HIFIS – Training Guide

For Site Administrators in the City of Lethbridge

April 2025

Version 1.0

Questions?

Speak with your site administrator, email us at HIFIS@lethbridge.ca, or submit a support ticket or change request at HIFIS - City of Lethbridge

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Purpose Statement for Site Administrators

The purpose of this guide is to support Site Administrators in delivering comprehensive HIFIS training to their agency staff, eliminating the need for new users to attend training at City Hall. By equipping Site Administrators with the tools and knowledge necessary to onboard and support staff internally, agencies can ensure timely and efficient HIFIS access while maintaining compliance with privacy standards.

Before any user can be granted access to the production environment (otherwise known as PROD), they must complete FOIP (Freedom of Information and Protection of Privacy) training. This is a mandatory requirement to ensure all users understand their obligations under Alberta's privacy legislation. Users can fulfill this requirement by:

Taking the Government of Alberta's FOIP: Access and Privacy – Fundamentals course (recommended course of action) found here: **https://www.alberta.ca/external/im-courses/foip-access-privacy-fundamentals-alberta-public-bodies/story.html**,

OR attending a training session delivered by the Community Social Development team at the City of Lethbridge.

By following this approach, Site Administrators play a key role in ensuring their teams are trained, privacy-compliant, and able to begin using HIFIS effectively and responsibly.

Privacy Information

HIFIS operates under strict privacy laws to protect the personal client information. Two key regulations apply in Alberta:

- **Freedom of Information and Protection of Privacy Act (FOIP):** Governs how public bodies collect, use, and disclose personal information. Includes municipal offices, government-funded programs, etc.
- **Personal Information Protection Act (PIPA):** Regulates how private organizations handle personal information. Includes private organizations, such as non-profit organizations.

Custody and Control

Custody and control refer to who is responsible for the protection and management of client data. An organization can have control of information without having custody.

- **Custody**: Physical possession of client records (e.g., storing data in HIFIS). Agencies using HIFIS have custody over their entered data.
- **Control**: Authority over how information is accessed and shared. The City of Lethbridge, as the HIFIS administrator, retains control and sets data policies.

Personal Information

Personal information includes any data that can identify an individual. This may include names, birthdates, gender, contact details, previous interactions with HIFIS, and any Identification numbers. Because HIFIS stores sensitive client data, users must follow strict guidelines when accessing and handling information.

Key Privacy Obligations

- ***Access to Information Requests****:* If an external organization, individual, or the public requests HIFIS data, they must follow official procedures. Staff should not provide client information directly but should refer all request to the Community Social Development department (CSD) at the City of Lethbridge.
- ***Correction Requests****:* Clients and users have the right to request corrections to the information if it is inaccurate. Staff must follow agency protocols for updates and reach out to CSD if assistance is required.
- ***Incident Response****:* Any suspected or actual privacy breaches—such as unauthorized access, disclosure, or data loss—must be reported immediately to supervisors and CSD.

Training and Support

Understanding privacy regulations is essential for all HIFIS users. If you need further training, clarification on FOIP compliance, or guidance on handling information requests, contact:

- **Community and Social Development** at the City of Lethbridge for privacy-related concerns.
- **Your agency's privacy officer or supervisor** for internal data management protocols.

By following these privacy guidelines, staff ensure compliance with provincial laws and uphold the trust of the clients they serve.

Accessing HIFIS

Requirements

To access HIFIS, users will require the following:

- A device with internet access and a web browser (e.g. Google Chrome, Firefox, Microsoft Edge, or Safari. Do not use Internet Explorer).
- The internet address (URL) for login.
- An active HIFIS user account. Users must provide an agency email address to be used for their HIFIS login and a mobile phone number for secure system authentication.
- New users are required to complete the following before they are granted access to the HIFIS system:
    - HIFIS System Training
    - Privacy Education & Training
    - Review & sign the HIFIS User Confidentiality Agreement, confirming their understanding of system usage policies and agreeing to comply with information and security protocols.

User Management

Site Administrators are responsible for performing user management activities on behalf of their agency. This includes:

- Requesting new users or changes to user access
- Notifying **HIFIS support** when agency employees no longer require access
- Duties related to quarterly user access reviews (i.e. reviewing the user list for accuracy and ensuring all users at their agency have the correct permissions assigned).

Understanding DEV and PROD Sites

- **DEV (Development Environment): https://devhifis.lethbridge.ca/**
  A replica of the PRODUCTION environment used for training and testing purposes, and it does not contain live client data. This has a pink banner with the words DEV ENVIRONMENT to let users know that they are in the test environment. A pop-up window will also appear at various intervals as a reminder that you are in the DEV (or testing) environment.

- **PROD (Production Environment): https://hifis.lethbridge.ca/**
  The live site containing real client information that is used for daily operations. Keeping data in the production environment clean and pristine is crucial to ensure data is accurate & reliable, and to maintain the integrity of the system for all users. There are no banners or pop-ups to indicate you are using the live site.

HIFIS Support

Site administrators are responsible for providing the initial level of functional support and guidance to agency users. There are training related documents and forms that can be utilized for information and requests on the city webpage. If support is required beyond the Site Administrators, a support ticket can be submitted to the HIFIS Support Team at the City of Lethbridge.

- **Support Website**: https://www.lethbridge.ca/hifis
  - To submit a Support Ticket: HIFIS Support Ticket
  - To submit a Change Request: HIFIS Change Request Form
- **Email**: hifis@lethbridge.ca (***Note**: This email is to be used for questions and information only).

Login, Passwords, and Secure Authentication

Logging into HIFIS

When a new user account is created, they will receive an email with a link to rest their password. Follow the prompts to complete the password reset and log in with the new password. Users will need to remember their password to enter each time they log into HIFIS.

If a user forgets their password, they can click on the Forgot Password link on the HIFIS login page and follow the prompts to complete a password reset.

Secure Authentication

Each time a user logs in to HIFIS, they must securely verify their identity using a unique token sent via text message to their mobile device. After entering their username and password, the token is automatically sent to their mobile device. Users then enter this token into the 'Security Token' field to complete the authentication process.

Main Screen Overview

Dashboard Navigation

When logged into HIFIS, you will be directed to the main screen, which says Welcome to HIFIS and includes Your Bulletins. At the bottom of the screen, you will find additional information about HIFIS and Support. At the top of the screen, you will see different drop-down menus relative to the user's rights in HIFIS. You will also notice a search bar at the top right of the screen, which can be used to quickly search for clients without needing to go through the drop-down menu. You can select the HIFIS banner to bring you back to this home page, at any point while navigating through HIFIS.

Clients

When going to add clients into HIFIS, it is imperative that you do a search for your client before adding them to HIFIS. This is to avoid any duplication of clients in the system, as other service providers may have already put your client into HIFIS, through previous service interactions. If you access a client previously entered in HIFIS, by another service provider, you will need to **attest** that you are accessing their information for the purposes of coordinated access.

Searching for Clients

As mentioned above, you can go to the top right of the HIFIS main screen to search for your client, or you can go to Front Desk > Clients.

Adding a New Client

After searching for your client and ensuring they don't have a profile in HIFIS, you can select + Add Client. Please ensure that you fill in all the required information (marked by red stars). Select Save.

Consent

There are four types of consent a client can have:

1. **Coordinated Access + Explicit**: Collecting and sharing information with other service providers and the Unique Identifiers List. We aim to always have this consent, if the client is over 18 and are consenting to information sharing. 16 and 17 years olds cannot be added to the Unique Identifier List.

2. **Explicit**: Collecting and sharing information with other service providers and **not** the Unique Identifier List. Client must be 16+.
3. **Inherited**: A client's legal guardian(s) is/are active client(s) in HIFIS and have signed either one, both, or none of the consent forms. The individual under 16 inherits the consent type of their guardian.
4. **Declined – Anonymous**: Your client does not consent to having their information collected or stored by any service provider other than yours and does not consent to having their information put on the Unique Identifier List.

Adding Housing History When Adding a New Client

If you are adding Housing History, you can toggle the Add Housing History to 'Yes' and input the required information there. The type of housing you select will indicate on the client's profile whether they are housed, homeless, or unknown.

Overview of Modules

When you go to the Front Desk drop down menu, you will see Clients, Case Management, Housing Placement, Group Activities, and Diversion. You may not have access to all of these modules, but you will have display access to all of them. This allows for a more streamlined service delivery, increased collaboration between service providers, and better client tracking and management.

Access vs. Display Access

- **Access:** This means you have the ability to add, edit, and potentially delete information within these modules.
- **Display Access:** You will **not** have the ability to add, edit, or delete information, but you will have the ability to see the information in these modules, so you can see which services your client may have accessed.

Key Modules and Their Purpose

Case Management

- Access by navigating:
  - If on the Client Profile: Client Management > Case Management; OR
  - If on the main Welcome to HIFIS page: Front Desk > Case Management > Add Case

Add Case

Case Management is the area of HIFIS that tracks individual goals set by the client and their service provider. Cases = Goals. For each goal, you will need to create a new Case by following the previous step. When you have a case goal that has multiple referral sources, you will need to create a separate case/goal for each referral source. It might seem redundant, but each referral source will have their own session activity to meet the overarching case/goal of the client, so it is important to separate the referrals this way. Please ensure you are creating a Program Intake goal for when a new client is accepted into your program, and then once they are housed, create a program Retention goal for them. After your client has graduated from your program, you can close this Housing Retention goal.

Add Session

Once a case/goal is created, you will be able to Add Sessions to your client's case/goal. Sessions are used to track all the efforts/actions that a caseworker takes to meet the client's case/goal.

Housing Placement

- Access by navigating:
  - Client Management > Housing Placements; OR
  - Front Desk > Housing > Housing Placements > Add Housing Placement

Housing Placement List keeps track of the housing history of your client. It will notify you if your client is past their Expected Move-In date. You can edit and manage housing placements, as well as edit their secured and moved-in dates.

To move a client out, you will need to select Manage Housing Placement, and then select Add Follow-Up. Toggle Final Follow-Up to YES, and fill in the required information, and select Save.

Group Activities

When interacting with a number of clients at the same time, for the same purpose, the Group Activities module can be utilized to capture the information.

- You can access Group Activities by navigating:
  - Front Desk > Group Activities > Add Activity

There are some key things to remember when adding in Group Activities:

- When putting in the number of individuals who attended, ensure you select the save icon beside Client Name(s) and Anonymous Attendees. Only put in the client name if you personally know who they are. There isn't a need to ask everyone for their names, as not everyone (and their consent type) will be in HIFIS.
- After putting in the number of attendees, you will need to select **Mark all as attended.**
- After these steps are completed, you will be able to navigate to the other sections of the Group Activities module.
  - On the Organizers tab, you will need to select the + icon after inputting the names, as this is how the staff and external contact information is saved to HIFIS.

Diversion

When you are providing services to a participant, and an individual need(s) of theirs needs to be fulfilled, you can utilize this module in HIFIS to document it. This could look like providing information on support services or by taking an individual to get a coat during the winter. The individual can remain anonymous when entering the Diversion attempt into HIFIS.

The diversion worker can enter their case notes in the comments or diversion story section on this page.

- You can access Diversion by navigating:
  - Front Desk > Diversion > Add Diversion Attempt