Version 2: Updated March 27, 2025

Modules Testing – Case Management: Supportive Housing

Note: *It is likely you will be documenting your main Case Management efforts in the Case Management Module (see Case Management training materials). However, the Housing Placement Module can be utilized when you are attempting to locate, secure, and move a client into housing.*

Supportive Housing programs provide safe and stable housing for eligible individuals who are homeless or at risk of homelessness, with the goal of preparing them for independent, market-based housing or other suitable long-term housing. These programs offer life skills training, housing readiness supports, and case management to help participants transition successfully into stable housing environments and develop the necessary skills for long-term self-sufficiency.

When accessing the Housing Placement module, there are two additional lists that assist users with accessing records in a timely manner: Follow-Ups Due this Month and Past Target Date for Housing Placement from the "Filter options" button above the list. Click the name of the list to expand it and view the records.

On the Housing Placement Details page, the status at the top of the page indicates the stage at which the client is in a placement attempt: from housing not secured, to moving into their house. This page also lets you see and record details on housing searches and follow-ups performed after a client has moved in.

*Note – Before commencing the process of creating a housing placement record for the client, ensure to first review their housing placement history (Front Desk > Clients > Search Client > Client - Details > Client Management > Housing Placements) to see if they have another open placement of Moved Into Housing status. If they do have an open Moving Into Housing status, contact the service provider that entered it or HIFIS Support Desk and have the placement closed.

Similarly, ensure to check the client's Housing History record (Client > Client Vitals > Client Information > Housing History) ahead of time to see if they have an open Housing History. **The system will not allow a client to be moved into a placement while the system shows no End Date for their Housing History.**

Test Modules	Action
1. Housing Placement Record	New Record **(Create Housing Placement Record)** in Client Profile • Front Desk > Housing > Housing Placement > + Add Housing Placement
2. Edit Housing Placement Record	New Record **(Edit Housing Placement Record)** in Client Profile • Front Desk > Housing > Housing Placement > Housing Placement List page > Locate Housing Placement Record you want to Edit
3. Housing Placement - Secure Housing Unit	New Record **(Secure Housing Unit for Client)** • Front Desk > Housing > Housing Placements > Housing Placements List > Action – Manage Icon > + Add and Secure Housing Unit
4. Housing Placement - Record Client Move In	New Record **(Record Client Move In)** • Housing Placement Details > Move In
5. Housing Rent Supplement	New Record **(Add Rent Supplement)** • Front Desk > Clients > Search Clients > Client – Details > Client Management > Housing Placements > Manage > + Add Subsidy
6. After Client has "Moved In"	New Record **(Add Attempts and Follow-Ups)** • Front Desk > Housing > Housing Placements > Housing Placement Details > Attempts & Follow-Ups
7. Entering Landlord Information	New Record **(Add Landlord)** • Front Desk > People > + Add Person
8. Record Maintenance Work	New Record **(Record Maintenance Work)** • Front Desk > Housing > Housing Unites > Edit > Maintenance

Preconditions to Case Management: Supportive Housing

Prerequisite	• Client Profile/Record has been created in HIFIS. • Review client Housing History and Housing Placement before completing one of the following: • Client is unhoused and need to obtain housing and/or temporary safe shelter or; • Client is in transition (moving away from unhealthy home situation, older and moving out but does not have supports at home to transition to living away from home etc.)

1. Procedure to Add Housing Placement Record

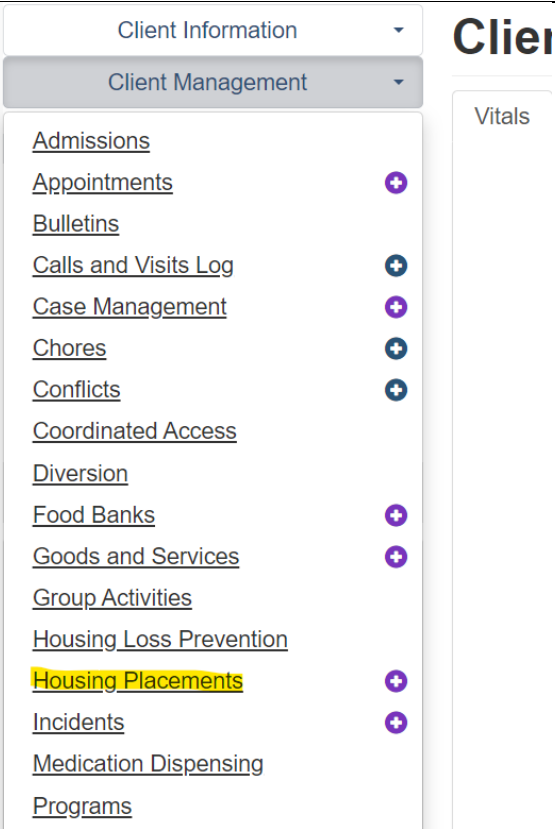| Action	
1. From the HIFIS main page, navigate to Front Desk > Housing > Housing Placements > + Add Housing Placement	

2. From the Add Housing Placement page, fill in all required fields marked with a red star including any optional fields for reference.	**Add Housing Placement** Client Name [▾] ★ Caseworker [Select an option ▾] ★ Housing Type(s) Sought [Select an option] [**+**] [**−**] ★ Search Started Date [2024-11-20 📅] ★ Target Date [📅] Program [Select an option] [**+**] [**−**] Referred from [Select an option ▾] Referred to [Select an option ▾] [💾 Start Housing Placement] [✖ Cancel]
3. Type the pre-existing Client Name that is looking for a Housing Placement.	**Client Name** [▲] ★ [ ] **Caseworker** Please enter 3 or more characters ★ **Type(s) Sought**
4. Select the Caseworker responsible for the housing placement.	**Caseworker** [Select an option ▾] ★
Note – The HIFIS system will auto populate the name of the user entering the Housing Placement information if they have Caseworker as a role. You may select a different user if adding the record on behalf of someone else.	
5. Select one or more Housing Type(s) Sought field - **Housing Type(s) Sought**: will create a bunch of housing units in the background in HIFIS, ensure they	**Housing Type(s) Sought** [Select an option] [**+**] [**−**] ★

are tagged with a "housing type". Select all (+) for testing purposes. - If you only have 1 housing unit in here, it may be difficult for the system to detect (depending on if the housing unit is tagged with this ahead of time in the Housing Units List). - Will add the type of housing your client wants to be in.	
6. Confirm/Select the Search Started Date for a housing placement for client, if applicable, you may change this date manually.	**Search Started Date** 2024-11-22 📅 ★
7. If applicable, enter the Target Date by which you hope to have the client placed.	**Target Date** 📅
8. If applicable, select the program that is involved (funding) the services provided to the client.	**Program** Select an option ✚ ➖

9. Click the Start Housing Placement button.	Start Housing Placement

2. Procedure to Edit a Housing Placement Record

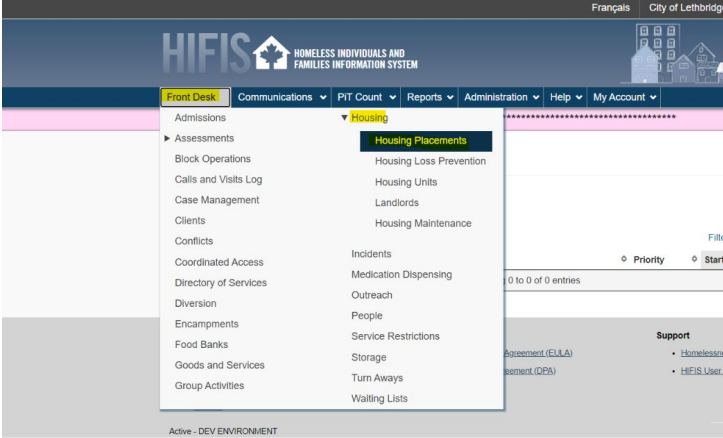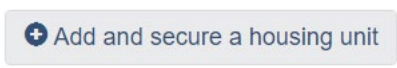| Action	
1. From the HIFIS main page, navigate to Front Desk drop down menu and select Housing > Housing Placements	Client Information ▾ Client Management ▾ Admissions Appointments ⊕ Bulletins Calls and Visits Log ⊕ Case Management ⊕ Chores ⊕ Conflicts ⊕ Coordinated Access Diversion Food Banks ⊕ Goods and Services ⊕ Group Activities Housing Loss Prevention Housing Placements ⊕ Incidents ⊕ Medication Dispensing Programs Clien Vitals
2. From the Housing List page, locate the Housing Placement record you wish to modify and click on the Edit icon.	✏️

3. On the Client - Edit Housing Placement page, you can edit the existing page and add any additional information you may have missed.

Client - Edit Housing Placement

Search Started Date	2024-11-04	★
Target Date		
Housing Secured Date	2024-11-04	★
Date Moved In	2024-12-03	★
Next Scheduled Follow-up		
Program	N/A	
Referred from	Select an option	
Referred to	Select an option	
Caseworker	Case Manager, She... × ▾	★
Housing Type(s) Sought	× Emergency Shelter ＋ −	★

💾 Save   ✖ Cancel

3. Procedure to Secure a Housing Unit for Client

Action	
1. From the Front Desk drop down menu, click Housing and select Housing Placements.	
2. From the Housing Placement List page, navigate and select the correct Housing Placement record for the client and select the Manage icon.	⚙
3. From the Housing Placement Details page, you will see the title for the client housing placement page as "Housing Placement Details - Housing Not Secured".	**Housing Placement Details - Housing Not Secured**
4. Select the + Add and Secure Housing Unit button.	⊕ Add and secure a housing unit

5. Fill in all required fields marked with a red star and if applicable, any optional fields from the Add Housing Unit prompt open text box.	**Add Housing Unit** Housing Type — Select an option ★ Status — Select an option ★ Status Date — 2024-11-20 📅 ★ Place Name — Address Line 1 — ★ Address Line 2 — Unit/Apartment Number — Country — Canada × ▾ ★ Province/Territory — Select an option ▾ City — Select an option ▾ Postal Code — Expected Move In Date — 2024-11-20 📅 💾 Save and secure Close
6. Select the Housing Type of the housing unit.	**Housing Type** Select an option ▾ ★
7. Select the Status (condition) of the selected housing unit.	**Status** Select an option ▾ ★
8. Enter the Status Date for when confirming the condition of the housing unit.	**Status Date** 2024-11-22 📅 ★
9. Enter the address information of the housing unit. For Address Line 1.	**Address Line 1** ★

10. If applicable, after entering the Country of which the housing unit is located (Canada), enter the following fields for additional information: • Province/Territory • City • Postal Code	**Country** Canada × ▾ ★ **Province/Territory** Select an option ▾ **City** Select an option ▾ **Postal Code**
11. Enter the Expected Move-In Date by which you hope to move your client into the housing unit.	**Expected Move In Date** 2024-11-20 🗓
12. Once all required fields have been inputted, select the Save and Secure button.	💾 Save and secure
Note – You can End Housing Placement Record after creating and starting a housing placement for your client by clicking the End Housing Placement button at the bottom of Housing Placement Details page. This option (button) will only be available through the Housing Not Secured and Housing Secured stages. ✖ End Housing Placement	

4. Procedure to Record Client Move In

*Note – If the client has an active housing history record, a prompted Warning message will appear above the Move In fields:

⚠ **Warning!**

The client has an active housing history record, you can proceed with the move in, but are required to provide an end date for the active housing history record. **Go to active client housing record**

Before proceeding with the Move In function, a link is provided in the Warning message for you to go to the client's Housing History and provide an End Date for their current Housing History:

Display Housing History

Details   Follow-ups   Subsidies

Housing Type   Couch Surfing – Staying Temporarily with Others

Start Date   2024-09-02

End Date   - -

Select the Edit button at the bottom of Display Housing History and select the End Date for when client had moved out of their original housing:

Client - Edit Housing History

Details   Follow-ups   Subsidies

Housing Type   Couch Surfing – Staying Temporarily ... × ▾ ★

**Start Date**   2024-09-02 📅 ★

End Date   2024-11-20 📅

Please Note - For reporting purposes, a client is defined as experiencing homelessness if any of the following Housing Types are recorded/chosen when creating a new client profile in HIFIS (Add Housing History):

- Add Client > Add Housing History > Housing Type or;

- Client Information > Housing History:

If any of the below Housing Type(s) option are selected, the client will display as Homeless for their current Housing Status:

- Abandoned Building
- Emergency Shelter
- Encampment/Campsite
- Hostel
- Hotel / Motel
- Makeshift/Street
- Staying with friends/Relatives (Couch-surfing)
- Trailer/RV without rent
- Vehicle

Action	
1. With he Housing Placement Details page now set as "Housing Placement Details – Housing Secured", select the Move In button	**Housing Placement Details - Housing Secured** ➜ Move In
2. Once the above function has been updated, return to the Move In function for Client and proceed with filling in all required fields marked with a red star and if applicable, any additional/optional fields.	**Move In** Rent $ [____] Move In Date [2024-11-20] 📅 ★ Telephone 1 [____] Telephone 2 [____] Mobile Phone [____] Email Address [____] Use Exact Follow-up Date [No] Months Until Follow-up [____] 💾 Move In Close
3. Enter the Rent amount charged by the Landlord (optional)	**Rent** $ [____]
4. Enter the Move In Date by which the client had moved into the unit.	**Move In Date** [2024-11-22] 📅 ★

5. If applicable, enter the Landlord's phone numbers and email address fields (optional)	**Telephone 1** [_____] **Telephone 2** [_____]
6. Change the "Use Exact Follow-up Date" to Yes.	**Use Exact Follow-up Date** [Yes]
7. Enter the appropriate Months Until Follow-up from the date you are entering the Move In for client. This will generate a scheduled reminder for the Case Manager as first required follow-up in HIFIS.	**Next Scheduled Follow-up** [_____ 📅]
8. Select the Move In button.	💾 Move In
9. On the Housing Placement Details page, the title will now show as "Housing Placement Details – Moved Into Housing"	**Housing Placement Details - Moved Into Housing**
Note – HIFIS generates a report of upcoming Housing Placements follow-ups that are due.	

5. Procedure to Add Rent Supplement & Housing Placement Attempts

Note – If the client does not have an Open Housing Placement in HIFIS, see previous procedure above (Procedure to Entering a Housing Loss Prevention Record) or;

If the client has an Open Housing Placement, navigate to the client's Housing Placement Record: Front Desk > Clients > Search Client > Client – Details > Housing Placements > Housing Placement List

Action	
1. From the Client- Details page, navigate to Client Management and click on Housing Placements > Housing Placement List	Client Information ▾ Client Management ▾ Admissions Appointments ⊕ Bulletins Calls and Visits Log ⊕ Case Management ⊕ Chores ⊕ Conflicts ⊕ Coordinated Access Diversion Food Banks ⊕ Goods and Services ⊕ Group Activities Housing Loss Prevention Housing Placements ⊕ Incidents ⊕ Medication Dispensing Programs Service Restrictions ⊕ SPDAT Storage ⊕ Surveys

|	
2. Click on the Manage Icon beside the Housing Placement record.	**Housing Placement List** ▼ Filter Options Showing 1 to 2 of 2 entries | Show 10 ⌄ entries 	Service Provider ◇	Caseworker ◇	Search Started Date ◇	Status	Action
---	---	---	---	---
City of Lethbridge	Manager, Case	2024-11-20	Moved Into Housing Next Scheduled Follow-up: 2025-05-20	⚙ ✏	
3. At the bottom of the client's Housing Placement Details page, select the Subsidies tab and click on the + New Subsidy button	Follow-ups Attempts Subsidies Documents Showing 0 to 0 of 0 entries | Show 10 ⌄ entries Filter items _____ | Program Name ◇	Service Provider ◇	Amount ◇	Start Date ◇	End Date ◇	Action
---	---	---	---	---	---
No data is available in the table						 ⊕ New Subsidy ← Back to Housing Placement List ✏ Edit Placement Details
4. For the New Subsidy prompted text box, fill in all required fields and if applicable, optional fields as well. **Please indicate in the comments whether the subsidy is paid to Landlord or paid to Client.**	**New Subsidy** Program Select an option ▾ ★ Start Date 2024-11-20 📅 ★ Reason for Service Select an option ▾ ★ End Date 📅 Amount $ 0 ★ Payment Date 📅 Pay Frequency Select an option ▾ Comment 💾 Save Close
5. For Program, enter the program that is	**Program** Select an option ▾ ★

funding the rent supplement.	
6. For the Start Date field, enter the date for when the client will start to receive the rent supplement.	**Start Date** 2024-11-20 📅 ★
Note – The Start Date cannot be before the Move In date for the client.	
7. Enter the Reason for Service	**Reason for Service** Select an option ▼ ★
8. For the End Date field, ensure you enter the date for when you predict/estimate you will stop providing the supplement to the client.	**End Date** 📅
Note – The End Date must be the last day of the month for when you estimate the client will no longer be receiving the supplement.	
9. In the Amount field, enter the monthly supplement amount you will be providing to the client.	**Amount** $ 0 ★
10. The Payment Date and Pay Frequency are optional fields to fill in if applicable.	**Payment Date** 2024-11-30 📅 **Pay Frequency** Monthly ✕ ▼
11. Click Save	💾 Save

*Note – Ensure you enter the **Monthly** supplement amount for *Rent Supplement* for the client, not the full amount you are providing for the whole period for which they will be receiving supplement. Entering the amount for the whole period will show up on reports as though you are providing the full amount monthly (e.g., January Rent Supplement for XYZ Client - $8,400.00, and should rather be January Rent Supplement for XYZ Client - $700.00).

6. After Client has "Moved Into Housing"

| 1. Once clicking Save, you will be redirected to the Housing Placement Details page of the client.	

2. Navigate down the page and click on **"Attempts"**: *Housing Placement Attempt button – indicates when you tried to find housing for client and it did not workout (not a good fit, couldn't afford it etc.)*	**Housing Type** Single Room Occupancy **Date Moved In** 2024-12-05 **Rent** $1000.00 **Address** 1234 Riverstone Blvd **Status** Excellent **Landlord** Follow-ups **Attempts** Subsidies 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 ← Back to Housing Placement List ✎ Edit Placement Details

Note: You will notice that there is no "Housing Placements Attempt" button available as the client has their current housing status set to **"Moved Into Housing"**. *The Housing Placement Attempt button will only be available to utilize before any point of moving the client into housing (i.e, Housing Not Secured and Housing Secured stages).*

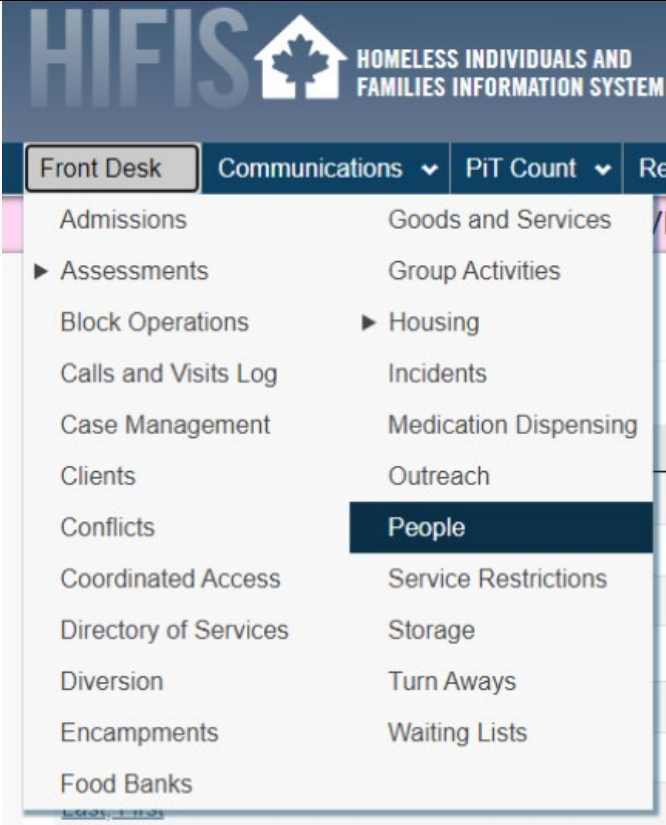|	
3. *Follow-Ups* – indicates you have checked in with the client and all is well. Can add comments and date you followed up	**Follow-ups** Attempts Subsidies Documents Showing 1 to 1 of 1 entries | Show 10 entries Filter items Follow-up Date Service Provider Caseworker Months Elapsed Action 2024-12-05 City of Lethbridge Supervisor, CM 0 ✎ 🖼 1 ⊕ Add Follow-up

and indicate if they are still housed.	

7. Procedure for Entering Landlord Information on Housing Placement

*Note - If the landlord does not appear in the dropdown list you will need to add them in the People module (Front Desk > People > + Add Person).

Action	
1. From the HIFIS main page, navigate and select Front Desk and click on People.	

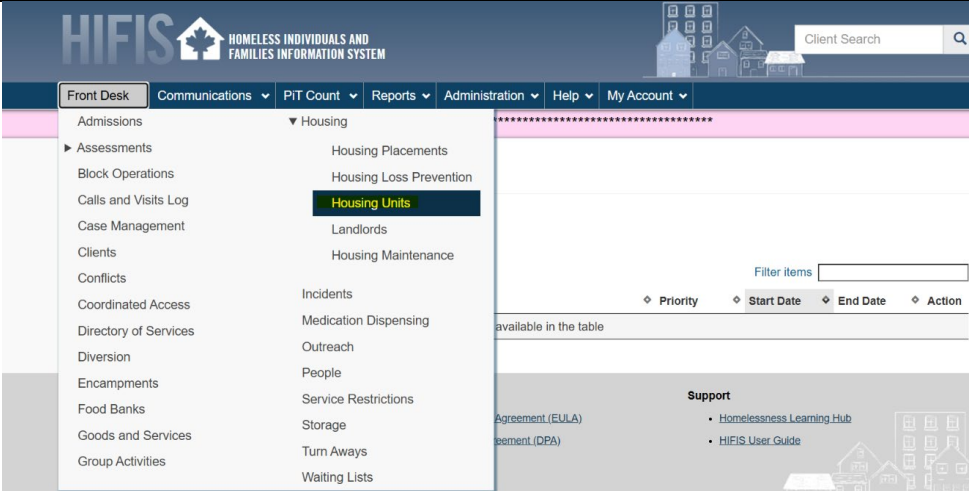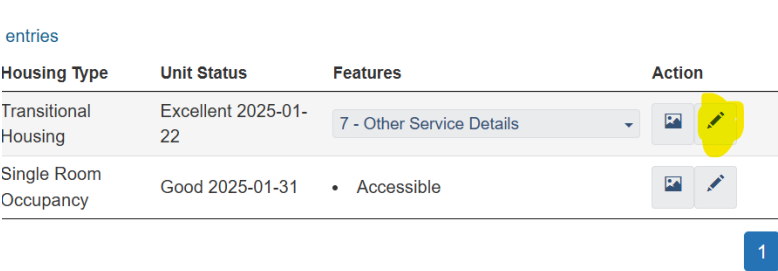|	
2. From the People List, elect the + Add Person button below.	**People List** Filte **Full Name** **Gender** **Role(s)** Anonymous, Anonymous Don't Know Baines, Amber Female Staff Case Manager, Shelter Don't Know CaseWorker Eyjolfson, Kristina Don't Know 2 Roles Fang, Weiyu Don't Know Contract Worker Jiang, Canming Don't Know Contract Worker Last, First Other (Not Listed) Staff Manager, Case Don't Know CaseWorker Moncrieff, Allison Don't Know Unassigned Navigator, System Don't Know Staff **Q New Search** **⊕ Add Person**
3. From the Add Person page, fill in in all required fields and if applicable, any optional fields.	**Add Person** Last Name ★ First Name ★ Middle Name Gender Select an option ▾ ★ Alias 1 Alias 2 Date of Birth Known Yes Date of Birth 📅 Roles Select an option + − Active Yes 💾 Save ✖ Cancel
4. *On the **"Roles"** field, click in the option text box and ensure you select the **"Landlord"** option	Roles Select an option + − Active Emergency Contact Volunteer Landlord 💾 Save ✖ Cancel Probation/Parole Officer Social Assistance Officer

5. Ensure the status of the new Person profile is set to "Yes" for the Active field.	**Active** **Yes**
6. Click Save.	**H Save**

8. Procedure to Record Maintenance Work

Action	
1. From the HIFIS main page, navigate over to Front Desk drop down menu and select Housing > Housing Units.	
2. From the Housing Unit List page, select the housing unit by which you want to add maintenance work to, and click on the Edit icon.	

*Please Note – when clicking on the Housing Units List page and no housing unit options are appearing, one tip to fix this is by clicking on the "Filter Options" button and filtering the "Geographic Region" to Lethbridge. Click on the "Apply Filter" button and it will then generate all the housing units under the Geographic Region of Lethbridge:

When adding a New Housing Unit, always ensure that you fill in the Geographic Region field and select Lethbridge.

3. On the Edit Housing Unit page, select the Maintenance tab.	**Edit Housing Unit** Details ★ Address ★ Photos <mark>Maintenance</mark> **Place Name** Sky Homes Supportive Livir **Address Line 1** 450 4th Ave N **Address Line 2** **Unit/Apartment Number** **Country** Canada ✕ ▾ ★ **Province/Territory** Alberta ✕ ▾ **City** Lethbridge ✕ ▾ **Postal Code** T1H6K2
4. Select the "+ Add Maintenance Work" button.	**Edit Housing Unit** Details ★ Address ★ Photos Maintenance **No Records** <mark>⊕ Add Maintenance Work</mark>
5. From the Add Maintenance Work page, select the type of maintenance work being done.	**Add Maintenance Work** **Maintenance Work** Select an option ▾ ★

6. If applicable, add any comments in the "Description" field for the maintenanc e work being done.	**Description**
7. If applicable, select the Contractor who is performing the work. *Please note – The contractor must already be entered in the People module to appear in this field.	**Contractor** Select an option ▲ Tuner, Will **Completed** **Company**
8. If applicable, indicate whether the work has been completed including the company name and additional comments concerning the	**Work Completed** No **Company** **Comments**

maintenance work being done.	
9. Select the date by which the maintenance work is scheduled to commence, and if applicable, select the scheduled end date of the work.	**Scheduled Start Date** [ ] 🗓 ★ **Scheduled End Date** [ ] 🗓
10. If applicable, select the Estimated Cost of the maintenance work. Additionally, select the "Actual From Date" by which the maintenance started. Finally, enter the "Actual Cost" of the maintenance work performed on the	**Estimated Cost** $ [ ] **Actual From Date** [ ] 🗓 ★ **Actual To Date** [mm/dd/yyyy] **Actual Cost** $ [ ]

housing unit.	
11. Click on "Save".	![Save icon] **Save**
12. After clicking Save, user will be re-directed to the Edit Housing Unit page and will see the entered information. Ensure after reviewing the logged maintenance work, that user clicks the save button.	**Edit Housing Unit** ❓ Details ★ Address ★ Photos Maintenance Maintenance Work ◇ Description ◇ Scheduled Date ◇ Contractor ◇ Actual Cost ◇ Action ◇ Siding 2025-01-16 Tuner, Will $500.00 ✏️ 🗑️ Total: $500.00 ➕ Add Maintenance Work 💾 Save ✖ Cancel