

# HIFIS – Cheat Sheets

For Service Providers in the City of Lethbridge

## Peak – Funds Administration

March 2025

Version 1.0



### Questions?

Speak with your site administrator, who can email us at [HIFIS@lethbridge.ca](mailto:HIFIS@lethbridge.ca), or submit a support ticket at [HIFIS - City of Lethbridge](#) on your behalf.

## Funds Administration

Within HIFIS, the Funds Administrator oversees financial supports for individuals in the Sustainable Housing Solutions program with Peak Support Services. Their role ensures accurate financial management, record-keeping, budgeting, and income support and banking assistance. All activities in HIFIS fall under one overarching financial goal.

### Funds Administrator Goal

1. Search for a client using the Client Search bar at the top right of the site, or by going to Front Desk > Clients > Client Search and selecting your client.
2. Select Client Management > Case Management > Add Case
3. Goal: Financial Stability
4. Referred from: Whichever service provider/program sent in the referral.
5. Referred to: Peak Support Services – Funds Admin.
6. Save
7. Navigate to Sessions tab
8. Add Session

### Common Funds Administrator Sessions

- Apply for Social Assistance
- Obtain Financial Assistance
- Funds Request
- Budgeting
- Open Bank Account

In most cases, the **'Referred From'** field will be your agency, and the **'Referred To'** field will also be your agency. However, if you are referring a client to a specific financial program—such as financial counseling, AISH, Alberta Works, etc.—please indicate that in the **'Referred To'** field.