

DATA MIGRATION GUIDELINES: ETO-TO-HIFIS

Data migration is the process of transferring data from one system to another. It involves extracting data from the source system and loading it to the new system. For the HIFIS implementation, all agencies must manually transfer their existing client and service data from ETO into the corresponding fields in HIFIS.

Manually migrating data from an aged system allows for cleansing, standardization, and selective transfer of only accurate and relevant information. Though time-intensive, it minimizes errors, improves data quality, and ensures better alignment with the new system, ultimately supporting business goals.

Data Migration Instructions

Following the data mapping below, please review and move all required data from ETO into HIFIS. If a field is missing from ETO or you are unsure of the accuracy of the information, please confirm with participants.

1. Data should be **copied** from ETO into HIFIS, **do not delete** any current data in the ETO software.
2. Kayla Podrasky will provide each agency with an ETO checklist to verify all ETO clients have been moved successfully to HIFIS.
3. When moving client data, complete the following fields in the HIFIS Custom Table on the client file:
 - a. Date client was moved from ETO to HIFIS
 - b. Client unique ETO Case Number (Client identifier in ETO)
4. Only current active client + service data can be copied into HIFIS. No historic or closed client data can be entered into HIFIS.
 - a. Only copy over the client service history data needed to maintain continuity in supporting the individual. Ie: Important milestones/information for the agency to know, remember, or report on.
 - b. Previous SPDAT's can be brought over by uploading old SPDATs as documents to the client file or re-entering SPDAT data in HIFIS and back date to the original date the SPDAT was taken. Move any assessments that occur or are due between January and March 2025. Beyond that, copying up to one year of assessments aligns with the current assessment schedule.
 - a. As a general guideline, copy only 6 to 12 months of service history for current clients, including service plans, assessments, efforts, and referrals. If focusing solely on efforts, staff can print them for reference as needed, making a 6-month to 1-year range reasonable. Copying beyond this may become too cumbersome.

5. **ETO access will expire as of April 1, 2025.** Please ensure you have either migrated your data or print any information required prior to this date. The Government of Alberta will provide Agencies with a copy of their ETO data for future reference.
6. UIL (formerly Bynames List - BNL) We will phase out the existing BNL spreadsheet **once all applicable agencies have been onboarded to HIFIS**. Until then, agencies will be required to ensure accurate client information is entered in both HIFIS and the BNL spreadsheet.
7. **IMPORTANT:** Client housing history must be entered correctly in HIFIS when moving over data to ensure the BNL list within HIFIS generates correctly.
8. For the month of March, the following information must be double posted - both in ETO and in HIFIS:
 - a. Efforts/Service Plans; Referrals; SPDAT assessments.
9. Intake Assessments; Follow Up Assessments; Exit Interviews:
 - a. Until March 31, 2025, post in ETO but there is no requirement to post the same in HIFIS. The Government of Alberta is currently working through processes on the future of these assessments and will update at such time as decisions have been made.
 - b. Any assessments that are scheduled to be completed on March 31st – in all possible cases please complete in advance and enter in ETO when they are complete – if the schedule is off it is okay. This is because we will not be able to access ETO as of April 1, 2025, and will ensure as much information from the previous contract year as possible is in ETO.
 - c. Please print off any pertinent information from ETO that you will require in order to support participants. As we do not have access to ETO as of April 1, 2025, **any information you need must be printed off prior to that date.**

Data Mapping

The table below outlines what data must be moved and how the data from ETO maps to the corresponding fields in HIFIS.

#	ETO field name	Description	Example	HIFIS field name	Description	Example
CLIENT DATA						
1	ETO Case Number	Unique number automatically assigned to a client in ETO	12345	ETO Case Number	Custom Table in Client record to store the ETO Case Number (client's ID number in ETO) and the date the client was migrated to HIFIS.	12345
				Date Client File Moved		February 26, 2025
2	BNL ID	Unique number assigned to the individual by using letters from their name and digits from their DOB	DOJA1197 (Jane Doe, DOB November 1, 1997)	N/A	The Unique Identifier is automatically assigned in HIFIS.	

#	ETO field name	Description	Example	HIFIS field name	Description	Example
3	First Name	Client first name	Jane	First Name	Client first name	Jane
4	Last Name	Client last name	Doe	Last Name	Client last name	Doe
5	Address	This tracks the individual's location upon Intake.	For example – Couch surfing; No Fixed; Shelter; etc.	Address	Enter current address for client.	
				Housing History	Add a Housing History Record to capture clients current housing status.	
6	Date of Birth	Client's date of birth	Jan 31, 1997	Date of Birth	Client's date of birth	Jan 31, 1997
7	Phone Number	Client's phone number	403-555-1234	In Client - Details under "Contact Info"	Various types of client contact information can be added here.	
8	Also Known As (AKA) / Nickname	Other names the individual may go by.	le: Hollywood	Alias 1 Alias 2	Other names the individual may go by.	le: Hollywood
9	What gender do you identify with?	The individual's gender identity	May include Male; Female; Transgender	Gender	The individual's gender identity. The options are increased from ETO.	
10	Ethnicity	The ethnic identity the individual discloses	From ETO: Aboriginal Caucasian First Nations (Treaty) Other	Indigenous Status AND Racial Identity	First select from the drop down menu what has been disclosed regarding Indigenous Status. Then select Racial Identify from the drop down menu.	
11	Citizenship and Residency Status	The individual's status in Canada	This could be Canadian Citizen; Permanent Resident; etc.	Citizenship/Immigration Status	The results of this are very similar to what is in ETO.	
12	Migrant Status	Tracks recent moves to the City of Lethbridge and/or to the Province	Options include: Recent Immigrant (w/in 3 yrs) , New to Province (w/in 3 mon)	Does not exist in HIFIS		
13	Aboriginal Band/Settlement	The Band or Settlement that the individual's family descends from.		Does not exist in HIFIS.		
14	Primary Language	The language the individual prefers to use.		Does not exist in HIFIS.		
15	Health Card #			Does not exist in HIFIS.	HIFIS does not track or store health data. If your program requires it, please use an alternative storage solution.	
16	Did you serve in the Canadian Forces?	Used for tracking Veteran status in ETO.		Veteran Status	Select from the drop down menu options.	

#	ETO field name	Description	Example	HIFIS field name	Description	Example
CLIENT SERVICE HISTORY DATA						
1	Recent Referrals	Places that the Case Manager has suggested the individual attend.	Individual does not have income – case manager applied for AB Works.	Referred From / Referred To in Client Case.	Referred From: Agency that sent the client to you Referred To: Agency you are sending the client next.	Within a Case with Goal of “Obtain Income” Referred From: Your Agency Referred To: AB Works
2	Efforts	Activities completed with the client or on behalf of the client.	Case Manager met with individual to work on service planning.	Session	Acts of service completed with or for a client. Completed in HIFIS by adding a Client Session to a Case Goal.	ie: client meetings/calls, filling out forms, etc.
3	Service Plans	Goals set by the Client that guide the work completed by case managers.	To obtain housing for example.	Create one Case and Goal for each ETO Service Plan/Goal	Case: a plan to address client needs involving coordinated services and support. Goal: specified client outcome	Case/Goal #1 – Obtain Income Case/Goal #2 – Connect with Housing
4	Assessments	Surveys completed by the case manager in order to document progress and/or adherence to outcomes.	SPDAT;	SPDAT	Re-enter SPDAT data in HIFIS with the original assessment date.	
			Intake;			
			Follow Ups	Set Follow-up date in Client Case or Session		