PROGRAM INTAKE

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HOUSING PLACEMENT

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HOUSING RETENTION

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HOUSING EVICTION PREVENTION (if required)

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PROGRAM EXIT

PROGRAM INTAKE

Purpose: To document client acceptance to the agency program and record onboarding activities and support provided.

Steps required:
- Create a "Program Intake" case goal on the client file.
- Complete the "Program Intake Survey" via Custom Tables within the "Program Intake" case goal.
- Update Client Details and Client's Housing History record in HIFIS.
- Create session activities to record onboarding support provided. For example: Warm Transfer, Case Planning, Completing Forms, SPDAT Assessment
- Once Program Intake is complete, close this case goal.

HOUSING PLACEMENT

Purpose: To record support services provided for client to find and secure housing.

Steps required:
- Create a "Housing Placement" Case Goal on the client file.
- Create session activities to record support provided to obtain housing. For example: Apply for Permanent Housing, Completing Forms, Transportation
- Document all housing attempts in a HIFIS housing placement record
- Close the goal once housing is secured or placement efforts conclude.

HOUSING RETENTION

Purpose: To document the support provided to help the client maintain stable housing over time, and to track the effectiveness of ongoing services through follow-up surveys.

Steps required:
- Create a "Housing Retention" Case Goal on the client file.
- Create session activities to record support provided to maintain stable housing. For example: Assistance with decision-making, Accompaniment to appointments, Follow-up
- Complete the "Program Follow-Ups Survey" via Custom Tables within the "Housing Retention" case goal at the required intervals for your program (ie: at 3, 6, 9, or 12 months).
- Close the goal once Case Management support concludes for the client.

HOUSING EVICTION PREVENTION

Purpose: Document support provided to identify and respond to early or sudden housing instability to prevent eviction.

Steps required:
- Create a "Housing Eviction Prevention" Case Goal on the client file.
- Create session activities to record support provided to help the client prevent housing instability or eviction. For example: Obtain financial assistance, advocacy, crisis intervention, completion of forms
- Close the goal once the client is no longer at risk of losing their housing.

PROGRAM EXIT

Purpose: Record the completion of program service delivery and document final outcomes and program effectiveness upon client exit.

Steps required:
- Create a "Program Exit" Case Goal on the client file.
- Create session activities to record client exit procedures and document program completion. For example: Warm transfer, SPDAT Assessment, Completing forms
- Complete the "Program Exit Survey" via Custom Tables within the "Program Exit" case goal.
- Close the case goal once the client has completed their exit from your agency program.