

# 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

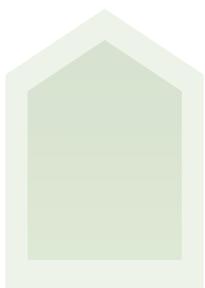


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# INTRODUCTION

## 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.

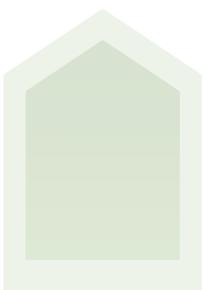
## Purpose of the User Manual

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/2210164999004811523-Session1)

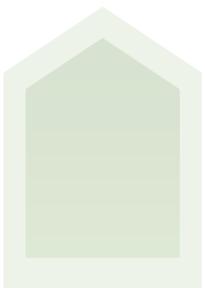
[https://attendee.gotowebinar.com/register/  
4747561858803951873- Session 2](https://attendee.gotowebinar.com/register/4747561858803951873-Session2)



## 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

HIFIS / SISA  
Homeless Individuals and Families Information System / Système d'information sur les personnes et les familles sans abri

Client Search

Front Desk ▾ Communications ▾ PIT Count ▾ Reports ▾ Administration ▾ Help ▾ My Account ▾

Log In / Connexion

User Name / Nom d'utilisateur

Password / Mot de passe  \*

Service Provider / Fournisseur de services  \*

Log In / Connexion

[Forgot Password? / Mot de passe oublié?](#)

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.

Error

- Your attempt to log in failed. You may have a locked account.

# HIFIS 4.0 WELCOME SCREEN

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

Homeless Individuals and Families Information System

Client Search

Front Desk Communications PIT Count Reports Administration Help My Account

Welcome to HIFIS

Your Bulletins

Showing 0 to 0 of 0 entries | Show 10 entries | Filter items

| Subject                           | Client Name(s) | Priority | Start Date | End Date | Action |
|-----------------------------------|----------------|----------|------------|----------|--------|
| No data is available in the table |                |          |            |          |        |

HIFIS Support

- Feedback
- Contact Us
- Community Forum

Online Learning

- HIFIS.ca
- Online Training
- Help Centre

Updates

- Application Updates
- Release Notes
- Beta Program

About Your Application

- Technical Specifications
- Copyright
- [Terms and Conditions](#)

Build 4.0.55.23 (2018-05-31)

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.

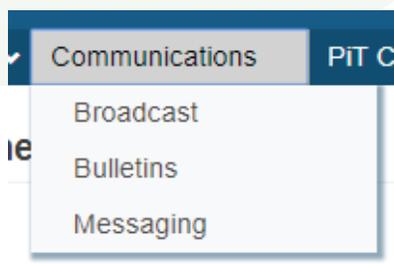
## FRONT DESK

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.



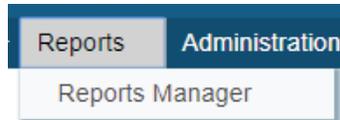
## COMMUNICATION

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.



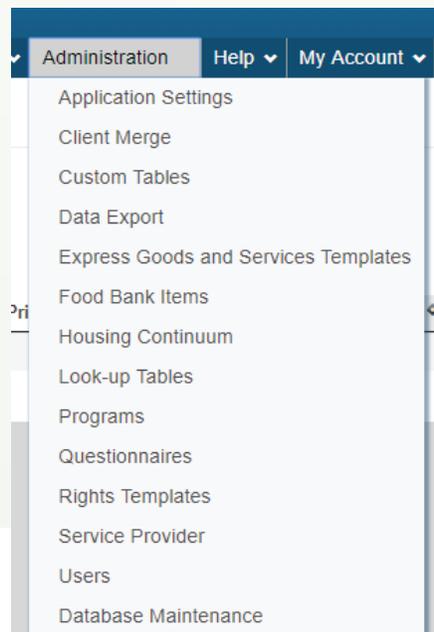
# REPORTS

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



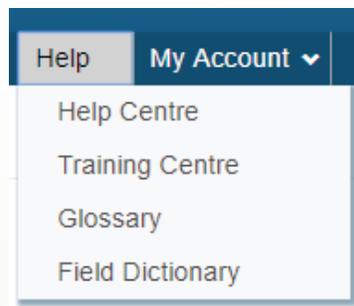
# ADMINISTRATION

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.



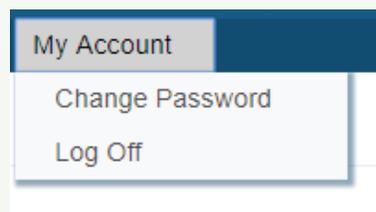
## HELP

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.

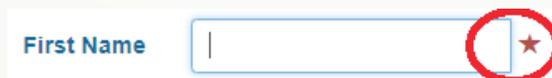


## ENTERING THE DATA INTO HIFIS

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.



The image shows a form field with the label "First Name" on the left. To the right of the label is a text input box. At the end of the input box, there is a red star icon inside a red circle, which signifies that this field is mandatory.

### 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

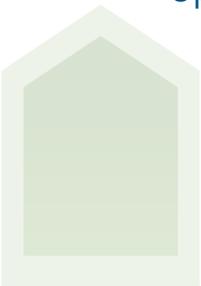
These are fields where users must enter an applicable date. An example of a Date Field is when a user is entering in a date of occupancy for a unit the client is renting.

- Select Drop Down Fields

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

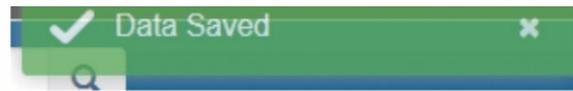
- Upload fields

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.

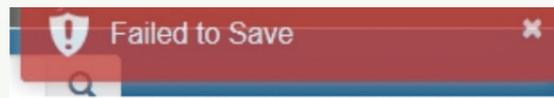


## SAVING DATA

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.



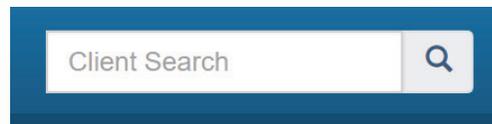
Sometimes the data fails to save. In many of these cases the user has not completed a mandatory field. When the data fails to save a red box will appear in the top right hand corner of the screen notifying users that the data has not been saved.



## 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*.

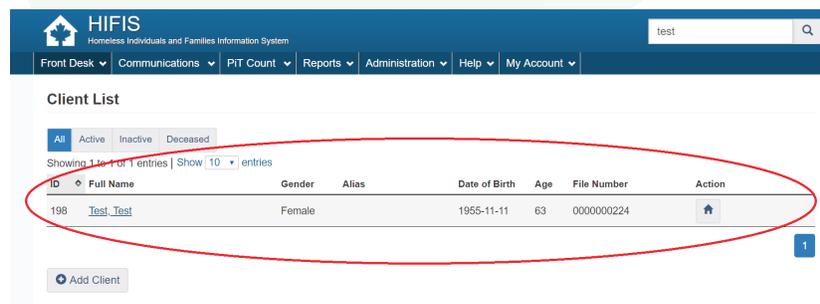
The easiest way to search a client's profile is by typing their name in the *Client Search Box*.

A screenshot of the Client Search box, which is a white input field with the placeholder text "Client Search" and a magnifying glass icon on the right side, all contained within a dark blue border.

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.

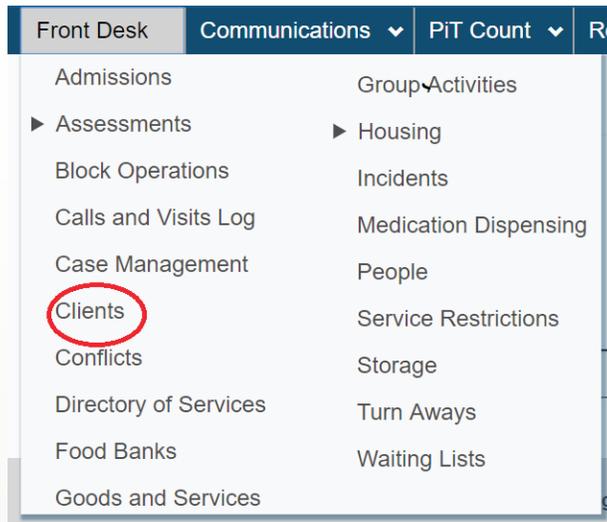
1. Enter *Clients Name* or *Client ID* into the **Client Search Box**.
2. Select the **Search** button  to find the client.
3. This will bring you to the Client List screen where the client profiles can be accessed. If the name exists in the system it will be shown here along with the Gender, Date of Birth, Age and File Number. The client's profile can be accessed by double clicking on the person's name.

A screenshot of the HIFIS Client List screen. The header shows "HIFIS Homeless Individuals and Families Information System" with a search bar containing "test". Below the header is a navigation menu with items like "Front Desk", "Communications", "PIT Count", "Reports", "Administration", "Help", and "My Account". The main content area is titled "Client List" and shows a table with columns: ID, Full Name, Gender, Alias, Date of Birth, Age, File Number, and Action. A single row is visible with the following data: ID 198, Full Name Test\_Test, Gender Female, Date of Birth 1955-11-11, Age 63, File Number 000000224, and an Action icon. A red oval highlights the "Full Name" column and the "Action" icon for the first row. There is also an "Add Client" button at the bottom left of the table area.

| ID  | Full Name | Gender | Alias | Date of Birth | Age | File Number | Action  |
|-----|-----------|--------|-------|---------------|-----|-------------|---|
| 198 | Test_Test | Female |       | 1955-11-11    | 63  | 000000224   |  |

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.

A screenshot of the HIFIS (Homeless Individuals and Families Information System) Client List page. The page header includes the HIFIS logo and navigation tabs: Front Desk, Communications, PIT Count, Reports, Administration, Help, and My Account. A search bar is visible. The main content area shows a table of client records. The 'All' filter is circled in red. The table has columns for ID, Full Name, Gender, Alias, Date of Birth, Age, File Number, and Action. The table contains 10 rows of data.

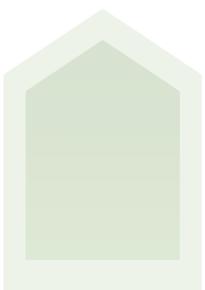
| ID  | Full Name                            | Gender  | Alias   | Date of Birth | Age | File Number  | Action |
|-----|--------------------------------------|---------|---------|---------------|-----|--------------|--------|
| 385 | <a href="#">Animal, Animal</a>       | Male    |         | 1985-11-11    | 34  | 0000000385   |        |
| 1   | <a href="#">Anonymous, Anonymous</a> | Unknown |         | 1930-01-01    | 89  |              |        |
| 185 | <a href="#">Arokiasamy, Jane</a>     | Female  |         | 1985-11-01    | 54  | HS17-001     |        |
| 170 | <a href="#">Banks, Bill</a>          | Male    |         | 1985-11-18    | 34  | 0000000170   |        |
| 382 | <a href="#">Frog, Kermit</a>         | Male    |         | 1985-11-11    | 34  | 0000000382   |        |
| 192 | <a href="#">Griffiths, Carole</a>    | Female  |         | 1955-12-12    | 64  | hs17-0000    |        |
| 350 | <a href="#">Hifs, Henry</a>          | Male    |         | 1955-11-18    | 64  | 0000000350   |        |
| 384 | <a href="#">Miss, Piggy</a>          | Female  |         | 1985-11-11    | 34  | 0000000384   |        |
| 194 | <a href="#">Parker, Fred</a>         | Male    | Freddie | 1990-12-15    | 29  | hs17-0000-01 |        |
| 171 | <a href="#">Region, Durham</a>       | Male    |         | 1977-01-01    | 42  | 0000000171   |        |

Showing 1 to 10 of 10 entries | Show 10 entries

1 2 Next

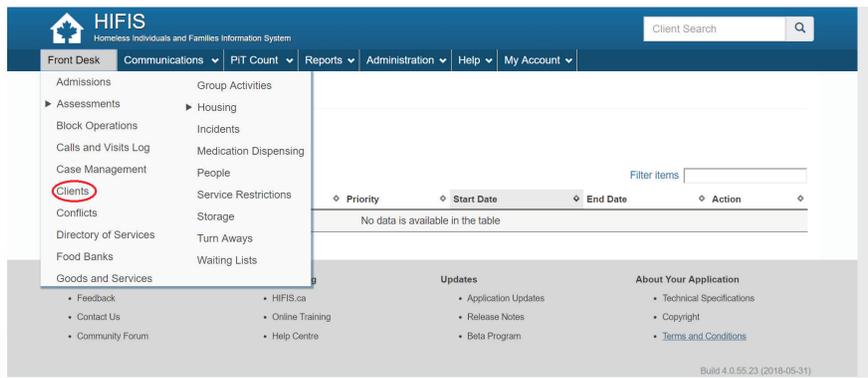
[Add Client](#)

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.

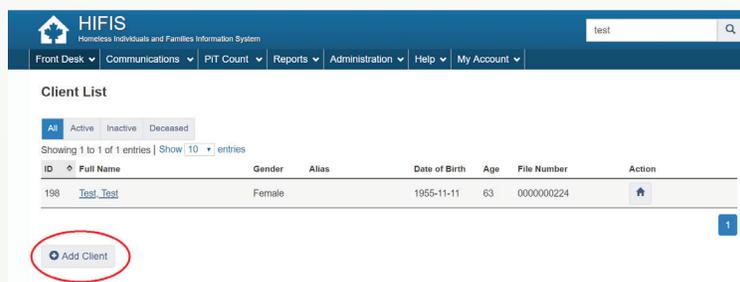


# ADDING A CLIENT RECORD

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.

The screenshot shows the 'Add Client' form in the HIFIS system. The form is divided into several sections. The top section includes 'Consent Type' (Explicit), 'Consent Start Date' (2018-11-09), and 'Consent Expiry Date' (2020-10-29). Below this are fields for 'Last Name' (Test), 'First Name' (Test), 'Middle Name', 'Alias 1', and 'Alias 2'. The 'Date of Birth Known' field is set to 'Yes', and the 'Date of Birth' is 01/01/2000. The 'Information Verified' field is also 'Yes'. The 'Gender' is set to 'Male'. The 'Disability' and 'MediAlert' fields are both set to 'No'. The 'Client is' field is set to 'Yes'. The 'Veteran Status' is 'Not a Veteran', and the 'Citizenship/Immigration Status' is 'Canadian Citizen - Born in Canada'. The 'Aboriginal Status' is 'Non-Aboriginal', and the 'Geographic Region' is 'Oshawa'. The 'File Number' and 'Country of Birth' fields are empty. At the bottom of the form, four buttons are visible: 'Save', 'Save and go to Book In', 'Save and Start Family', and 'Cancel'. These buttons are circled in red.

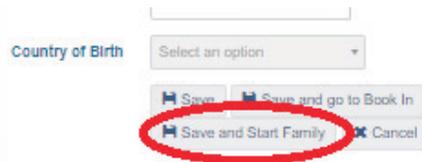
Note

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*.

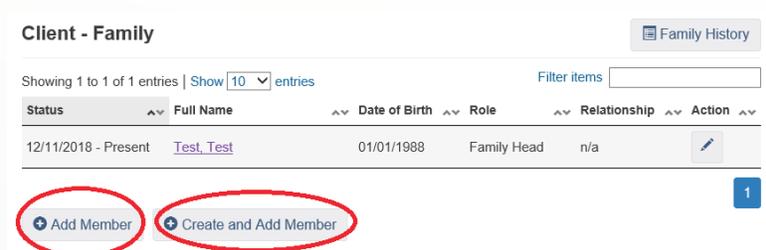


The next is to click on the **Family** module under the **Client Information** drop down in the client's profile.



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**.

The 'Add Member' form has a dark blue header. It contains the following fields:

- Family Member Name:** A dropdown menu with a red star icon.
- Family Role:** A dropdown menu with the text 'Select an option' and a red star icon.
- Relationship to Family Head:** A dropdown menu with the text 'Select an option' and a red star icon.
- Start Date:** A date input field with '2019-03-12' and a calendar icon, with a red star icon.
- End Date:** An empty date input field with a calendar icon.

At the bottom right are 'Save' and 'Close' buttons.

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**.

**Create and Add Member**

Family Role  \*

Relationship to Family Head  \*

Consent Type  \*

Consent Start Date

---

Last Name  \*

First Name  \*

Middle Name

Alias 1

Alias 2

Date of Birth Known  Yes

Date of Birth  \*

Information Verified  No

Gender  \*

Disability  No

MedicAlert  No

Client is  Visible

Veteran Status  \*

Citizenship/Immigration Status  \*

Aboriginal Status  \*

Geographic Region  \*

File Number

Country of Birth

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.

The screenshot displays the HIFIS (Homeless Individuals and Families Information System) interface. The main heading is "Client - Family". On the left, there is a profile card for "Test Test" with a placeholder image and a "Client Alerts" section. Below the profile card, a "Consent Status" section shows "Active" and other client details: File Number 000000234, Current Stay Not Booked In, Gender Male, Date of Birth 2016-11-11 (2), and Family Yes. The central part of the screen features a table of family members. The table has columns for Status, Full Name, Date of Birth, Role, Relationship, and Action. Two entries are shown: one for "Test\_Test" (Family Head) and one for "Test\_Jr" (Dependant - Child). The "Test\_Jr" entry is circled in red. Below the table are buttons for "Add Member" and "Create and Add Member".

| Status               | Full Name                 | Date of Birth | Role              | Relationship | Action |
|----------------------|---------------------------|---------------|-------------------|--------------|--------|
| 2018-07-12 - Present | <a href="#">Test_Test</a> | 2016-11-11    | Family Head       | n/a          |        |
| 2019-03-12 - Present | <a href="#">Test_Jr</a>   | 2000-10-11    | Dependant - Child | Child        |        |

# EDITING FAMILY MEMBERS

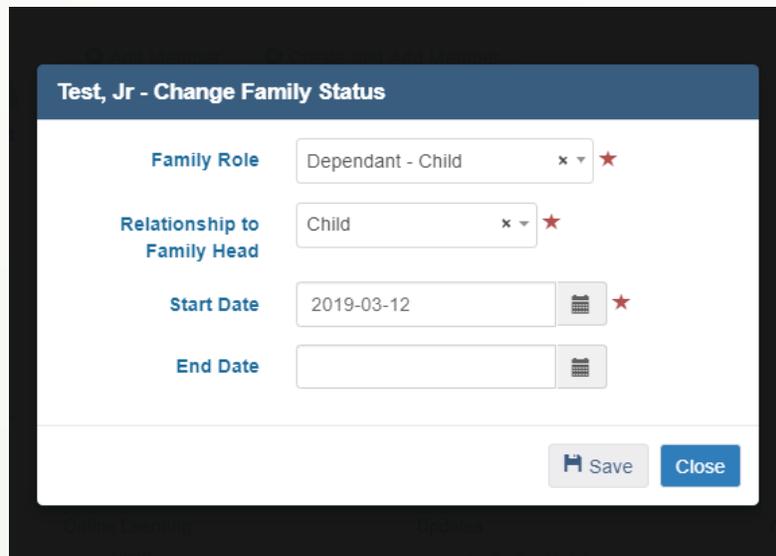
1. Click on the edit button to the right of the family member's name.



The screenshot shows the 'Client - Family' management interface. On the left, there are navigation menus for 'Client Information' and 'Client Management', and a profile card for 'Test Test'. The main area displays a table with one entry. The 'Action' column for this entry contains an edit icon (a pencil) which is circled in red. Below the table are buttons for 'Add Member' and 'Create and Add Member'. A 'Family History' tab is visible in the top right.

| Status               | Full Name | Date of Birth | Role        | Relationship | Action  |
|----------------------|-----------|---------------|-------------|--------------|---|
| 12/11/2018 - Present | Test_Test | 01/01/1988    | Family Head | n/a          |  |

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



The screenshot shows a modal window titled 'Test, Jr - Change Family Status'. It contains the following fields:

- Family Role:** A dropdown menu with 'Dependant - Child' selected.
- Relationship to Family Head:** A dropdown menu with 'Child' selected.
- Start Date:** A date field with '2019-03-12' entered.
- End Date:** An empty date field.

At the bottom right of the form are two buttons: 'Save' and 'Close'.

## ACCESSING A CLIENT PROFILE

### 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.

| Attestation   |                |
|---------------|----------------|
| Gender        | Male           |
| Date of Birth | 2016-11-11 (2) |
| Family        | Yes            |
| Alias 1       |                |
| Alias 2       |                |

I attest that my agency is serving this client.

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.

**Consent (Tommy Tester)**

This client does not have an active consent. In order to modify or retrieve information, a new consent must be added.

**Consent Type** Select an option ★

**Start Date** 2019-03-13 ★

Cancel Save

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.

The screenshot displays the 'Client - Vitals' screen. On the left, there is a sidebar with 'Client Information' and 'Client Management' dropdown menus. Below these is a profile picture placeholder for 'Test Test' and a table of client details. The main area shows a 'Client - Vitals' tab with sub-tabs for 'Vitals', 'Contact Info', 'Physical Appearance', 'Languages', and 'Comments'. The 'Vitals' tab is active, showing a list of fields and their values. At the bottom, there are 'Edit' and 'Display Vitals History' buttons, along with creation and update metadata.

| Field          | Value          |
|----------------|----------------|
| Consent Status | Active         |
| File Number    | 000000234      |
| Current Stay   | Not Booked In  |
| Gender         | Male           |
| Date of Birth  | 2016-11-11 (2) |
| Family         | Yes            |

| Field                          | Value                             |
|--------------------------------|-----------------------------------|
| Consent Type                   | Explicit                          |
| Full Name                      | Test Test                         |
| Gender                         | Male                              |
| Alias                          |                                   |
| File Number                    | 000000234                         |
| Date of Birth                  | 2016-11-11                        |
| Date of Birth Known            | Yes                               |
| Approximate Age                | 2                                 |
| Information Verified           | No                                |
| Country of Birth               | Canada                            |
| Province/Territory of Birth    | Ontario                           |
| City of Birth                  | Oshawa                            |
| Disability                     | No                                |
| MedicAlert                     | No                                |
| Veteran Status                 | Not a Veteran                     |
| Citizenship/Immigration Status | Canadian Citizen - Born in Canada |
| Aboriginal Status              | Non-Aboriginal                    |
| Geographic Region              | Pickering                         |
| Client State                   | Active                            |
| Client is                      | Visible                           |

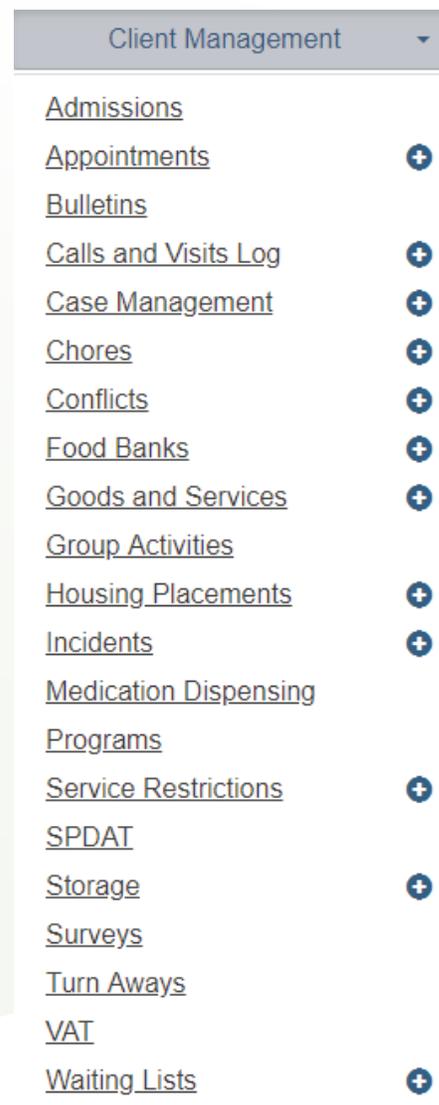
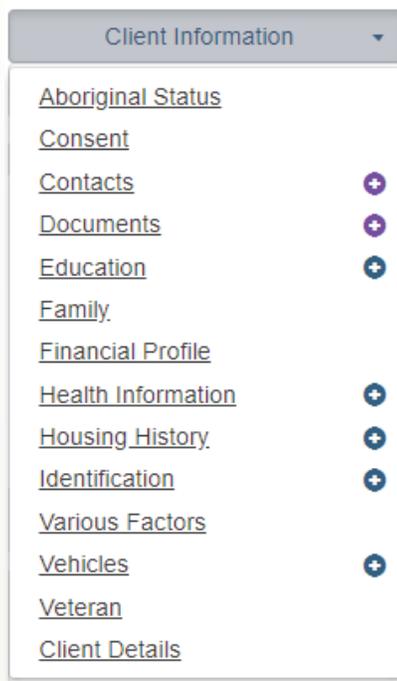
Created by: Barber, Lori  
Date Created: 2018-06-13  
Updated by: McDonald, Ashley  
Date Updated: 2019-03-12

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 performed 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.



The screenshot displays the 'Client - Consent List' interface. On the left, there is a profile card for 'Tommy Tester' with a red circle around the 'Add Consent' button. The main area shows a table with the following data:

| Service Provider | Start Date | End Date   | Consent Type | Attached Documents | Action        |
|------------------|------------|------------|--------------|--------------------|---------------|
| CDCC             | 2019-03-15 | 2021-03-04 | Explicit     | None               | [View] [Edit] |
| Region of Durham | 2018-11-29 | 2018-11-29 | Explicit     | None               | [View] [Edit] |

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

## - Add Consent

Consent Type: Select an option \*

Comment

Save Cancel

## EDITING CONSENT

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

| Service Provider | Start Date | End Date   | Consent Type | Attached Documents | Action |
|------------------|------------|------------|--------------|--------------------|--------|
| CDCD             | 2019-03-15 | 2021-03-04 | Explicit     | None               |        |
| Region of Durham | 2018-11-29 | 2018-11-29 | Explicit     | None               |        |

Tommy Tester

Add Consent

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

Start Date: 2019-03-15 \*

End Date: 2021-03-04

Consent Type: Explicit \*

File On Record: None

Comment

Save Cancel

## 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

Client Information ▾  
Client Management ▾

**Client - Contact List** ⓘ

Show 10 ▾ entries Filter items

| Contact Name                      | Relationship | Phone | Email Address | Action |
|-----------------------------------|--------------|-------|---------------|--------|
| No data is available in the table |              |       |               |        |

**Add Contact**

Tommy Tester

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

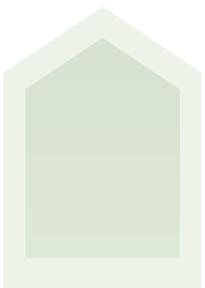
### Client - Add Contact

Contact Name  \*

Relationship  \*

 Save

 Cancel



# 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.

## Client - Add Document

File to Upload  No file chosen ★

Name

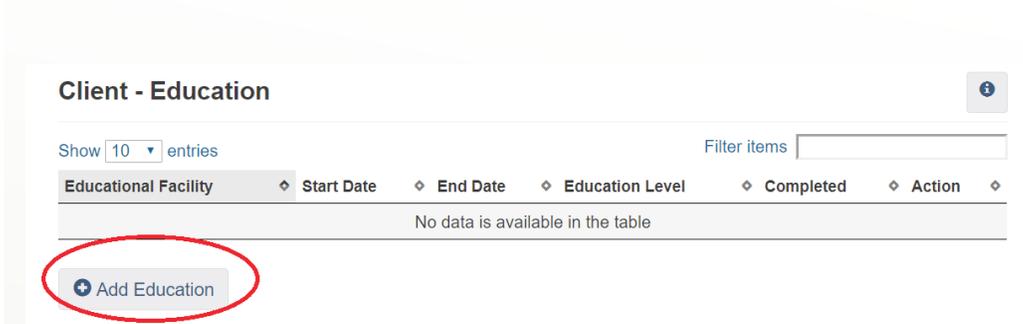
Confidential  No

Description

# 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



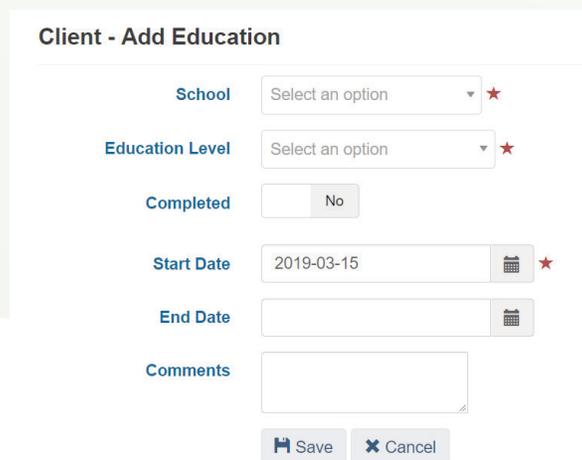
**Client - Education**

Show 10 entries Filter items

| Educational Facility              | Start Date | End Date | Education Level | Completed | Action |
|-----------------------------------|------------|----------|-----------------|-----------|--------|
| No data is available in the table |            |          |                 |           |        |

**+ 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.



**Client - Add Education**

**School** Select an option \*

**Education Level** Select an option \*

**Completed**  No

**Start Date** 2019-03-15 \*

**End Date**

**Comments**

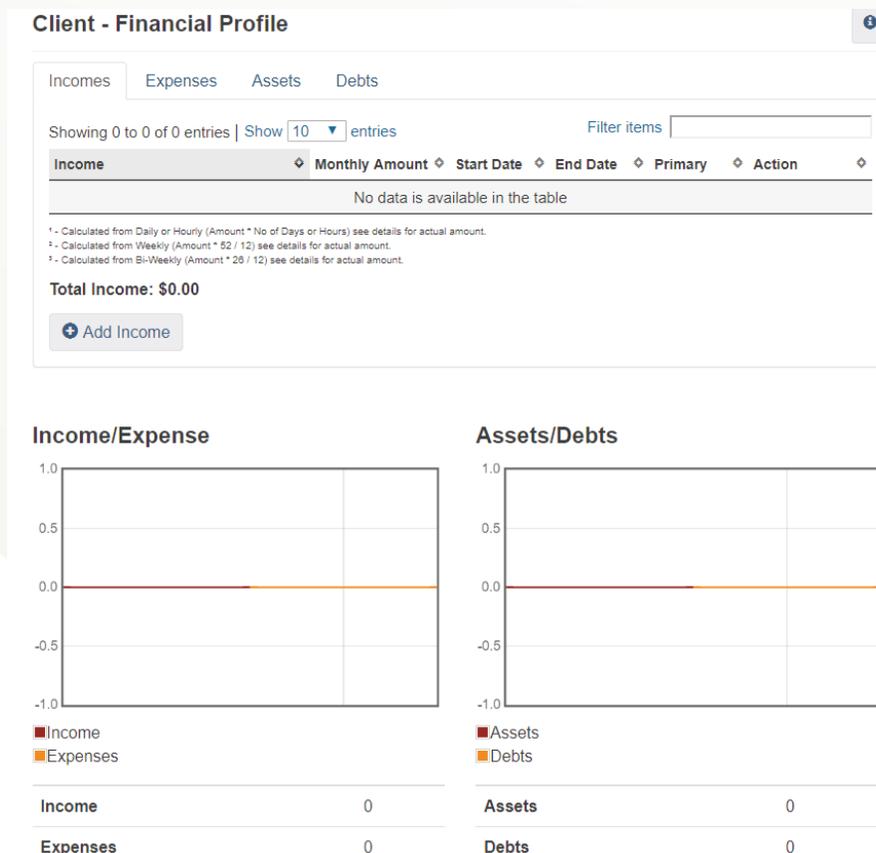
**Save** **Cancel**

# 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

**Client - Financial Profile** ⓘ

Incomes Expenses Assets Debts

Showing 0 to 0 of 0 entries | Show 10 entries Filter items

| Income                            | Monthly Amount | Start Date | End Date | Primary | Action |
|-----------------------------------|----------------|------------|----------|---------|--------|
| No data is available in the table |                |            |          |         |        |

\*1 - Calculated from Daily or Hourly (Amount \* No of Days or Hours) see details for actual amount.  
\*2 - Calculated from Weekly (Amount \* 52 / 12) see details for actual amount.  
\*3 - Calculated from Bi-Weekly (Amount \* 26 / 12) see details for actual amount.

**Total Income: \$0.00**

**Add Income**

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.

### Add Financial Income

**Income Type**  ★

**Pay Frequency**  x ▼ ★

**Hours per Month**  ★

**Hourly Wage** \$  ★

**Start Date**  📅 ★

**End Date**  📅

**Primary**  No

**Shareable**  Yes

**Editable**  Yes

## ADDING EXPENSES

1. Toggle onto the Expenses tab.
2. Click on the add expense button at the bottom left hand corner of the screen.

### Client - Financial Profile ⓘ

Incomes
Expenses
Assets
Debts

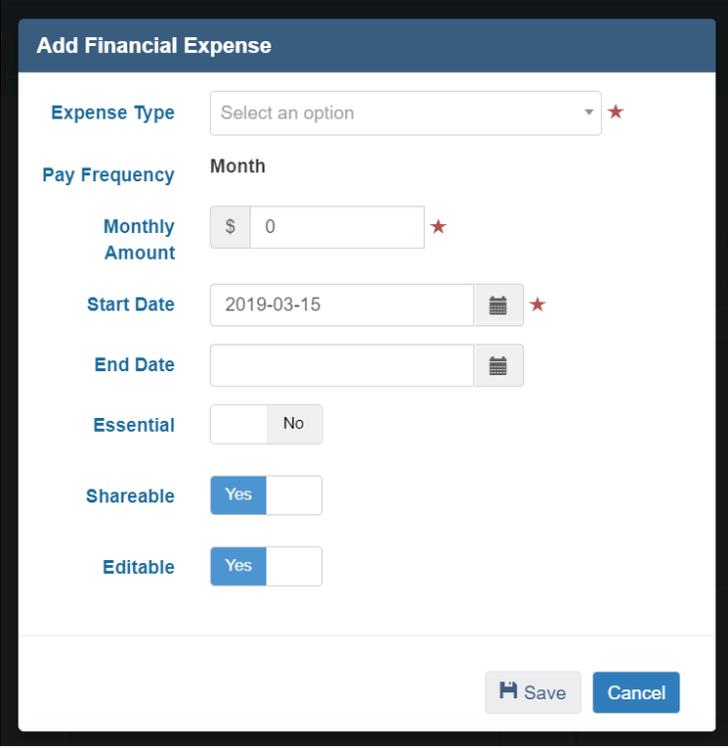
Showing 0 to 0 of 0 entries | Show 10 entries Filter items

| Expense                           | Monthly Amount | Start Date | End Date | Essential | Action |
|-----------------------------------|----------------|------------|----------|-----------|--------|
| No data is available in the table |                |            |          |           |        |

**Total Expenses: \$0.00**

➕ Add Expense

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.



The screenshot shows a form titled "Add Financial Expense" with the following fields and controls:

- Expense Type:** A dropdown menu with the text "Select an option" and a red star icon.
- Pay Frequency:** A dropdown menu with the text "Month".
- Monthly Amount:** A text input field with a dollar sign icon, the value "0", and a red star icon.
- Start Date:** A date picker with the value "2019-03-15" and a red star icon.
- End Date:** A date picker with an empty field and a calendar icon.
- Essential:** A toggle switch currently set to "No".
- Shareable:** A toggle switch currently set to "Yes".
- Editable:** A toggle switch currently set to "Yes".

At the bottom right of the form, there are two buttons: "Save" (with a floppy disk icon) and "Cancel".

## ADDING ASSETS

1. Toggle onto the assets tab.
2. Click on add assets button at the bottom left hand corner of the screen.

**Client - Financial Profile** i

Incomes Expenses **Assets** Debts

Showing 0 to 0 of 0 entries | Show 10 entries Filter items

| Assets                            | Amount | Start Date | End Date | Action |
|-----------------------------------|--------|------------|----------|--------|
| No data is available in the table |        |            |          |        |

**Total Assets: \$0.00**

[+ Add Asset](#)

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 Financial Asset**

**Asset Type**  ★

**Amount**  ★

**Country**  ★

**Start Date**   ★

**End Date**

**Description**

**Shareable**  Yes

**Editable**  Yes

# ADD A DEBT

1. Toggle over to the debt tab
2. Click on the Add Debt button at the bottom left of the screen.

**Client - Financial Profile**

Incomes Expenses Assets **Debts**

Showing 0 to 0 of 0 entries | Show 10 entries | Filter items

| Debts                             | Amount | Start Date | End Date | Action |
|-----------------------------------|--------|------------|----------|--------|
| No data is available in the table |        |            |          |        |

Total Debts: \$0.00      Net Income: \$0.00      Net Worth: \$0.00

**+ Add Debt**

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.

**Add Financial Debt**

Debt Type: Select an option \*

Amount: \$ 0 \*

Country: Select an option \*

Start Date: 2019-03-15 \*

End Date: \*

Description: \*

Shareable: Yes

Editable: Yes

Save Cancel

# 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.

Incomes Expenses Assets **Debts** Angular Snip

Showing 1 to 1 of 1 entries | Show 10 entries | Filter items

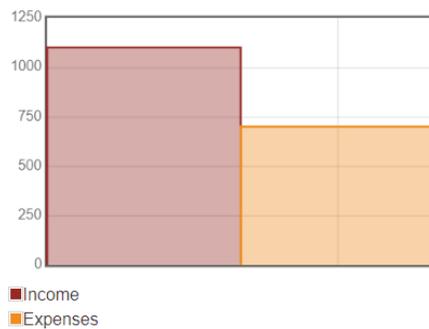
| Income | Monthly Amount | Start Date | End Date | Primary | Action  |
|--------|----------------|------------|----------|---------|---|
| ODSP   | 1100.00        | 2019-03-15 |          | Yes     |   |

\* - Calculated from Daily or Hourly (Amount \* No of Days or Hours) see details for actual amount.  
\* - Calculated from Weekly (Amount \* 52 / 12) see details for actual amount.  
\* - Calculated from Bi-Weekly (Amount \* 26 / 12) see details for actual amount.

**Total Income: \$1,100.00**

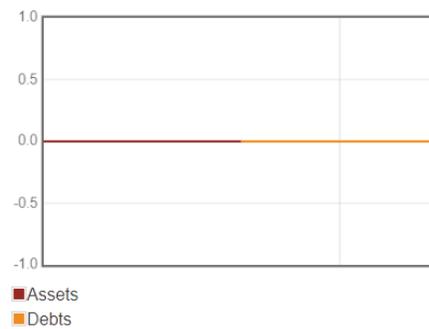
[+ Add Income](#)

Income/Expense



|                 |         |
|-----------------|---------|
| <b>Income</b>   | 1100.00 |
| <b>Expenses</b> | 700.00  |

Assets/Debts



|               |   |
|---------------|---|
| <b>Assets</b> | 0 |
| <b>Debts</b>  | 0 |

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

The screenshot shows a modal window titled "Edit Income" with the following fields and controls:

- Income Type:** A dropdown menu with "ODSP" selected, a close button (x), and a red asterisk.
- Pay Frequency:** A dropdown menu with "Monthly" selected, a close button (x), and a red asterisk.
- Monthly Wage:** A text input field with "\$ 1100.00", a close button (x), and a red asterisk.
- Start Date:** A date picker with "2019-03-15" and a calendar icon, followed by a red asterisk.
- End Date:** A date picker with an empty field and a calendar icon.
- Primary:** A toggle switch with "Yes" selected.
- Shareable:** A toggle switch with "Yes" selected.
- Editable:** A toggle switch with "Yes" selected.

At the bottom right, there are two buttons: "Save" (with a floppy disk icon) and "Cancel".

## 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.

**Client - Housing History**

Housing History Risk of Homelessness

Show 10 entries Filter items

| Housing Type                      | Address | Start Date | End Date | Action |
|-----------------------------------|---------|------------|----------|--------|
| No data is available in the table |         |            |          |        |

+ Add Housing

## ADDING HOUSING HISTORY

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

**Client - Housing History**

Housing History Risk of Homelessness

Show 10 entries Filter items

| Housing Type                      | Address | Start Date | End Date | Action |
|-----------------------------------|---------|------------|----------|--------|
| No data is available in the table |         |            |          |        |

+ Add Housing

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.

The screenshot shows a web form titled "Client - Add Housing History". The form includes the following fields and controls:

- Housing Type:** A dropdown menu with "Select an option" and a red star icon.
- Start Date:** A date input field with "2019-03-16", a calendar icon, and a red star icon.
- End Date:** A date input field with a calendar icon.
- Place Name:** A text input field.
- Address Line 1:** A text input field.
- Address Line 2:** A text input field.
- Unit/Apartment Number:** A text input field.
- Country:** A dropdown menu with "Canada", a close icon, and a red star icon.
- Province/Territory:** A dropdown menu with "Select an option".
- City:** A dropdown menu with "Select an option".
- Postal Code:** A text input field.
- Geographic Region:** A dropdown menu with "Select an option", a plus icon, and a minus icon.
- Rent:** A text input field with a dollar sign icon.
- Telephone 1:** A text input field.
- Extension:** A text input field.
- Telephone 2:** A text input field.
- Mobile Phone:** A text input field.
- Email Address:** A text input field.
- Buttons:** "Save" and "Cancel" buttons at the bottom.

## 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.

Client - Add Homelessness Risk

At-Risk Status Select an option \*

Date of Change 2019-03-16 \*

Caseworker Select an option \*

Save Close

## 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.

**Client - Housing History**

Housing History Risk of Homelessness

Show 10 entries Filter items

| Housing Type           | Address  | Start Date | End Date | Action  |
|------------------------|--|------------|----------|---|
| Rental at Market Price | <a href="#">123 Street Ave Oshawa Ontario Canada</a> | 2019-03-16 | --       |   |

+ Add Housing + Add Housing Loss Prevention

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.

## Client - Housing History

Housing History Risk of Homelessness

Show 10 entries Filter items

| Housing Type          | Address                  | Start Date | End Date | Action  |
|-----------------------|--------------------------|------------|----------|---|
| Single Room Occupancy | 123 Street Street Canada | 2019-08-01 | --       |    |

[+ Add Housing](#) [+ 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.

### Add Housing Loss Prevention

Reason for Service  ★

Start Date and Time   ★

Caseworker  ★

Program  + -

First Follow-up Date  

[Save](#) [Close](#)

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.

**Housing Loss Prevention Details**

**Caseworker** [McDonald, Ashley](#) **Next Scheduled Follow-up** 2019-10-31  
**Program** Community Outreach **Service Provider** Region of Durham

**Housing Type** Single Room Occupancy **Date Moved In** 2019-08-01  
**Rent** \$700.00 **Address** 123 Street Street

Follow-ups Subsidies Documents

Showing 0 to 0 of 0 entries | Show 10 entries | Filter items

| Follow-up Date                    | Service Provider | Caseworker | Months Elapsed | Action |
|-----------------------------------|------------------|------------|----------------|--------|
| No data is available in the table |                  |            |                |        |

[Add Follow-up](#)

[Back to Housing Loss Prevention List](#) [Edit Loss Prevention Details](#)

## 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.

**Housing Loss Prevention List**

**Active** **All**

Filter: 1 Week(s)

Show 10 entries | Filter items

| Service Provider | Start Date | Caseworker       | Status                               | Action  |
|------------------|------------|------------------|--------------------------------------|---|
| Region of Durham | 2019-09-23 | McDonald, Ashley | Next Scheduled Follow-up: 2019-10-31 |    |

1

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.

**Housing Loss Prevention Details**

**Caseworker** McDonald, Ashley      **Next Scheduled Follow-up** 2019-10-31  
**Program** Community Outreach      **Service Provider** Region of Durham

**Housing Type** Single Room Occupancy      **Date Moved In** 2019-08-01  
**Rent** \$700.00      **Address** 123 Street Street

Follow-ups   Subsidies   Documents

Showing 0 to 0 of 0 entries | Show 10 entries      Filter items

| Follow-up Date                    | Service Provider | Caseworker | Months Elapsed | Action |
|-----------------------------------|------------------|------------|----------------|--------|
| No data is available in the table |                  |            |                |        |

**Add Follow-up**

[Back to Housing Loss Prevention List](#)   [Edit Loss Prevention Details](#)

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

**New FollowUp**

**Follow-up Date** 2019-09-24

**Months Elapsed** 1

**Final Follow-up** No

**Use Exact Follow-up Date** No

**Months Until Next Follow-up**

**All Clients Still In Housing** Select an option

**Comments**

**Save**   **Close**

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

### Housing Loss Prevention Details

**Caseworker** [McDonald, Ashley](#)

**Next Scheduled Follow-up** 24/03/2020

**Program** Community Outreach

**Service Provider** Region of Durham

**Housing Type** Single Room Occupancy

**Date Moved In** 2019-08-01

**Rent** \$700.00

**Address** 123 Street Street

Follow-ups Subsidies Documents

Showing 1 to 1 of 1 entries | Show 10 entries

Filter items

| Follow-up Date | Service Provider | Caseworker       | Months Elapsed | Action  |
|----------------|------------------|------------------|----------------|---|
| 2019-09-24     | Region of Durham | McDonald, Ashley | 1              |   |

[Add Follow-up](#)

[Back to Housing Loss Prevention List](#)

[Edit Loss Prevention Details](#)

## CLIENT IDENTIFICATION

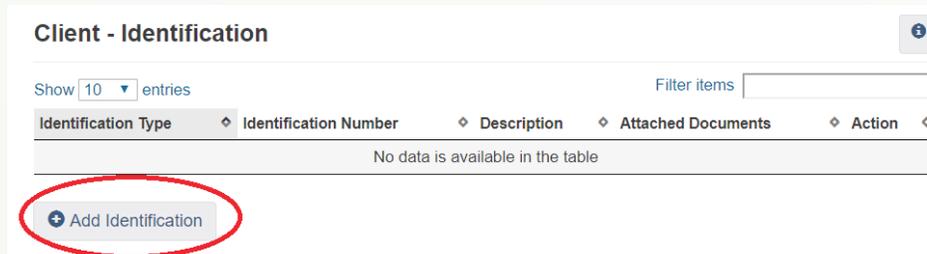
The client identification module is used to manage the client's identification.

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

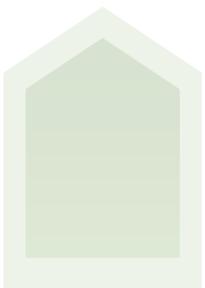
Attachments

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.

**Client - Various Factors**

Contributing Factors Behavioural Risk Factors Watch Concerns Life Events

Showing 0 to 0 of 0 entries | Show 10 entries | Filter items

| Contributing Factor               | Start Date | End Date | Action |
|-----------------------------------|------------|----------|--------|
| No data is available in the table |            |          |        |

+ Add Contributing Factor

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.

**Client - Vehicles**

Show 10 entries Filter items

| Make                              | Model | License Plate | Start Date | End Date | Action |
|-----------------------------------|-------|---------------|------------|----------|--------|
| No data is available in the table |       |               |            |          |        |

[+ Add Vehicle](#)

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

**Client - Add Vehicle**

Make  \*

Model

Year

Colour

License Plate

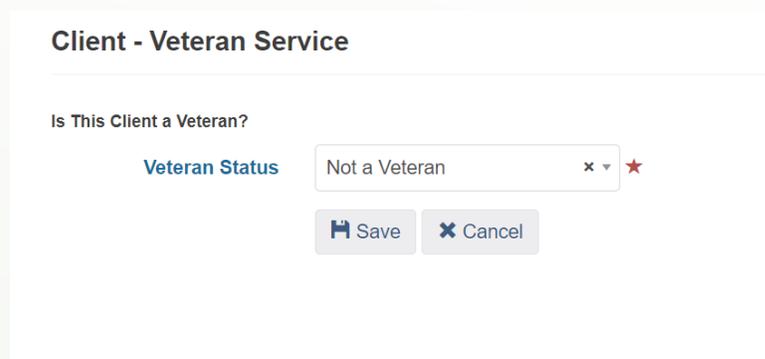
Start Date   \*

End Date

## 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.



The screenshot shows a web form titled "Client - Veteran Service". Below the title is a section labeled "Is This Client a Veteran?". Underneath this label is a label "Veteran Status" followed by a dropdown menu. The dropdown menu is currently set to "Not a Veteran" and has a red star icon to its right. Below the dropdown menu are two buttons: "Save" and "Cancel".

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.

**Client - Admission List** ⓘ

Booked In | Reservations

Showing 0 to 0 of 0 entries | Show 10 entries | Filter items

| Service Provider                  | In : Out | Reason for Service | Room : Bed | Action |
|-----------------------------------|----------|--------------------|------------|--------|
| No data is available in the table |          |                    |            |        |

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.

The screenshot shows a web form titled "Add Book In". The form contains the following fields and controls:

- Client Name(s)**: A text input field containing "Tester, Tommy (2007-6-5)".
- Start Date and Time**: A date and time picker showing "2019-03-16" and "12:31 PM".
- Expected Book Out Date**: A date picker field.
- Reason for Service**: A dropdown menu with the text "Select an option".
- Program**: A dropdown menu with the text "Select an option" and plus/minus icons.
- AssistanceRequired**: A checkbox labeled "No".
- Referred from**: A dropdown menu with the text "Select an option" and a filter icon.
- Referred by**: A text input field.
- Late Pass Time**: A time picker field.
- Wake Up Time**: A time picker field.
- Intoxicated**: A checkbox labeled "No".
- Comments**: A text area for notes.

At the bottom of the form are two buttons: "Next" and "Cancel".

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.

**Book In - Bed Selection**

Change Your View  
 Small Icons  Large Icons

← Back Save × Cancel Refresh Occupancy

Tester, Tommy  
(2007-6-5)

001

## 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.

**Client - Admission List**

Booked In Reservations

Showing 1 to 1 of 1 entries | Show 10 entries Filter items

| Service Provider                     | In : Out                    | Reason for Service             | Room : Bed | Action |
|--------------------------------------|-----------------------------|--------------------------------|------------|--------|
| Community Development Council Durham | 2019-03-16 : -- / -- / ---- | Housing - Eviction by Landlord | 001 : 004  |        |

**Book Out**

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.

**Book Out**

**Service Provider** Community Development Council Durham

**Room** 001

**Bed** 004

**Start Date and Time** 2019-03-16 12:31 PM

**Reason for Service** Housing - Eviction by Landlord

**Book Out Date and Time** 2019-03-16 12:34 PM

**Reason for Discharge** Select an option

**Referred to** Select an option

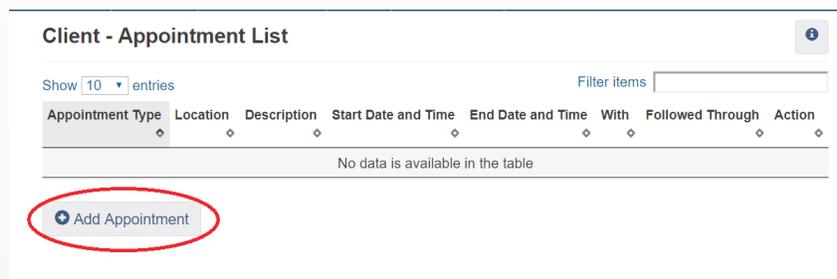
**Comments**

Book Out Cancel

# 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.

### Client - Add Appointment

Appointment Type  \*

Location  ▼ ⚙️ \*

Description

With

Followed Through  No

Start Date and Time  📅  🕒 \*

End Date and Time  📅  🕒

Comments

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.

### Client - Appointment List

Show  entries Filter items

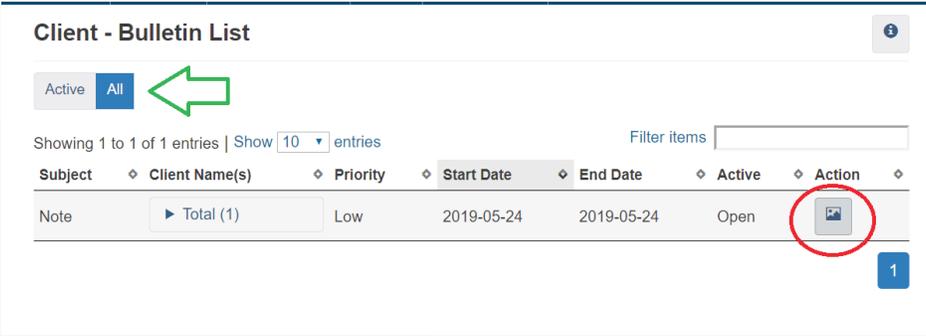
| Appointment Type | Location | Description   | Start Date and Time | End Date and Time | With | Followed Through | Action |
|------------------|----------|---|---------------------|-------------------|------|------------------|--------|
| Case Management  | Oshawa   | Client has appointment regarding Housing Retention. | 2019-05-24          | 2019-05-24        |      |                  |        |

## 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.



**Client - Bulletin List**

Active All 

Showing 1 to 1 of 1 entries | Show 10 entries | Filter items

| Subject | Client Name(s) | Priority | Start Date | End Date   | Active | Action  |
|---------|----------------|----------|------------|------------|--------|---|
| Note    | Total (1)      | Low      | 2019-05-24 | 2019-05-24 | Open   |  |

1

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.

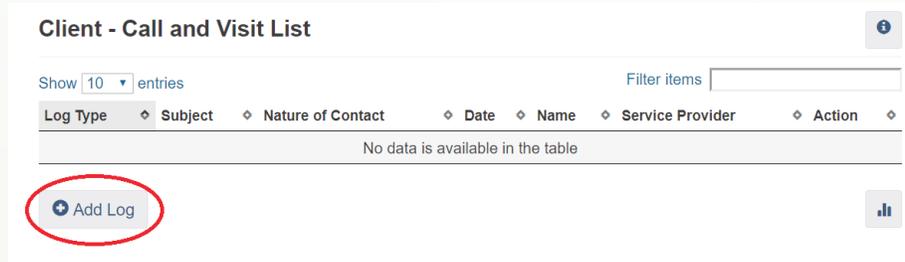
## CALL AND VISIT LOG

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.

**Client - Add Calls and Visits Log**

Log Type  \*

Type

Nature of Contact  \*

Subject

Date and Time   \*

Name  \*

Ex-Resident

Duration Hours

Duration Minutes

Geographic Region

Comments

Edit Insert Format View Table

Font Sizes A A B I U S

Words: 0

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.

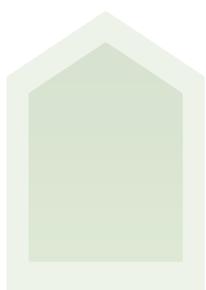
### Client - Call and Visit List

Show 10 entries Filter items

| Log Type | Subject | Nature of Contact | Date                  | Name                 | Service Provider | Action  |
|----------|---------|-------------------|-----------------------|----------------------|------------------|---|
| Call     | test    | Crisis / Distress | 2019-05-24 4:26:00 PM | Durham Mental Health | Region of Durham |    |

[Add Log](#) 1 

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 performed with a client to reach the client's pre-determined goals.

### Note

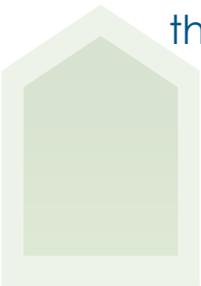
Each goal that a case worker and client work towards is a separate record in the Case Management module. For example: If a client would like to find housing but also has a mental health issue that they would like to work on, two case management records would be created for the client.

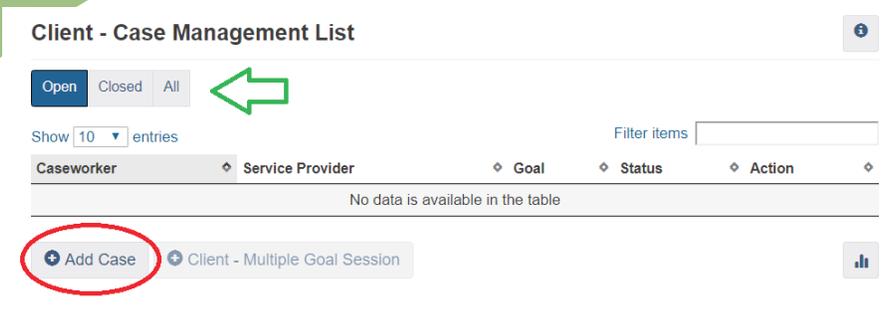
1. From the Client Management drop down click on Case Management.

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.

## Display Case Management

Details Sessions Documents Case Comments 

**Goal** Housing Retention

**Family Members**

**Caseworker** McDonald, Ashley

**Service Provider** Community Development Council Durham

**Status** Open

**Contributing Factors** Housing - Eviction by Landlord

**Program**

**Start Date** 2019-03-16

**Target Date** - -

**Expended Time** 0 Hrs 0 Mins

**Elapsed Time** 0 Days

 Edit  Cancel

## 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.

### Client - Case Management List

Open Closed All 

Show 10 entries Filter items

| Caseworker       | Service Provider                     | Goal              | Status                   | Action  |
|------------------|--------------------------------------|-------------------|--------------------------|---|
| McDonald, Ashley | Community Development Council Durham | Housing Retention | Open<br>Target Date: N/A |  |



 Add Case 

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

**Client - Edit Case Management** Programs ? ?

Details | Sessions | Documents | Case Comments

**Goal** Housing Retention x ★

**Family Members** Select an option + -

**Caseworker** McDonald, Ashley x ★

**Program**

**Status** Open x ★

**Contributing Factors** x Housing - Eviction by Landlord + -

**Start Date** 2019-03-16 📅 ★

**Target Date** 📅

**Total Expended Time** 0 Expended Hours 0 Expended Minutes

**Total Elapsed Time** 1 Days

💾 Save ✖ Cancel

## CONFLICTS

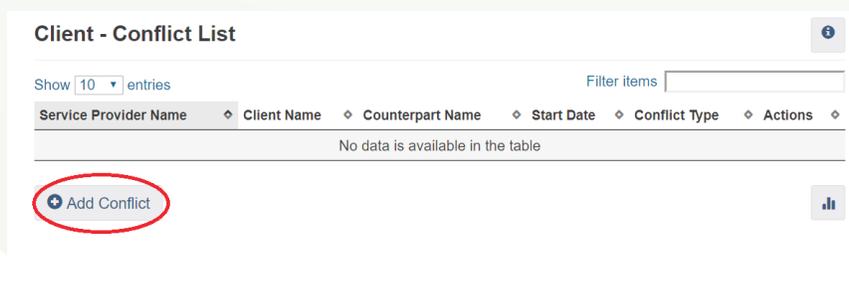
The Conflicts Module is used to record conflicts that have taken place between two individuals. The conflict can include clients and staff members. In the conflicts module users can specify whether the client was an aggressor or a victim in the incident.

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.

### Client - Add Conflict

Conflict Type: Select an option + - \*

Client Is:  Aggressor

Counterpart Name:  \*

Counterpart Is:  Aggressor

Intensity: Select an option \*

Start Date: 2019-05-24 \*

End Date:

Probability: Select an option

Relationship: Select an option

Location Type: Select an option + -

Referred from: Select an option + - ▾

Referred to: Select an option + - ▾

Comments:   
 Edit ▾ Insert ▾ Format ▾ View ▾ Table ▾  
 Font Sizes A A B I U S  
 p Words: 0  
 Save Cancel

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.

### Client - Conflict List

Show 10 entries Filter items

| Service Provider Name | Client Name            | Counterpart Name        | Start Date | Conflict Type | Actions   |
|-----------------------|------------------------|-------------------------|------------|---------------|---|
| Region of Durham      | Test, Test (Aggressor) | Smith, Test (Aggressor) | 2019-05-24 | Physical      |    |

Add Conflict

## 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.

## Client - Goods and Services

30Days 90Days 180Days All 

Show 10 entries Filter items

| Service Provider                  | Date | Details | Action |
|-----------------------------------|------|---------|--------|
| No data is available in the table |      |         |        |

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.

### Client - Add Goods and Services Transaction

Reason for Service  \*

Start Date and Time   \*

Program  + -

Case Management Activity

Number of Individuals

Referred from  ▼

Referred to  ▼

Referred by

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.

**Goods and Services**

**Service Provider** Region of Durham      **Start Date and Time** 2019-07-31  
**Program** Community Outreach      **End Date and Time** 2019-07-31  
**Reason for Service** Housing - Eviction by Landlord      **Referred by** Ashley McDonald  
**Case Management Activity** N/A      **Referred from** Social Services - Community Based - CDCD  
**Number of Individuals**      **Referred to** Another Shelter - Cornerstone

**Comments**

Goods Services ←

Showing 0 to 0 of 0 entries | Show 10 entries      Filter items

| Good                              | Quantity | Unit Cost | Unit Price | Unit Of Measure | Action |
|-----------------------------------|----------|-----------|------------|-----------------|--------|
| No data is available in the table |          |           |            |                 |        |

**Add Good**

[← Back to Goods and Services List](#)      [Edit Goods and Services Details](#)

2. This will bring up an Add Good screen where users can add the applicable information.
3. Once finished click on the Add Good button.

**Add Good**

**Good** Select an option ★

**Unit Of Measure** Select an option ★

**Quantity**

**Unit Cost** \$

**Unit Price** \$

**Add Good** **Close**

# ENTERING A SERVICE

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

The screenshot shows the 'Goods and Services' page. At the top, there are tabs for 'Goods' and 'Services', with a green arrow pointing to the 'Services' tab. Below the tabs is a table with columns: Service, Date, Unit Cost, Unit Price, and Action. The table is currently empty, with the text 'No data is available in the table' displayed. A red circle highlights the 'Add Service' button at the bottom left of the table. Above the table, there are several fields for service details: Service Provider (Community Development Council Durham), Start Date and Time (2019-03-16), End Date and Time (2019-03-16), Referred by, Referred from, Referred to, Program, Reason for Service (Financial - Crisis), Case Management Activity (N/A), Number of Individuals, and Comments. At the bottom of the page, there are two buttons: 'Back to Goods and Services List' and 'Edit Goods and Services Details'.

2. This will bring up an Add Service screen where users can add the applicable information.
3. Once finished click on the Add Service button.

The screenshot shows the 'Add Service' form. It has a dark blue header with the title 'Add Service'. The form contains the following fields: 'Service' (a dropdown menu with 'Select an option' and a red star icon), 'Start Date and Time' (two input fields: '2019-03-16' and '12:53 PM', each with a calendar icon and a red star icon), 'End Date and Time' (two empty input fields with calendar icons), 'Expended Hours' (an input field with '0'), 'Expended Minutes' (an input field with '0'), 'Service Cost' (an input field with a '\$' symbol), and 'Service Price' (an input field with a '\$' symbol). At the bottom right, there are two buttons: 'Add Service' and 'Close'.

## 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.

#### Client - Goods and Services

The screenshot shows a web interface for 'Client - Goods and Services'. At the top, there are filter tabs for '30Days', '90Days', '180Days', and 'All'. Below these is a 'Show 10 entries' dropdown and a 'Filter items' search box. A table header is visible with columns: 'Service Provider', 'Date', 'Details', and 'Action'. The table body contains the text 'No data is available in the table'. At the bottom, there are three buttons: '+ Add Goods and Services Transaction', '+ Express Good' (which is circled in red), and '+ Express Service'.

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.

## Add Express Goods Transaction

**Good**  ★

**Program**  + -

**Unit Of Measure**  ★

**Unit Price**

**Reason for Service**  ★

**Comments**

## EXPRESS SERVICE

1. Click on the Express Service Button.

**Client - Goods and Services**

30Days 90Days 180Days All

Show  entries Filter items

| Service Provider                  | Date | Details | Action |
|-----------------------------------|------|---------|--------|
| No data is available in the table |      |         |        |

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.

### Add Express Services Transaction

**Service**  ★

**Program**  + -

**Reason for Service**  ★

**Expended Minutes**

**Referred to**  ▼

**Comments**

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.

### Client - Goods and Services

30Days 90Days 180Days All

Show 10 entries Filter items

| Service Provider | Date                    | Details  | Action |
|------------------|-------------------------|--|--------|
| Region of Durham | 2019-07-31 - 2019-07-31 | 2 Goods / Services <ul style="list-style-type: none"><li>Goods<ul style="list-style-type: none"><li>Last month's rent</li></ul></li><li>Services</li><li>Referrals</li></ul> |        |

1

## 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.

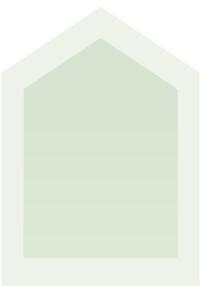
### Note

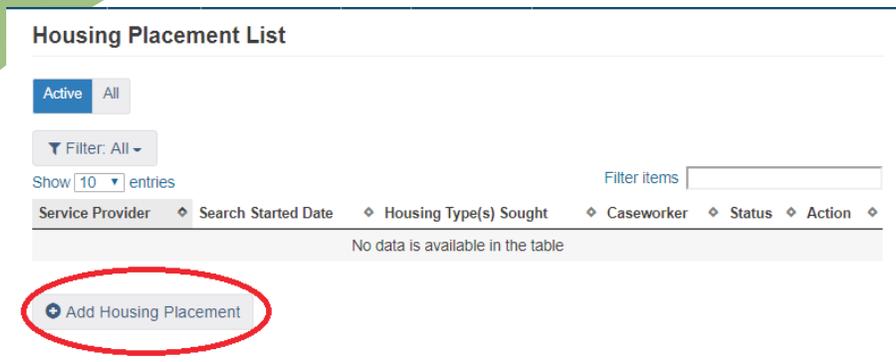
Once a housing placement is complete and details have been added about the housing a client has secured, a Housing History will automatically be created in the client's profile.

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.

## Housing Placement Details - Housing Not Secured

**Family Members** [Tester, Tommy](#) **Search Started Date** 2019-05-28  
**Housing Type(s) Sought** [View All](#) **Target Date** 2019-06-01  
**Caseworker** [McDonald, Ashley](#) **Service Provider** Region of Durham  
**Program** Community Outreach

Attempts Documents

Showing 0 to 0 of 0 entries | Show  entries

| Date Attempted                    | Caseworker | Reason Housing Not Secured | Comments |
|-----------------------------------|------------|----------------------------|----------|
| No data is available in the table |            |                            |          |

## ADDING AN UNSUCCESSFUL HOUSING ATTEMPT

1. Click on Add Housing Placement Attempt.

**Housing Placement Details - Housing Not Secured**

**Family Members** [Tester, Tommy](#) **Search Started Date** 2019-05-28  
**Housing Type(s) Sought** [View All](#) **Target Date** 2019-06-01  
**Caseworker** [McDonald, Ashley](#) **Service Provider** Region of Durham  
**Program** Community Outreach

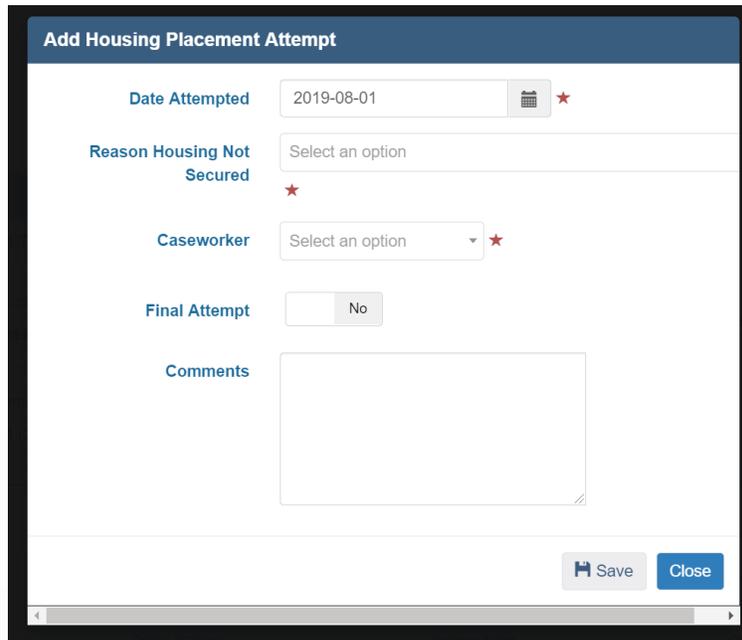
Attempts Documents

Showing 0 to 0 of 0 entries | Show  entries

| Date Attempted                    | Caseworker | Reason Housing Not Secured | Comments |
|-----------------------------------|------------|----------------------------|----------|
| No data is available in the table |            |                            |          |

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.



The screenshot shows a web form titled "Add Housing Placement Attempt". The form contains the following fields and controls:

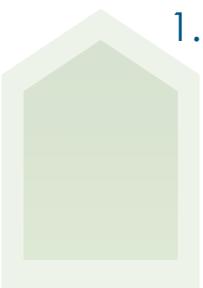
- Date Attempted:** A date input field with the value "2019-08-01", a calendar icon, and a red asterisk.
- Reason Housing Not Secured:** A dropdown menu with the text "Select an option" and a red asterisk.
- Caseworker:** A dropdown menu with the text "Select an option" and a red asterisk.
- Final Attempt:** A radio button labeled "No".
- Comments:** A large text area for entering comments.
- Buttons:** "Save" and "Close" buttons at the bottom right.

## 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.



## Housing Placement Details - Housing Not Secured

**Family Members** [Tester, Tommy](#) **Search Started Date** 2019-05-28  
**Housing Type(s) Sought** [View All](#) **Target Date** 2019-06-01  
**Caseworker** [McDonald, Ashley](#) **Service Provider** Region of Durham  
**Program** Community Outreach

Q New Housing Search **+** Add and secure a housing unit

Attempts Documents

Showing 0 to 0 of 0 entries | Show 10 entries Filter items

| Date Attempted                    | Caseworker | Reason Housing Not Secured | Comments |
|-----------------------------------|------------|----------------------------|----------|
| No data is available in the table |            |                            |          |

**+** Add Housing Placement Attempt

[← Back to Housing Placement List](#) [✕ End Housing Placement](#) [✎ Edit Placement Details](#)

2. Enter applicable information such as Housing Type, Address, and Expected Move in Date.
3. When finished click the Save and Secure button.

### Add Housing Unit

**Housing Type** Select an option \*

**Status** Select an option \*

**Place Name**

**Address Line 1**  \*

**Address Line 2**

**Unit/Apartment Number**

**Country** Canada x \*

**Province/Territory** Select an option

**City** Select an option

**Postal Code**

**Geographic Region** Select an option + - \*

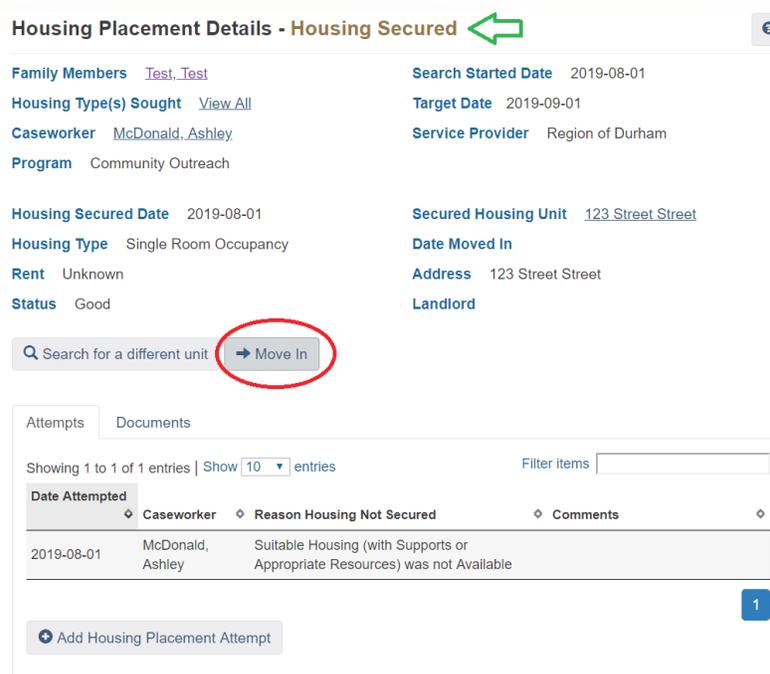
**Expected Move In Date** 2019-08-01

[Save and secure](#) [Close](#)

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.



**Housing Placement Details - Housing Secured** 

**Family Members** [Test, Test](#) **Search Started Date** 2019-08-01  
**Housing Type(s) Sought** [View All](#) **Target Date** 2019-09-01  
**Caseworker** [McDonald, Ashley](#) **Service Provider** Region of Durham  
**Program** Community Outreach

**Housing Secured Date** 2019-08-01 **Secured Housing Unit** [123 Street Street](#)  
**Housing Type** Single Room Occupancy **Date Moved In**  
**Rent** Unknown **Address** 123 Street Street  
**Status** Good **Landlord**

Search for a different unit **→ Move In**

Attempts Documents

Showing 1 to 1 of 1 entries | Show 10 entries | Filter items

| Date Attempted | Caseworker       | Reason Housing Not Secured  | Comments |
|----------------|------------------|---|----------|
| 2019-08-01     | McDonald, Ashley | Suitable Housing (with Supports or Appropriate Resources) was not Available |          |

**1**

**+** Add Housing Placement Attempt

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.

### Move In

**Rent**

**Move In Date**  ★

**Telephone 1**

**Telephone 2**

**Mobile Phone**

**Email Address**

**Use Exact Follow-up Date**  No

**Months Until Follow-up**

## ADDING A FOLLOW UP

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

### Housing Placement Details - Moved Into Housing

**Family Members** [Test, Test](#)

**Housing Type(s) Sought** [View All](#)

**Caseworker** [McDonald, Ashley](#)

**Program** Community Outreach

**Search Started Date** 2019-08-01

**Next Scheduled Follow-up** 2019-12-01

**Service Provider** Region of Durham

**Housing Secured Date** 2019-08-01

**Housing Type** Single Room Occupancy

**Rent** \$700.00

**Status** Good

**Secured Housing Unit** 123 Street Street

**Date Moved In** 2019-08-01

**Address** 123 Street Street

**Landlord**

**Follow-ups** Attempts Subsidies Documents

Showing 0 to 0 of 0 entries | Show 10 entries Filter Items

| Follow-up Date                    | Service Provider | Caseworker | Months Elapsed | Action |
|-----------------------------------|------------------|------------|----------------|--------|
| No data is available in the table |                  |            |                |        |

[← Back to Housing Placement List](#)
[✎ Edit Placement Details](#)

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

**New FollowUp**

**Follow-up Date** 2019-08-01

**Months Elapsed** 0

**Final Follow-up** No

**Use Exact Follow-up Date** No

**Months Until Next Follow-up**

**All Clients Still In Housing** Select an option

**Comments**

Save Close

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

**Housing Placement Details - Moved Into Housing**

**Family Members** [Test, Test](#) **Search Started Date** 2019-08-01

**Housing Type(s) Sought** [View All](#) **Next Scheduled Follow-up** 2019-08-01

**Caseworker** [McDonald, Ashley](#) **Service Provider** Region of Durham

**Program** Community Outreach

**Housing Secured Date** 2019-08-01 **Secured Housing Unit** [123 Street Street](#)

**Housing Type** Single Room Occupancy **Date Moved In** 2019-08-01

**Rent** \$700.00 **Address** 123 Street Street

**Status** Good **Landlord**

Follow-ups Attempts Subsidies Documents

Showing 1 to 1 of 1 entries Show 10 entries Filter items

| Follow-up Date | Service Provider | Caseworker       | Months Elapsed | Action |
|----------------|------------------|------------------|----------------|--------|
| 2019-08-01     | Region of Durham | McDonald, Ashley | 6              |        |

Add Follow-up

## 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.

**Client - Incidents** ⓘ

Show 10 entries Filter items

| Nature of Incident                | Service Provider | Location | Date | Witnesses | Involved | Attachments | Action |
|-----------------------------------|------------------|----------|------|-----------|----------|-------------|--------|
| No data is available in the table |                  |          |      |           |          |             |        |

[+ Add Incident As Involved](#) [+ Add Incident As Witness](#)

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.



## 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.

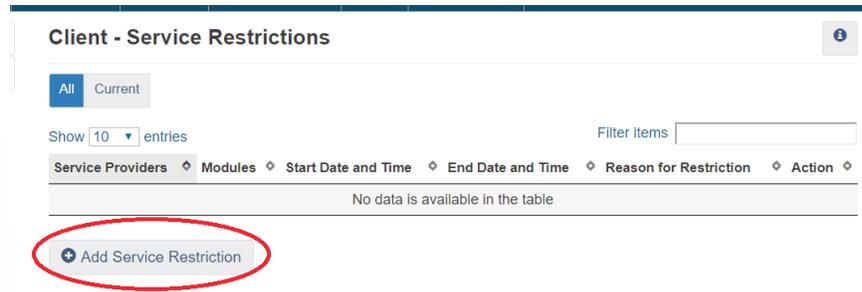
### Note

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.

The screenshot shows the 'Client - Add Service Restriction' form. It includes the following fields and controls:

- Requested by:** A dropdown menu with 'Select an option' and a red star icon.
- Start Date and Time:** A date field with '2019-03-16' and a time field with '1:09 PM', both with calendar icons and a red star icon.
- End Date and Time:** A date field with '2019-03-16' and a time field with '1:09 PM', both with calendar icons and a red star icon.
- Service Providers:** A dropdown menu with 'Select an option', plus and minus buttons, and a red star icon.
- Modules:** A dropdown menu with 'Select an option', plus and minus buttons, and a red star icon.
- Reason for Restriction:** A dropdown menu with 'Select an option' and a red star icon.
- Comments:** A rich text editor with a toolbar (Edit, Insert, Format, View, Table) and a text area containing 'p'. A red star icon is next to it.

At the bottom, there are 'Save' and 'Cancel' buttons.

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.

**Client - Service Restrictions** ⓘ

All Current

Show 10 entries Filter items

| Service Providers | Modules | Start Date and Time | End Date and Time   | Reason for Restriction                | Action  |
|-------------------|---------|---------------------|---------------------|---------------------------------------|---|
| Region of Durham  | Goods   | 2019-08-06 10:23 AM | 2019-08-06 10:23 AM | Non-compliance with Rules/Regulations |    |

1

+ Add Service 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.



The screenshot shows the 'Client - SPDAT Intake' interface. At the top, there are tabs for 'VI-SPDAT' and 'SPDAT'. Below the tabs, it displays 'Showing 0 to 0 of 0 entries | Show 10 entries' and a 'Filter items' search box. A table header is visible with columns: 'Service Provider', 'Start Date and Time', 'Caseworker', 'Type', 'Version', 'Score', and 'Action'. The table body is empty, with the message 'No data is available in the table'. Below the table, there is a prompt: 'Start a new VI-SPDAT assessment by selecting one of the following:'. Three buttons are shown: 'Adult v1', 'Family v1', and 'Youth v1'. Three green arrows point upwards from below the buttons to each of the three buttons.

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.

**New F-VI-SPDAT Version 1 Intake**

**Caseworker** Select an option ★

**Start Date and Time** 2019-08-06 10:52 AM ★

**Pre-Screen Period** Select an option ★

**Pregnancy** No

**Consent** No

**Program** Select an option + -

**Description**

Edit Insert Format View Table

Font Sizes A A B I U

Words: 0

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.

### Client - SPDAT Intake

VI-SPDAT | SPDAT

Showing 1 to 1 of 1 entries | Show 10 entries | Filter items

| Service Provider | Start Date and Time    | Caseworker       | Type  | Version | Score | Action  |
|------------------|------------------------|------------------|-------|---------|-------|---|
| Region of Durham | 2019-08-06 10:36:00 AM | McDonald, Ashley | Adult | 1       | 9     |    |

Start a new VI-SPDAT assessment by selecting one of the following:



## 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.



**Client - Turn Away List**

Show 10 entries Filter items

| Service Provider                  | Date and Time of Turn Away | Reason for Turn Away | Action |
|-----------------------------------|----------------------------|----------------------|--------|
| No data is available in the table |                            |                      |        |

+ Add Turn Away

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.

### Add Turn Away

**Family Members**  + -

**Effective Date and Time**

**Number of Adults**  ★

**Number of Children**  ★

**Reason for Turn Away**  ★

**Requested by**  ★

**Referred by**

**Referred from**  ▼

**Referred to**  ▼

**Comments**

Edit | Insert | Format | View | Table

Font Sizes | A | A | B | I | U | S

Words: 0

Save Cancel

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.

### Client - Turn Away List

Show 10 entries Filter items

| Service Provider | Date and Time of Turn Away | Reason for Turn Away | Action  |
|------------------|----------------------------|----------------------|---|
| Region of Durham | 2019-08-06 11:40:00 AM     | No Beds Available    |     |

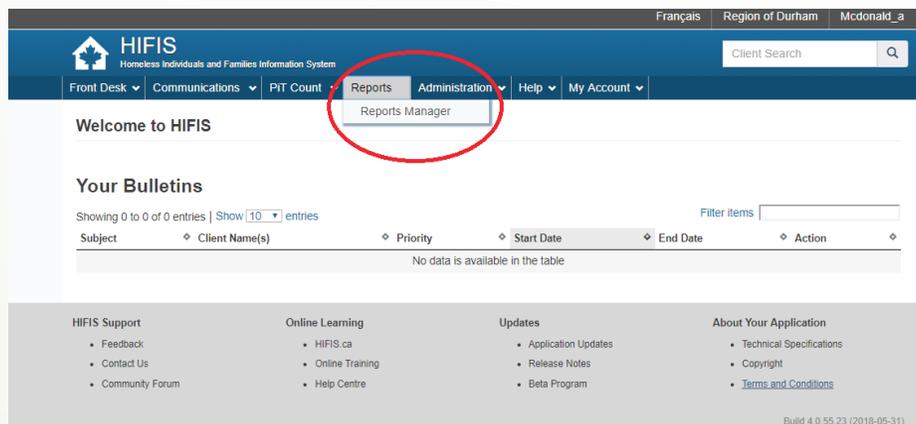
1

[+ Add 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.)

**HIFIS**  
Homeless Individuals and Families Information System

Client Search

Front Desk | Communications | PIT Count | **Reports** | Administration | Help | My Account

**Report Manager**

HIFIS Reports | Custom Reports | **Add Report**

Show 10 entries | Filter Items

| Report Name                           | Type           | Date Created | Last Edited | Description                       | Action  |
|---------------------------------------|----------------|--------------|-------------|-----------------------------------|---|
| Active Service Restrictions.rpt       | Crystal Report | 08-15-2018   | 12-19-2018  | From London                       |     |
| Bed Check List.rpt                    | Crystal Report | 08-15-2018   | 12-19-2018  | From London                       |     |
| Client Outcomes Report.rpt            | Crystal Report | 08-15-2018   | 12-19-2018  | From London                       |     |
| Client Stays and Durations.rpt        | Crystal Report | 04-16-2019   | 04-16-2019  | Client Stays and Durations        |     |
| Contributing Factors                  | Crystal Report | 03-28-2019   | 04-16-2019  | This one should work.             |     |
| Duplicate Name Check.rpt              | Crystal Report | 08-15-2018   | 08-15-2018  | From ACRE Consulting              |     |
| General Stats.rpt                     | Crystal Report | 05-13-2019   | 05-13-2019  | General Stats                     |     |
| Geographic Region, Age and Gender.rpt | Crystal Report | 05-03-2019   | 05-03-2019  | Geographic Region, Age and Gender |     |
| Geographic Region.rpt                 | Crystal Report | 03-28-2019   | 05-03-2019  | Geographic Region Listing ONLY    |     |
| Goods Summary.rpt                     | Crystal Report | 08-15-2018   | 12-19-2018  | From ACRE Consulting              |     |

1 2 3 Next

## 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.

### Report Generator | Daily Shelter Occupancy.rpt

#### Report Parameters

Reporting Period Start Date:  

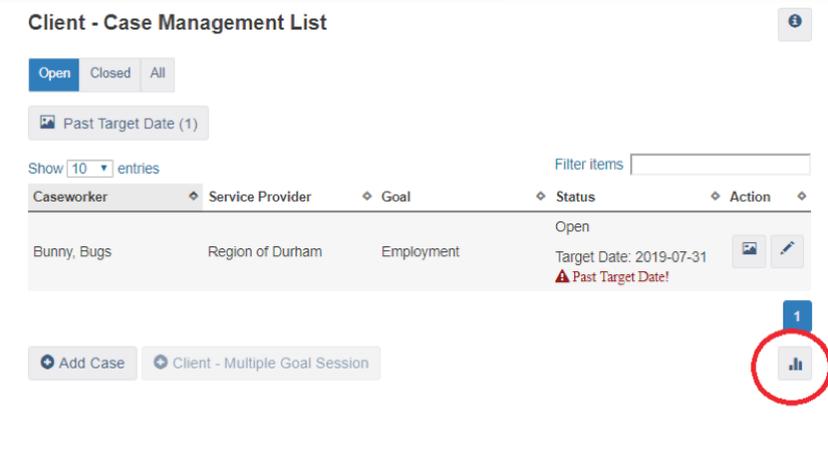
Reporting Period End Date:  

Select a service provider:

## 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.



**Client - Case Management List**

Open Closed All

Past Target Date (1)

Show 10 entries Filter items

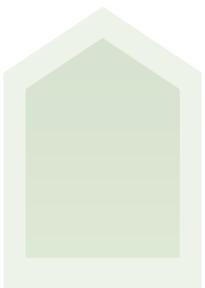
| Caseworker  | Service Provider | Goal       | Status   | Action  |
|-------------|------------------|------------|--|---|
| Bunny, Bugs | Region of Durham | Employment | Open<br>Target Date: 2019-07-31<br>▲ Past Target Date! |   |

Add Case Client - Multiple Goal Session

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.



For additional training or information please contact:

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