

Version 2: Updated March 11, 2025

Training Materials – Entering Case Management & Record/Related Activities

This training module provides an overview of case management processes within the HIFIS system. It covers the fundamental aspects of client intake, assessment, case planning, and documentation within the system. By the end of this module, case managers will be equipped with the knowledge and skills to effectively use HIFIS for managing client data and supporting individuals experiencing homelessness.

The Case Management module allows the service provider to keep records of the activities done with a client to reach pre-determined goals. Each goal (desired outcome) that a caseworker and client work towards is a separate record in the Case Management module. For example, if a client has a mental health issue they would like to work on and they would also like to find employment, two Case Management records would be created for the client.

Quick steps to become comfortable with for Case Management in HIFIS:

1. Case Management Summary List - (Front Desk > Case Management)

- Shows a list of all case plans under your agency created at the site for a given period of time.

2. View All Client Case Session Details or Add Session – (Front Desk > Clients > Search Client > Client Vitals > Client Management – Case Management > Sessions > View All Sessions Details or Add Session).

- Displays all case session details for a client's case plan or add a new case session.

Training Module	Action
Case Management	New Record (Add Case/Goal) in Client Profile – Case Management List is created <ul style="list-style-type: none"> Search Client > Client Vitals > Client Management – Case Management > Client – Case Management List > Add Case.
Case Management	New Record (Add Session) under the Sessions tab in Display Case Management is created <ul style="list-style-type: none"> Client – Case Management List > Sessions > Add Session.

Case Management	<p>New Record (Add Comment) under the Case Comments tab in Display Case Management is created</p> <ul style="list-style-type: none"> Client – Case Management List > Display Case Management > Case Comments > Add Comment.
Case Management	<p>New Record (Add Document) under the Display Case Management list is uploaded:</p> <ul style="list-style-type: none"> Client – Case Management List > Display Case Management > Documents > Upload Document.
Case Management	<p>New Record (Add Multiple Goal Session) under Client - Case Management List</p> <ul style="list-style-type: none"> Client – Details > Client Management > Case Management > Client - Case Management List > Client – Multiple Goal Session
Case Management	<p>New Record (Add Service Restriction/Alert) under Client Record</p> <ul style="list-style-type: none"> Front Desk > Service Restrictions > + Add Service Restriction
Case Management	<p>New Record (Add SPDAT Assessment to Client Record/Profile)</p> <ul style="list-style-type: none"> Front Desk > Clients > Client Search > Client – Details (Vitals) > Client Management > SPDAT

Enter a Case Management & Record Related Activities

Prerequisite	Client Profile/Record has been created in advance.
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Benefits of Case Management in HIFIS:

- Enables user to create goal setting (i.e. Child Welfare, Crisis Intervention, Conflict Resolution, Employment, housing Placement, Financial Stability etc.).
- All session details can be recorded.
- Comments (Case Comments) regarding each case and session can be recorded.
- Documents for backup can be uploaded and kept with the case.

***Note – Please utilize the Housing-Based Case Management Standard, where applicable. This is to document housing-related Case Management efforts outside of the Housing Placement Module, and in the Case Management Module.**

Housing Placement - CM Goal

- 1.To be used for tracking all work related to getting a client housed.
- 2.Once client has moved in, the Case Manager can close this case.
 - 1.Referred from: your agency; Referred to: Housing Services - Private Market, or Housing Services - LHA, etc.

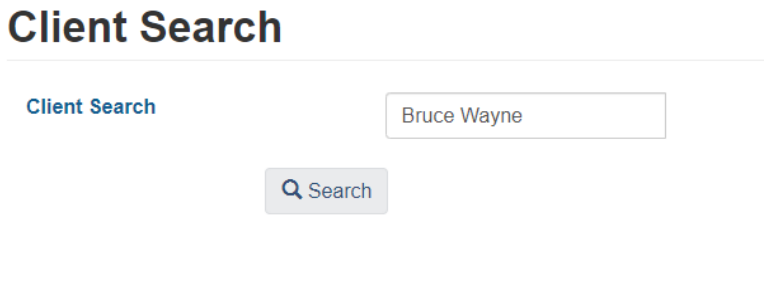

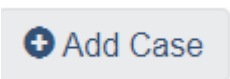
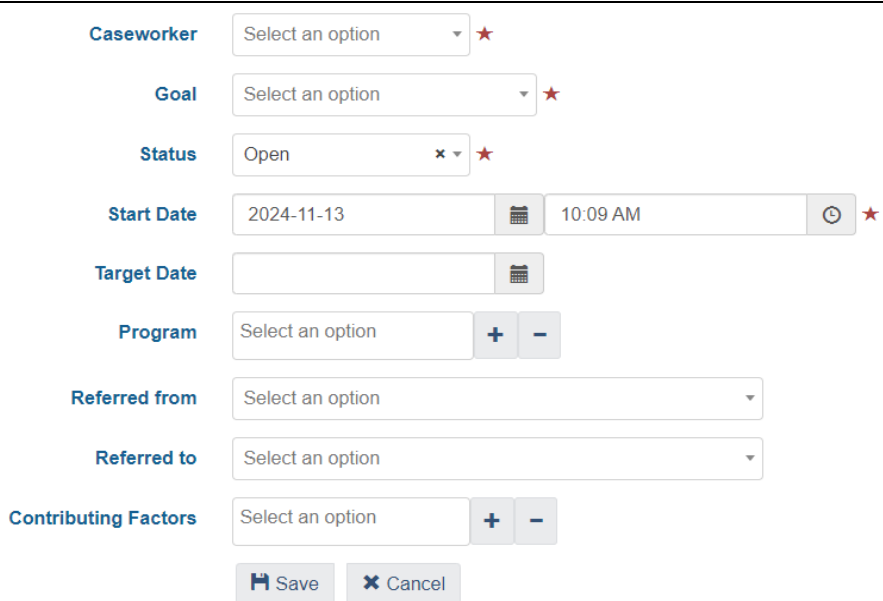
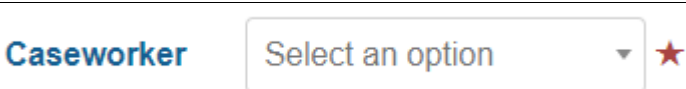
Housing Retention

- 1.To be used for tracking all work related to following up and keeping a client housed.
- 2.Once the Case Manager are no longer providing services to the client, they can close this case.
 - 1.Referred from: your agency; Referred to: Housing Services - Private Market, or Housing Services - LHA, etc.

Eviction Prevention

- 1.To be used for tracking all work related to helping a client prevent loss of housing or being evicted.
- 2.Once this service is complete, the Case Manager can close this case.
 - 1.Referred from: your agency; Referred to: possibly themselves, depending on the Case Manager/organization/nature of work (i.e., supportive housing providers would likely keep the Referred from and to the same here).

1. Procedure to Add Case Goal

Action	
1. From the HIFIS main page, navigate to Front Desk > Clients> Search Client >Client -Details.	 <p>The screenshot shows the 'Client Search' page. At the top, there's a header 'Client Search'. Below it, there's a search bar with the text 'Bruce Wayne' entered. To the left of the search bar is a link 'Client Search'. Below the search bar is a button with a magnifying glass icon and the text 'Search'.</p>
2. From the Client Management drop down menu, click on Case Management.	 <p>The screenshot shows a dropdown menu with the text 'Client Management' and a downward arrow icon.</p>
3. From the Client – Case Management List page, select the + Add Case Button.	 <p>The screenshot shows a button with a plus icon and the text 'Add Case'.</p>
4. From the Client - Add Case Management page, fill in all required fields marked with a red star and any additional/optional fields to fill in on behalf of client:	 <p>The screenshot shows the 'Add Case Management' form. It contains several fields with labels and dropdown menus, some marked with a red star indicating required fields. The fields are: Caseworker (dropdown), Goal (dropdown), Status (dropdown), Start Date (calendar icon), Target Date (calendar icon), Program (dropdown with plus and minus buttons), Referred from (dropdown), Referred to (dropdown), and Contributing Factors (dropdown with plus and minus buttons). At the bottom, there are 'Save' and 'Cancel' buttons.</p>
5. Select the case worker that is	 <p>The screenshot shows a dropdown menu with the label 'Caseworker' and a dropdown arrow. The text 'Select an option' is visible in the dropdown menu, and a red star is next to it.</p>

working with the client.	
6. Select the appropriate goal the client is trying to achieve.	Goal <div> Select an option ▼ ★ </div>
<p>*Note – If there are several goals that a client is trying to pursue, a Case Management Record will need to be created for each goal.</p>	
7. Leave “Status” field set to Open	Status <div> Open ✕ ▼ ★ </div>
8. In Start Date field, enter the date the Case Management record is being created.	Start Date <div> 2024-11-14 <div> 📅 8:10 AM 🕒 ★ </div> </div>
9. In the Program field, enter the program that is funding the services provided to client (Reaching Homes or OSSl).	Program <div> Select an option + - </div> <div> erred from <div> Reaching Home Funded </div> <div> OSSl Funded </div> </div>
10. Pick the Contributing Factors that are related to the main Goal.	Contributing Factors <div> Select an option + - </div> <div> Anger Management </div>

***Note – Contributing Factors will only appear in the dropdown box if they have been pre-entered in the Various Factors option, see example below:**

11. Various Factors (Contributing Factors) option, navigate to Client Information drop down list > Various Factors > + Add Contributing Factor

Client - Various Factors

Contributing Factors Behavioural Risk Factors

Showing 0 to 0 of 0 entries | Show 10 entries

Contributing Factor
No data is available

+ Add Contributing Factor

***Note – Once selecting a Contributing Factor from Various Factors page, return to Client – Add Case Management page and will see the selected option from Various Factors show up when inputting Contributing Factors.**

12. Click Save

Client - Add Case Management

Caseworker Manager, Case

Goal Conflict Resolution

Status Open

Start Date 2024-11-14 8:35 AM

Target Date

Program *OSSI Funded

Referred from Select an option

Referred to Select an option

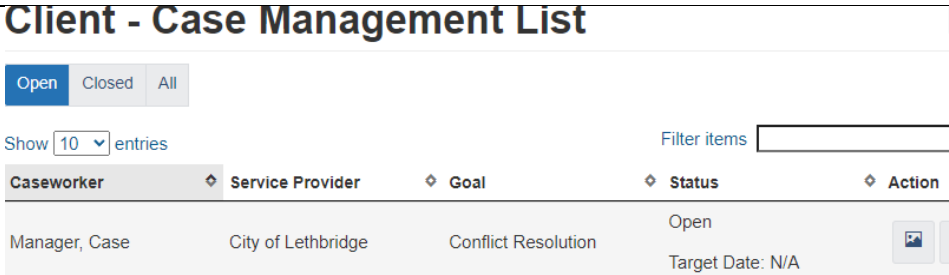

Contributing Factors *Anger Management

Save Cancel

- The Process presented above is one of 2 ways to create a Case Management profile in HIFIS. Another quick process to add a Case Management profile is navigating to Front Desk > Case Management > + Add Case.
- Once the Goal for case management has been inputted, activities performed to meet the goal can be entered as a **Case Session**.

***Note – To perform this process there must already be a pre-existing client profile already entered in the system.**




2. Procedure to Add a Case Session

Action	
1. From the Client Management drop down list, click on Case Management. This will display the Client – Case Management List with the case you had just previously entered and save.	
2. Select the Display icon to enter the Display Case Management page.	

4. From the Client Session page, fill in all required fields marked with a **red star** and any additional/optional fields to fill in on behalf of client:

Goal	Conflict Resolution		
Activity	<input type="text" value="Select an option"/> ★		
Description	<input type="text"/>		
Date and Time	<input type="text" value="2024-11-14"/>	<input type="text" value="9:03 AM"/>	★
Expended Time			
Hours	<input type="text" value="0"/>		
Minutes	<input type="text" value="0"/>		
Caseworker	<input type="text" value="Select an option"/> ★		
Responsibility	<input type="text" value="Select an option"/>		
Agency Involved / Referral	<input type="text" value="Select an option"/>		
Client Present	<input type="checkbox"/> No		
Family Present	<input type="checkbox"/> No		


****Note – The selected Goal from adding a Case Goal will automatically populate when adding a Case Session.***

5. Select what the Activity was	<div> <div>Activity</div> <div>Select an option </div> <div> <div>description</div> <div> <div>Accompaniment to Appointments / Services</div> <div>Advocacy</div> <div>Assessment</div> <div>Assistance with Decision Making</div> <div>Case Conferencing / Consultation</div> </div> </div> </div>
6. Input any comments or details towards the activity (optional)	<div> <div>Description</div> <div></div> </div>
7. Select the Case Worker that was involved in the Activity	<div> <div>Caseworker</div> <div>Select an option </div> </div>
8. Click Save	<div> <div> Save</div> </div>
<p><i>*Note – Once the Session has been saved to a Case Management record, the goal cannot be changed.</i></p>	

3. Procedure to Add a Document

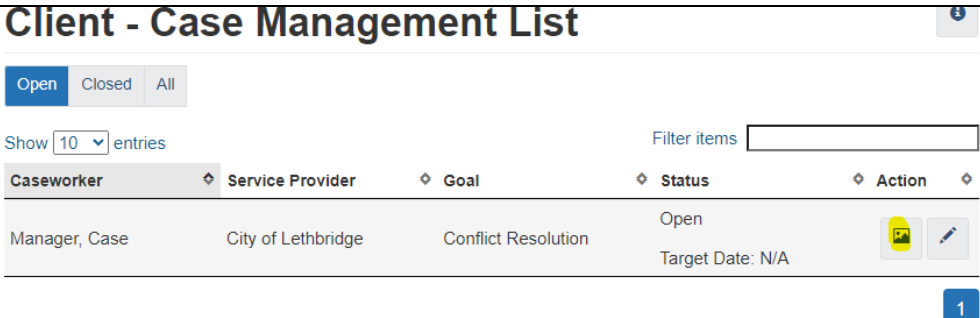
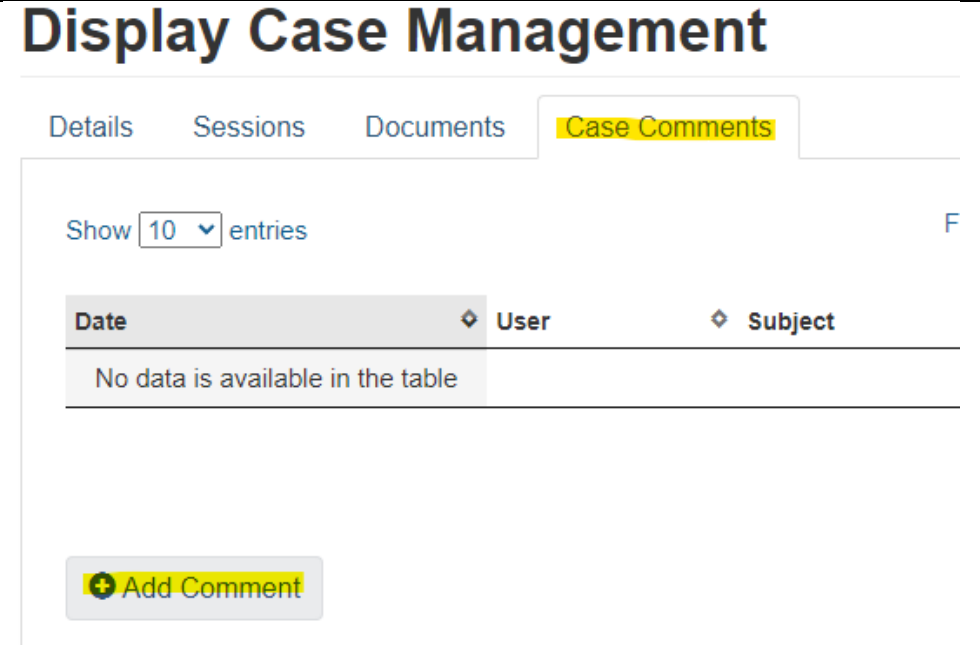
*Please Note - Service providers should only upload documents to HIFIS that help clients navigate the system of supports. This information must be uploaded to modules in the **Client Management** drop down menu of the application (with the exception of consent forms, which can be uploaded on the Client Vitals page when creating or after creating a new client). The following process is for Case Management testing only, other modules that have a "Documents" upload process include:

- Housing Placements > Housing Placement Details > Documents
- Housing Loss Prevention > Housing Loss Prevention Details > Documents
- Incidents > Add Incidents > Attachments

Action	
1. From the Client Management drop down list, click on Case Management and navigate/click on Display Case Management Icon	

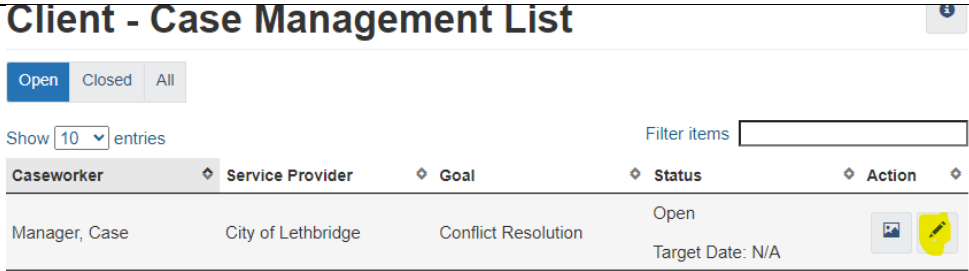
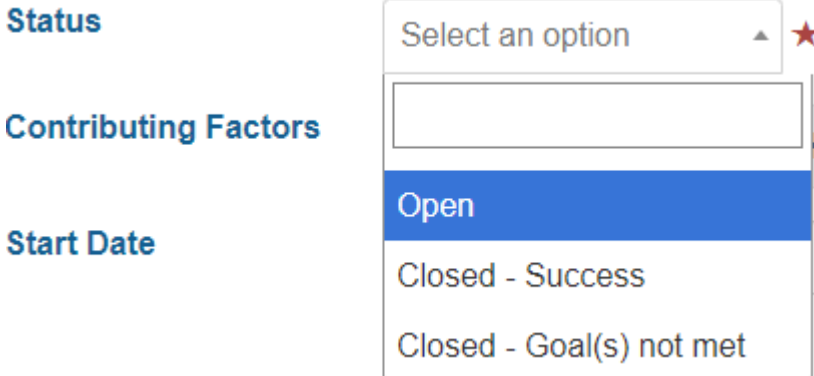

<p>2. On the Display Case Management page, navigate and click on Documents > Select a file / Browse to find the documents you want to upload to this case.</p>	<div> <h2>Display Case Management</h2> <div> Details Sessions Documents Case Comments </div> <div> Show 10 entries Filter ite </div> <table> <thead> <tr> <th>Existing Attachments</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td colspan="2">No data is available in the table</td> </tr> </tbody> </table> <div> Documents <div> <input type="text" value="Select a file..."/> <input type="button" value="Browse"/> </div> </div> <div> <input type="button" value="Save"/> </div> </div>	Existing Attachments	Actions	No data is available in the table	
Existing Attachments	Actions				
No data is available in the table					
<p>3. Click Save</p>	<div> <input type="button" value="Save"/> </div>				
<p>*Note – Scanned client identification documents (Driver’s License, Passport etc.) are useful documents to store in this module. However, a client’s health records are prohibited from being uploaded into HIFIS.</p>					
<p><i>*Note – Users can multi-select files for a maximum of 5MB per upload. Not all file types are permitted (e.g. pptx).</i></p>					




















4. Procedure to Add a Case Comment (Case Notes)

Action 1. From the Client Management drop down list, click on Case Management and navigate/click on Display Case Management Icon	
2. On the Display Case Management page, navigate and click on Case Comments > + Add Comment	

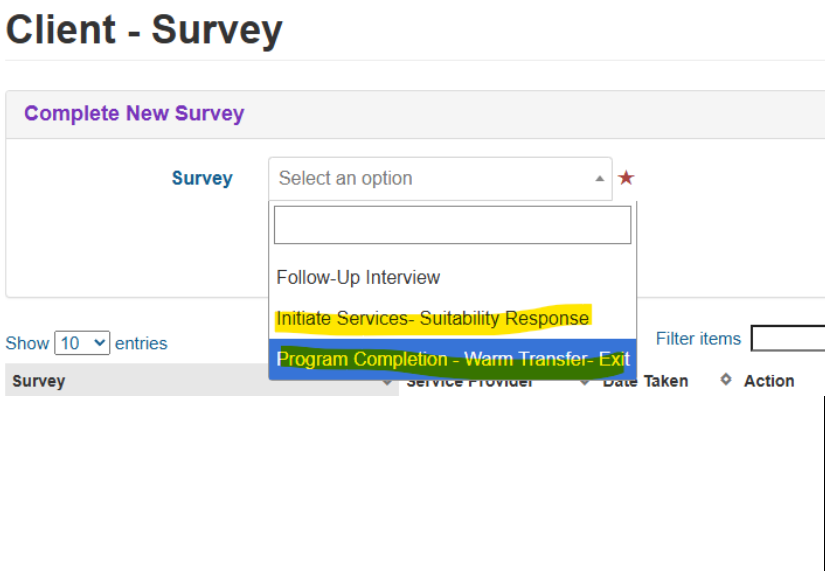

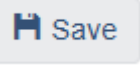
<p>3. Enter a subject for Case Comment and proceed with entering Comments.</p>	<div data-bbox="435 231 1425 835"> <h3>Client - Add Case Comment</h3> <div> <div>Subject</div> <input type="text" value="Anger Management"/> </div> <div> <div>Comments</div> <div> <div> Edit Insert Format View Table </div> <div> Font Sizes A A B I U </div> <div> </div> </div> <div> <div>Words: 0</div> </div> <div> <div>Save</div> <div>Cancel</div> </div> </div> </div>
<p>4. Click Save once you have completed adding Subject and Comments to case.</p>	<div data-bbox="435 835 1425 1134"> <div>Save</div> </div>
<p><i>*Note – When going back to Display Case Comments, the caseworker who was involved in the activity will show up as under User Name.</i></p>	

5. Procedure to close a Goal

Action 1. Navigate to client record/profile and navigate to Client Management drop down list and select Case Management, select Edit icon.	
2. On the Client - Edit Case Management > Details page, navigate down to Status drop down field.	
3. Change Status field to Closed – Success or Closed – Goal(s) not met.	

4. Click Save	<div><div> Save</div></div>																				
5. Navigate back to Case Management main page – Client Management > Case Management > Client Case Management List to review Open, closed or All entries.	<div><div>Client - Case Management List</div><div><div><div>Open</div><div>Closed</div><div>All</div></div><div>Show 10 entries</div><div>Filter items</div></div><table><thead><tr><th>Caseworker</th><th>Service Provider</th><th>Goal</th><th>Status</th><th>Action</th></tr></thead><tbody><tr><td>Case Manager, Shelter</td><td>City of Lethbridge</td><td>Substance Abuse/Addiction</td><td>Closed - Success Target Date: N/A</td><td></td></tr><tr><td>Manager, Case</td><td>City of Lethbridge</td><td>Conflict Resolution</td><td>Closed - Goal(s) not met Target Date: N/A</td><td></td></tr><tr><td>Manager, Case</td><td>City of Lethbridge</td><td>Crisis Intervention</td><td>Closed - Goal(s) not met Target Date: N/A</td><td></td></tr></tbody></table></div>	Caseworker	Service Provider	Goal	Status	Action	Case Manager, Shelter	City of Lethbridge	Substance Abuse/Addiction	Closed - Success Target Date: N/A	 	Manager, Case	City of Lethbridge	Conflict Resolution	Closed - Goal(s) not met Target Date: N/A	 	Manager, Case	City of Lethbridge	Crisis Intervention	Closed - Goal(s) not met Target Date: N/A	 
Caseworker	Service Provider	Goal	Status	Action																	
Case Manager, Shelter	City of Lethbridge	Substance Abuse/Addiction	Closed - Success Target Date: N/A	 																	
Manager, Case	City of Lethbridge	Conflict Resolution	Closed - Goal(s) not met Target Date: N/A	 																	
Manager, Case	City of Lethbridge	Crisis Intervention	Closed - Goal(s) not met Target Date: N/A	 																	
6. Administer the Exit survey to participants.	<div><div><div>Procedure to Administering a Survey:</div>Initiation and Exit</div><div><p>The Surveys module in HIFIS will be utilized when you receive a client (Initiation survey) and when you refer a client out / close their case (Exit survey). We have demonstrated the process below with Exit, but the steps are the same for both.</p><p>*Please Note – Ensure you stay in the Client’s Profile/Vitals page to begin proceeding the step for administering a survey as you will need to access the Survey through Client Management.</p><p>*Please Note – When performing the “Warm Transfer – Program Change” survey, when referring out to a housing support, this is another step in closing a case file.</p></div></div>																				

	<div><div><div><div><div>Client Information</div><div>Client Management</div></div><div><div>Admissions</div><div>Appointments</div><div>Bulletins</div><div>Calls and Visits Log</div><div>Case Management</div><div>Chores</div><div>Conflicts</div><div>Coordinated Access</div><div>Diversion</div><div>Food Banks</div><div>Goods and Services</div><div>Group Activities</div><div>Housing Loss Prevention</div><div>Housing Placements</div><div>Incidents</div><div>Medication Dispensing</div><div>Programs</div><div>Service Restrictions</div><div>SPDAT</div><div>Storage</div><div>Surveys</div><div>Turn Aways</div><div>VAT</div></div></div></div><div><div>Client - Details</div><div><div>Vitals</div><div>Contact Info</div><div>Physical Appearance</div><div>Language</div></div><div><div>Consent Type</div><div>Explicit</div><div>Full Name</div><div>Jack Sparrow</div><div>Gender</div><div>Male</div><div>Alias</div><div>File Number</div><div>0000000003</div><div>Date of Birth</div><div>1975-07-17</div><div>Date of Birth Known</div><div>Yes</div><div>Approximate Age</div><div>49</div><div>Information Verified</div><div>No</div><div>Country of Birth</div><div>N/A</div><div>Disability</div><div>No</div><div>MedicAlert</div><div>No</div><div>Veteran Status</div><div>Not a Veteran</div><div>Citizenship/Immigration Status</div><div>Canadian Citizen</div></div></div></div>
	<div><div><div>Client - Survey</div><div><div>Complete New Survey</div></div><div><div>Show 10 entries</div><div>Filter items</div></div><div><div>Survey</div><div>Service Provider</div><div>Date Taken</div><div>Action</div></div><div>No data is available in the table</div></div></div>

	<p>3. In the "Survey" field, click in the text box "Select an Option" and select your option and then click "+ Begin Survey".</p>	
	<p>4. After selecting this option, the survey will prompt open and can begin filling in all the fields available.</p>	
	<p>5. Once you have filled in all the fields of the survey, click Save.</p>	

	<p>6. Once clicking Save, you will be redirected back to the Client-Survey page showing that the survey has been completed . All surveys will now stay with the client in Client – Survey.</p>	<div><h2>Client - Survey</h2><div>Complete New Survey</div><div><div>Show <div>10</div> entries</div><div>Filter items <div></div></div></div><table><tr><th>Survey</th><th>Service Provider</th><th>Date Taken</th><th>Action</th></tr><tr><td>Initiate Services- Suitability Response</td><td>City of Lethbridge</td><td>2025-02-25</td><td><div><div></div><div></div></div></td></tr></table></div>	Survey	Service Provider	Date Taken	Action	Initiate Services- Suitability Response	City of Lethbridge	2025-02-25	<div><div></div><div></div></div>
Survey	Service Provider	Date Taken	Action							
Initiate Services- Suitability Response	City of Lethbridge	2025-02-25	<div><div></div><div></div></div>							

6. Procedure to Add Multiple Goal Session

This module will be utilized for client's that have sub-goals to a main goal that they are looking to achieve. For example, if a client has a main goal for wanting to become Financially stable, the Multiple Goal Sessions would be utilized to categorize sub-goals such as Employment, Budget, Applications etc. that can be entered to reach their main goal.

****Note – To perform this function successfully, the Client Status (Display Case Management) must be set as OPEN. Goals (2 or more) must be previously created separately before proceeding with function.***

Action	
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1. From the Client – Details main page, navigate to Client Management > Case Management > + Client - Multiple Goal Session

Client - Case Management List

Open Closed All

Show 10 entries Filter items

Caseworker	Service Provider	Goal	Status	Action
Manager, Case	City of Lethbridge	Employment Maintenance	Open Target Date: N/A	
Manager, Case	City of Lethbridge	Substance Abuse/Addiction	Open Target Date: N/A	

+ Add Case + Client - Multiple Goal Session

2. In the Client – Multiple Goal Session, fill in all required fields and optional (***Note – previously inputted goals must have Status set to Open**).

Client - Multiple Goal Session

Goals Select an option + - ★

Activity Select an option ★

Description

Date and Time 2024-11-15 9:47 AM ★

Expend Time - Total

Hours 0

Minutes 0

☐ Split time equally between goals

Caseworker Select an option ★

Responsibility Select an option





Agency Involved / Referral Select an option

3. In the Goals field, select the relevant goals from the drop down list or


Goals Select an option + - ★

Activity

- Employment Maintenance - Manager, Case
- Substance Abuse/Addiction - Manager, Case

click Select All button (+) to select all the goals created for client.	
4. Enter the sessions Activity and if applicable, enter a description of Activity.	<div> <div>Activity</div> <div>Select an option </div> <div> <div>description</div> <div> <div>Accompaniment to Appointments / Services</div> <div>Advocacy</div> <div>Assessment</div> <div>Assistance with Decision Making</div> <div>Case Conferencing / Consultation</div> <div>Case Planning</div> </div> </div> <div>and Time</div> </div>
5. Confirm the Start Date and Time of the Activity, and if needed, you can change the date/time manually.	<div> <div>Date and Time</div> <div> <div>2024-11-15 </div> <div>9:47 AM </div> </div> <div></div> </div>

<p>6. Indicate, in hours and minutes, how much time was spent on the session (Goal) in the Expended Hours and Expended Minutes fields. This includes the option to split time equally between goals.</p>	<div> Expended Time - Total </div> <div> Hours <input type="text" value="0"/> </div> <div> Minutes <input type="text" value="0"/> </div> <div> <input type="checkbox"/> Split time equally between goals </div> <div> Expended Time - "Employment Maintenance - Manager, Case" </div> <div> Hours <input type="text" value="0"/> </div> <div> Minutes <input type="text" value="0"/> </div> <div> Expended Time - "Substance Abuse/Addiction - Manager, Case" </div> <div> Hours <input type="text" value="0"/> </div> <div> Minutes <input type="text" value="0"/> </div>
<p>7. Select the Caseworker that was assigned to the sessions and if applicable, the individual who was responsible for the session (either Client or Caseworker).</p>	<div> Caseworker <input type="text" value="Manager, Case"/> ✕ ★ </div> <div> Responsibility <input type="text" value="Select an option"/> ▼ </div>

<p>8. If applicable, select the Agency or Referral Involved with the case session. This includes indicating if the client and/or family were present for session.</p>	<div><div>Agency Involved / Referral</div><div>Select an option ▼</div><div>Client Present</div><div><input type="checkbox"/> No</div><div>Family Present</div><div><input type="checkbox"/> No</div></div>
<p>9. Click the Save button.</p>	<div><div> Save</div></div>

7. Procedure to add an Alert under Client Record

There are several types of entries in a client's record/profile that cause an alert to be create. These alerts indicate some piece of information that would be good for user (Case Managers, Systems Navigator, Outreach etc.) to know when serving a client. Alerts are created when one of the following is entered for a client:

- *Behavioural Risk Factor*
- *Watch Concerns*

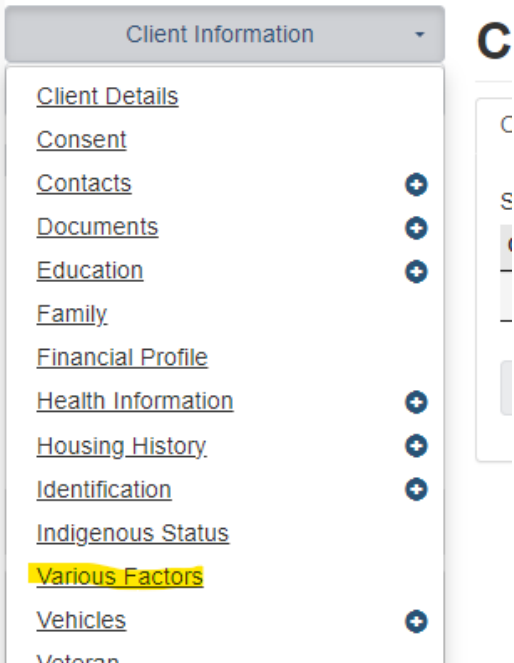

This Training Module will go through the Alerts that will show up on a client's profile/record.




Behavioural Risk Factor







The Behavioural Risk Factor module is client behaviour's that HIFIS users (case managers, outreach, systems navigator etc.) may need to be aware of for the safety of the client, staff members, or other clients. Behavioural Factors include Vandalism, Drug use, Staff Dependency and Theft.

Action	
1. Navigate to Front Desk and select the Clients option, search up existing client in system.	

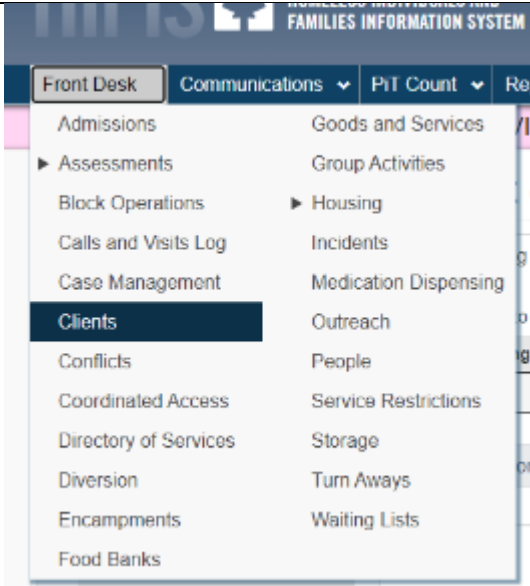
<p>2. From the Client – Details pages, navigate to Client Information and select Various Factors.</p>	
<p>3. From the Client-Variation Factors page, select the Behavioural Risk Factors tab and select the + Add Behavioural Risk button.</p>	

<p>4. Proceed with filling out all required fields and if applicable, optional fields.</p>	<div> <div>Client - Add Behavioural Factor</div> <div> <div>Behavioural Factor</div> <div>Select an option ▼ ★</div> </div> <div> <div>Start Date</div> <div>2024-11-21  ★</div> </div> <div> <div>End Date</div> <div></div> </div> <div> <div>Severity</div> <div>Select an option ▼</div> </div> <div> <div>Comments</div> <div></div> </div> <div> <div>Save</div> <div>Cancel</div> </div> </div>	
<p>5. Enter the Behavioural Risk Factor of the client.</p>	<div> <div>Behavioural Factor</div> <div>Select an option ▼ ★</div> </div>	
<p>6. Confirm the Start Date and if applicable, you can manually change the start date.</p>	<div> <div>Start Date</div> <div>2024-11-21  ★</div> </div>	

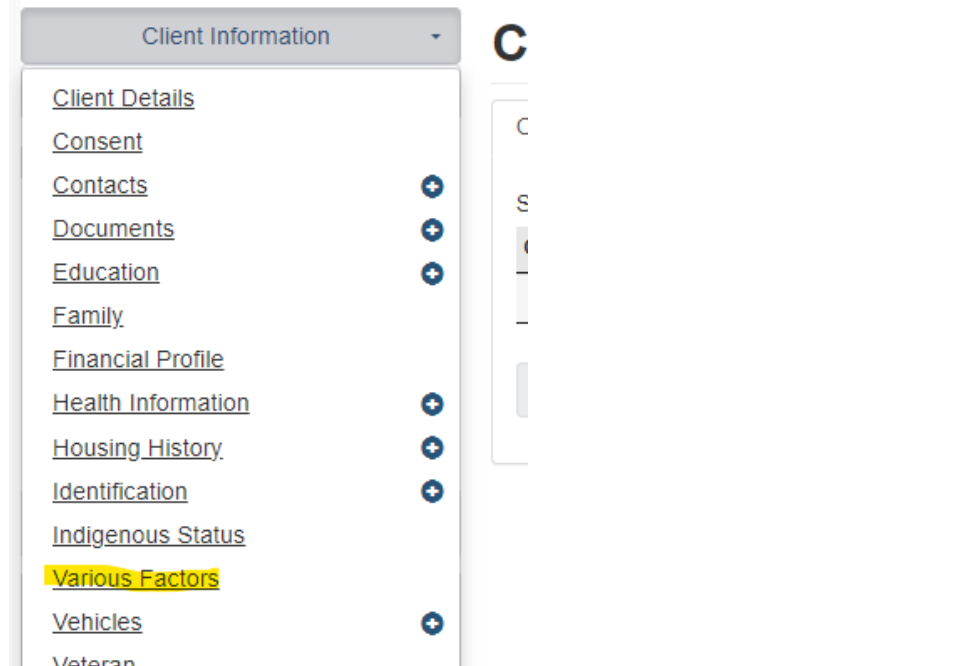
<p>7. If applicable, enter the End Date, Severity of the behavioural factor and any additional comments concerning the behavioural factor (optional).</p>	<div data-bbox="462 247 1323 745"> <p>End Date <input type="text" value=""/></p> <p>Severity <input type="text" value="Select an option"/></p> <p>Comments <div></div></p> </div>
<p>8. Click Save.</p>	<div data-bbox="406 924 555 987">  Save </div>
<p>*Note – The Behavioural Risk Factor Alert will show up next to Client Alerts for users to view:</p> <div data-bbox="462 1165 1161 1732"> <div> <div>Client Information</div> <div>Client Management</div> <div>  <div>Bruce Banner</div> </div> <div> <div>Client Alerts</div> <div>   </div> </div> </div> <div> <h3>Client - Vari</h3> <div>Contributing Factors</div> <div>Showing 1 to 1 of 1 entries:</div> <div>Behavioural Factor</div> <div>Drugs</div> <div>+ Add Behavioural Ri</div> </div> </div>	

Watch Concerns

The Watch Concern module is utilized for informing Case Manager, Systems Navigators, Shelter Workers, Outreach etc. of contributing factors that they must be aware of pertaining to the client (e.g., Drugs, Injecting Drugs, Medical Alert, Medication None-compliance etc.).

Action	
1. From the HIFIS main page, navigate to the Front Desk drop down menu and select the clients options, and perform the existing client search.	

2. From the Client- Details under Vitals page, select Client Information and click on Various factors.



The screenshot shows a dropdown menu titled "Client Information" with a list of options. The options are: Client Details, Consent, Contacts, Documents, Education, Family, Financial Profile, Health Information, Housing History, Identification, Indigenous Status, **Various Factors** (highlighted in yellow), Vehicles, and Veteran. Each option has a plus icon to its right. To the right of the dropdown is a large, empty white box with a large "C" at the top.







3. Under Client – Various Factors page, navigate to Watch Concerns tab and click on + Add Watch Concern.




The screenshot shows the "Client - Various Factors" page. At the top, there are three tabs: "Contributing Factors", "Behavioural Risk Factors", and **Watch Concerns** (highlighted in yellow). Below the tabs, it says "Showing 0 to 0 of 0 entries | Show 10 entries". There is a table with the following structure:

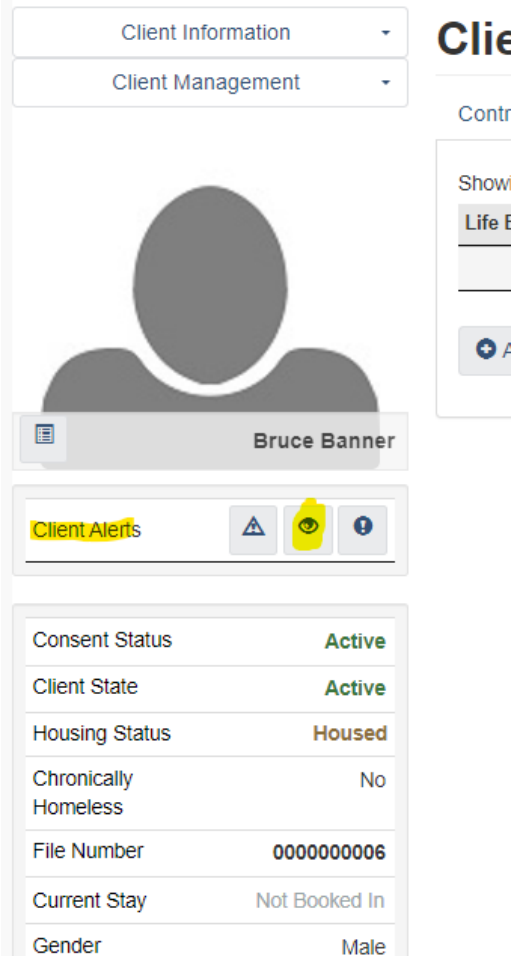
Watch Concern	Start Date	End Date
No data is available in the table		

At the bottom, there is a button labeled **+ Add Watch Concern** (highlighted in yellow).

<p>4. In the Client – Add Watch Concern page, fill in the required fields.</p>	<div> <div>Client - Add Watch Concern</div> <div> <div> <div>Watch Concern</div> <div>Select an option ▼ ★</div> </div> <div> <div>Start Date</div> <div>2024-11-21 </div> </div> <div> <div>End Date</div> <div></div> </div> <div> <div>Severity</div> <div>Select an option ▼</div> </div> <div> <div>Comments</div> <div></div> </div> <div> <div>Save</div> <div>Cancel</div> </div> </div> </div>
<p>5. Select the Watch Concern pertaining to client.</p>	<div> <div>Watch Concern</div> <div>Select an option ▼ ★</div> </div>
<p>6. If applicable, fill in the optional fields;</p> <ul style="list-style-type: none"> • Start Date • End Date • Severity of the Watch Concern and; • Additional Comments concerning the 	<div> <div> <div>Start Date</div> <div>2024-11-21 </div> </div> <div> <div>End Date</div> <div></div> </div> <div> <div>Severity</div> <div>Select an option ▼</div> </div> <div> <div>Comments</div> <div></div> </div> </div>

Watch Concern	
7. Click Save.	 Save

****Note – The active Watch Concern Alert will now show up next to Client Alerts from client profile/record:***





Consent Status	Active
Client State	Active
Housing Status	Housed
Chronically Homeless	No
File Number	0000000006
Current Stay	Not Booked In
Gender	Male

You can also see the Watch Concern icon active/visible when searching up a client – Front Desk > Clients > Search Client > Client List:

Client List

AllActiveInactiveDeceasedArchived

Showing 1 to 1 of 1 entries | Show10entries

ID	Full Name	Gender	Alias	Date of Birth	Age	File Number	Housing Status	Action
6	Banner, Bruce	Male		1962-05-12	62	0000000006	Housed	 


8. Procedure to Add an SPDAT (Service Prioritization Decision Assistance Tool)

Assessment to Client Record/Profile

The purpose of this tool is to help service providers prioritize their service delivery based on standardized assessments given to individuals and families who are homeless or at-risk. The different versions of this tool have been implemented in the HIFIS application to give HIFIS users an easy and efficient way to record SPDAT assessments and to make decisions based on the results.

Under Assessments (Front Desk > Assessments) from the Intake List page, the different tabs provided in the assessments are the VI-SPDAT (Vulnerability Index – SPDAT), the main SPDAT assessment and the Family and Youth version of both.

Prerequisite	<ul style="list-style-type: none"> Must have a pre-existing client already created in the HIFIS system to perform this function.
---------------------	---

<div>Action</div> <div>1. From the Front Desk drop down menu, select the Assessments tab, then select SPDAT.</div>	<div><div><div><div><div>HIFIS</div><div></div><div>HOMELESS INDIVIDUALS AND FAMILIES INFORMATION SYSTEM</div></div></div><div><div>Front Desk</div><div>Communications</div><div>PiT Count</div><div>Reports</div><div>Admissions</div><div>Assessments</div><div>SPDAT</div><div>VAT</div><div>Block Operations</div><div>Calls and Visits Log</div><div>Case Management</div><div>Clients</div><div>Conflicts</div><div>Coordinated Access</div><div>Directory of Services</div><div>Diversion</div><div>Encampments</div><div>Food Banks</div><div>Goods and Services</div><div>Group Activities</div><div>Housing</div><div>Incidents</div><div>Medication Dispensing</div><div>Outreach</div><div>People</div><div>Service Restrictions</div><div>Storage</div><div>Turn Aways</div><div>Waiting Lists</div></div></div></div>												
<div>2. From the SPDAT Intake List page, select the SPDAT tab.</div>	<div><div><div>SPDAT Intake List</div><div><div>Filter: All</div><div>VI-SPDAT</div><div>SPDAT</div></div><div>Showing 1 to 2 of 2 entries Show 10 entries</div><table><thead><tr><th>Client Name</th><th>Start Date and Time</th><th>Caseworker</th><th>Type</th><th>Version</th><th>Score</th></tr></thead><tbody><tr><td>Banner, Bruce</td><td>2024-11-06 9:26 AM</td><td>Manager, Case</td><td>Adult</td><td>4</td><td>20</td></tr></tbody></table></div></div>	Client Name	Start Date and Time	Caseworker	Type	Version	Score	Banner, Bruce	2024-11-06 9:26 AM	Manager, Case	Adult	4	20
Client Name	Start Date and Time	Caseworker	Type	Version	Score								
Banner, Bruce	2024-11-06 9:26 AM	Manager, Case	Adult	4	20								

<p>3. From the SPDAT Intake list page and selecting the SPDAT tab, select the option depending on the type of client and version of the assessment you would like to use (e.g., + Adult v4)- (v4 = Version 4).</p>	<p>Start a new SPDAT assessment by selecting one of the following:</p> <div data-bbox="483 296 1318 352"><div>+ Adult v3</div><div>+ Adult v4</div><div>+ Family v1</div><div>+ Family v2</div><div>+ Youth v1</div></div>
--	--

4. From the Add SPDAT page, fill in all required fields marked with a **red star** and if applicable, fill in optional fields as well.

Add SPDAT - Single Adult Version 4 Intake

Client Name ★

Caseworker ★

Start Date and Time ★

Assessment Period ★

Pre-Screen Period ★

Consent ☐ No

Identifies as LGBTQ2S+? ☐ No

Pet(s)? ☐ No

Program + -

Description

Edit Insert Format View Table

Font Sizes A A B / U

5. Under Client Name, type to search for existing client, then select the client from search results.

Client Name ★

6. Select the caseworker conducting the assessment with cline from drop down list.

Caseworker ★

7. Confirm the Start Date and Time of the assessment taking place.	<div> Start Date and Time <div> 2024-11-25 <div> 10:17 AM <div>🕒</div> </div> </div> </div>
8. Select the Assessment Period by which period this assessment for the client is being conducted: <ul style="list-style-type: none"> • 1st Assessment • Move-In • 30 Day Scores • 90 Day Scores • Etc. 	<div> Assessment Period <div> <div>Select an option</div> <div> <div>1st Assessment</div> <div>Move-In</div> <div>30 Day Scores</div> <div>90 Day Scores</div> <div>180 Day Scores</div> <div>270 Day Scores</div> </div> </div> </div>
9. Select the Assessment Pre-Screen Period to indicate if the assessment has been completed before (first time, second time, etc.)	<div> Pre-Screen Period <div> <div>Select an option</div> <div> <div>First</div> <div>Second</div> <div>Third</div> <div>Fourth</div> <div>Fifth</div> <div>Nth</div> </div> </div> </div>

<p>10. Indicate whether the client has given their Consent to perform assessment.</p>	<div data-bbox="529 264 695 308">Consent</div> <div data-bbox="794 264 855 302">Yes</div>
<p>11. If applicable, fill in remaining optional fields.</p> <p>In the Description field, if applicable, add any additional information concerning the SPDAT assessment in text box.</p>	<div data-bbox="492 504 615 556">Identifies as LGBTQ2S+?</div> <div data-bbox="727 504 756 525">No</div> <div data-bbox="540 588 615 617">Pet(s)?</div> <div data-bbox="727 588 756 611">No</div> <div data-bbox="529 665 615 693">Program</div> <div data-bbox="657 665 803 688">Select an option</div> <div data-bbox="917 665 933 688">+</div> <div data-bbox="971 665 987 688">-</div> <div data-bbox="498 739 615 766">Description</div> <div data-bbox="652 730 1362 1163"> <div data-bbox="665 741 1089 762"> Edit Insert Format View Table </div> <div data-bbox="665 779 1263 861"> <div data-bbox="665 779 786 810"> Undo Redo </div> <div data-bbox="786 779 909 810"> Font Sizes </div> <div data-bbox="971 779 1263 810"> A A B I U </div> </div> <div data-bbox="665 819 1101 861"> <div data-bbox="665 819 786 852"> List Bulleted Numbered </div> <div data-bbox="786 819 909 852"> List Indented </div> <div data-bbox="909 819 1032 852"> List Nested </div> <div data-bbox="1032 819 1101 852"> List Nested Indented </div> </div> <div data-bbox="1274 1127 1356 1152">Words: 0</div> </div>
<p>*Note – From this point on, the caseworker and client can now proceed with answering and completing the SPDAT Assessment.</p>	
<p>12. For each question in SPDAT Assessment, select a number (1, 2, 3, 4) to indicate the score with the option to provide an additional written justification for reason of score.</p>	<div data-bbox="498 1346 591 1371">Wellness</div> <div data-bbox="498 1402 1232 1428"> <div data-bbox="498 1402 513 1428">#</div> <div data-bbox="550 1402 643 1428">Question</div> <div data-bbox="1144 1402 1161 1428">Answer</div> </div> <div data-bbox="571 1459 1144 1501"> Mental Health & Wellness & Cognitive Functioning </div> <div data-bbox="524 1575 540 1598">A</div> <div data-bbox="555 1518 1065 1711"> <div data-bbox="555 1518 1065 1711"></div> </div> <div data-bbox="1182 1524 1219 1654"> <div data-bbox="1182 1524 1219 1545">4</div> <div data-bbox="1182 1549 1219 1570">3</div> <div data-bbox="1182 1575 1219 1596">2</div> <div data-bbox="1182 1598 1219 1619">1</div> <div data-bbox="1182 1623 1219 1644">0</div> </div>

***Note – To view the full description of the question for each section, click on the arrow next to the title to expand it. You can also hover over each score (1, 2, 3, 4) in the answer column to see the description of that number selected indicates. This will ensure the assessment is being answered in a standardized way:**

Wellness

#	Question	Answer
A	<p>Mental Health & Wellness & Cognitive Functioning</p> <ul style="list-style-type: none"> • Have you ever received any help with your mental wellness? • Do you feel you are getting all the help you need for your mental health or stress? • Has a doctor ever prescribed you pills for nerves, anxiety, depression or anything like that? • Have you ever gone to an emergency room or stayed in a hospital because you weren't feeling 100% emotionally? • Do you have trouble learning or paying attention? • Have you ever had testing done to identify learning disabilities? • Do you know if, when pregnant with you, your mother did anything that we now know can have negative effects on the baby? • Have you ever hurt your brain or head? • Do you have any documents or papers about your mental health or brain functioning? • Are there other professionals we could speak with that have knowledge of your mental health? 	<p>○ 4</p> <p><input checked="" type="radio"/> 3</p> <p>○ 2</p> <p>○ 1</p> <p>○ 0</p>

Score Description

Any of the following:

- Heightened concerns about state of mental health, but fewer than 2 hospitalizations, and/or without knowledge of presence of a diagnosable mental health condition
- Diminished ability to perform tasks and functions of daily living or communicating intent because of a brain injury, learning disability or developmental disability

***Note – There is a Progress Panel on the left side of your SPDAT Assessment page in which allows you to keep track of your progress through the whole**

assessment. Hovering or click on this panel will expand it, revealing more details of your progress and highlight incomplete sections.

The screenshot shows a 'Progress Panel' on the left and a list of assessment questions on the right. The progress panel lists six categories with their completion status:

Category	Progress	Answered
Housing History	0%	0
Risks	0%	0
Socialization and Daily Functions	0%	0
Wellness	20%	1
Presenting Needs	0%	0
Vulnerabilities and Housing Support Needs	0%	0

On the right, under the heading 'Mental Health & Wellness & Co', there is a list of questions:

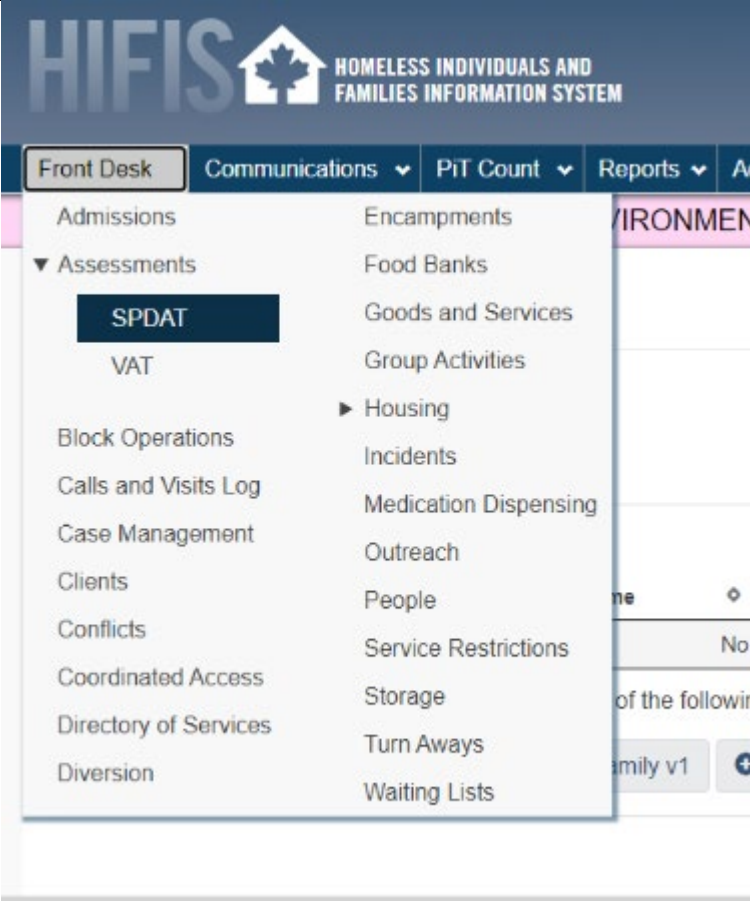
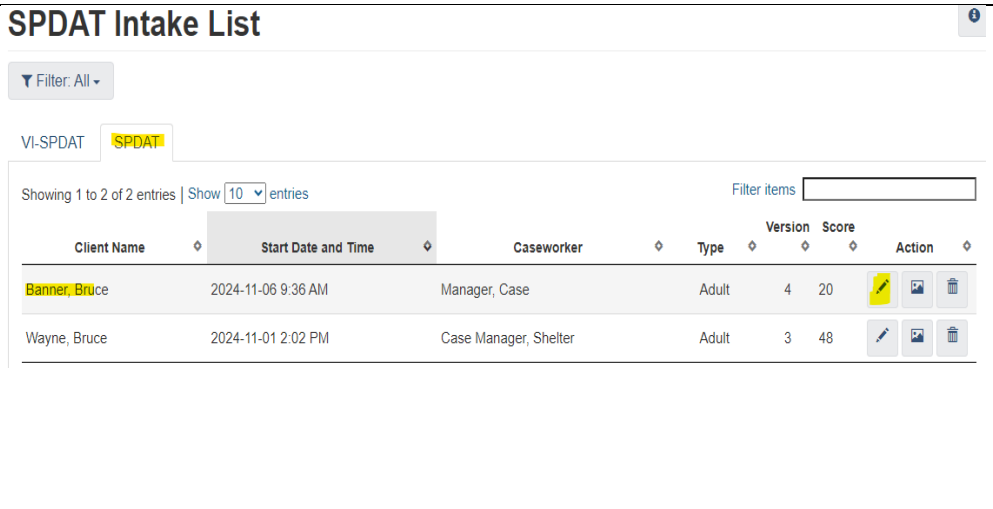


















- Have you ever received any hel
- Do you feel you are getting all th health or stress?
- Has a doctor ever prescribed yo depression or anything like that
- Have you ever gone to an emer because you weren't feeling 100
- Do you have trouble learning or
- Have you ever had testing done
- Do you know if, when pregnant that we now know can have neg
- Have you ever hurt your brain o
- Do you have any documents or brain functioning?
- Are there other professionals w knowledge of your mental healt

Below the questions, there are two sections labeled 'A' and 'B'. Section 'A' is a large empty box. Section 'B' is a smaller empty box under the heading 'Physical Health and Wellness'.

13. Once the assessment has been completed, click Save.

 Save

9. Procedure to Review or Edit an Assessment performed on Clients in HIFIS

Action																						
1. From the HIFIS main page, navigate to the Front Desk drop down menu and select the Assessments drop down and select SPDAT.																						
2. From the SPDAT Intake List page, select the SPDAT tab and find/locate the client assessment from the list and click on the Edit icon.	 <div><h3>SPDAT Intake List</h3><div>Filter: All</div><div>VI-SPDAT SPDAT</div><div>Showing 1 to 2 of 2 entries Show 10 entries</div><div>Filter items</div><table><thead><tr><th>Client Name</th><th>Start Date and Time</th><th>Caseworker</th><th>Type</th><th>Version</th><th>Score</th><th>Action</th></tr></thead><tbody><tr><td>Banner, Bruce</td><td>2024-11-06 9:36 AM</td><td>Manager, Case</td><td>Adult</td><td>4</td><td>20</td><td>  </td></tr><tr><td>Wayne, Bruce</td><td>2024-11-01 2:02 PM</td><td>Case Manager, Shelter</td><td>Adult</td><td>3</td><td>48</td><td>  </td></tr></tbody></table></div>	Client Name	Start Date and Time	Caseworker	Type	Version	Score	Action	Banner, Bruce	2024-11-06 9:36 AM	Manager, Case	Adult	4	20	  	Wayne, Bruce	2024-11-01 2:02 PM	Case Manager, Shelter	Adult	3	48	  
Client Name	Start Date and Time	Caseworker	Type	Version	Score	Action																
Banner, Bruce	2024-11-06 9:36 AM	Manager, Case	Adult	4	20	  																
Wayne, Bruce	2024-11-01 2:02 PM	Case Manager, Shelter	Adult	3	48	  																

3. From the Edit Intake page, you can edit existing information or add any additional information missed.

Edit SPDAT - Single Adult Version 4 Intake

Programs

Client Name Banner, Bruce ★

Caseworker Manager, Case x ★

Start Date and Time 2024-11-06 9:36 AM ★

Assessment Period 1st Assessment x ★

Pre-Screen Period First x ★

Consent Yes

Identifies as
LGBTQ2S+? No

Pet(s)? No

Program OSSI Funded

Description Edit Insert Format View Table

****Note – On the Edit Intake Page, you can also edit the existing scores inputted previously or return where you left off on the Assessment.***

4. Click Save.

Save