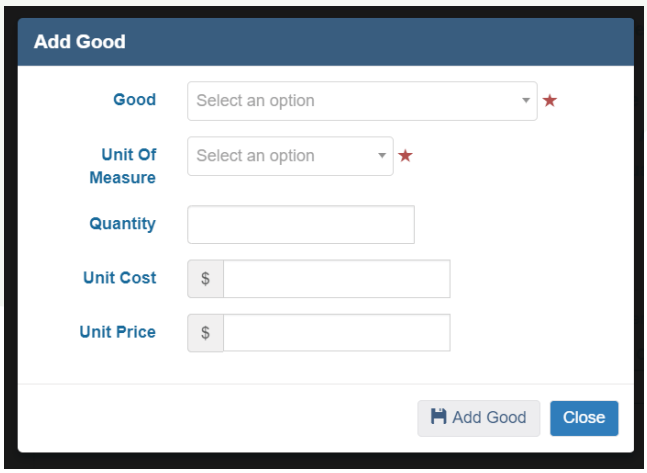
ENTERING A GOOD

1. Toggle to the Goods tab and click on the Add Good button.



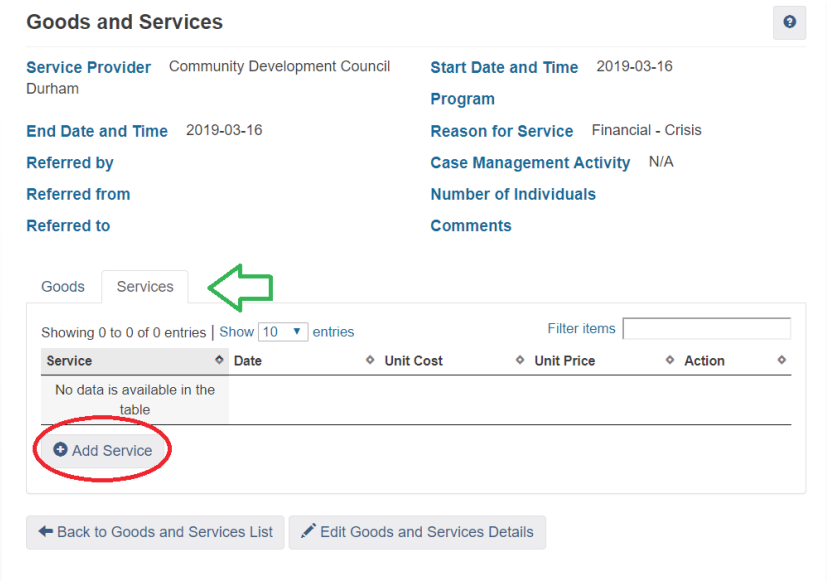
2. This will bring up an Add Good screen where users can add the applicable infomormation.

3. Once finished click on the Add Good button.



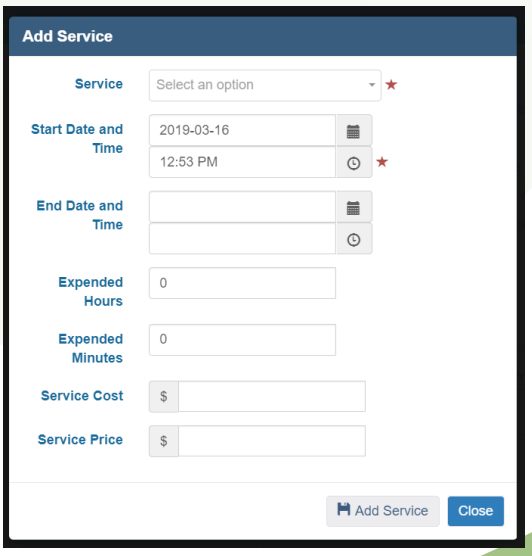
ENTERING A SERVICE

1. Toggle to the Services tab and click on the Add Service button.



2. This will bring up an Add Service screen where users can add the applicable infomormation.

3. Once finished click on the Add Service button.

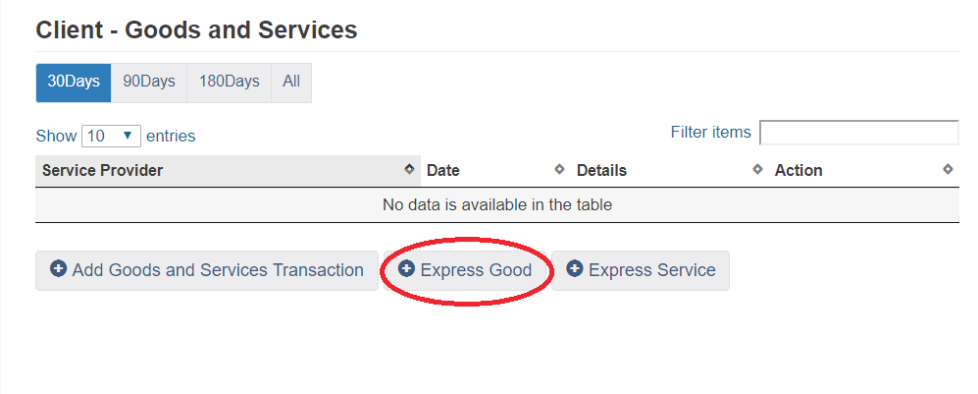


EXPRESS GOODS AND SERVICES

Express Goods and Services allows the users to enter in a good or service transaction for the client easier, allowing for a faster workflow.

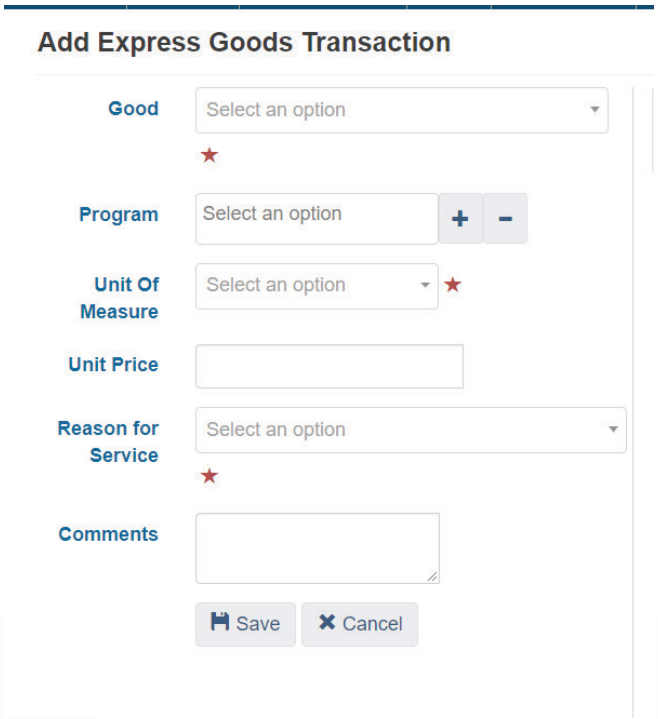
EXPRESS GOOD

1. Click on the Express Good Button.



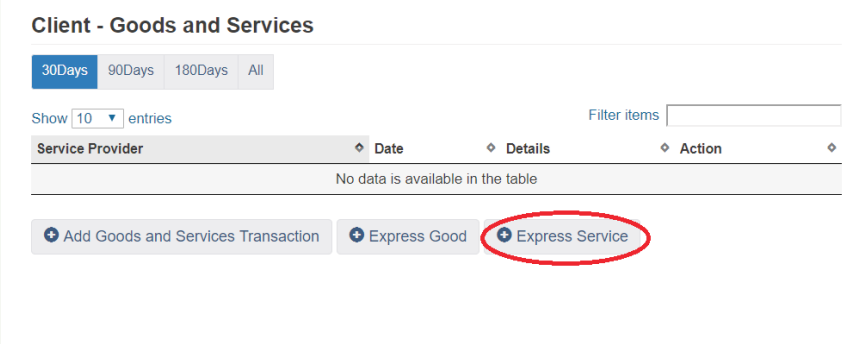
2. This brings users to the Add Express Good Transaction page. Here users can enter the required information such as type of good, unit price, and reason for service.

3. Once completed click on the Save button.



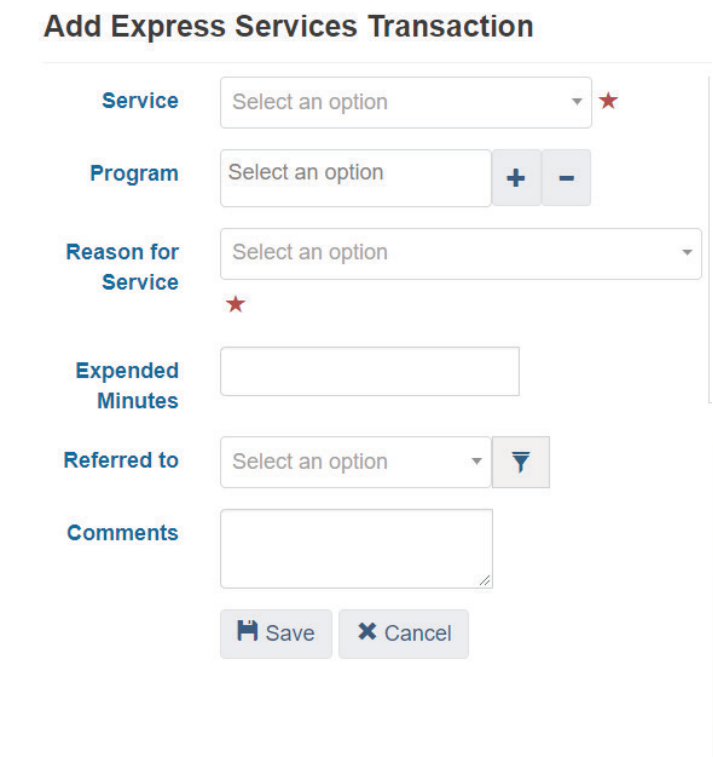
EXPRESS SERVICE

1. Click on the Express Service Button.

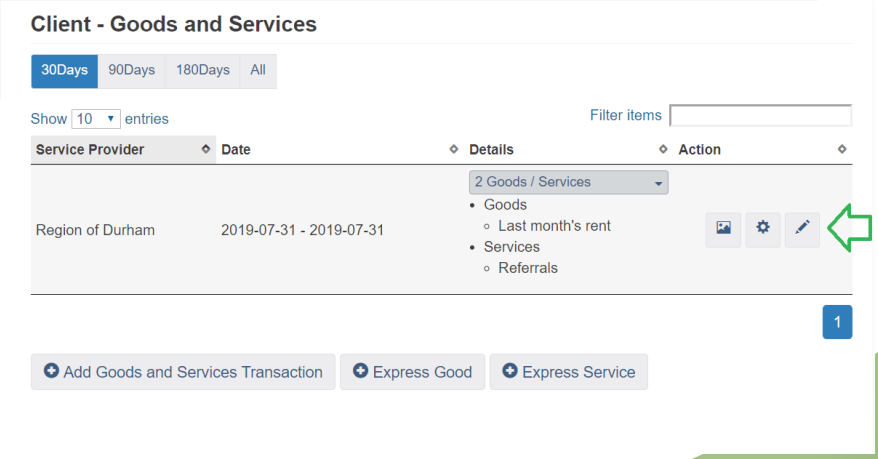


2. This brings users to the Add Express Service Transaction page. Here users can enter the required information such as Type of Service, which Program the Service is being offered from, and Reason for Service.

3. Once completed click on the Save button.



Once the Goods and Services transactions are completed they will be listed for users to see. Users can also Display, Manage, or Edit their Goods and Services templates by clicking on the buttons to the right of the screen.



HOUSING PLACEMENT

The Housing Placement module is used to record details of a client's housing search such as type of housing sought, target dates, and any attempts made at finding suitable housing. Once a client has been housed, workers can use the Housing Placement module to record details about the housing unit such as the type of housing, condition of the unit and expected move in date.

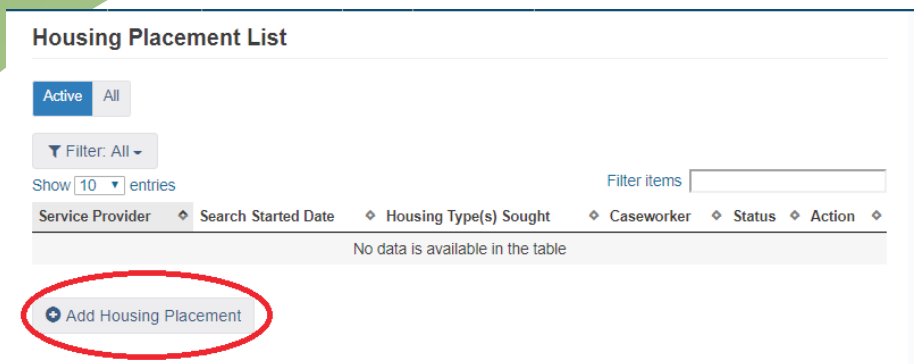
Note

Once a housing placement is complete and details have been added about the housing a client has secured, a Housing History will automatically be created in the client's profile.

1. From the Case Management Drop down click on Housing Placements. This will bring users to the Housing Placements module where users can track details about the clients housing search.

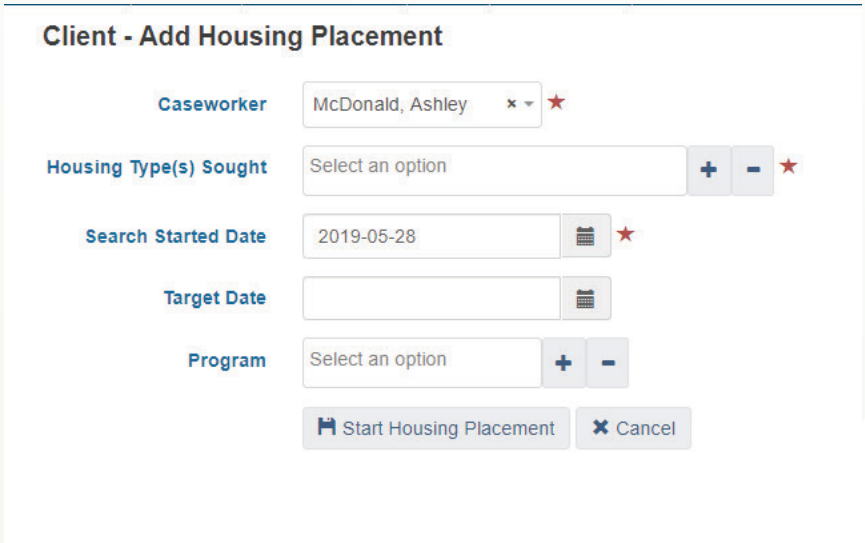
BEGIN A HOUSING PLACEMENT

1. Click on the Add Housing Placement Button.

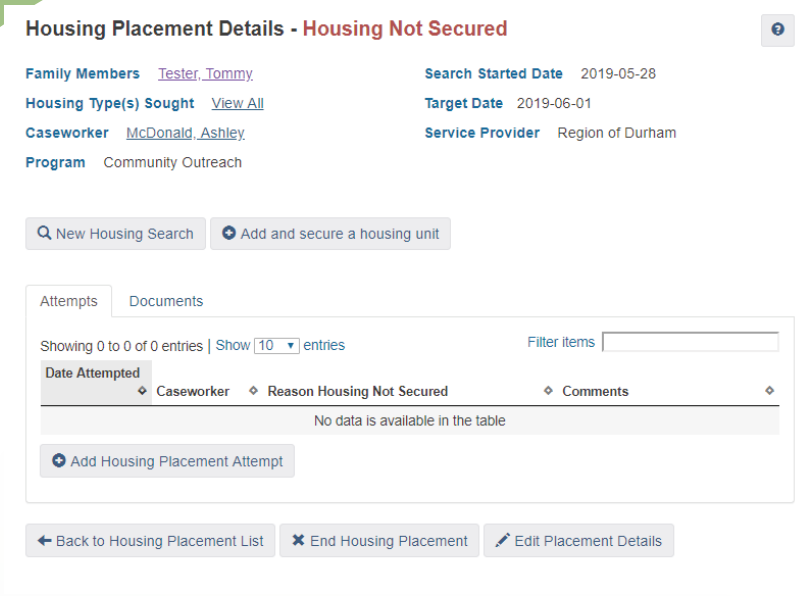


2. This will bring users to the page where they can enter important information before beginning a housing placement.

3. Once completed click on the Start Housing Placement Button.

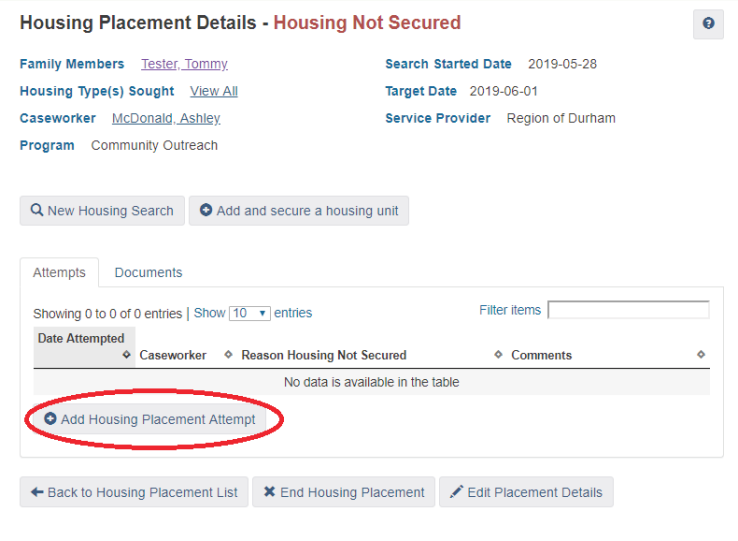


This brings users to the Housing Placements Page where they can keep track of clients housing attempts and added secured housing.



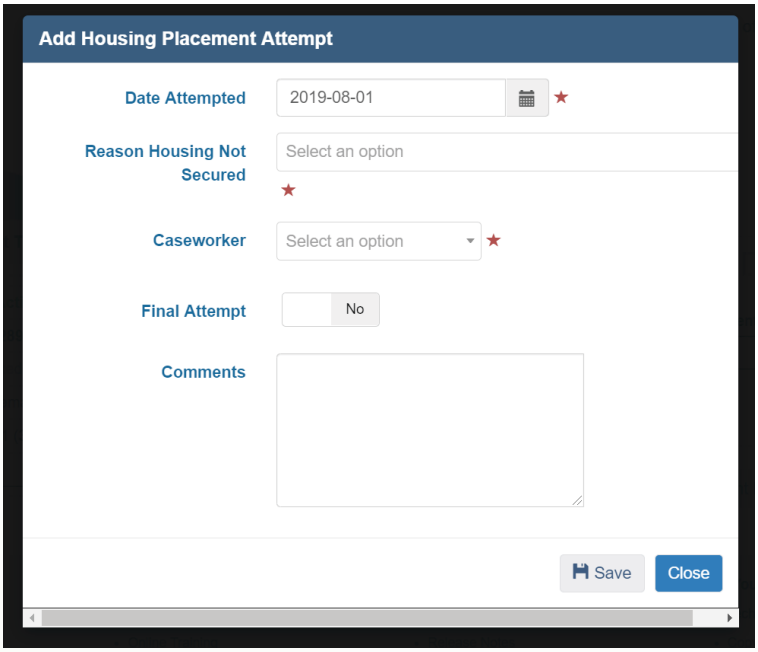
ADDING AN UNSUCCESSFUL HOUSING ATTEMPT

1. Click on Add Housing Placement Attempt.



2. Add information such as Date Attempted, Reason why attempt was unsuccessful and the Caseworker's name. Users can add any comments if they feel warranted.

3. Once completed click the Save button.

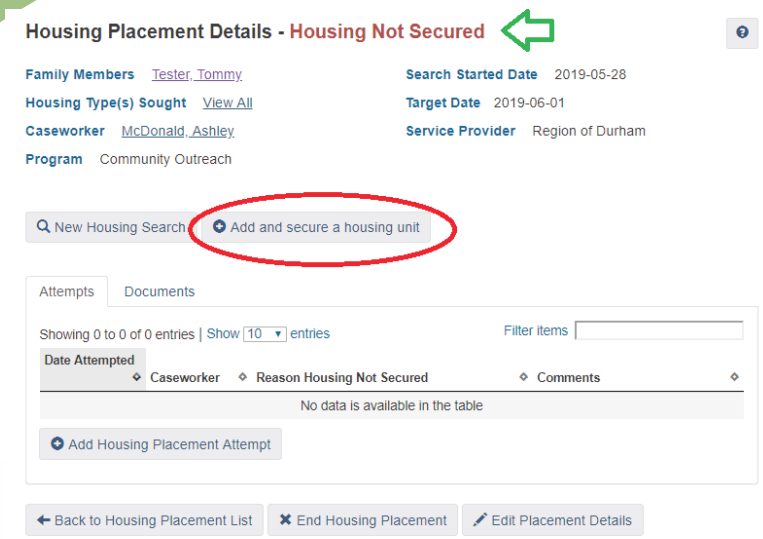


ADDING AND SECURING A HOUSING UNIT

Note

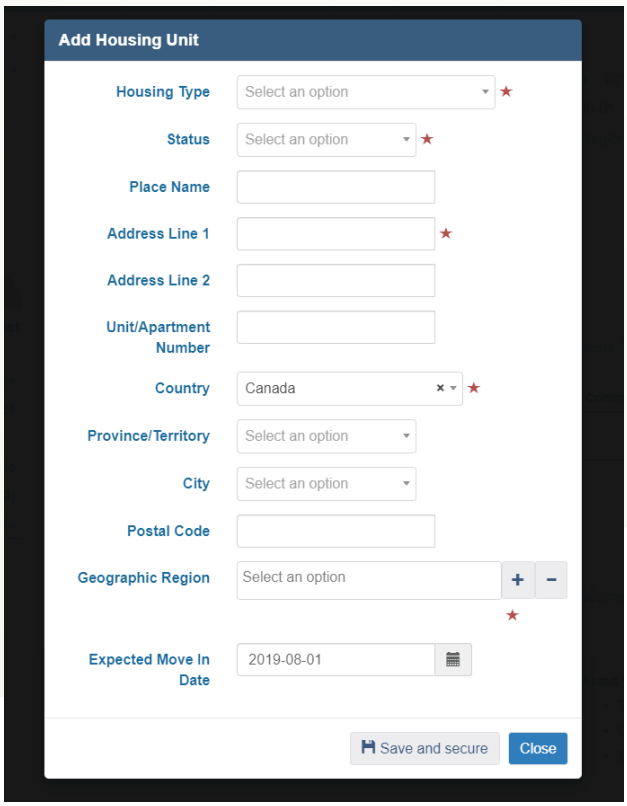
Users will note that beside the Housing Placement Details there is a status in red. If the client has not secured housing the status will read Housing Not Secured. Once the client has moved into the unit the status will say Moved In.

1. Click on the Add Secure Housing Unit Button.



2. Enter applicable information such as Housing Type, Address, and Expected Move in Date.

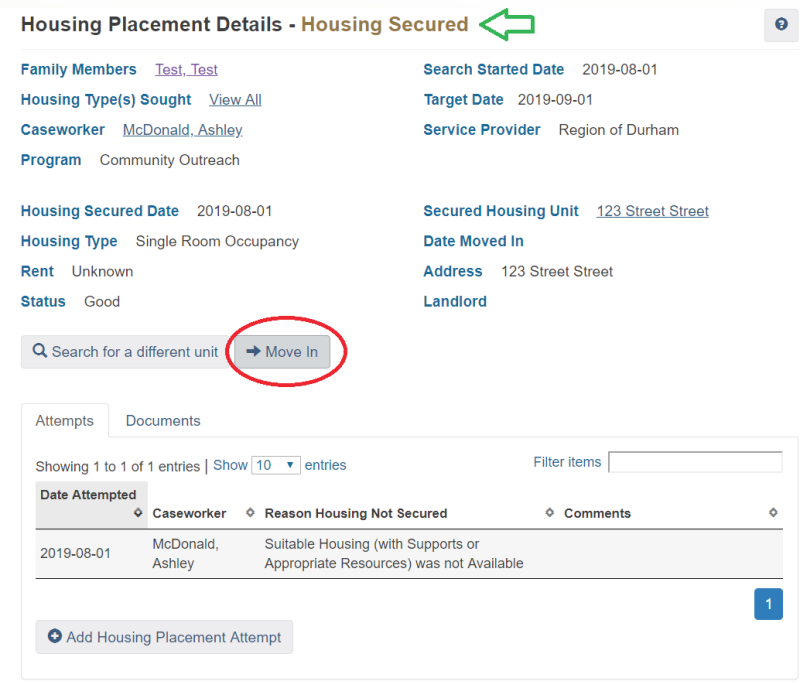
3. When finished click the Save and Secure button.



Once housing is secured a new page will open that will allow users to Add Housing Placement details. Once a client has moved into the unit users can record this using the Move In button.

RECORDING WHEN A CLIENT HAS MOVED IN

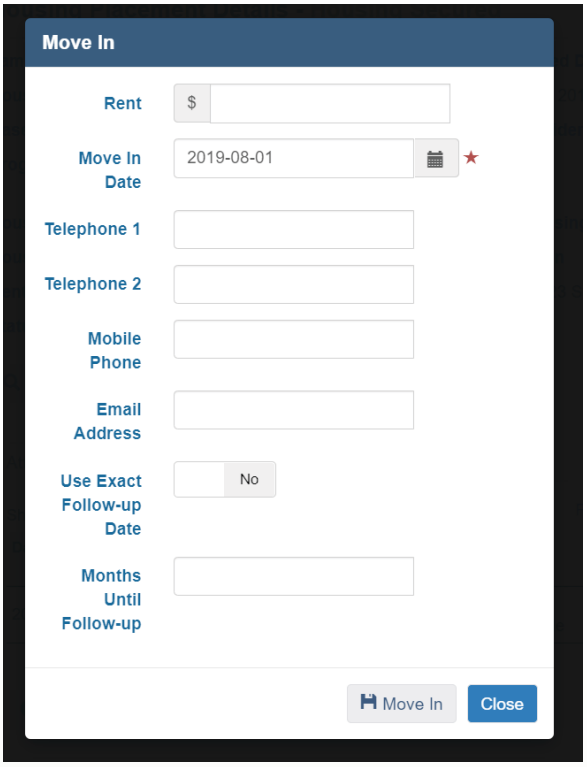
1. Click on the Move In button.



This will bring you to the Move in page.

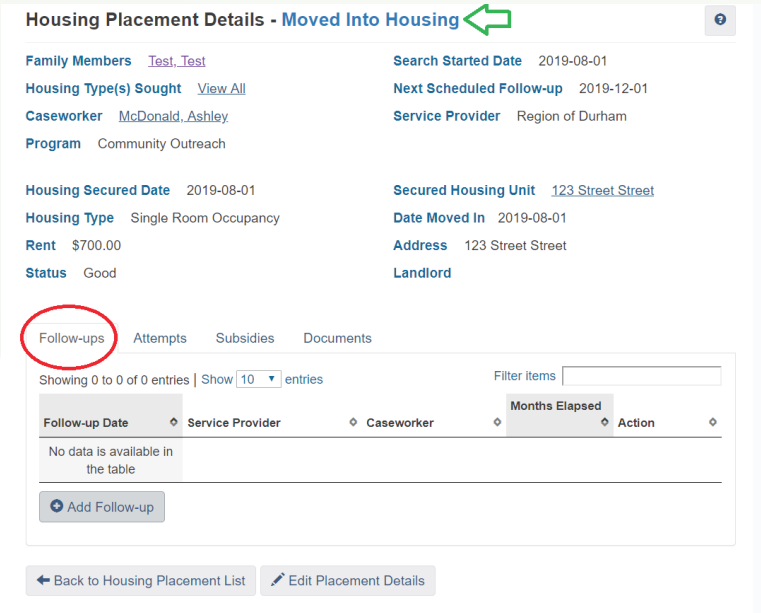
1. Add applicable information such as amount of rent, client contact information and a follow up date.

2. Once finished click on the Move In button.

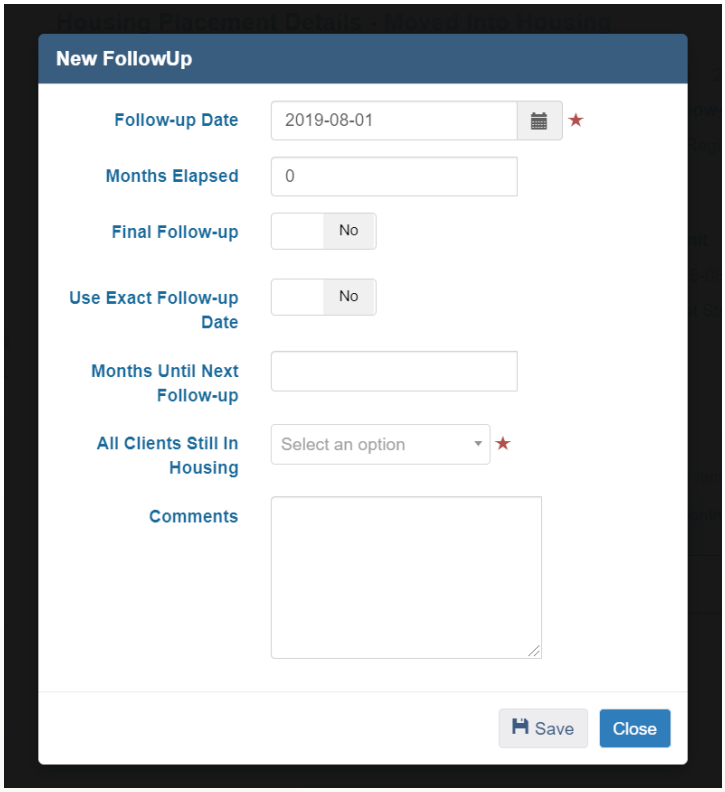


ADDING A FOLLOW UP

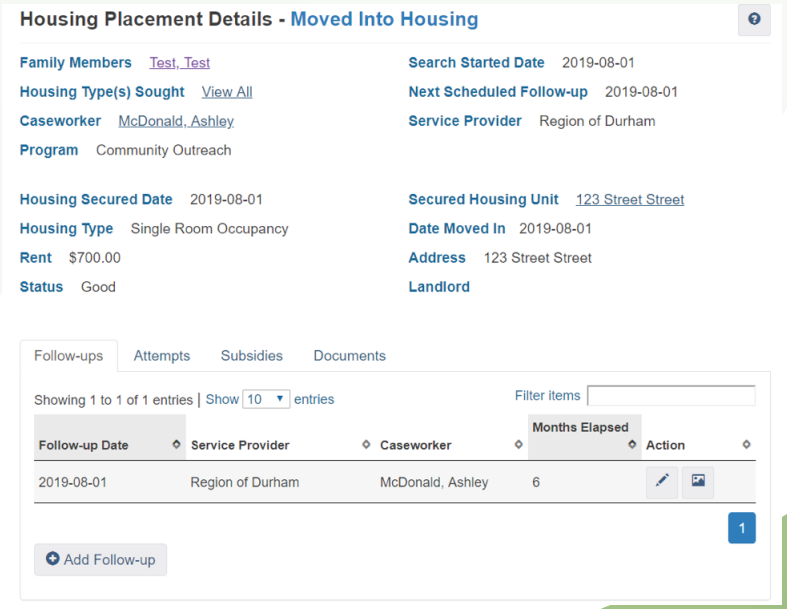
1. Toggle over to the Follow ups tab.
2. Click on Add Follow up.



3. Add applicable information about the follow up and then click on the Save button.



Users will now see the information they entered on the Housing Placements page.



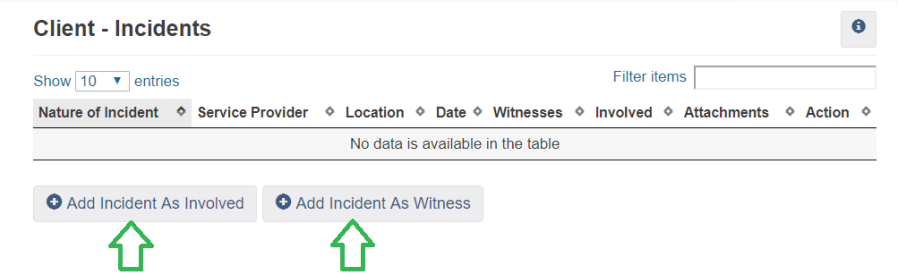
INCIDENTS

The incidents module is used to keep track of a specific event that the client has been involved in. In this module users can track if the client has been directly involved with the incident, or if the client was a witness to an incident.

1. From the Case Management Drop Down click on Incidents. This will bring users to the Incidents module where they can track important information about a specific incident.

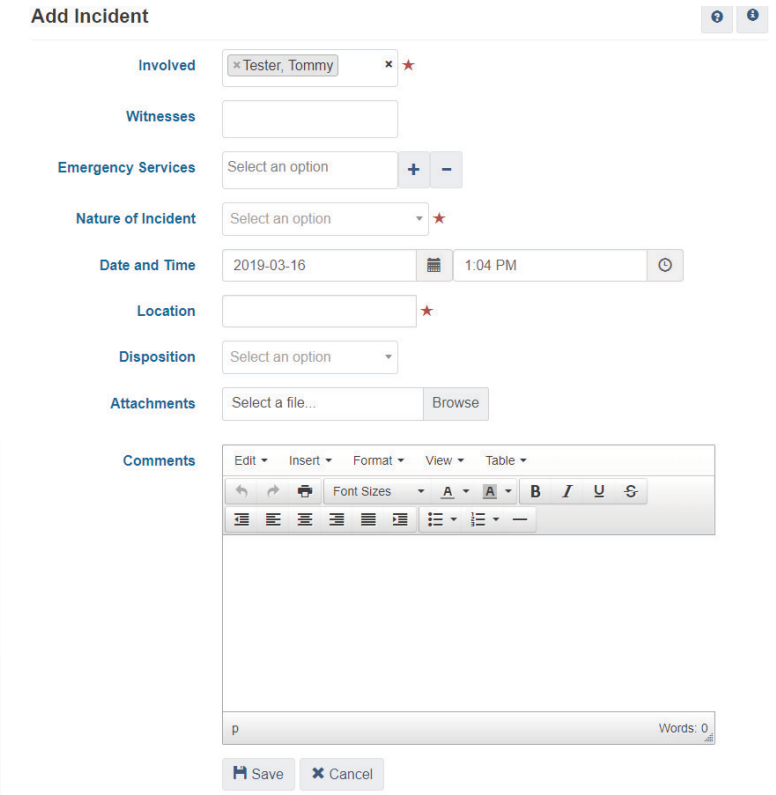
ADDING AN INCIDENT

1. Click on the Appropriate Add Incident button. This will depend on whether the client was directly involved or just a witness to the incident.

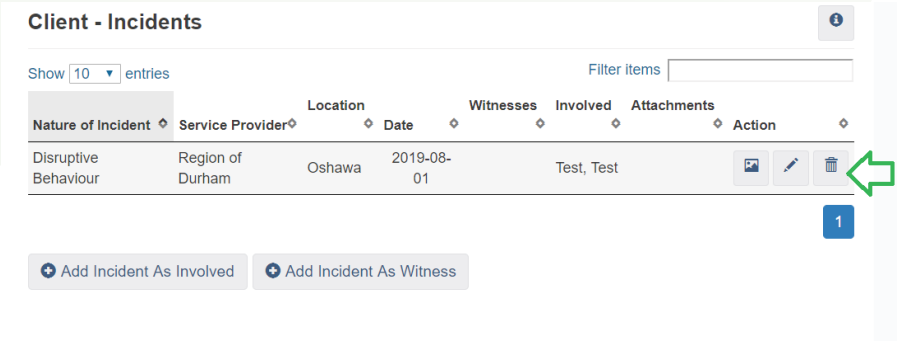


2. Add information about the incident such as if there were emergency services involved, Nature of the incident, Location of the Incident and any comments.

3. When finished click the Save button.



The incident will now appear. Users can view or edit the details about the incident by clicking on the buttons to the right.



SERVICE RESTRICTIONS

The Service Restrictions module is used to record services that the client is restricted from, which service providers have restricted them, and for how long. It also records the reason why 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.

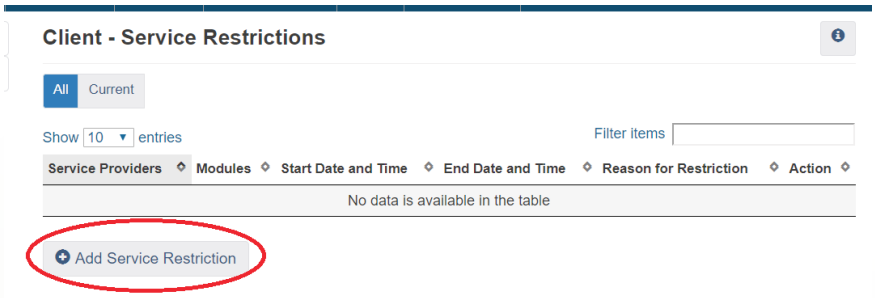
Note

A client may be restricted from a specific service but may be able to access other services that the Service Provider offers. For example, a client may have a service restriction on Stays at a shelter however, they may still be able to access outreach services.

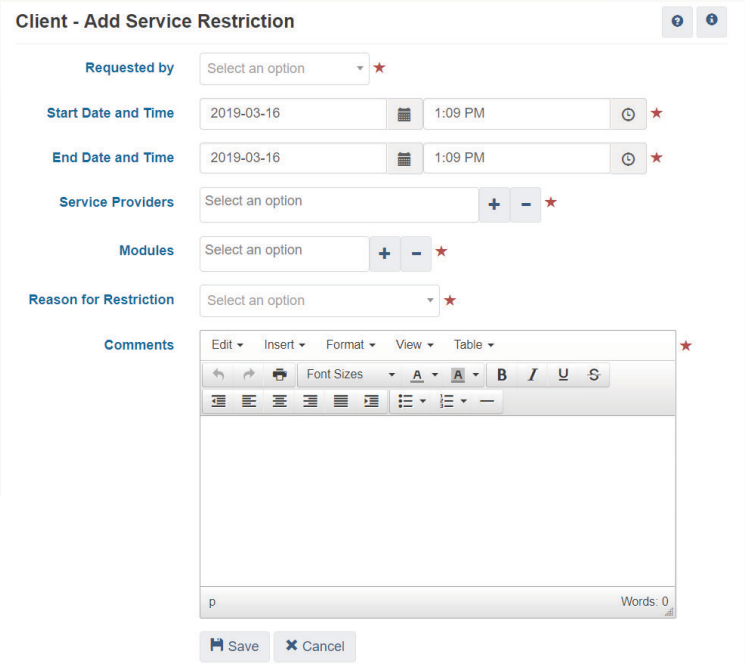
1. From the Case Management Drop Down click on Service Restrictions. This will bring users to the Service Restrictions page where they can view and add Service Restrictions.

ADDING A SERVICE RESTRICTION

1. Click on the Add Service Restriction Button.

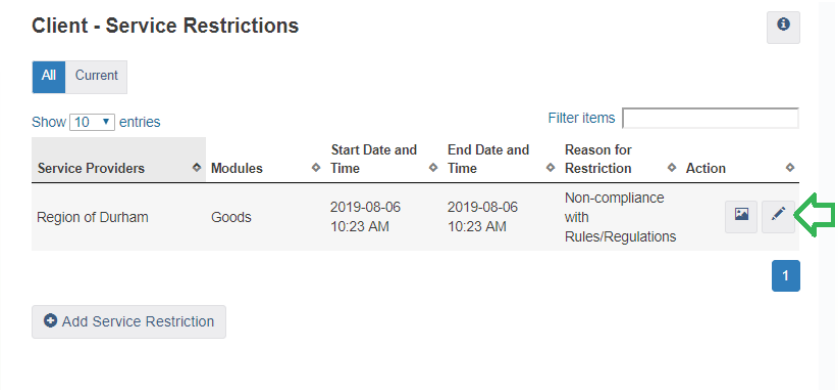


2. This will bring up the Add Service Restriction Page where users can add important details such as who the restriction was requested by, which service provider and module the client is restriction from, the reason for the restriction, as well as any comments if needed.



3. When finished click on the Save button.

The restriction will now appear in the list. Users can display or edit their Service Restrictions by clicking on the Display or Edit button to the right of the relevant restriction.



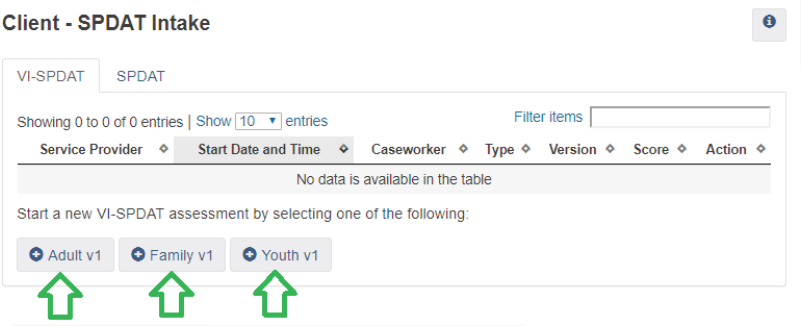
SPDAT

The SPDAT module allows organizations to prioritize their service delivery based on a standardized assessment given to individuals and families who are homeless or at risk of becoming homeless. There are three versions of the assessment 1. Adult 2. Family 3. Youth.

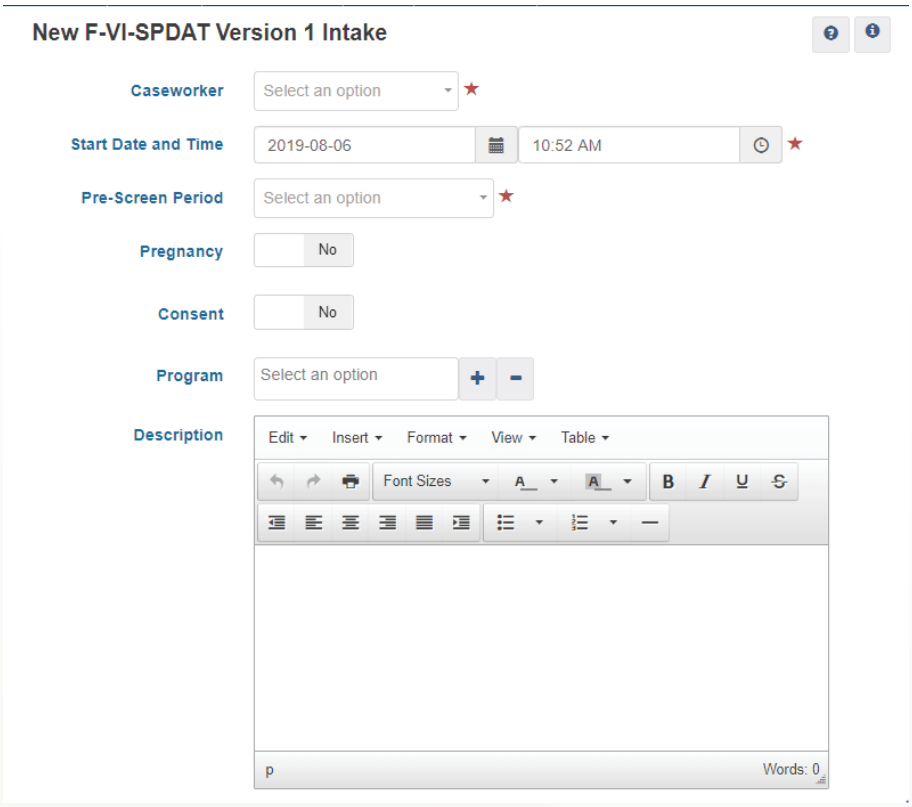
1. From Case Management drop down select SPDAT. This will bring you to the SPDAT Module where you can conduct the assessment.

ENTERING A SPDAT ASSESSMENT

1. From the SPDAT Intake Page select the appropriate assessment from below. This will differ depending if the user is working with a single adult, family or youth.



2. Once a user has selected the appropriate assessment users will be brought to the assessment page. Here users can enter the required information and fill out the questionnaire that is attached.

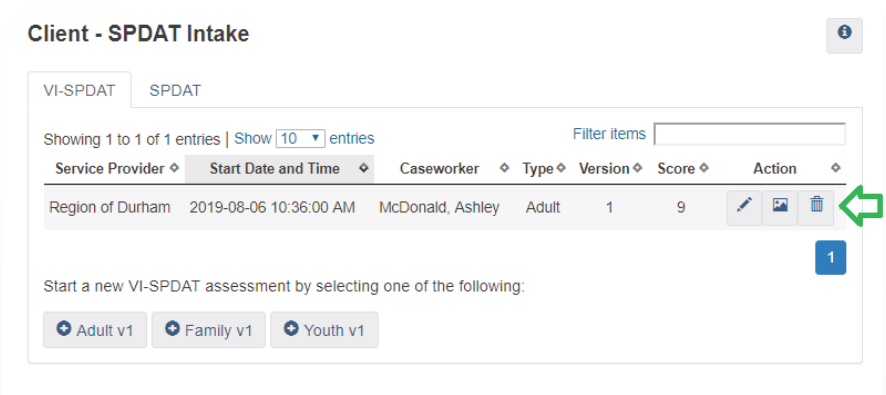


3. Once Finished click on the Save button below.

This will bring users back to the SPDAT module where they will now see the assessment that they have completed. Users can View or Edit the assessment by clicking on the display or edit button to the right of the assessment.

Note

Users will only be able to display or edit assessments that they have created. If another Service Provider has completed an assessment with a client the user will only be able to view the clients score and will not have access to any answers nor will be able to edit any answers.



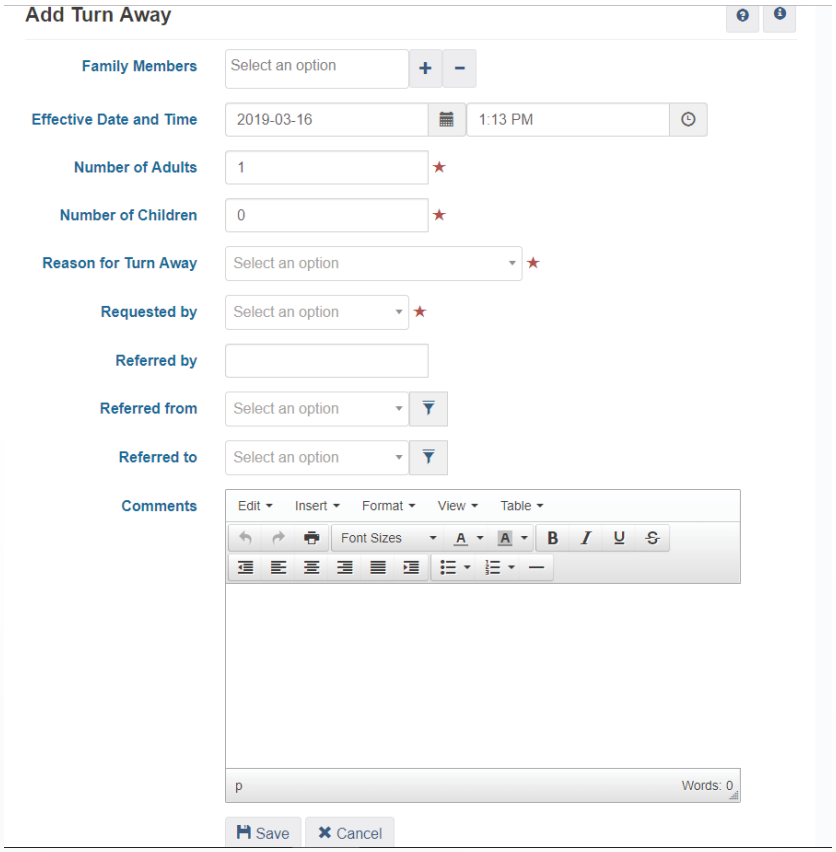
TURN AWAY

The turn away module is used to keep track of which service providers have turned the client away from their service and the reason for turn away.

This module is also used to help service providers identify how many clients they have turned away and for what reasons. It may point to the need for more shelter beds, or more temporary shelter beds. It could also help the community decide where to focus resources in order to appropriately help clients.

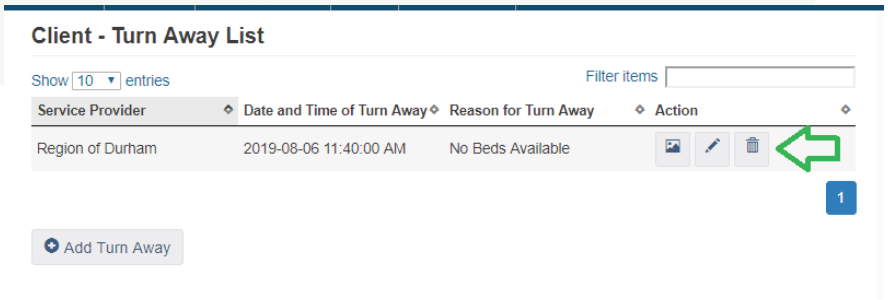
1. From the Case Management drop down click on Turn Away. This will bring users to the Turn away module. Click on the Add Turn Away box.

2. This will bring up the Add Turn away page. Here users can add important details about the Turn Away such as the Reason, Any Referrals made and any relevant comments.



3. When finished click Save.

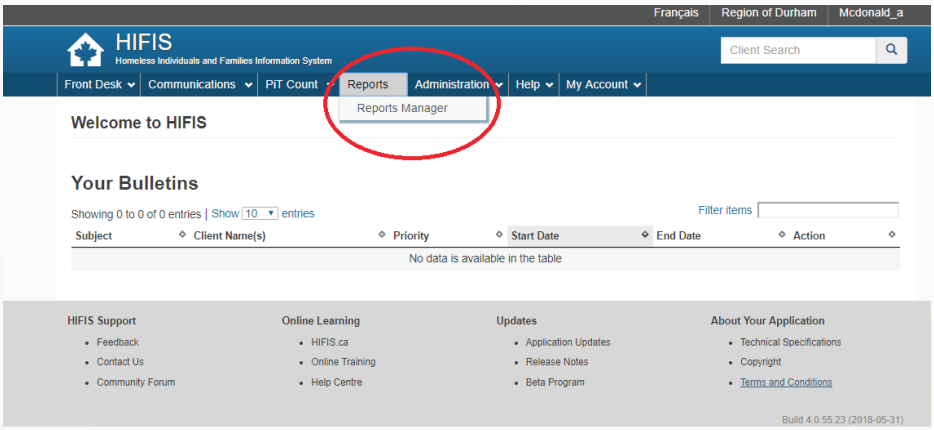
This will bring users back to the Client-Turn Away List where they can Display or Edit details by using the buttons to the right of the Turn Away.



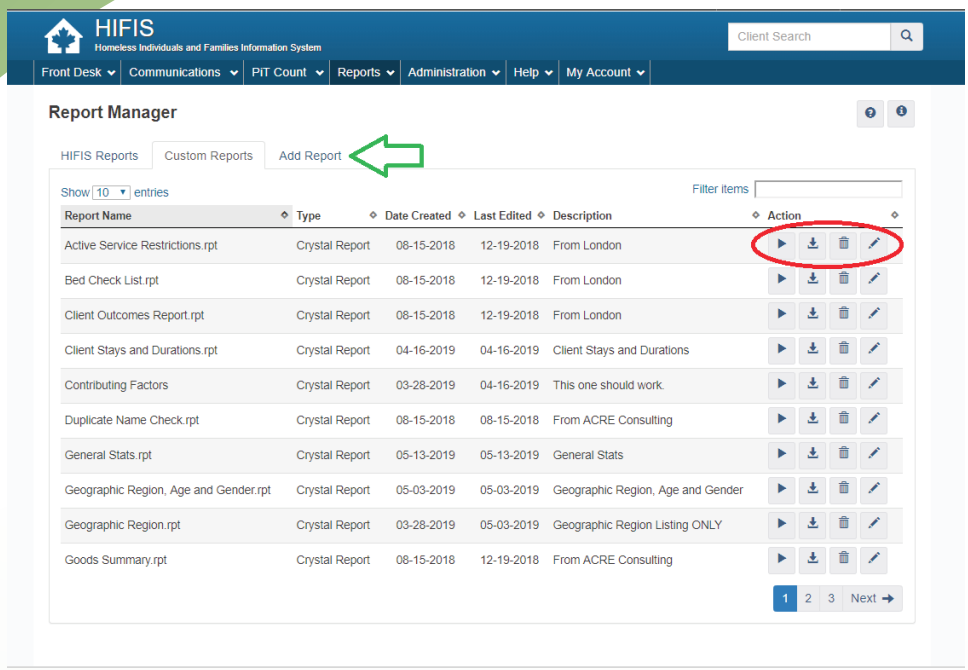
REPORTING

The Reports module is used to add, create or edit reports, users can select any report and read its description. Service Providers can also use this module to pull reports based on the data that they have entered into the HIFIS Database.

1. From the Front Desk Menu click on the Reports Drop Down, then click on Reports Manager.



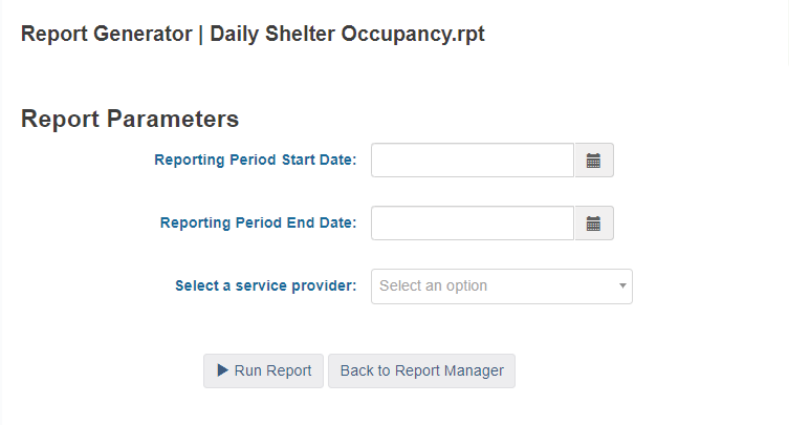
This brings users to the Reports Manager Screen. Here users can toggle between HIFIS Reports (Generic reports that the HIFIS team has created.) or Custom Reports (Reports that have been created specifically for Durham Region.)



RUNNING A REPORT

1. Click on the run report button to the right of the report.

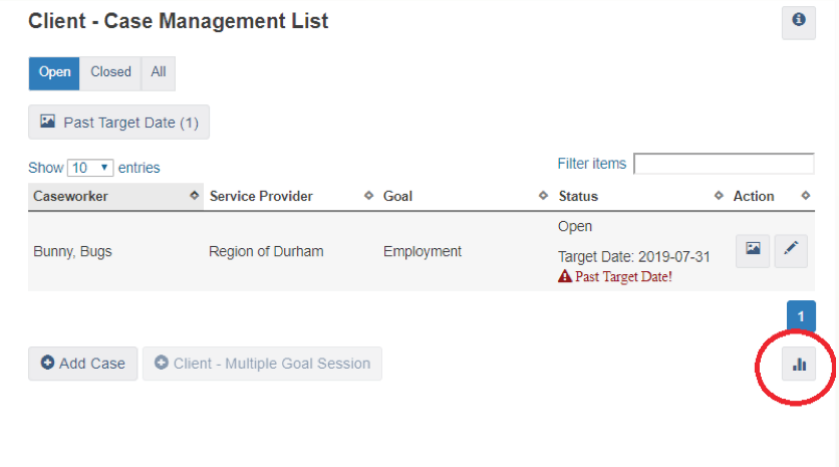
2. This will bring up the Report Parameters where users can set parameters. When finished click on Run Report.



DOWNLOADING A REPORT

Downloading a report can be done in two ways. The first can be done in the reports manager screen by clicking on the Download button to the right of the relevant report.

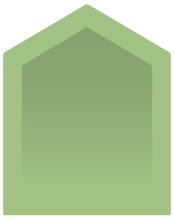
Some Modules have a button built in that allows you to export the data from that particular module to excel without having to use the Report Manager. This can be done by clicking on the export to excel button located at the bottom right of the screen.



We would like to thank to agencies who participate in the HIFIS Working Group for all their support and guidance on the creation of this document.
The HIFIS Working Group Includes:

- Region of Durham Housing Services
- Community Development Council Durham
- Cornerstone Community Association
- Community Living Durham North
- Joanne's House/ Jackie's Place
- Muslim Welfare Home
- John Howard Society
- North House
- Salvation Army Durham Region
- Durham Mental Health Services
- Canadian Mental Health Services
- VHA Home Healthcare
- Brain Injury Association of Durham Region

The purpose of this Training Manual is to familiarize new users on the basic functions of the HIFIS database.



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