

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

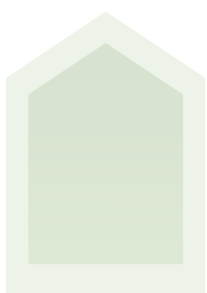


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INTRODUCTION

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.

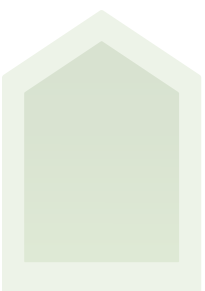
Purpose of the User Manual

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.

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

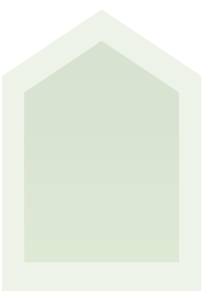
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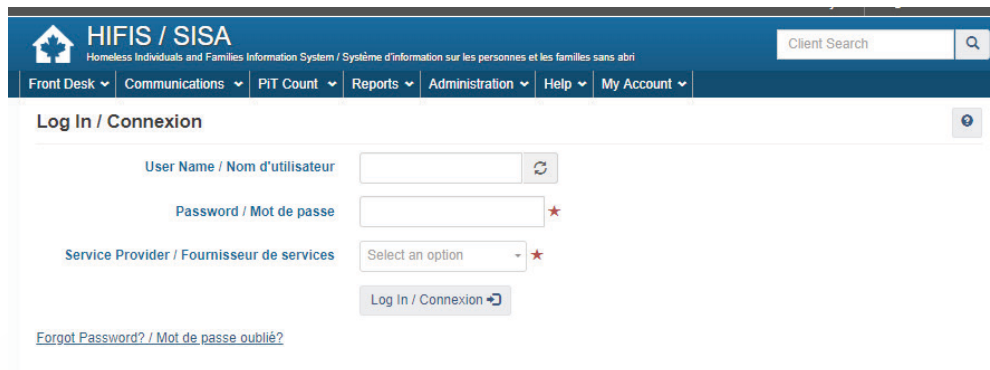
ACCESSING THE HIFIS DATABASE

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

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




HOW TO LOG INTO HIFIS



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

Note

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

4. Select **Log In**

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

Note

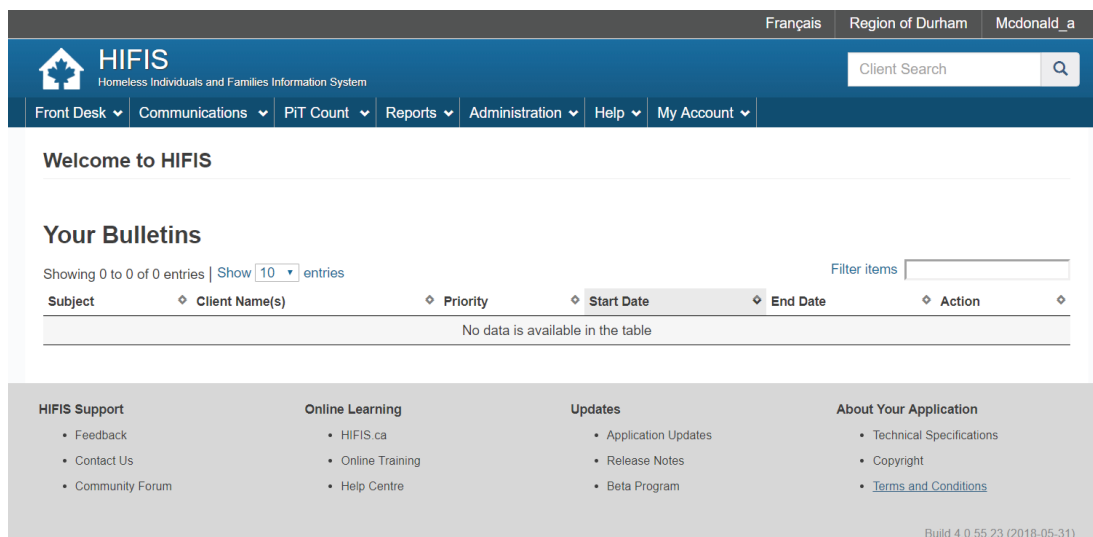
After 5 unsuccessful attempts to log in the account will become locked. Once an account is locked a Manager or HIFIS Administrator must unlock it.

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.



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.

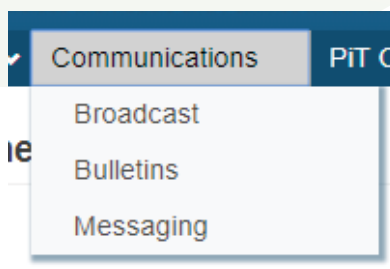
FRONT DESK

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.



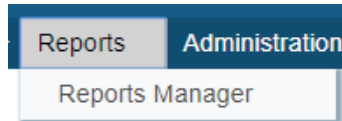
COMMUNICATION

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.



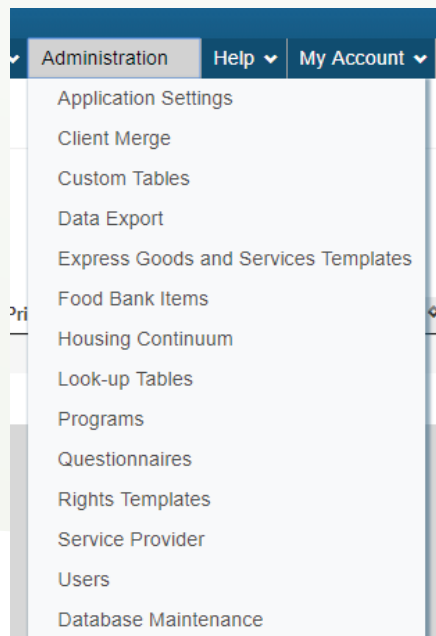
REPORTS

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



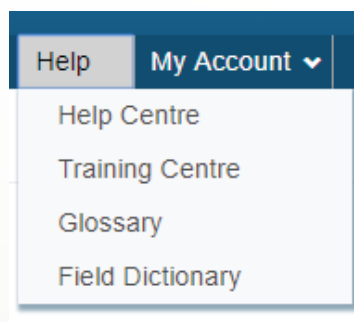
ADMINISTRATION

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.



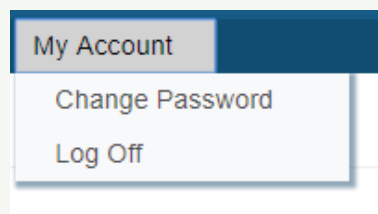
HELP

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.

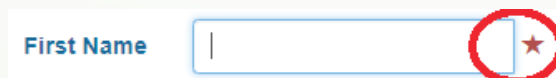


ENTERING THE DATA INTO HIFIS

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.

A screenshot of a web form. On the left, the text 'First Name' is displayed. To its right is a rectangular input field with a blue border. To the right of the input field is a red star icon, which is circled in red. A vertical cursor is visible inside the input field.

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

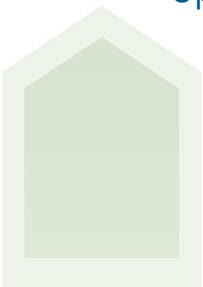
These are fields where users must enter an applicable date. An example of a Date Field is when a user is entering in a date of occupancy for a unit the client is renting.

- 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.

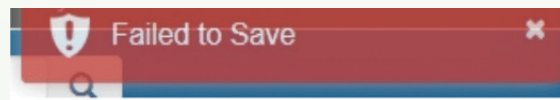


SAVING DATA

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.



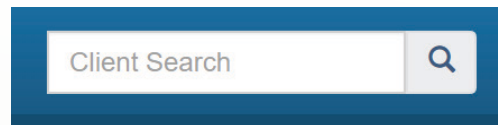
Sometimes the data fails to save. In many of these cases the user has not completed a mandatory field. When the data fails to save a red box will appear in the top right hand corner of the screen notifying users that the data has not been saved.



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*.

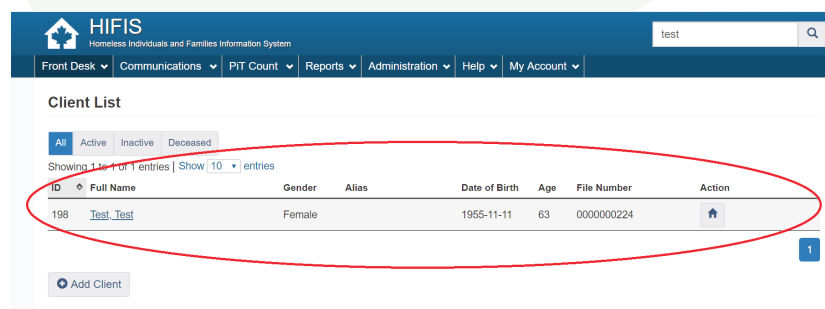
The easiest way to search a client's profile is by typing their name in the *Client Search Box*.


A screenshot of the 'Client Search' input field. It consists of a white text box with the placeholder text 'Client Search' and a magnifying glass icon to its right, all contained within a dark blue rectangular 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.

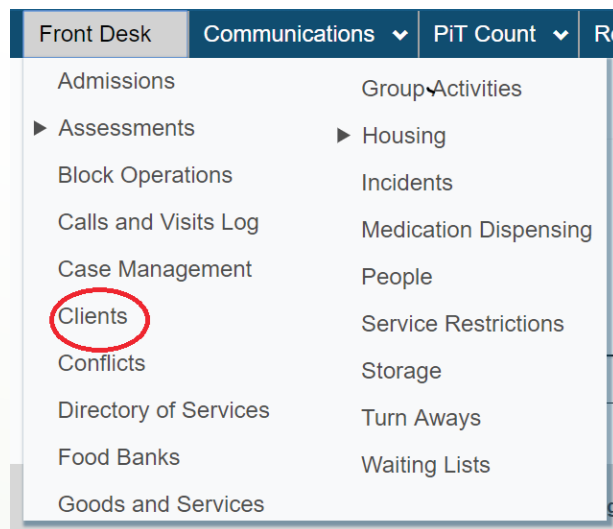
1. Enter *Clients Name* or *Client ID* into the **Client Search Box**.
2. Select the **Search** button  to find the client.
3. This will bring you to the Client List screen where the client profiles can be accessed. If the name exists in the system it will be shown here along with the Gender, Date of 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 (Homeless Individuals and Families Information System) 'Client List' screen. The interface includes a top navigation bar with the HIFIS logo and various menu items like 'Front Desk', 'Communications', 'PIT Count', 'Reports', 'Administration', 'Help', and 'My Account'. A search bar at the top right contains the text 'test'. Below the navigation bar, there are tabs for 'All', 'Active', 'Inactive', and 'Deceased'. The main area displays a table of client records. The first record is highlighted with a red oval. The table has columns for ID, Full Name, Gender, Alias, Date of Birth, Age, File Number, and Action. At the bottom left, there is an 'Add Client' button, and at the bottom right, a small blue box with the number '1' is visible.

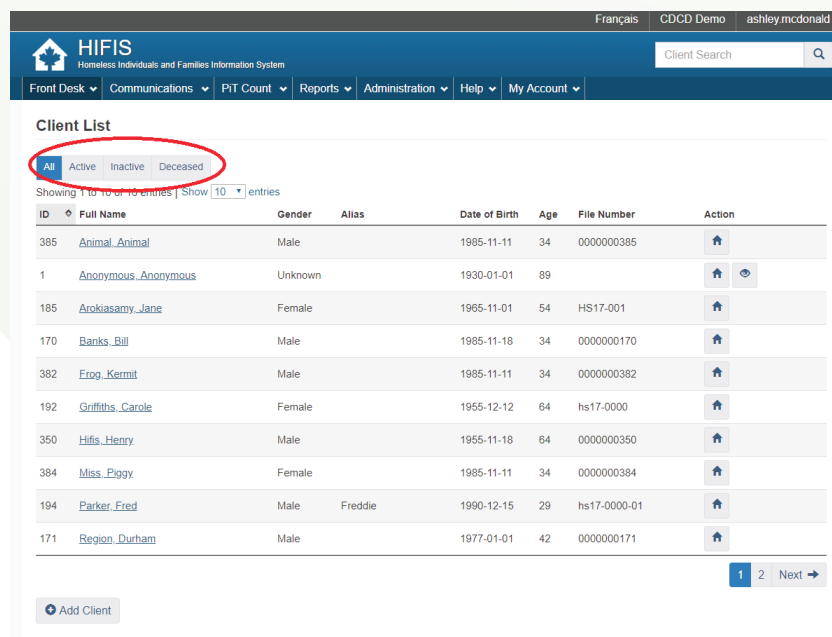
ID	Full Name	Gender	Alias	Date of Birth	Age	File Number	Action
198	Test Test	Female		1955-11-11	63	000000224	

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

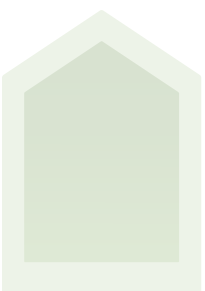
1. From the *Front Desk* drop down click on *Clients*.



This will bring up the Client List page.

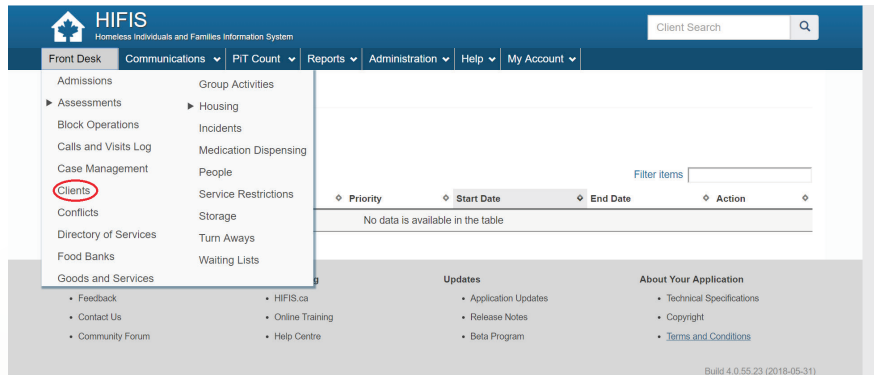


2. Users can filter down the list by selecting only Active, Inactive or Deceased clients. If the name exists in the system it will be shown here along with the Gender, Date of Birth, Age and File Number. The client's profile can be accessed by double clicking on the person's name.

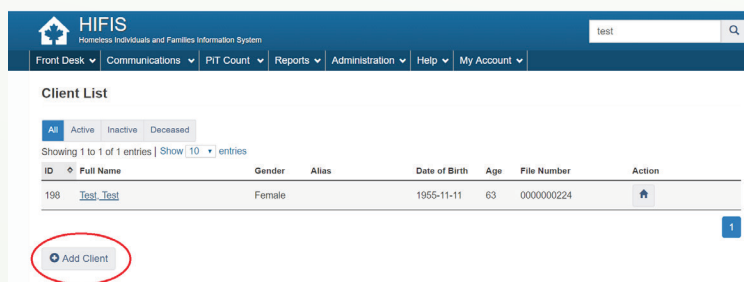


ADDING A CLIENT RECORD

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' (set to 'Explicit'), 'Consent Start Date' (2018-11-09), and 'Consent Expiry Date' (2020-10-29). Below this is an 'Attachments' section with a 'Select a file...' button and a 'Browse' button. The middle section contains personal information fields: 'Last Name' (Test), 'First Name' (Test), 'Middle Name' (empty), 'Alias 1' (empty), 'Alias 2' (empty), 'Date of Birth Known' (Yes), 'Date of Birth' (01/01/2000), 'Information Verified' (Yes), 'Gender' (Male), 'Disability' (No), 'MediAlert' (No), and 'Client is' (Visible). The bottom section includes 'Veteran Status' (Not a Veteran), 'Citizenship/Immigration Status' (Canadian Citizen - Born in Canada), 'Aboriginal Status' (Non-Aboriginal), 'Geographic Region' (Oshawa), 'File Number' (empty), and 'Country of Birth' (Canada). At the bottom of the form, four buttons are circled in red: 'Save', 'Save and go to Book In', 'Save and Start Family', and 'Cancel'.

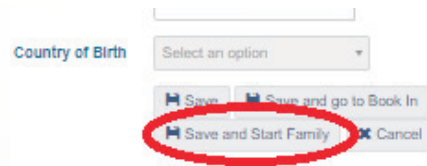
Note

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.

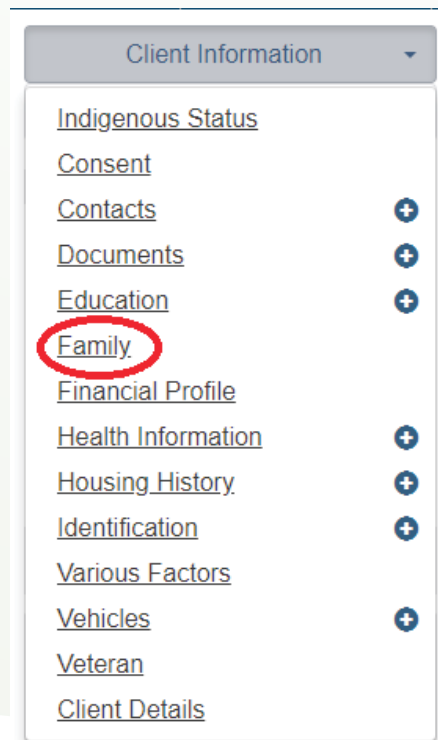
ADDING FAMILY MEMBERS

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.

The screenshot shows the 'Client - Family' interface. At the top right is a 'Family History' button. Below it, a status bar indicates 'Showing 1 to 1 of 1 entries' and a 'Filter items' search box. A table lists family members with columns: Status, Full Name, Date of Birth, Role, Relationship, and Action. One entry is shown: Status '12/11/2018 - Present', Full Name 'Test, Test', Date of Birth '01/01/1988', Role 'Family Head', and Relationship 'n/a'. Below the table, two buttons are circled in red: 'Add Member' and 'Create and Add Member'. A blue box with the number '1' is in the bottom right corner.

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

The screenshot shows the 'Add Member' form. It has a dark blue header with the title 'Add Member'. The form contains five fields, each with a red star icon indicating a required field: 'Family Member Name' (a dropdown menu), 'Family Role' (a dropdown menu with 'Select an option'), 'Relationship to Family Head' (a dropdown menu with 'Select an option'), 'Start Date' (a date input field with '2019-03-12' and a calendar icon), and 'End Date' (a date input field with a calendar icon). At the bottom right, there are two buttons: 'Save' and 'Close'.

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.

HIFIS
Homeless Individuals and Families Information System

Client Search

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

Client Information | Client Management

Client - Family | Family History

Showing 1 to 2 of 2 entries | Show 10 entries | Filter items

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

Add Member Create and Add Member

Test Test

Client Alerts

Consent Status: **Active**

File Number: 0000000234

Current Stay: Not Booked In

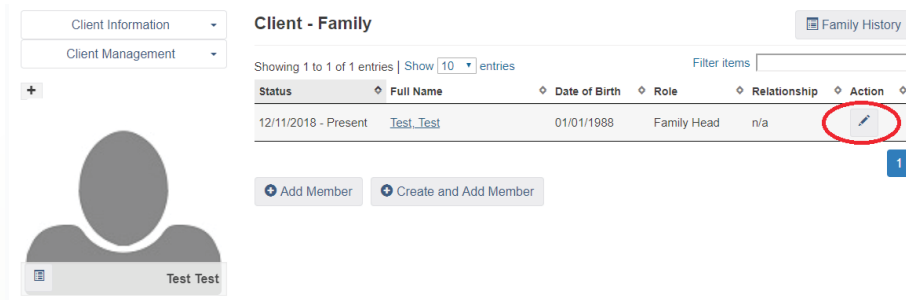
Gender: Male

Date of Birth: 2016-11-11 (2)


Family: Yes

EDITING FAMILY MEMBERS

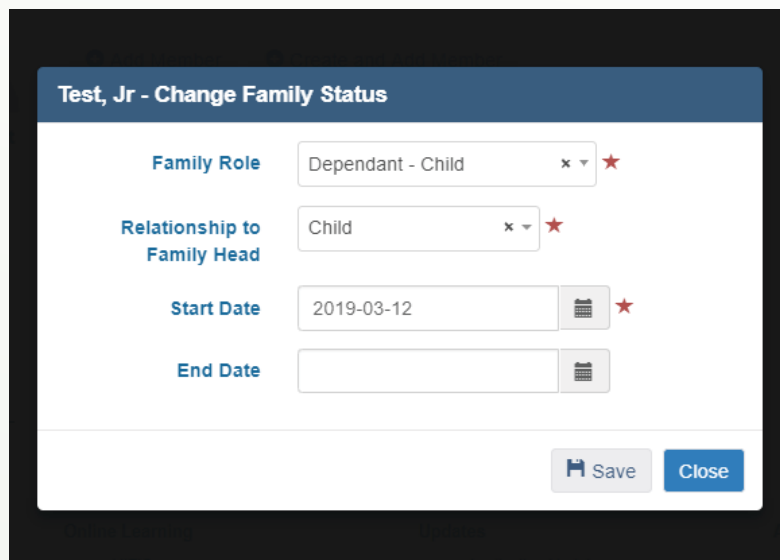
1. Click on the edit button to the right of the family member's name.



The screenshot shows the 'Client - Family' section of a software interface. On the left, there are tabs for 'Client Information' and 'Client Management', and a profile icon for 'Test Test'. The main area displays a table with one entry. The table has columns: Status, Full Name, Date of Birth, Role, Relationship, and Action. The entry shows '12/11/2018 - Present' for Status, 'Test_Test' for Full Name, '01/01/1988' for Date of Birth, 'Family Head' for Role, and 'n/a' for Relationship. The 'Action' column contains an edit icon (a pencil inside a circle) 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 corner.

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.



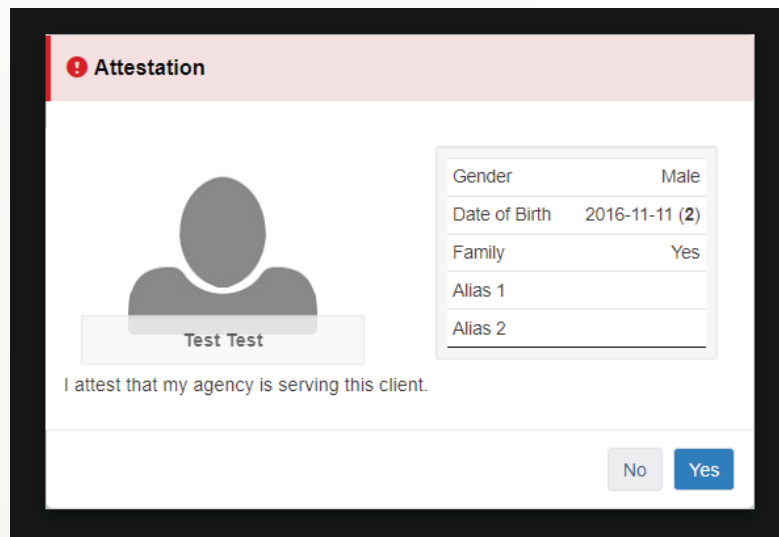
The screenshot shows a dialog box titled 'Test, Jr - Change Family Status'. It contains four fields: 'Family Role' with a dropdown menu showing 'Dependant - Child', 'Relationship to Family Head' with a dropdown menu showing 'Child', 'Start Date' with a date picker showing '2019-03-12', and 'End Date' with an empty date picker. Each field has a red star icon to its right. At the bottom right, there 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.

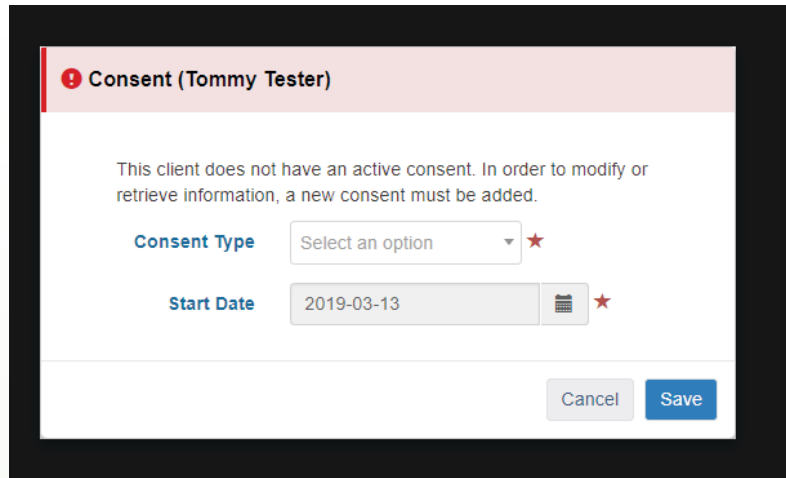
If a user has not accessed a particular client's profile in the past, an attestation box will appear when they attempt to access the profile.

A screenshot of an 'Attestation' dialog box. The title bar is red with a white exclamation mark icon and the text 'Attestation'. The main content area has a white background. On the left, there is a grey silhouette of a person's head and shoulders, with the name 'Test Test' below it. To the right of the silhouette is a table with client information. Below the table, there is a line of text: 'I attest that my agency is serving this client.' At the bottom right, there are two buttons: 'No' (grey) and 'Yes' (blue).

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

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

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



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

Note

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

CLIENT VITALS SCREEN

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

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

Client Information	
Consent Status	Active
File Number	0000000234
Current Stay	Not Booked In
Gender	Male
Date of Birth	2016-11-11 (2)
Family	Yes

Client - Vitals	
Consent Type	Explicit
Full Name	Test Test
Gender	Male
Alias	
File Number	0000000234
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
MediAlert	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

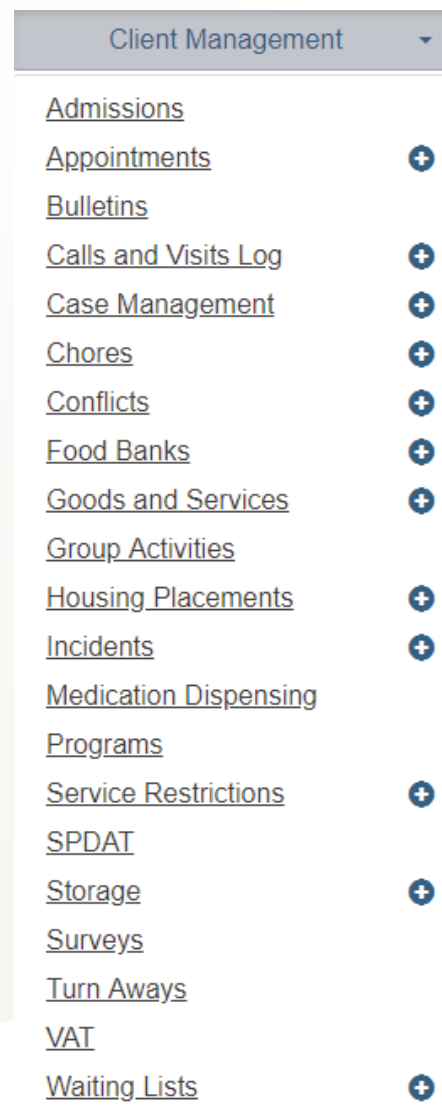
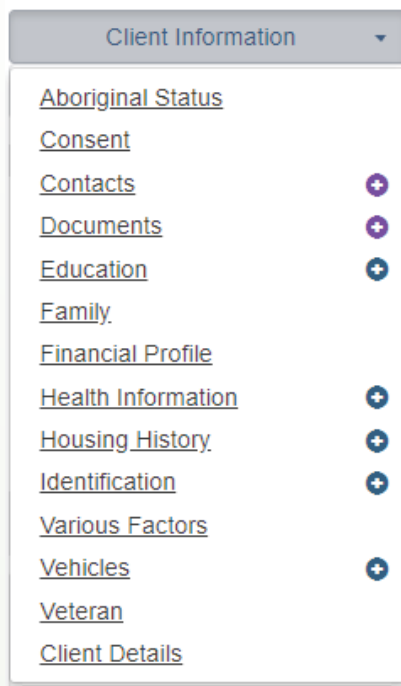
Updated by: McDonald, Ashley
Date Updated: 2019-03-12

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 preformed with the client.



ABORIGINAL STATUS

1. From the Client Information Drop down menu click on Aboriginal Status.
2. This will bring up the client aboriginal page where users can see the client's status. Adding or Editing a status can be done by clicking on the add button at the bottom left of the page.



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



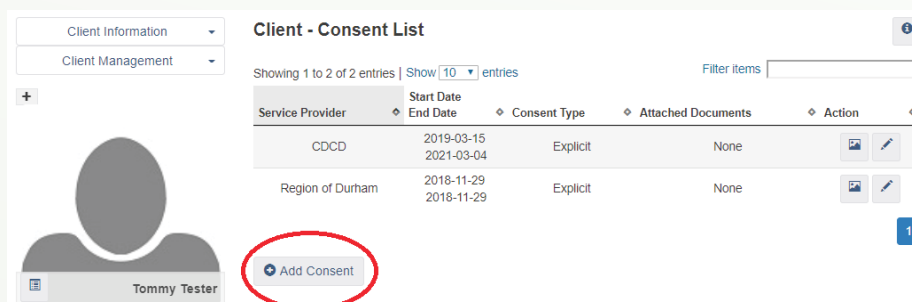
CONSENT

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

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

ADDING CONSENT

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



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

- Add Consent

it Type Select an option ★

Comment

Edit ▾ Insert ▾ Format ▾ View ▾ Table ▾

Font Sizes ▾ A ▾ A ▾ B / S

Words: 0

Save Cancel



EDITING CONSENT

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

Client Information ▾
Client Management ▾

Client - Consent List

Showing 1 to 2 of 2 entries | Show 10 ▾ entries Filter items

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.

Edit Consent

Start Date 2019-03-15 ★

End Date 2021-03-04

Consent Type Explicit ★

File On Record None 

Comment

Edit ▾ Insert ▾ Format ▾ View ▾ Table ▾

Font Sizes ▾ A ▾ A ▾ B / S

Words: 0

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	<input type="text"/>	★
Relationship	<input type="text" value="Select an option"/>	★
<div><input type="button" value="Save"/> <input type="button" value="Cancel"/></div>		

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.

Client - Document List

Show 10 entries Filter items

Document Type	Documents	Description	Date	Action
Barcode	Barcode (image/jpeg, 1.20kB)	File Number Barcode Image (Code128)	2019-03-15	

Add Document

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 Choose File No file chosen

Name

Confidential No

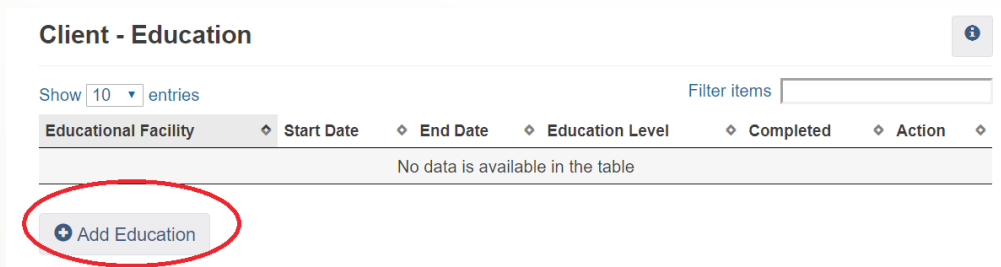
Description

Save Cancel

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



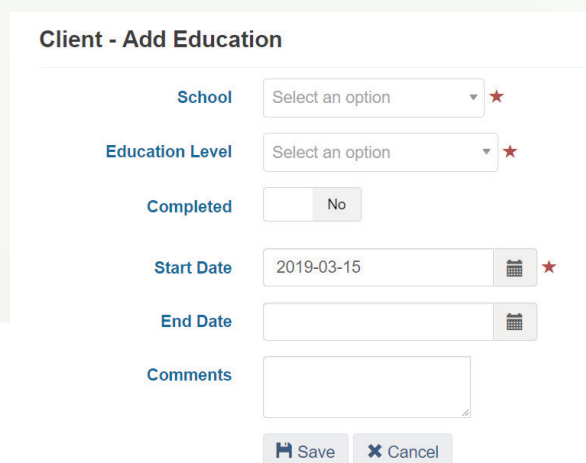
Client - Education

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

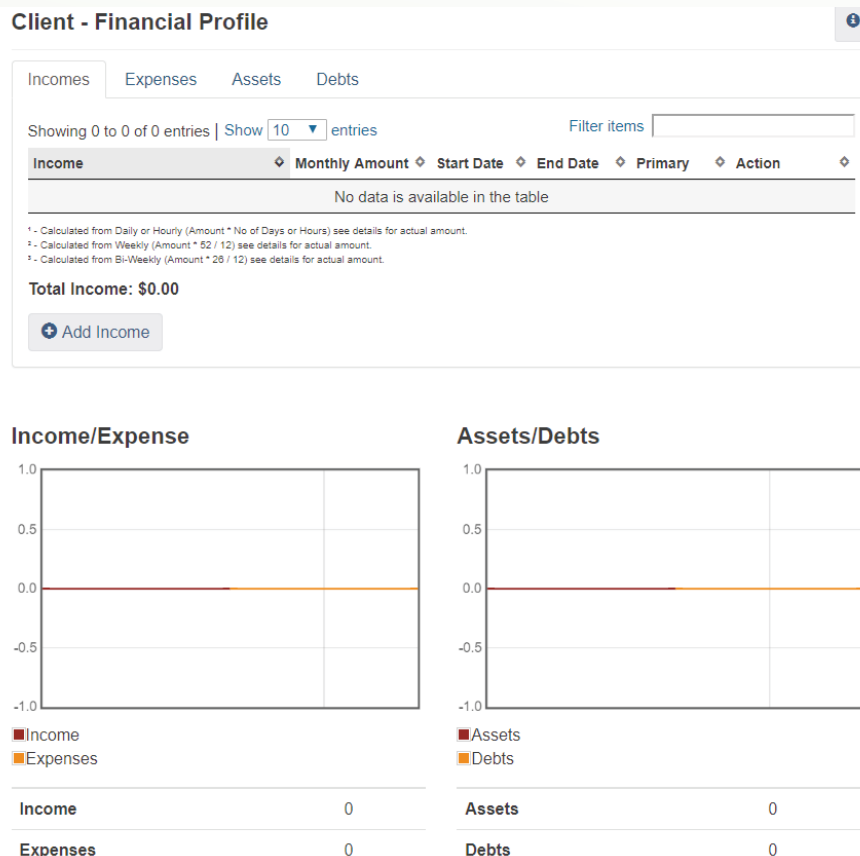
[Save](#) [Cancel](#)

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					

* - 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: \$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

Select an option

★

Pay Frequency

Hourly

x

★

Hours per Month

0

★

Hourly Wage

\$ 0

★

Start Date

2019-03-15

★

End Date

Primary

No

Shareable

Yes

Editable

Yes

Save

Cancel

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

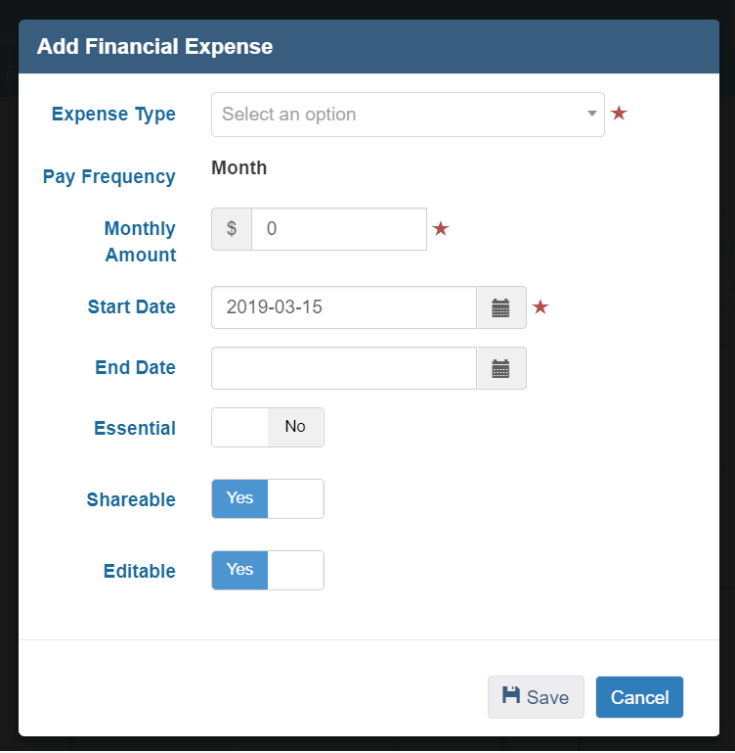
Filter items

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 a dark blue header. The form contains the following fields and controls:

- Expense Type:** A dropdown menu with the text "Select an option" and a red star icon.
- Pay Frequency:** A label with the value "Month".
- Monthly Amount:** A text input field with a dollar sign icon and the value "0", followed by a red star icon.
- Start Date:** A date picker showing "2019-03-15" with a calendar icon and a red star icon.
- End Date:** A date picker with 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 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

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

Select an option

★

Amount

\$ 0

★

Country

Select an option

★

Start Date

2019-03-15

★

End Date

Description

Shareable

Yes

Editable

Yes

Save

Cancel

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

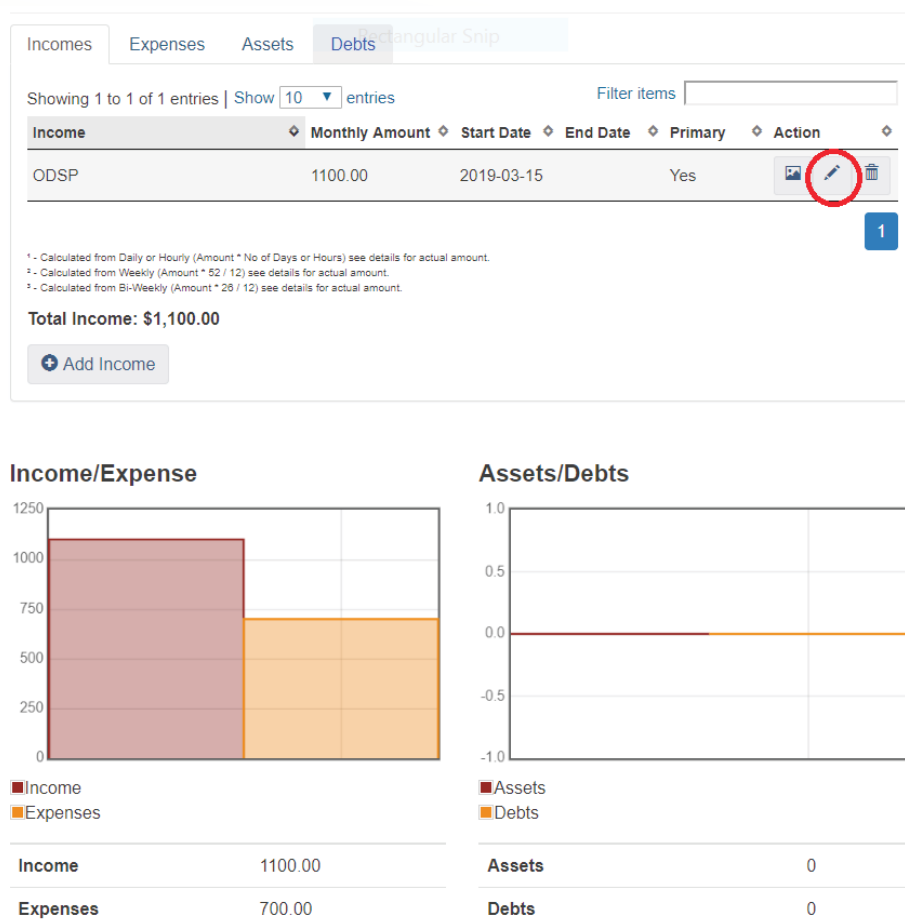
Editable Yes

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.



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

Edit Income

Income Type

ODSP

x

★

Pay Frequency

Monthly

x

★

Monthly Wage

\$ 1100.00

★

Start Date

2019-03-15

★

End Date

Primary

Yes

Shareable

Yes

Editable

Yes

Save

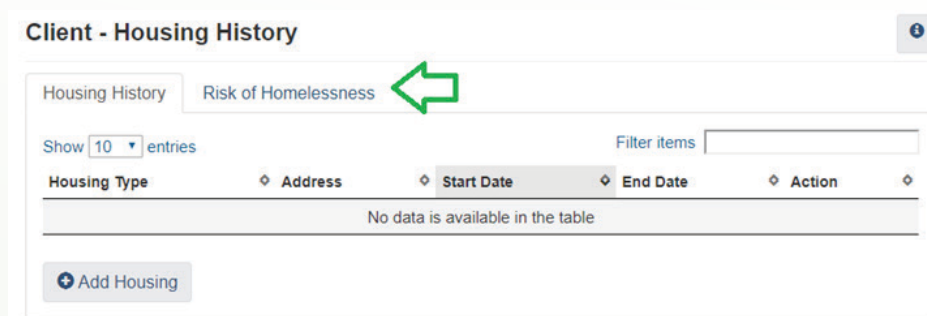
Cancel

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

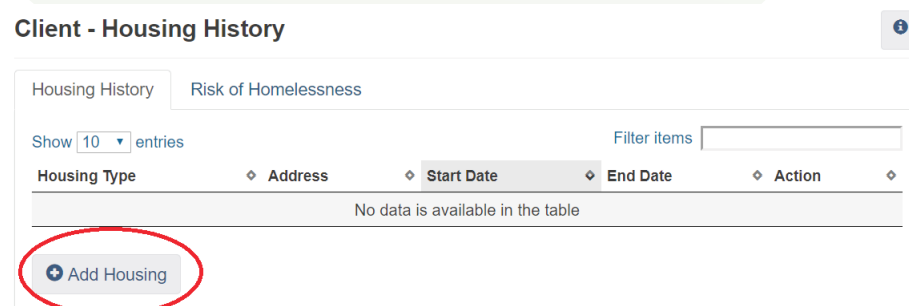
Show 10 entries Filter items

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.

Client - Add Housing History

Housing Type: Select an option *

Start Date: 2019-03-16 *

End Date: *

Place Name:

Address Line 1:

Address Line 2:

Unit/Apartment Number:

Country: Canada *

Province/Territory: Select an option

City: Select an option

Postal Code:

Geographic Region: Select an option + -

Rent: \$

Telephone 1:

Extension:

Telephone 2:

Mobile Phone:

Email Address:

Save Cancel

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.

Client - Housing History

Housing History | Risk of Homelessness

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

At-Risk Status	Date of Change	Caseworker	Action
No data is available in the table			

Add Homelessness Risk

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	123 Street Ave Oshawa Ontario Canada	2019-03-16	--	 

1

+ 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	-	  


1

+ 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

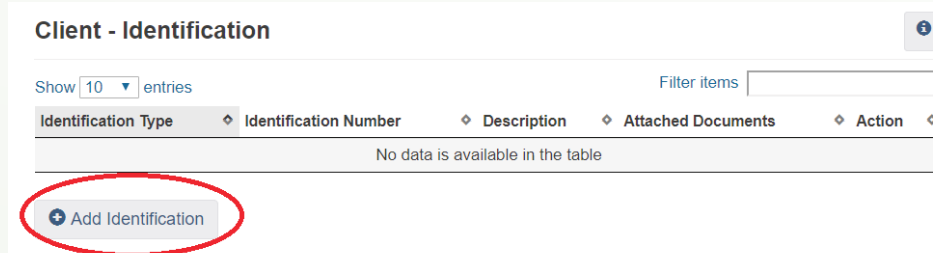
The client identification module is used to manage the client's identification.

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

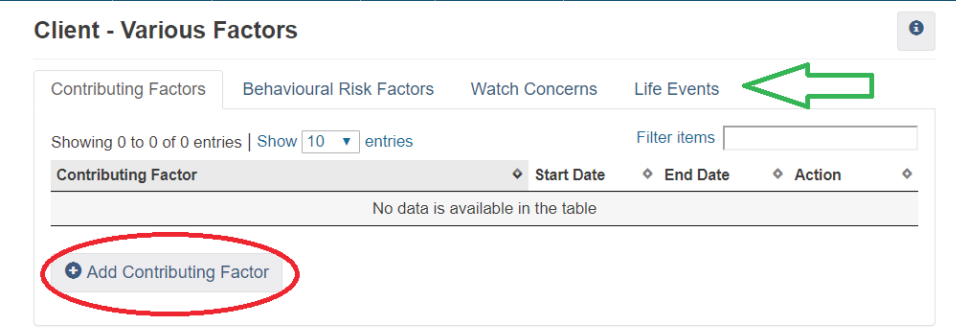
 Save

 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 ★

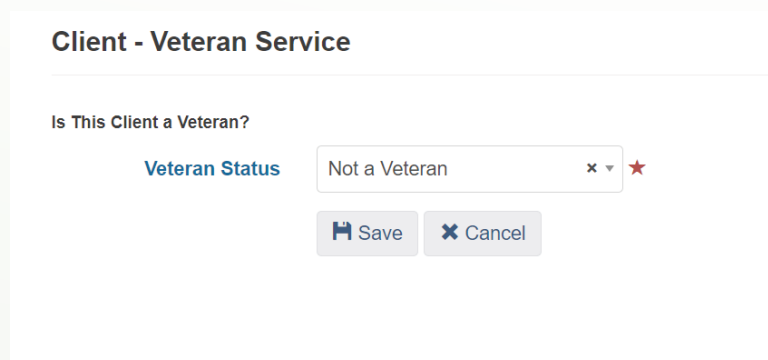
End Date

Save **Cancel**

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.



Client - Veteran Service

Is This Client a Veteran?

Veteran Status Not a Veteran x v ★

Save 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



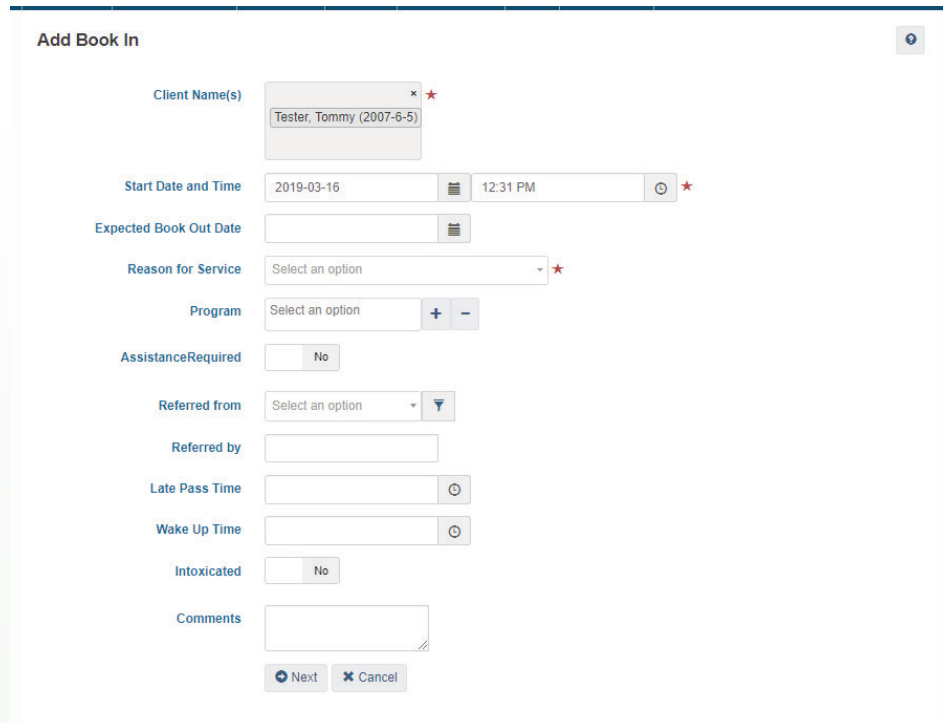
Booked In Reservations

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				

+ Book In + Book In Family

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" with a close button in the top right corner. 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:** Two input fields. The first contains "2019-03-16" with a calendar icon. The second contains "12:31 PM" with a clock icon.
- Expected Book Out Date:** An input field with a calendar icon.
- 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 buttons.
- AssistanceRequired:** A checkbox labeled "No".
- Referred from:** A dropdown menu with the text "Select an option" and a filter icon.
- Referred by:** An input field.
- Late Pass Time:** An input field with a clock icon.
- Wake Up Time:** An input field with a clock icon.
- Intoxicated:** A checkbox labeled "No".
- Comments:** A text area.
- Buttons:** "Next" and "Cancel" buttons at the bottom.

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	<div></div>

Book Out

1

60

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

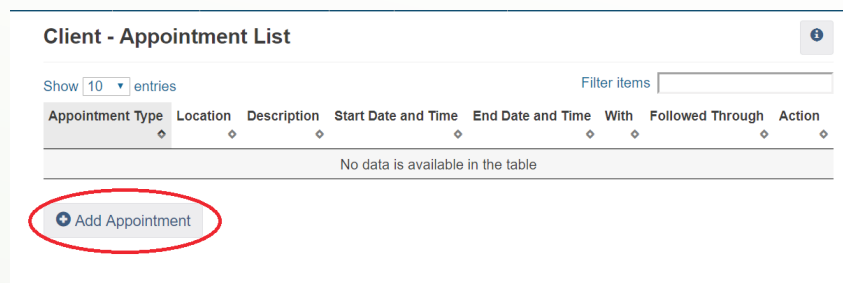
Book Out

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

Start Date and Time 4:03 PM ★

End Date and Time 6:03 PM

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

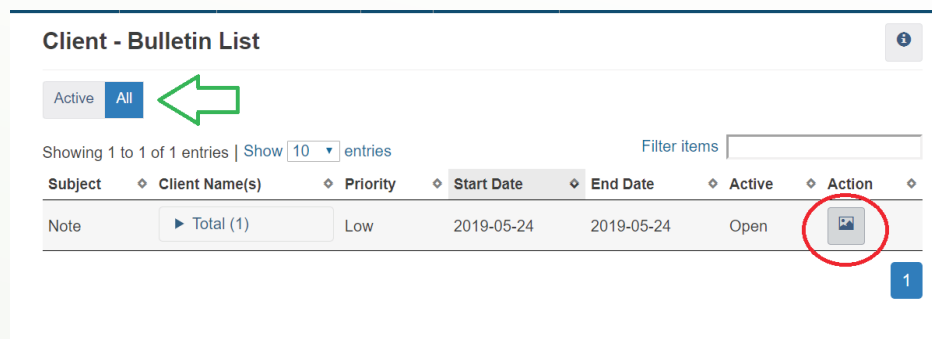
Appointment Type	Location	Description	Start Date and Time	End Date and Time	With	Followed Through	Action
Case Management	Oshawa	Client has appointment regarding Housing Retention.	2019-05-24	2019-05-24			

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.

Client - Call and Visit List

Show 10 entries Filter items

Log Type	Subject	Nature of Contact	Date	Name	Service Provider	Action
No data is available in the table						

+ Add Log

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

p 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	<div> <div></div> <div></div> </div>

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

Note

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

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

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

ADDING A CASE MANAGEMENT RECORD

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

Client - Case Management List

Open Closed All

Show 10 entries Filter items

Caseworker	Service Provider	Goal	Status	Action
No data is available in the table				

+ Add Case + Client - Multiple Goal Session

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.

Client - Add Case Management

Caseworker Select an option ★

Goal Select an option ★

Status Open × ★

Start Date 2019-03-16 📅 ★

Target Date 📅

Program Select an option + -

Contributing Factors Select an option + -

Save Cancel

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 Target Date: N/A	

Add Case Client - Multiple Goal Session

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

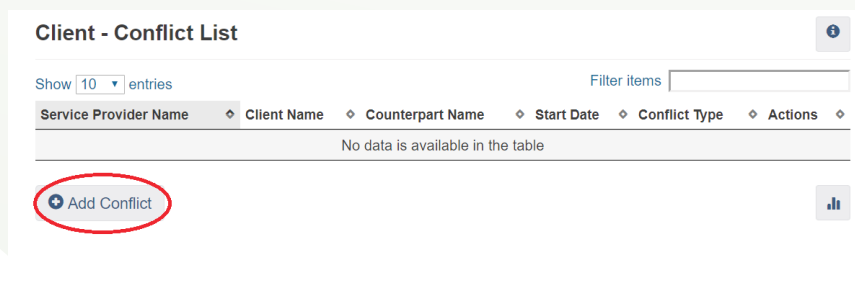
The Conflicts Module is used to record conflicts that have taken place between two individuals. The conflict can include clients and staff members. In the conflicts module users can specify whether the client was an aggressor or a victim in the incident.

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 ▾ B / 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			

+ Add Goods and Services Transaction + Express Good + Express Service

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 Select an option *

Start Date and Time 2019-03-16 12:43 PM *

Program Select an option + -

Case Management Activity Select an option

Number of Individuals

Referred from Select an option

Referred to Select an option

Referred by

Save Cancel


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.

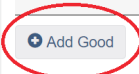
Goods and Services

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

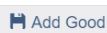

Good Select an option ★

Unit Of Measure Select an option ★

Quantity

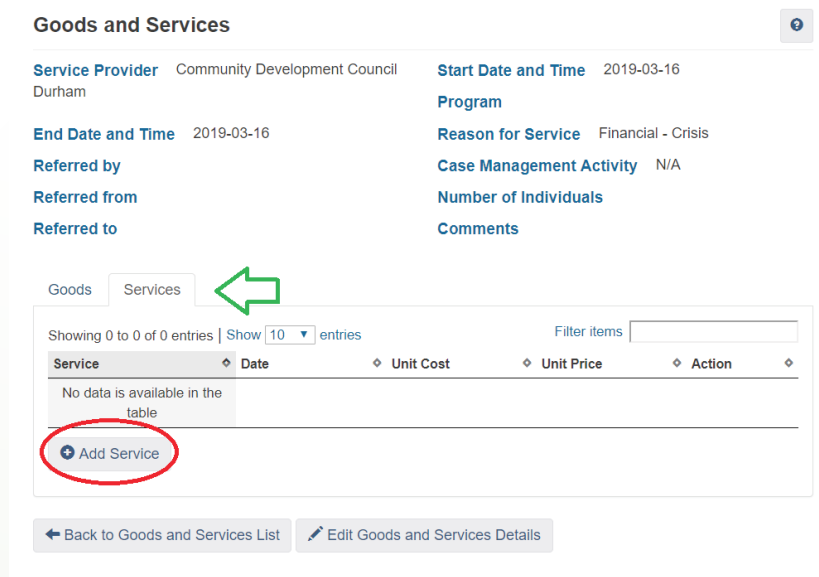
Unit Cost \$

Unit Price \$

 Add Good  Close

ENTERING A SERVICE

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

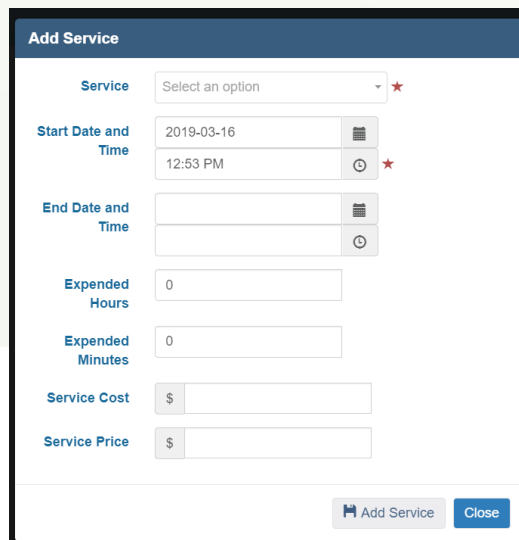


The screenshot shows the 'Goods and Services' form. The 'Services' tab is selected, indicated by a green arrow. The 'Add Service' button is circled in red. The form displays various fields for service entry, including Service Provider, Start Date and Time, End Date and Time, Referred by, Referred from, Referred to, Program, Reason for Service, Case Management Activity, Number of Individuals, and Comments. A table below the tabs shows 'No data is available in the table' and the 'Add Service' button is highlighted.

Service	Date	Unit Cost	Unit Price	Action
No data is available in the table				

[Add Service](#)

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 includes fields for Service (a dropdown menu), Start Date and Time (2019-03-16, 12:53 PM), End Date and Time, Expended Hours (0), Expended Minutes (0), Service Cost (\$), and Service Price (\$). The 'Add Service' button is highlighted at the bottom right.

Service	Start Date and Time	End Date and Time	Expended Hours	Expended Minutes	Service Cost	Service Price
Select an option	2019-03-16 12:53 PM		0	0	\$	\$

[Add Service](#) [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

30Days 90Days 180Days All

Show 10 entries Filter items

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

+ Add Goods and Services Transaction + Express Good + 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	Select an option	★
Program	Select an option	+ -
Reason for Service	Select an option	★
Expended Minutes		
Referred to	Select an option	▼
Comments		
<div>Save Cancel</div>		




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	<div>2 Goods / Services<ul style="list-style-type: none">Goods<ul style="list-style-type: none">Last month's rentServicesReferrals</div>	<div><div>1</div><div></div></div>

Add Goods and Services Transaction

Express Good

Express Service

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.

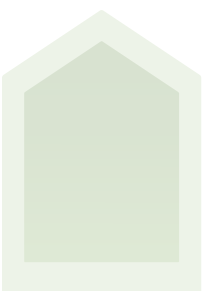
Note

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.



Housing Placement List

Active All

Filter: All

Show 10 entries

Filter items

Service Provider	Search Started Date	Housing Type(s) Sought	Caseworker	Status	Action
No data is available in the table					

+ Add Housing Placement

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.

Client - Add Housing Placement

Caseworker McDonald, Ashley x ★

Housing Type(s) Sought Select an option + - ★

Search Started Date 2019-05-28 ★

Target Date

Program Select an option + -

Start Housing Placement Cancel

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

[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](#)

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

[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](#)

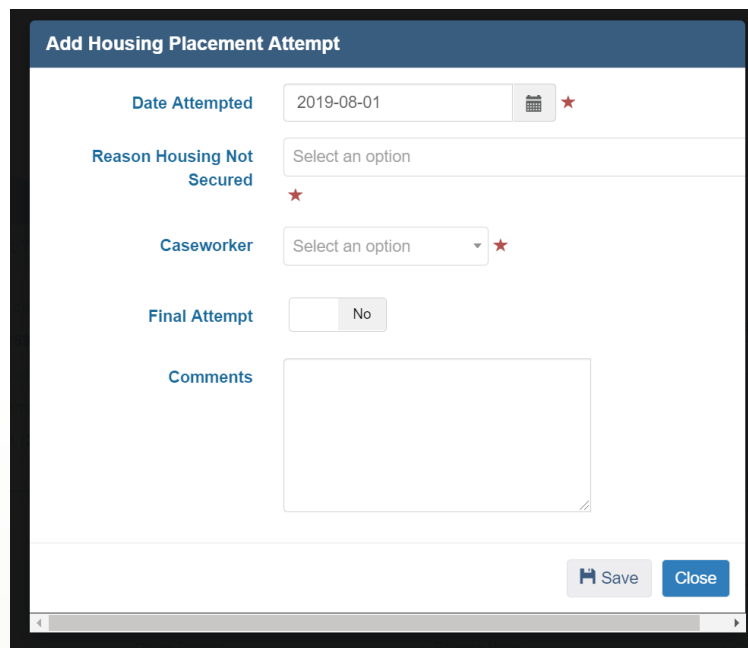
[Back to Housing Placement List](#)

[End Housing Placement](#)

[Edit Placement Details](#)

2. 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". It contains the following fields and controls:

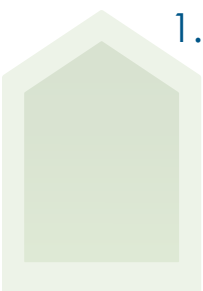
- Date Attempted:** A date input field with the value "2019-08-01", a calendar icon, and a red star.
- Reason Housing Not Secured:** A dropdown menu with the text "Select an option" and a red star.
- Caseworker:** A dropdown menu with the text "Select an option" and a red star.
- Final Attempt:** A toggle switch currently set to "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

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**

→ 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	

[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

2019-08-01

★

Telephone 1

Telephone 2

Mobile Phone

Email Address

Use Exact Follow-up Date

No

Months Until Follow-up

Move In

Close

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

Housing Secured Date

2019-08-01

Housing Type

Single Room Occupancy

Rent

\$700.00

Status

Good

Search Started Date

2019-08-01

Next Scheduled Follow-up

2019-12-01

Service Provider

Region of Durham

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

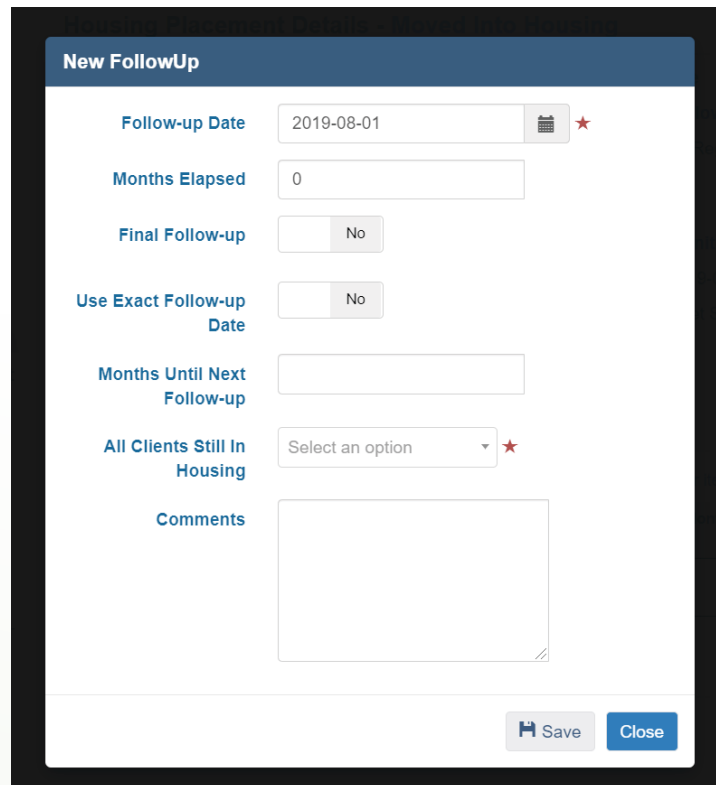
Follow-up Date	Service Provider	Caseworker	Months Elapsed	Action
No data is available in the table				

Add Follow-up

Back to Housing Placement List

Edit Placement Details

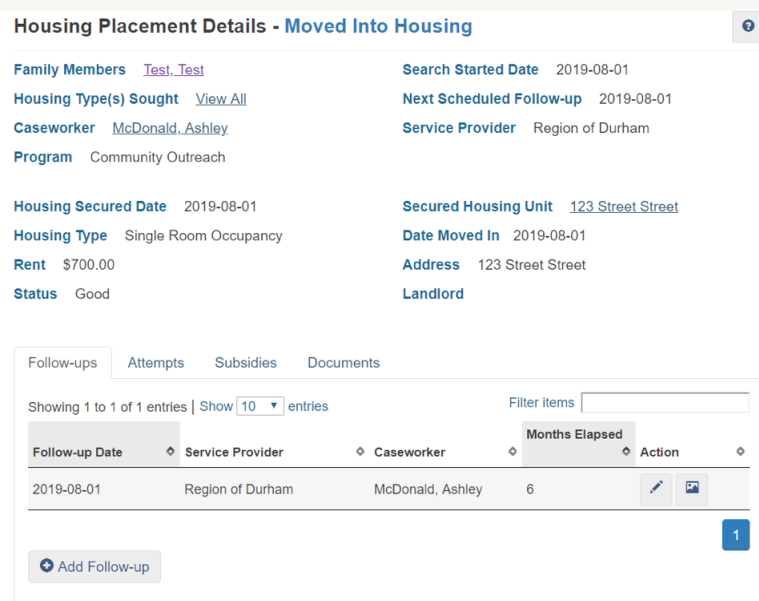
3. Add applicable information about the follow up and then click on the Save button.



The 'New FollowUp' form contains the following fields and controls:

- Follow-up Date:** A date input field with the value '2019-08-01', a calendar icon, and a red star icon.
- Months Elapsed:** A numeric input field with the value '0'.
- Final Follow-up:** A toggle switch currently set to 'No'.
- Use Exact Follow-up Date:** A toggle switch currently set to 'No'.
- Months Until Next Follow-up:** An empty numeric input field.
- All Clients Still In Housing:** A dropdown menu with the text 'Select an option' and a red star icon.
- Comments:** A large text area for notes.
- Buttons:** 'Save' and 'Close' buttons at the bottom right.



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



The 'Housing Placement Details - Moved Into Housing' page displays the following information:

- Family Members:** [Test, Test](#)
- Housing Type(s) Sought:** [View All](#)
- Caseworker:** [McDonald, Ashley](#)
- Program:** Community Outreach
- Housing Secured Date:** 2019-08-01
- Housing Type:** Single Room Occupancy
- Rent:** \$700.00
- Status:** Good
- Search Started Date:** 2019-08-01
- Next Scheduled Follow-up:** 2019-08-01
- Service Provider:** Region of Durham
- Secured Housing Unit:** [123 Street Street](#)
- Date Moved In:** 2019-08-01
- Address:** 123 Street Street
- Landlord:**

Below the details is a tabbed interface with 'Follow-ups' selected. It shows a table with 1 entry:

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

At the bottom of the Follow-ups tab is an 'Add Follow-up' button.

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.

The screenshot shows the 'Client - Incidents' interface. At the top, there's a title 'Client - Incidents' and a help icon. Below the title, there's a 'Show 10 entries' dropdown and a 'Filter items' search bar. A table header is visible with columns: Nature of Incident, Service Provider, Location, Date, Witnesses, Involved, Attachments, and Action. The table body is empty, displaying 'No data is available in the table'. At the bottom, there are two buttons: 'Add Incident As Involved' and 'Add Incident As Witness'. Two green arrows point upwards to these buttons.

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

3. When finished click the Save button.

Add Incident

Involved ✕ ★

Witnesses

Emergency Services + -

Nature of Incident ★

Date and Time

Location ★

Disposition

Attachments

Comments

Edit Insert Format View Table

Font Sizes A A B I U

p Words: 0

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

Client - Incidents

Show entries Filter items

Nature of Incident	Service Provider	Location	Date	Witnesses	Involved	Attachments	Action
Disruptive Behaviour	Region of Durham	Oshawa	2019-08-01		Test, Test		  

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.

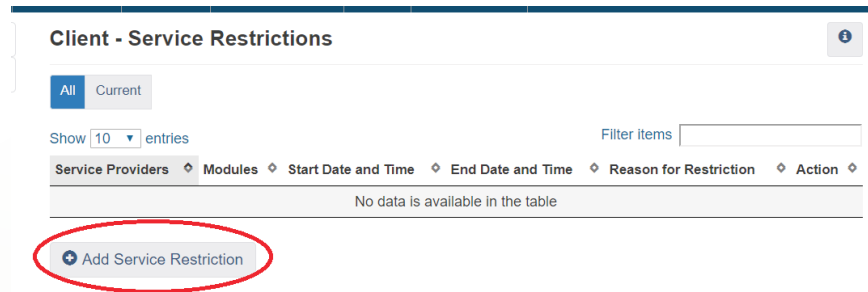
Note

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.



Client - Service Restrictions

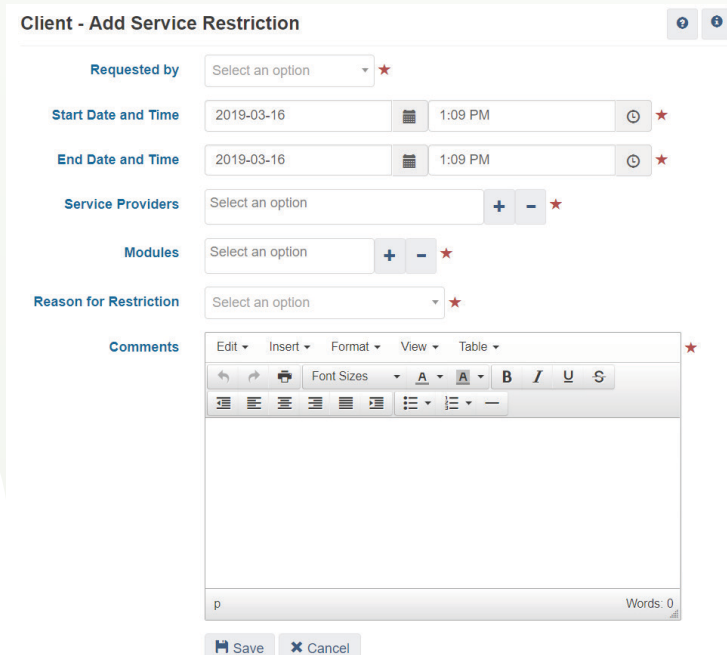
Buttons: All, Current

Show 10 entries Filter Items

Service Providers	Modules	Start Date and Time	End Date and Time	Reason for Restriction	Action
No data is available in the table					

Add Service Restriction

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.



Client - Add Service Restriction

Requested by Select an option *

Start Date and Time 2019-03-16 1:09 PM *

End Date and Time 2019-03-16 1:09 PM *

Service Providers Select an option + - *

Modules Select an option + - *

Reason for Restriction Select an option *

Comments

Rich text editor toolbar: Edit, Insert, Format, View, Table, Font Sizes, A, B, I, U, S, etc.

Words: 0

Buttons: Save, Cancel




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.

Client - SPDAT Intake

VI-SPDAT SPDAT

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

Service Provider	Start Date and Time	Caseworker	Type	Version	Score	Action
No data is available in the table						

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

Adult v1 Family v1 Youth v1

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.

The screenshot shows a web form titled "New F-VI-SPDAT Version 1 Intake". The form includes several fields: "Caseworker" with a dropdown menu showing "Select an option" and a red star icon; "Start Date and Time" with a date field set to "2019-08-06" and a time field set to "10:52 AM", both with calendar and clock icons and a red star icon; "Pre-Screen Period" with a dropdown menu showing "Select an option" and a red star icon; "Pregnancy" and "Consent" with toggle switches currently set to "No"; "Program" with a dropdown menu showing "Select an option" and plus/minus icons; and "Description" with a rich text editor. The rich text editor has a menu bar with "Edit", "Insert", "Format", "View", and "Table". Below the menu are icons for undo, redo, print, font size, bold, italic, underline, strikethrough, bulleted list, numbered list, and indent. The text area is empty, and the bottom status bar shows "p" and "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	  

1

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

Adult v1

Family v1

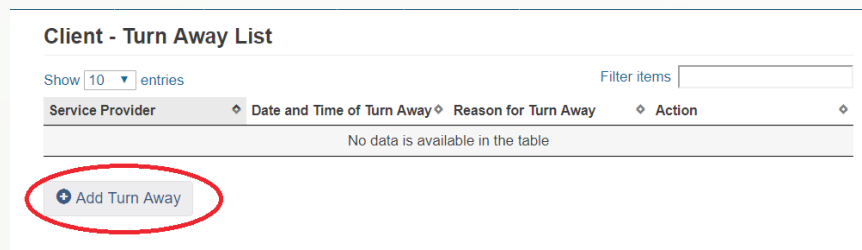
Youth v1

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 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

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 entries Filter items

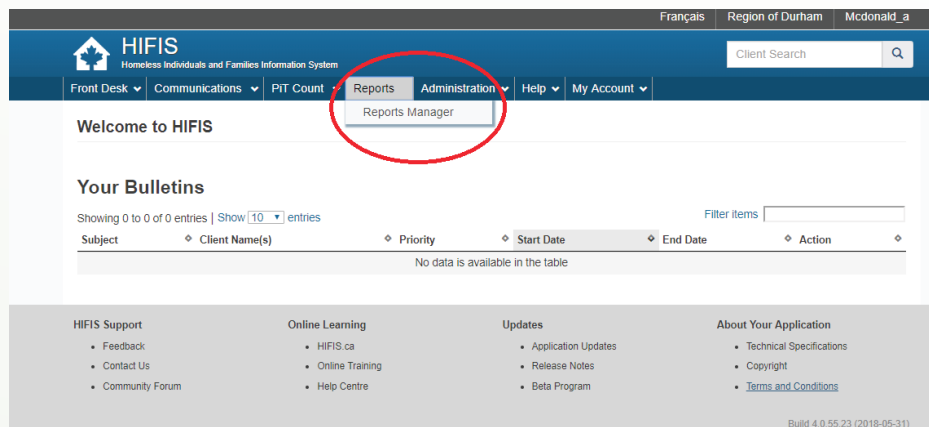
Service Provider	Date and Time of Turn Away	Reason for Turn Away	Action
Region of Durham	2019-08-06 11:40:00 AM	No Beds Available	  

➕ 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

Report Name	Type	Date Created	Last Edited	Description	Action
Active Service Restrictions.rpt	Crystal Report	06-15-2018	12-19-2018	From London	   
Bed Check List.rpt	Crystal Report	06-15-2018	12-19-2018	From London	   
Client Outcomes Report.rpt	Crystal Report	06-15-2018	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	06-15-2018	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	06-15-2018	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.

The screenshot displays the 'Client - Case Management List' interface. At the top, there are tabs for 'Open', 'Closed', and 'All'. Below these is a filter section with 'Past Target Date (1)' and a 'Filter items' search bar. A table lists case details with columns: Caseworker, Service Provider, Goal, Status, and Action. The first row shows 'Bunny, Bugs' as the caseworker, 'Region of Durham' as the service provider, 'Employment' as the goal, and 'Open' as the status. The target date is '2019-07-31', and a red warning icon indicates 'Past Target Date!'. At the bottom left are buttons for 'Add Case' and 'Client - Multiple Goal Session'. At the bottom right, an 'Export to Excel' button (represented by a bar chart icon) is circled in red.

Caseworker	Service Provider	Goal	Status	Action
Bunny, Bugs	Region of Durham	Employment	Open	Target Date: 2019-07-31 ⚠ Past Target Date!

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:

Ashley McDonald
HIFIS Community Coordinator
Community Development Council Durham
(905) 686-2661 ext:225
amcdonald@cdcd.org

