Training/Testing Materials – Case Management

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 > Seach 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 • Seach Client > Client Vitals > Client Manaegemnt – Case Management > Client – Case Management List > Add Case.
Case Management	New Record ***(Add Session)*** under the Sessions tab in Display Case Management is created • Client – Case Management List > Sessions > Add Session.

Case Management	New Record ***(Add Comment)*** under the Case Comments tab in Display Case Management is created • Client – Case Management List > Display Case Management > Case Comments > Add Comment.
Case Management	New Record ***(Add Document)*** under the Display Case Management list is uploaded: • Client – Case Management List > Display Case Management > Documents > Upload Document.
Case Management	New Record ***(Add Multiple Goal Session)*** under Client - Case Management List • Client – Details > Client Management > Case Management > Client - Case Management List > Client – Multiple Goal Session
Case Management	New Record ***(Add Service Restriction/ Alert)*** under Client Record • Front Desk > Service Restrictions > + Add Service Restriction
Case Management	New Record ***(Add SPDAT Assessment to Client Record/Profile)*** • Front Desk > Cline s > Client Search > Client – Details (Vitals) > Client Management > SPDAT

Enter a Case Management & Record Related Activities

Prerequisite	Client Profile/Record has been created in advance.

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.

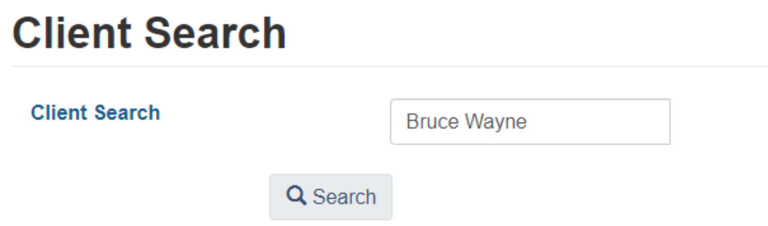
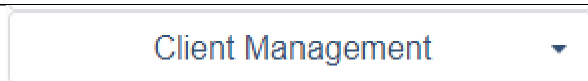
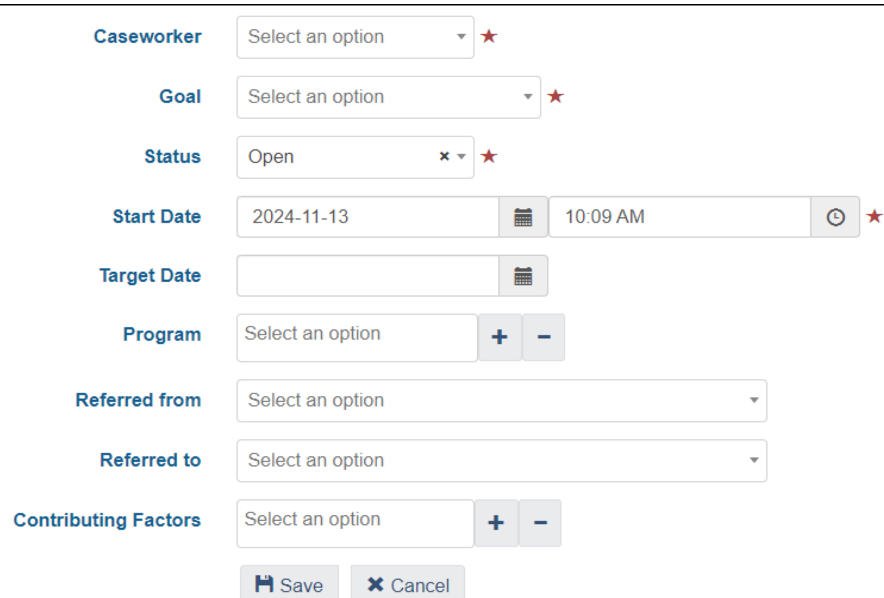
Housing Retention

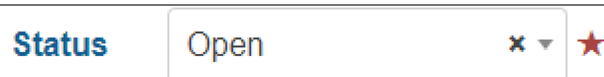
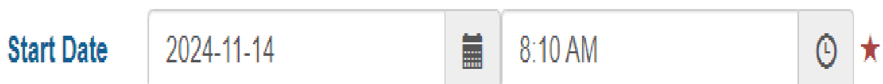
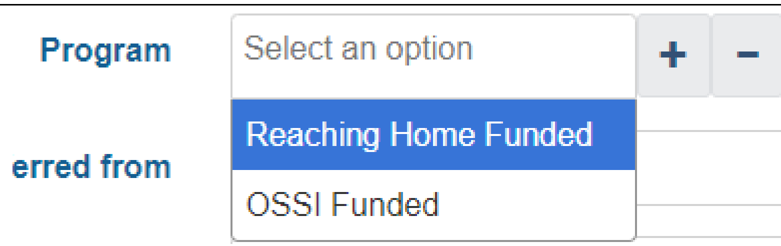
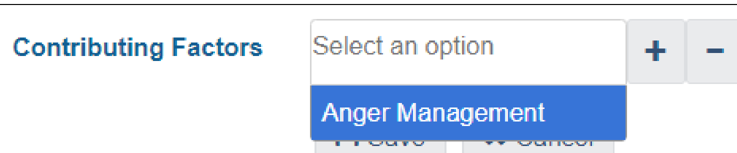
1. To be used for tracking all work related to following up and keeping a client housed.
2. Once the Case Manager are no longer providing services to the client, they can close this case.
    1. Referred from: your agency; Referred to: Housing Services - Private Market, or Housing Services - LHA, etc.

Eviction Prevention

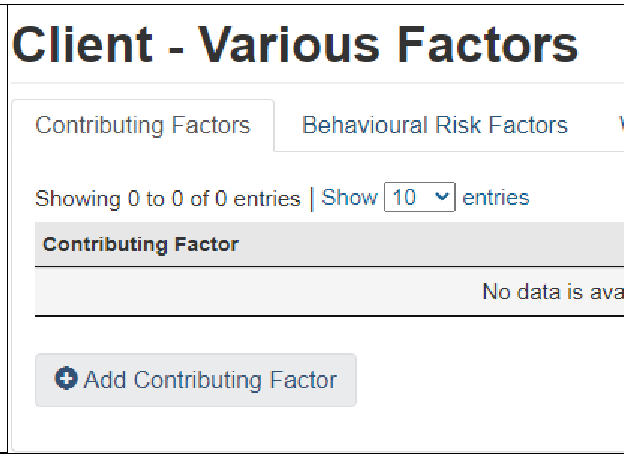
1. To be used for tracking all work related to helping a client prevent loss of housing or being evicted.
2. Once this service is complete, the Case Manager can close this case.
    1. Referred from: your agency; Referred to: possibly themselves, depending on the Case Manager/organization/nature of work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

1. Procedure to Add Case Goal

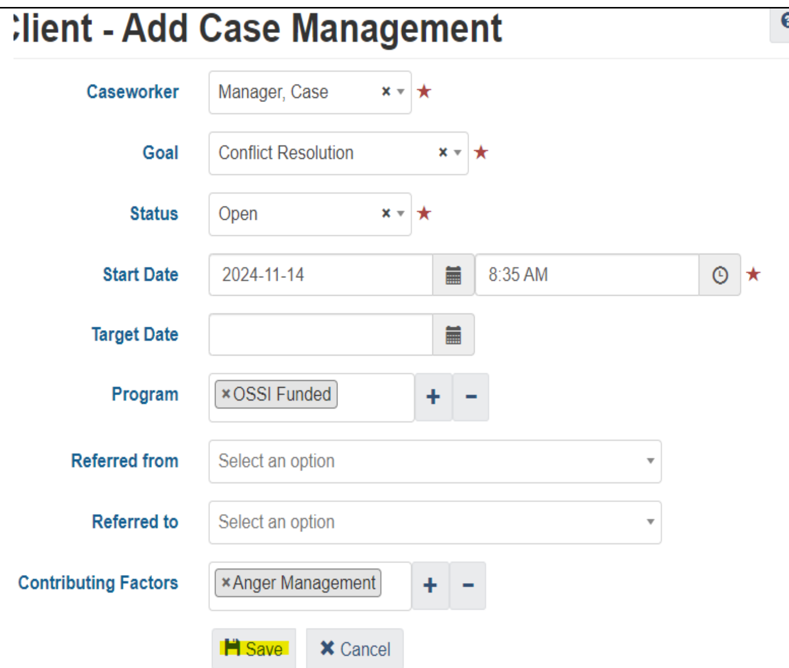
<table>
<tr><th>Action</th><th></th></tr>
<tr><td>1. From the HIFIS main page, navigate to Front Desk > Clients> Search Client >Client -Details.</td><td>
</td></tr>
<tr><td>2. From the Client Management drop down menu, click on Case Management.</td><td>
</td></tr>
<tr><td>3. From the Client – Case Management List page, select the + Add Case Button.</td><td>
</td></tr>
<tr><td>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:</td><td>
</td></tr>
<tr><td>5. Select the case worker that is</td><td>
</td></tr>
</table>

working with the client.	
6. Select the appropriate goal the client is trying to achieve.	
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.	
7. Leave "Status" field set to Open	
8. In Start Date field, enter the date the Case Management record is being created.	
9. In the Program field, enter the program that is funding the services provided to client (Reaching Homes or OSSI).	
10. Pick the Contributing Factors that are related to the main Goal.	

****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	

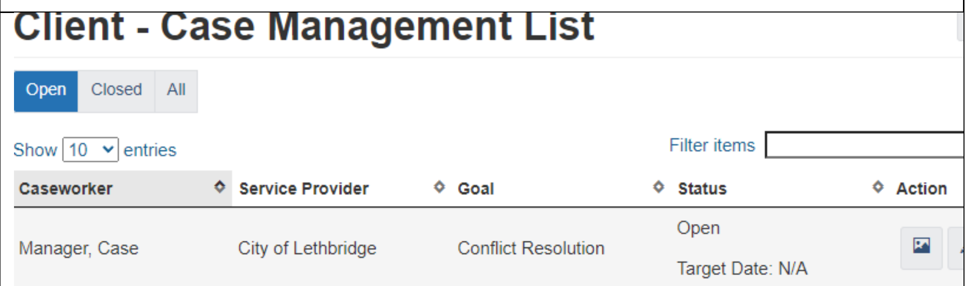
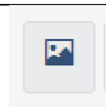
****Note – Once selecting a Contributing Factor from Various Factors page, return to Client – Add Case Management page and will see the selected option from Various Factors show up when inputting Contributing Factors.***

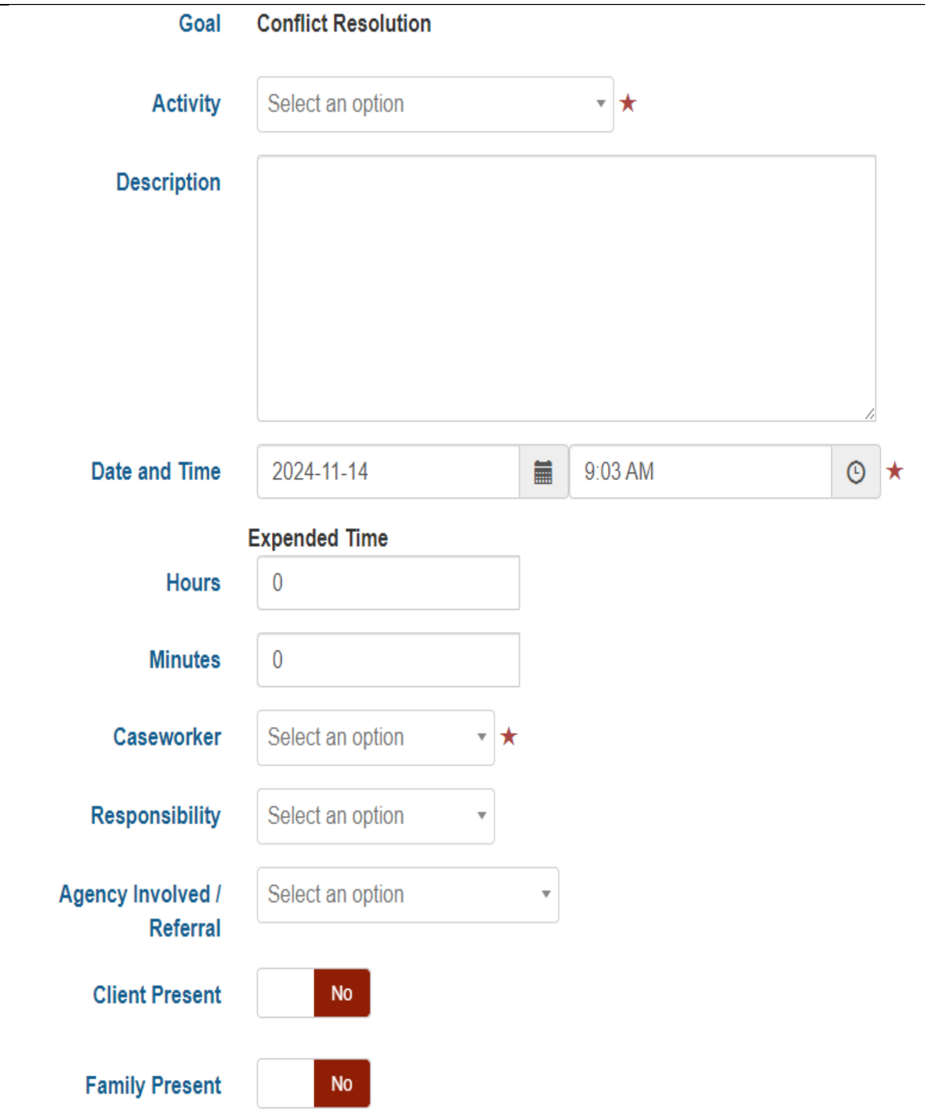
12. Click Save	

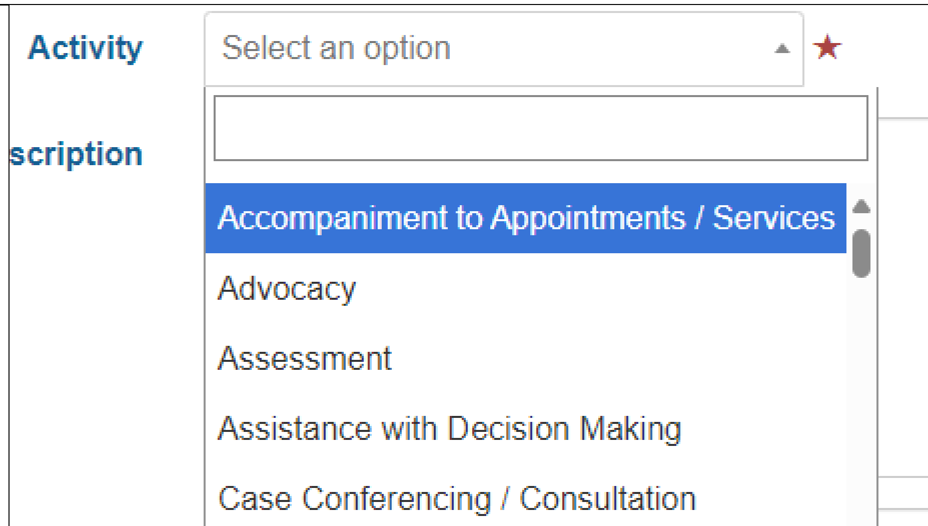
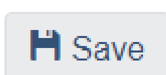
- The Process presented above is one of 2 ways to create a Case Management profile in HIFIS. Another quick process to add a Case Management profile is navigating to Front Desk > Case Management > + Add Case.
- Once the Goal for case management has been inputted, activities performed to meet the goal 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.	
3. From the Display case Management page, select the Sessions tab and click on + Add Session button.	

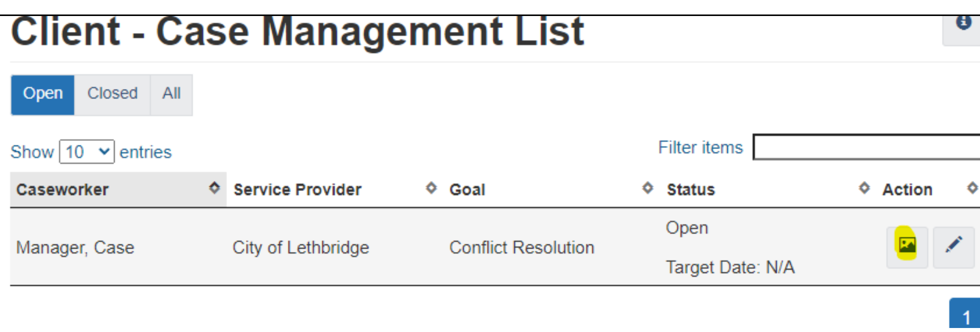
4. From the Client - Add Case Session page, fill in all required fields marked with a red star and any additional/optional fields to fill in on behalf of client:	
Note – The selected Goal from adding a Case Goal will automatically populate when adding a Case Session.	

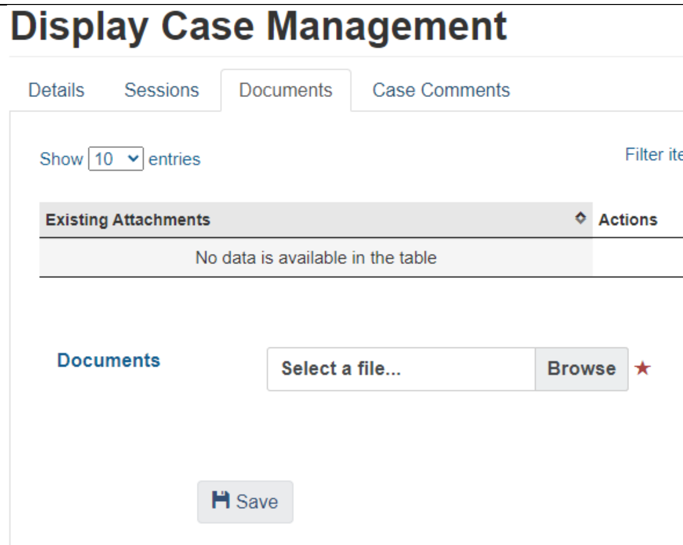
5. Select what the Activity was	
6. Input any comments or details towards the activity (optional)	
7. Select the Case Worker that was involved in the Activity	
8. Click Save	
***Note – Once the Session has been saved to a Case Management record, the goal cannot be changed.**	

3. Procedure to Add a Document

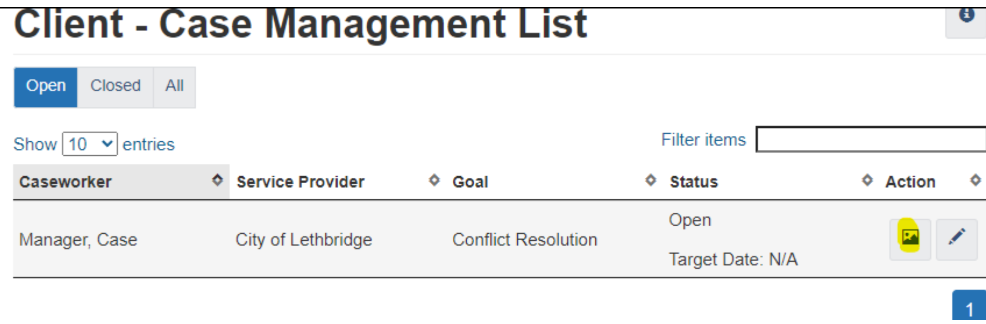
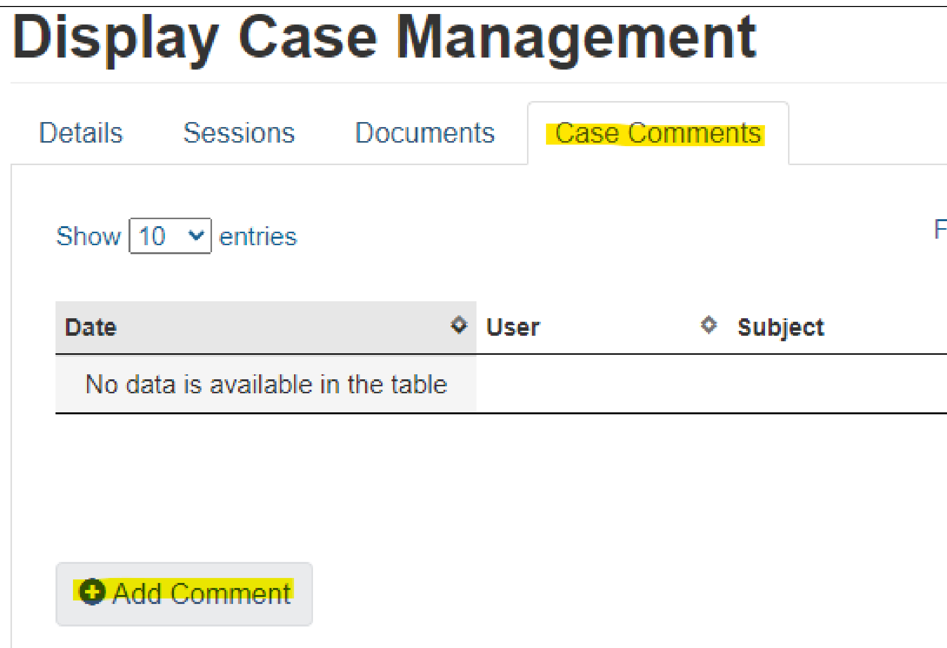
*Please Note - Service providers should only upload documents to HIFIS that help clients navigate the system of supports. This information must be uploaded to modules in the ***Client Management*** drop down menu of the application (with the exception of consent forms, which can be uploaded on the Client 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:

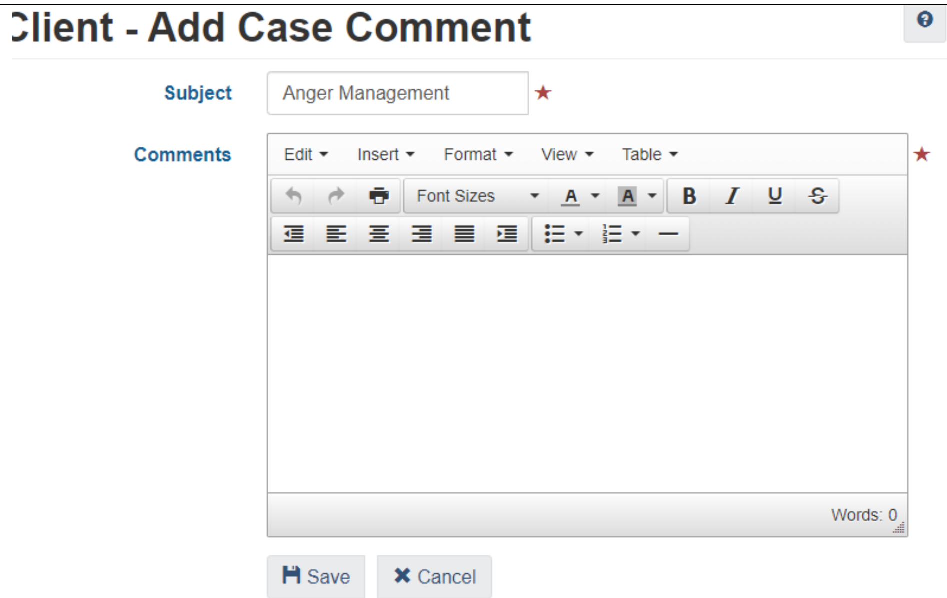
- Housing Placements > Housing Placement Details > Documents
- Housing Loss Prevention > Housing Loss Prevention Details > Documents
- Incidents > Add Incidents > Attachments

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

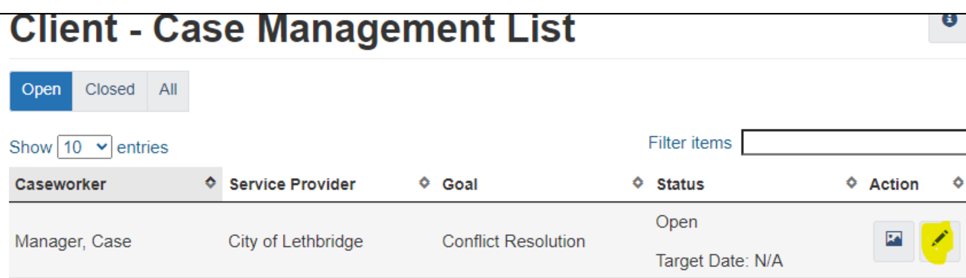
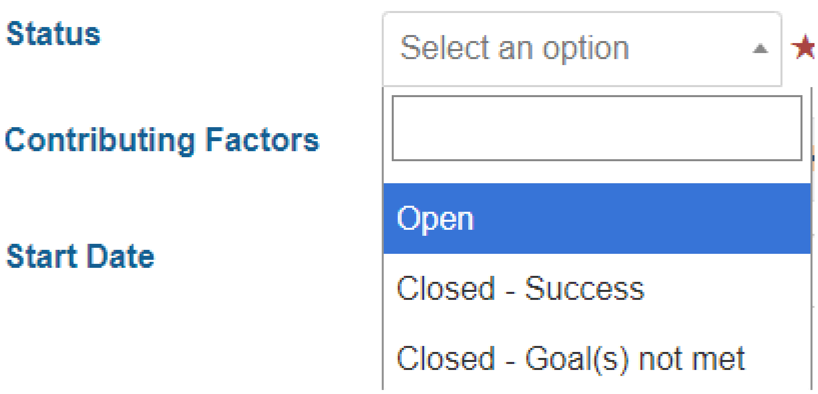
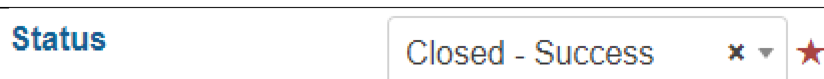
2. On the Display Case Management page, navigate and click on Documents > Select a file / Browse to find the documents you want to upload to this case.	
3. Click Save	
*Note – **Scanned client identification documents (Driver's License, Passport etc.) are useful documents to store in this module. However, a client's health records are prohibited from being uploaded into HIFIS.**	
****Note – Users can multi-select files for a maximum of 5MB per upload. Not all file types are permitted (e.g. pptx).***	

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	

3. Enter a subject for Case Comment and proceed with entering Comments.	
4. Click Save once you have completed adding Subject and Comments to case.	
Note – When going back to Display Case Comments, the caseworker who was involved in the activity will show up as under User Name.	

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.	

<table>
<tr>
<td>4. Click Save</td>
<td>
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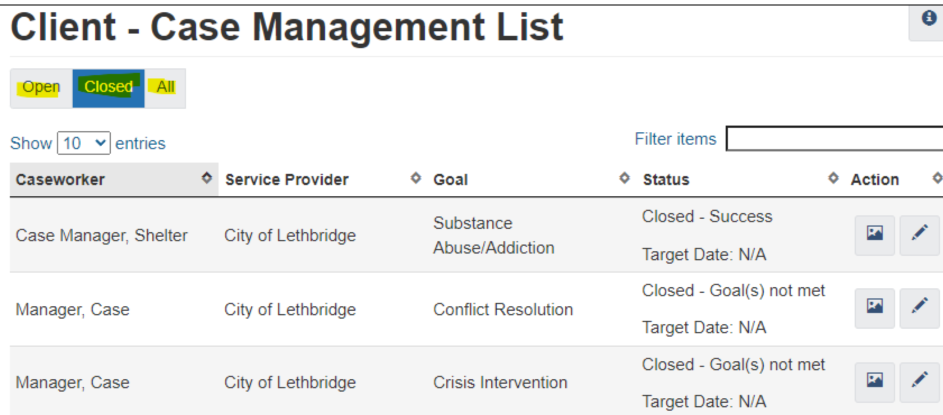
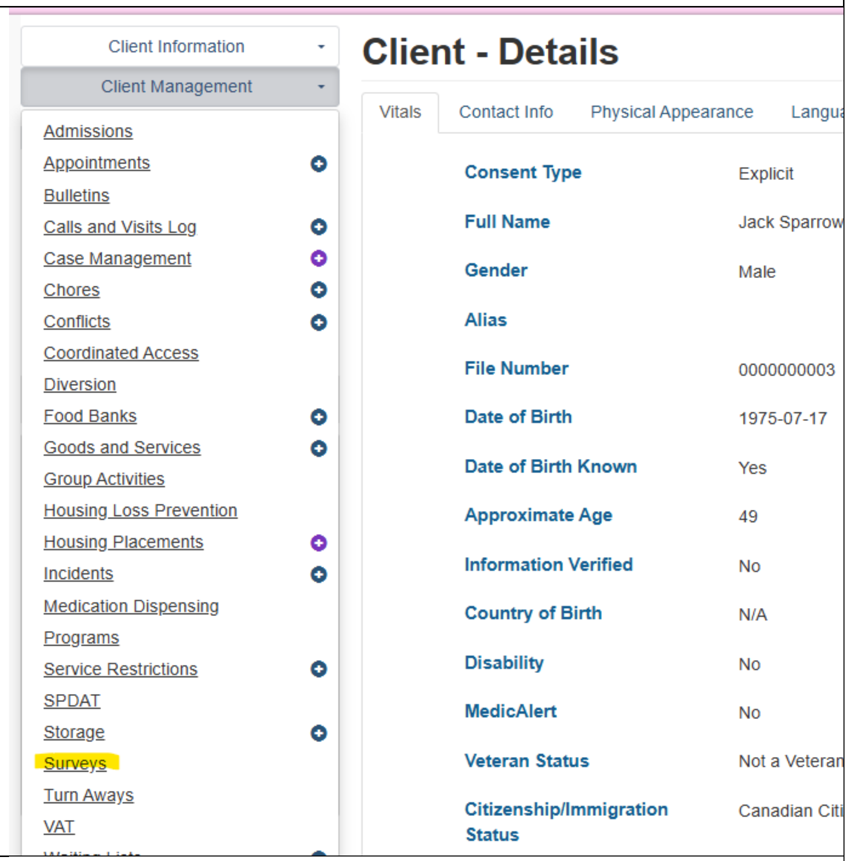
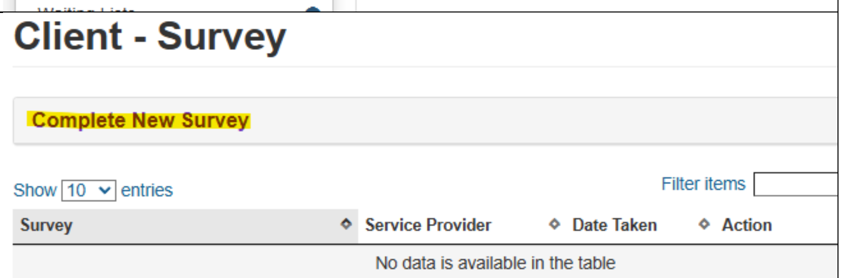
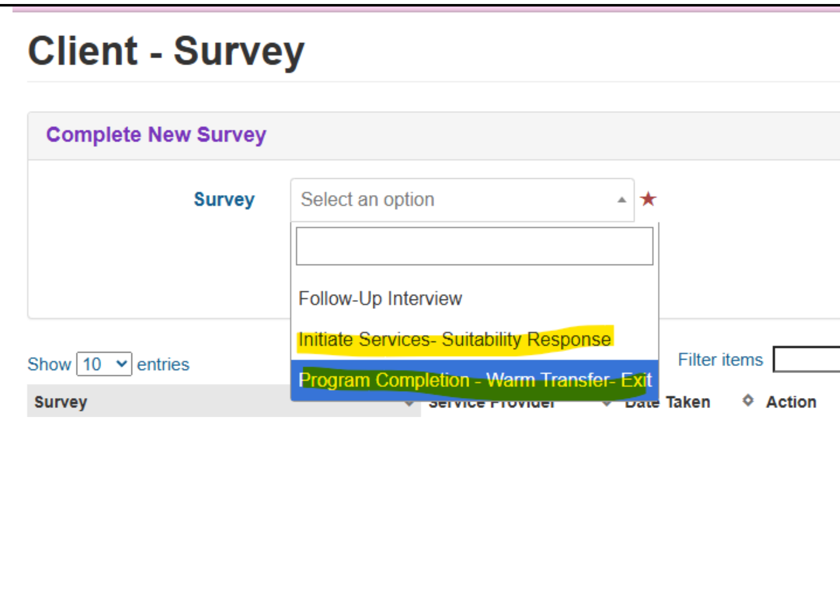
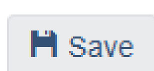
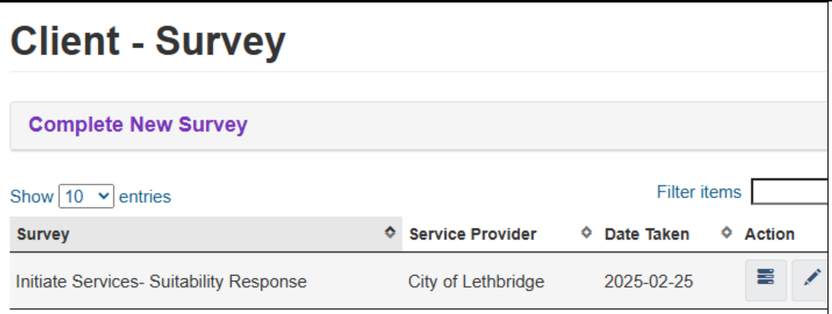
<tr>
<td>5. Navigate back to Case Management main page – Client Management > Case Management > Client Case Management List to review Open, closed or All entries.</td>
<td>
</td>
</tr>
<tr>
<td>6. Administer the Exit survey to participants.</td>
<td> <u>Procedure to Administering a Survey:</u> Initiation and Exit
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.
*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.
*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. </td>
</tr>
</table>

Action	
1. From the Client – Details page, navigate over to the Client Management drop down menu and select the “Surveys” option.	
2. From the Client – Survey page, click on the drop down arrow next to the “Complete New Survey” tab.	

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

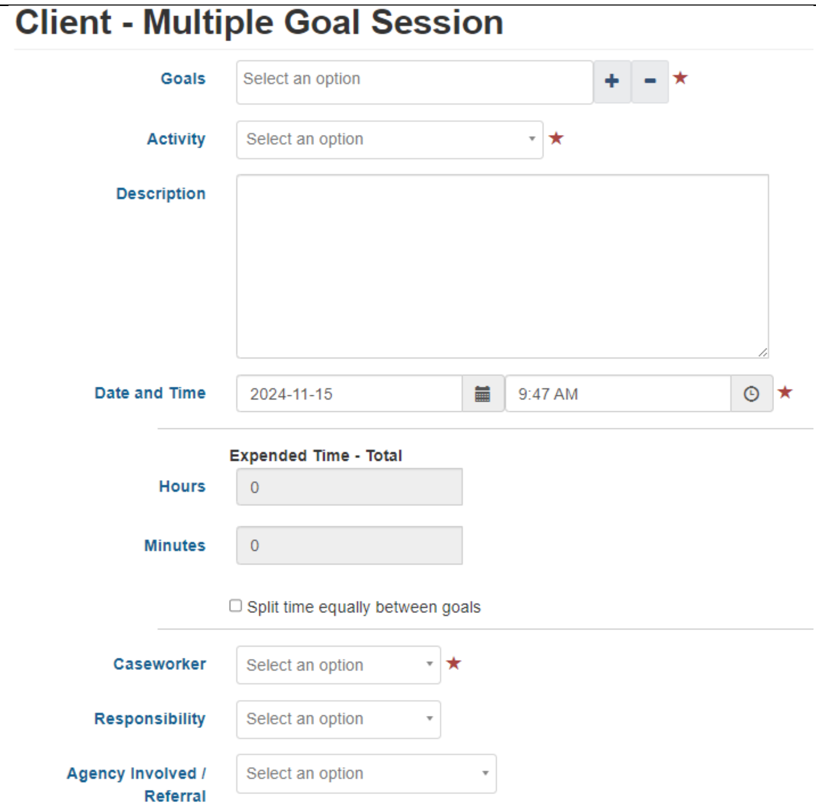
	6. Once clicking Save, you will be redirected back to the Client-Survey page showing that the survey has been completed. All surveys will now stay with the client in Client – Survey.	

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	

<table>
<tr>
<td>1. From the Client – Details main page, navigate to Client Management > Case Management > + Client - Multiple Goal Session</td>
<td>
</td>
</tr>
<tr>
<td>2. In the Client – Multiple Goal Session, fill in all required fields and optional (*Note – previously inputted goals must have Status set to Open).</td>
<td>
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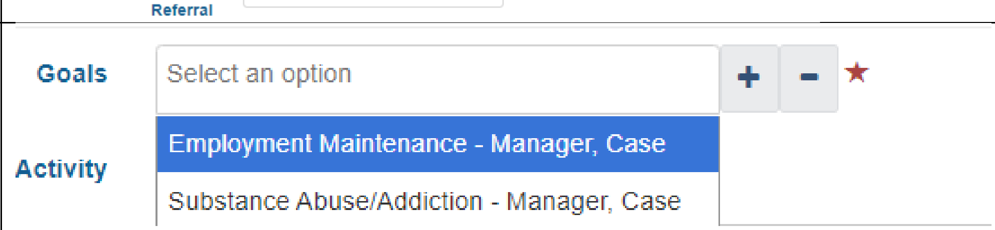
<tr>
<td>3. In the Goals field, select the relevant goals from the drop down list or</td>
<td>
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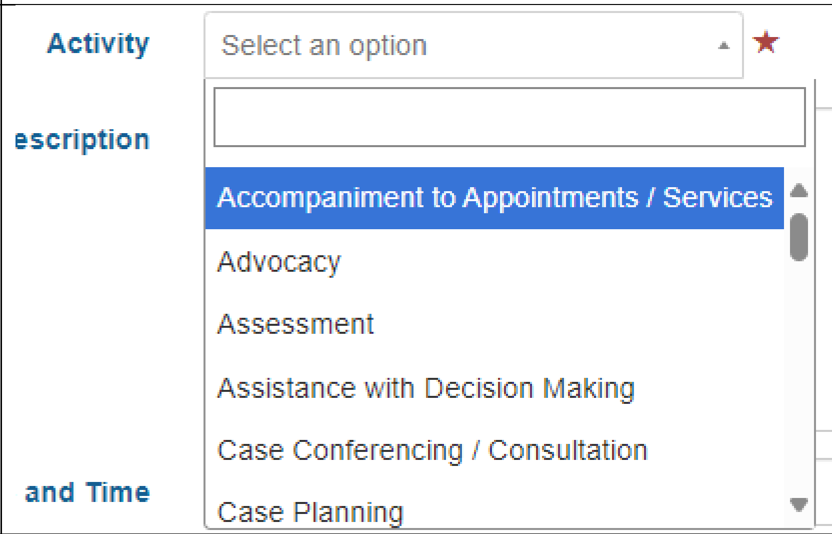
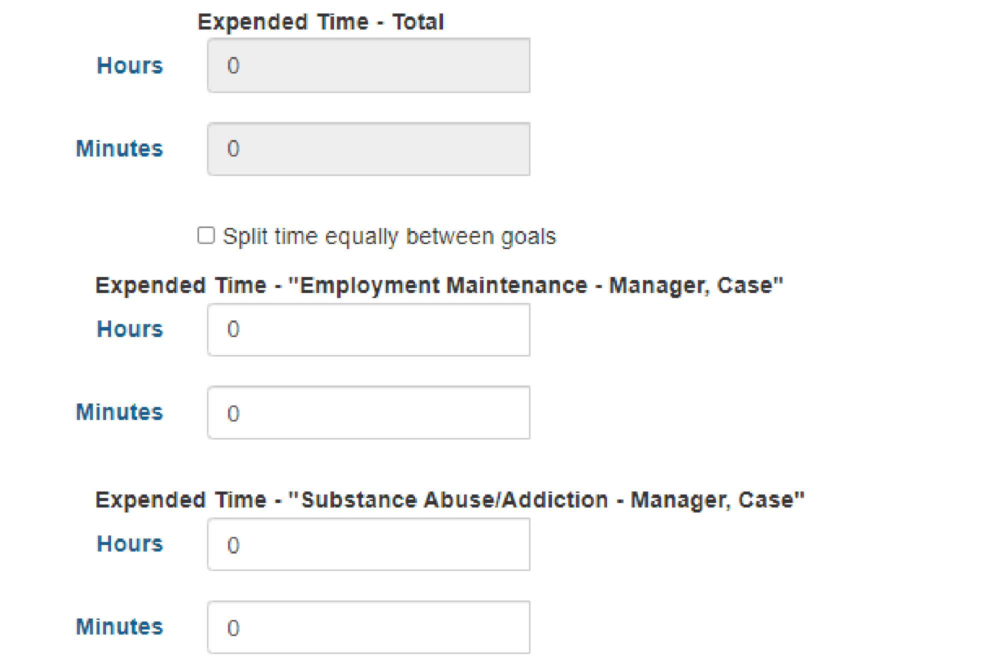
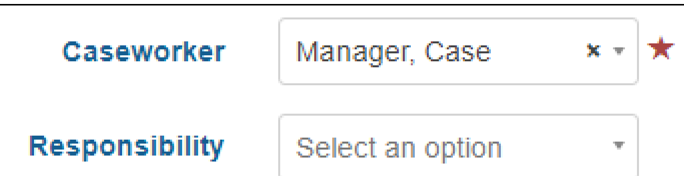
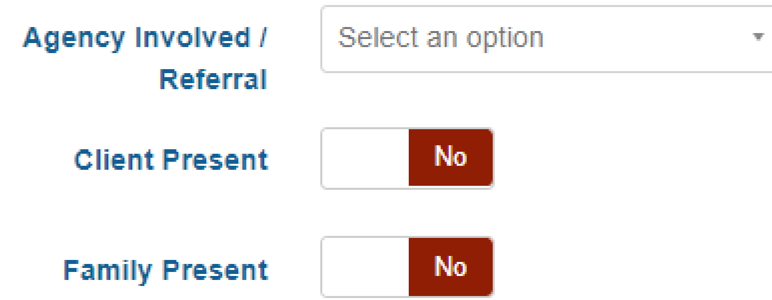
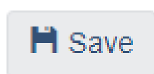
</table>

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.	
5. Confirm the Start Date and Time of the Activity, and if needed, you can change the date/time manually.	

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.	
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).	

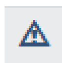
8. If applicable, select the Agency or Referral Involved with the case session. This includes indicating if the client and/or family were present for session.	
9. Click the Save button.	

7. Procedure to add an Alert under Client Record

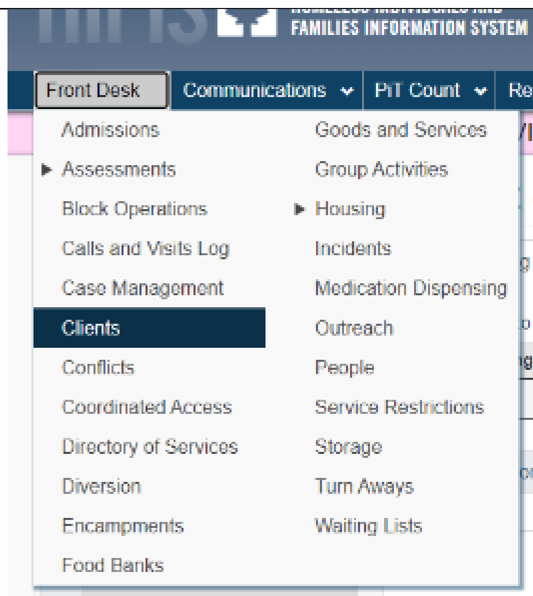
There are several types of entries in a client's record/profile that cause an alert to be create. These alerts indicate some piece of information that would be good for user (Case Managers, Systems Navigator, Outreach etc.) to know when serving a client. Alerts are created when one of the following is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

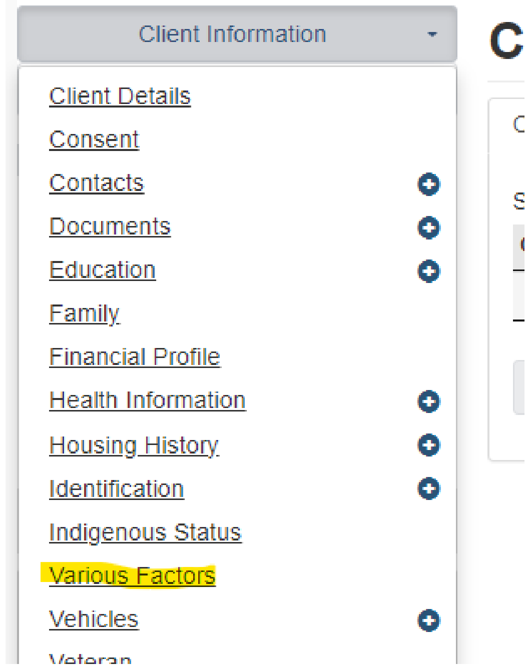
- *Behavioural Risk Factor*
- *Watch Concerns*

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.	

<table>
<tr>
<td>2. From the Client – Details pages, navigate to Client Information and select Various Factors.</td>
<td>
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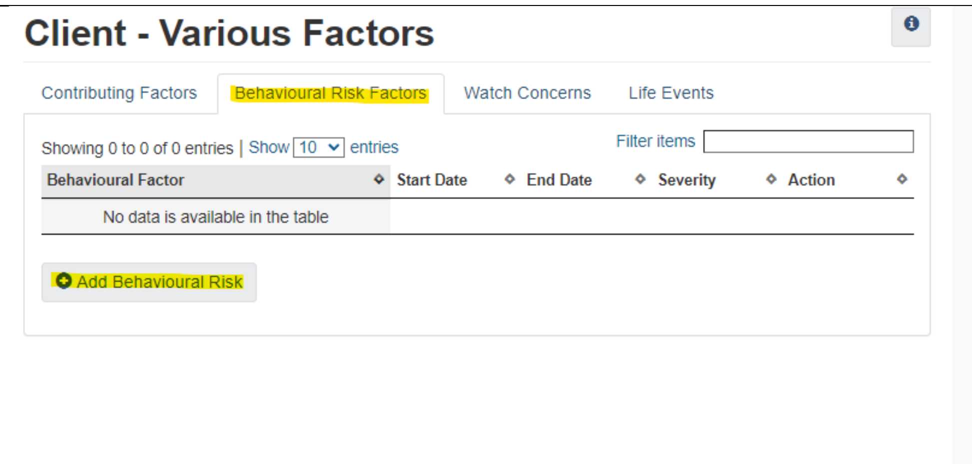
<tr>
<td>3. From the Client-Various Factors page, select the Behavioural Risk Factors tab and select the + Add Behavioural Risk button.</td>
<td>
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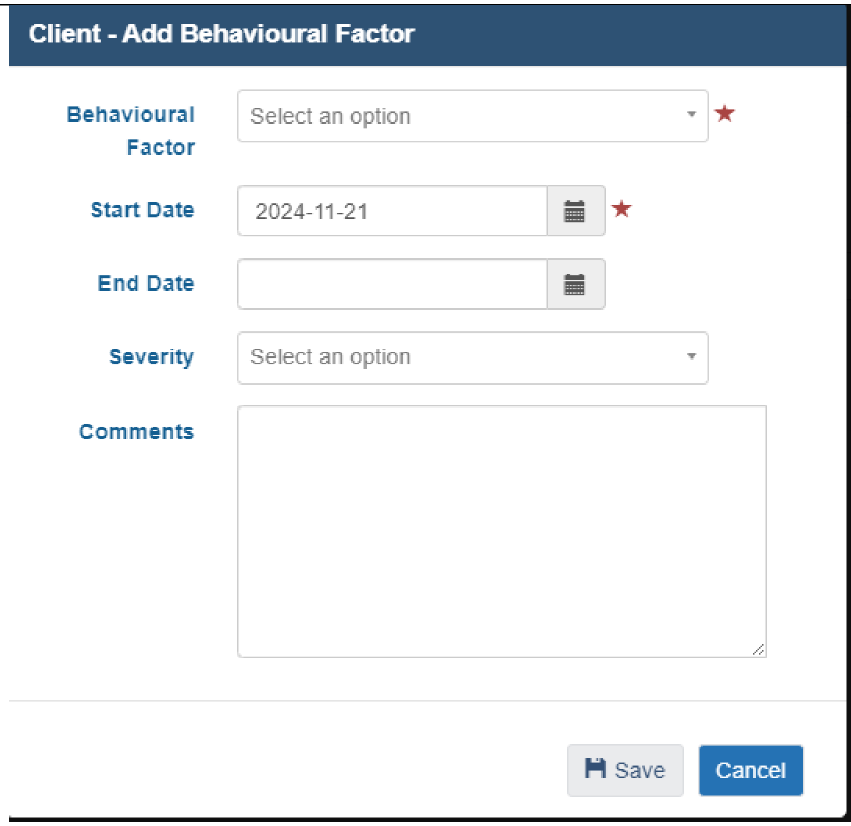
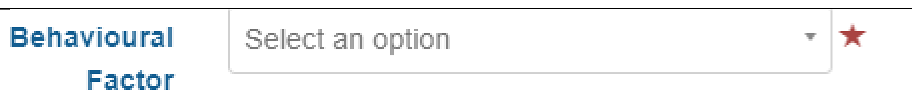
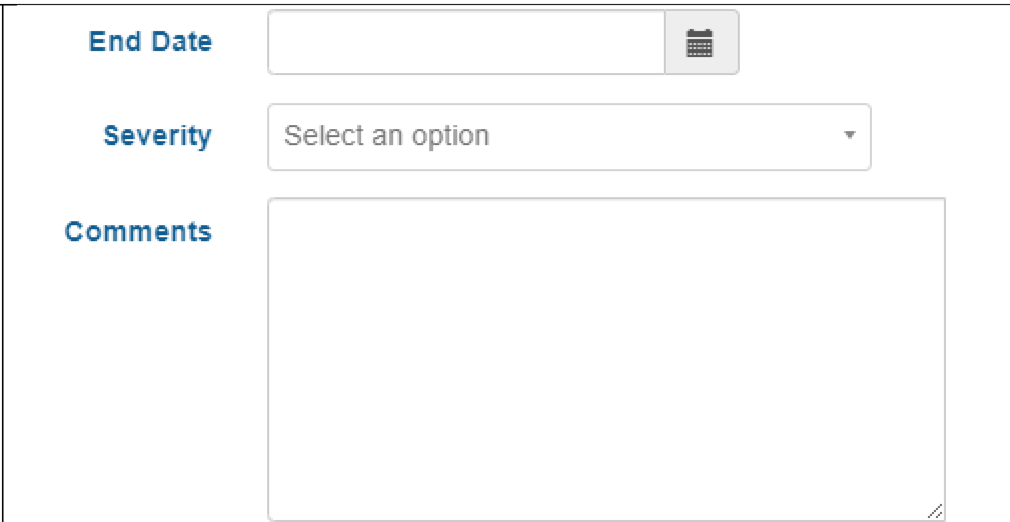
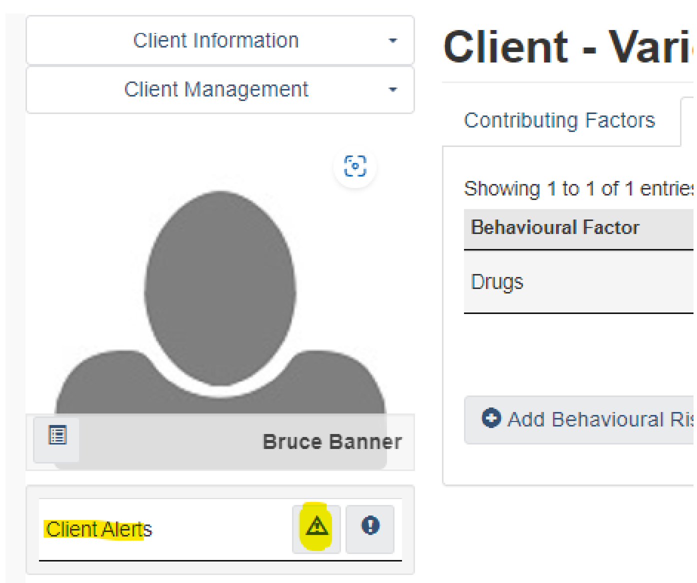
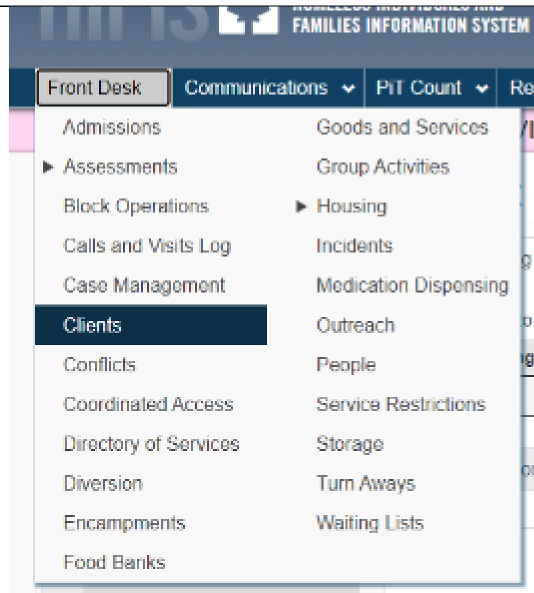
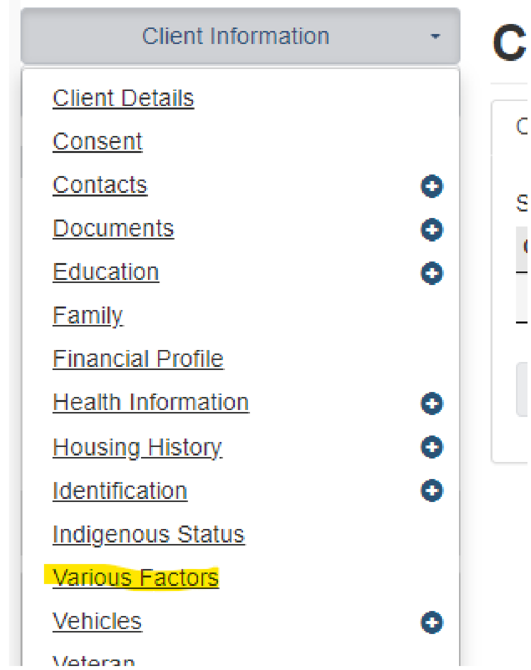
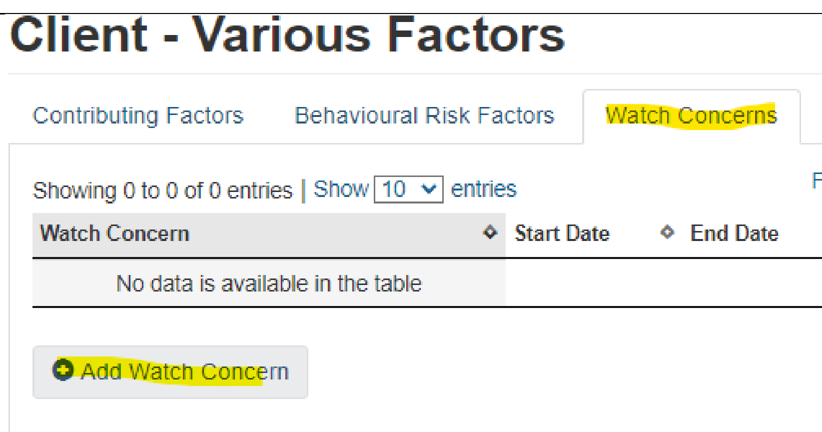
4. Proceed with filling out all required fields and if applicable, optional fields.	
5. Enter the Behavioural Risk Factor of the client.	
6. Confirm the Start Date and if applicable, you can manually change the start date.	

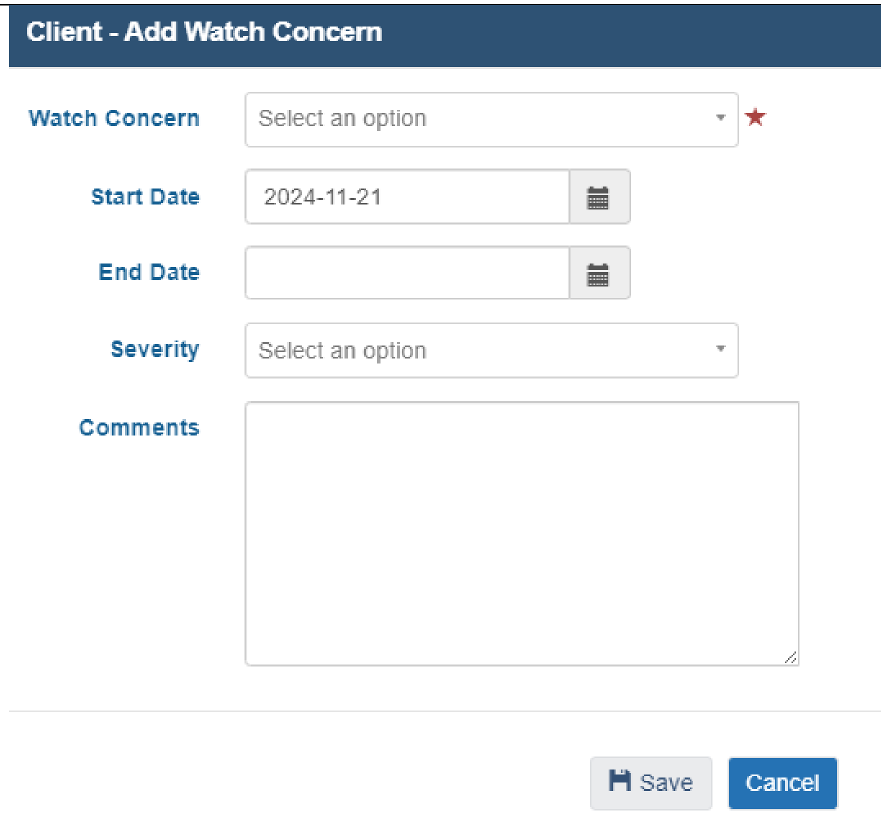
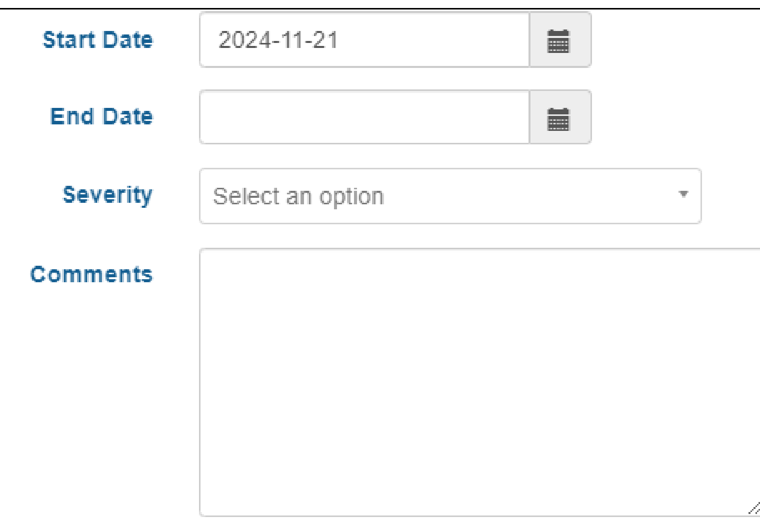
<table>
<tr><td>7. If applicable, enter the End Date, Severity of the behavioural factor and any additional comments concerning the behavioural factor (optional).</td><td>
</td></tr>
<tr><td>8. Click Save.</td><td>
</td></tr>
<tr><td colspan="2">*Note – The Behavioural Risk Factor Alert will show up next to Client Alerts for users to view:

</td></tr>
</table>

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.).

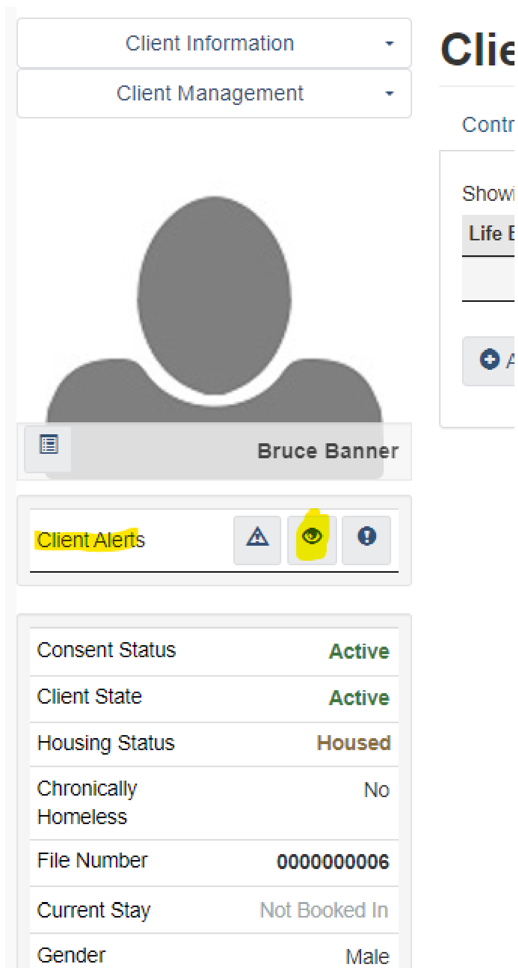
Action	
1. From the HIFIS main page, navigate to the Front Desk drop down menu and select the clients options, and perform the existing client search.	

2. From the Client- Details under Vitals page, select Client Information and click on Various factors.	
3. Under Client – Various Factors page, navigate to Watch Concerns tab and click on + Add Watch Concern.	

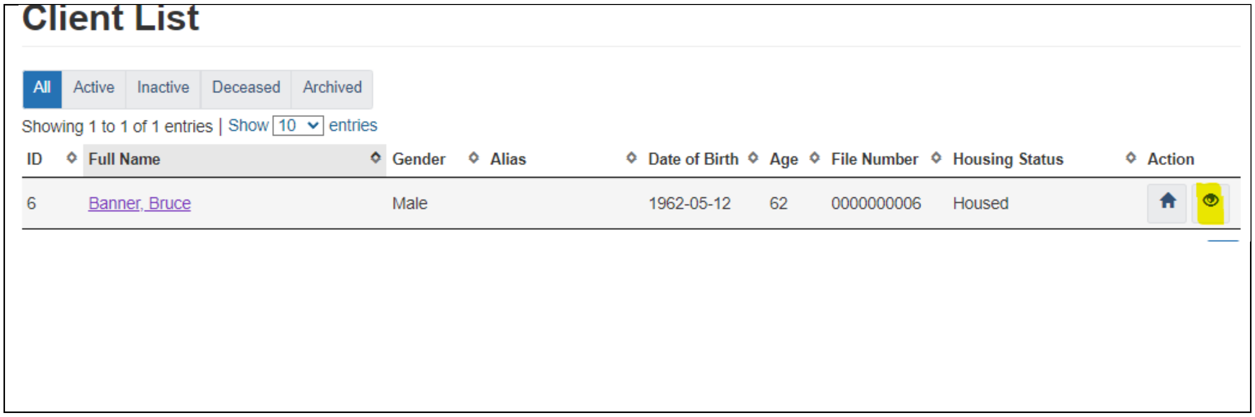
4. In the Client – Add Watch Concern page, fill in the required fields.	
5. Select the Watch Concern pertaining to client.	
6. If applicable, fill in the optional fields; • Start Date • End Date • Severity of the Watch Concern and; • Additional Comments concernin g the	

Watch Concern	
7. Click Save.	

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



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

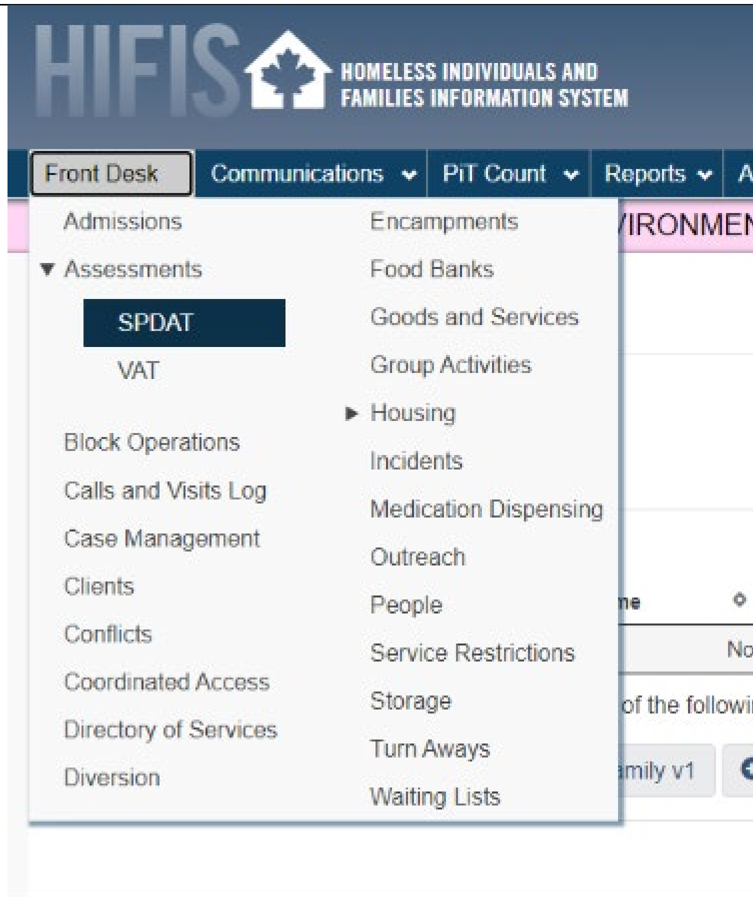


8. Procedure to Add an SPDAT (Service Prioritization Decision Assistance Tool) Assessment to Client Record/Profile

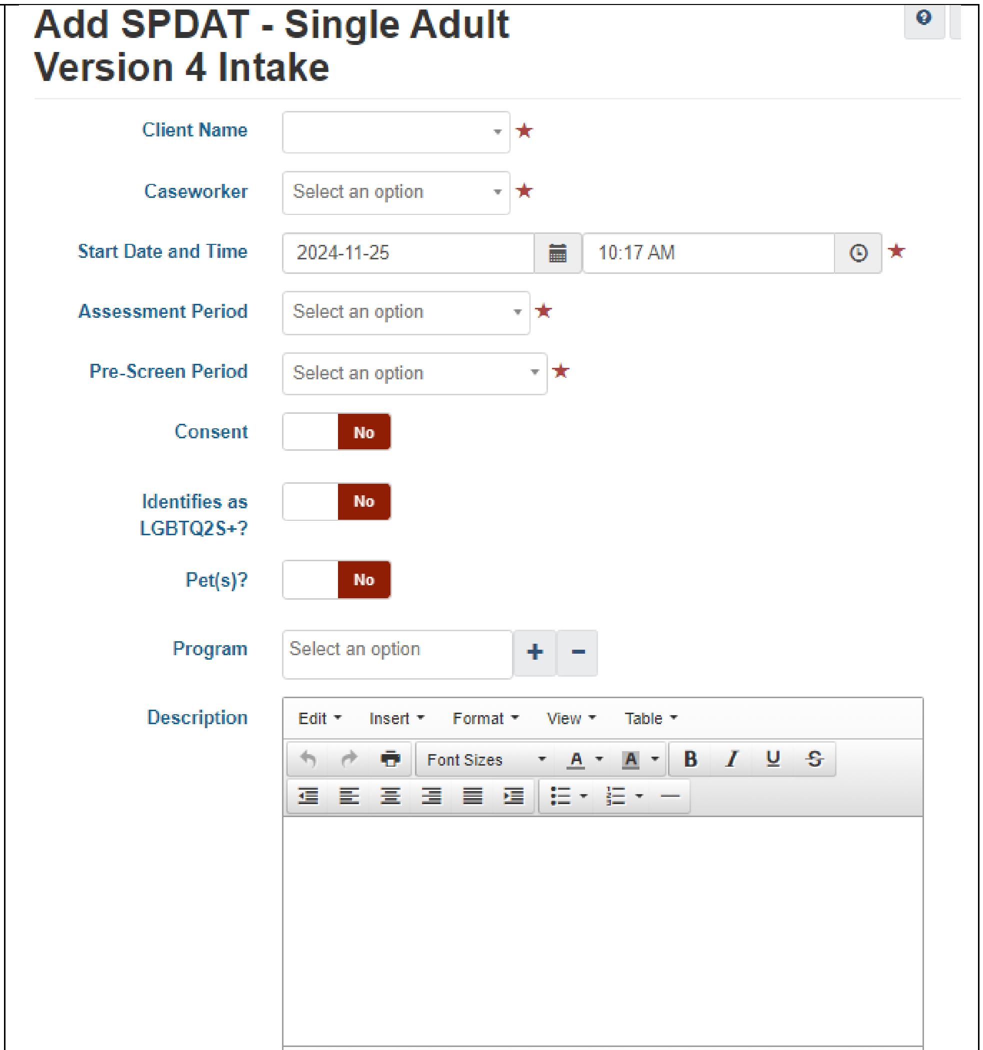
The purpose of this tool is to helps service providers prioritize their service delivery based on standardized assessments given to individuals and families who are homeless or at-risk. The different versions of this tool have been implemented in the HIFIS application to give HIFIS users an easy and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

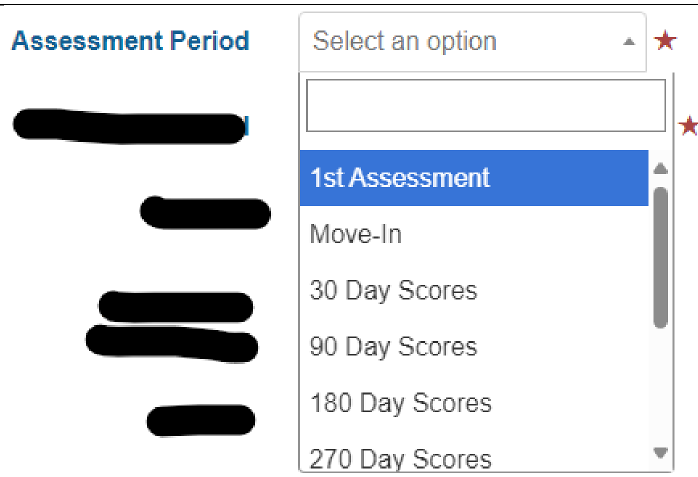
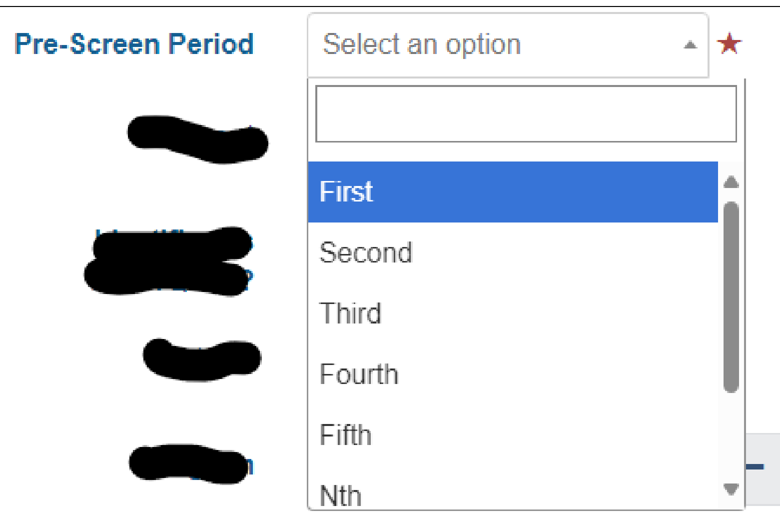
Under Assessments (Front Desk > Assessments) from the Intake List page, the different tabs provided in the assessments are the VI-SPDAT (Vulnerability Index – SPDAT), the main SPDAT assessment and the Famile and Youth version of both.

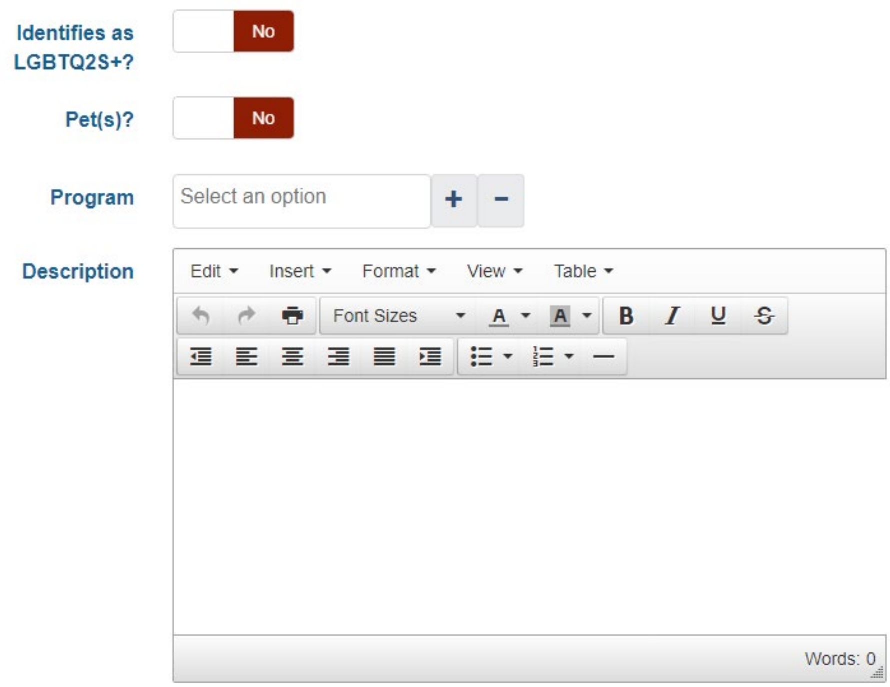
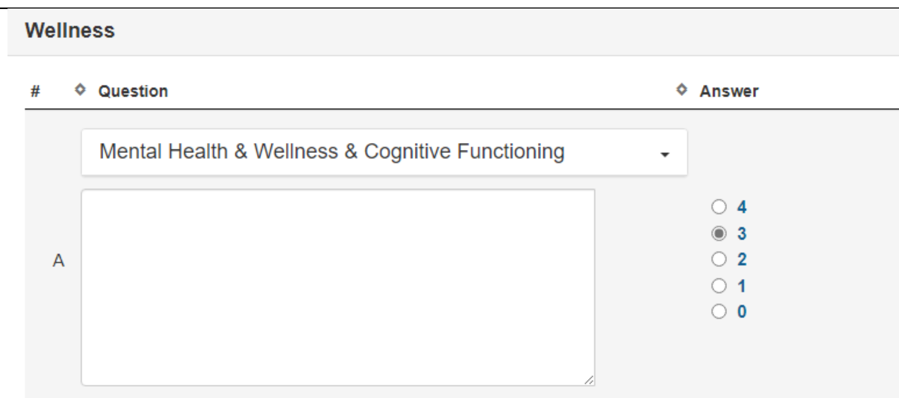
Prerequisite	• Must have a pre-existing client already created in the HIFIS system to perform this function.

<table>
<tr><th>Action</th><th></th></tr>
<tr><td>1. From the Front Desk drop down menu, select the Assessments tab, then select SPDAT.</td><td>
</td></tr>
<tr><td>2. From the SPDAT Intake List page, select the SPDAT tab.</td><td>
</td></tr>
</table>

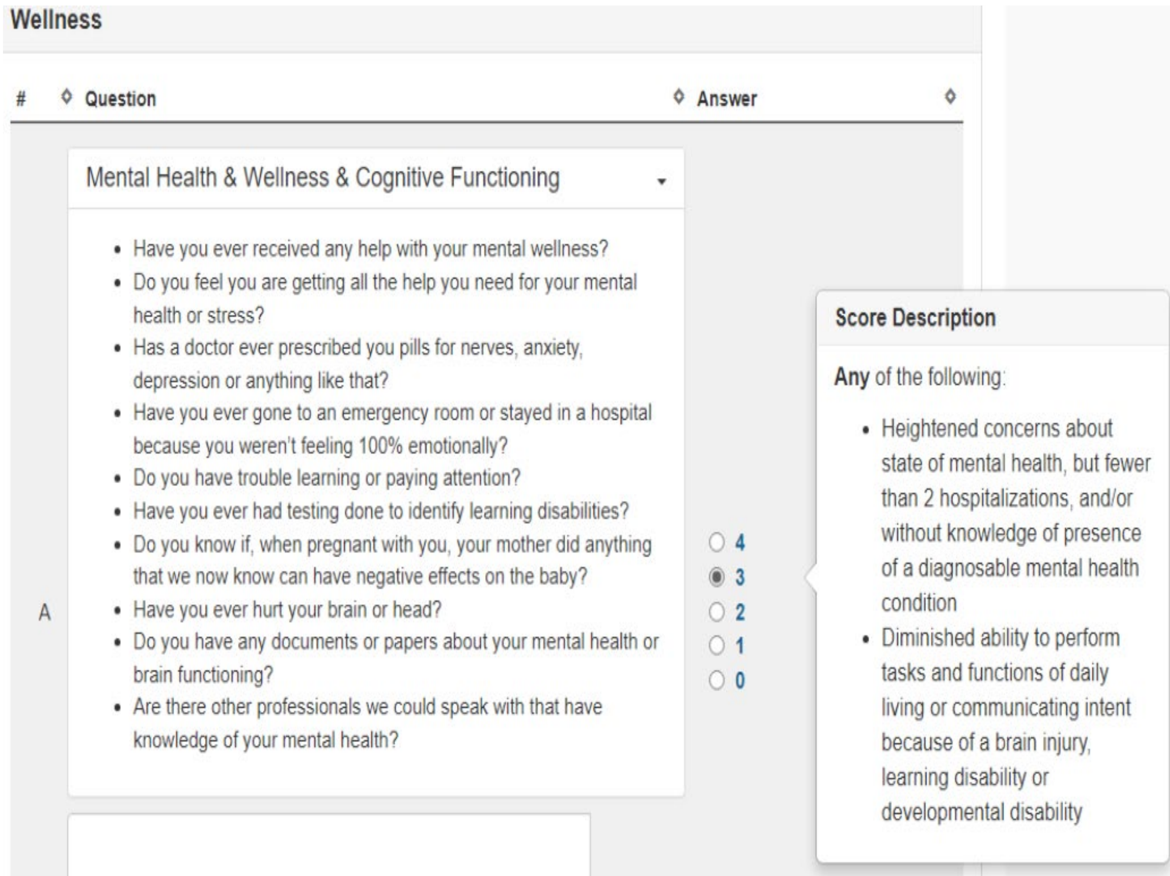
3. From the SPDAT Intake list page and selecting the SPDAT tab, select the option depending on the type of client and version of the assessment you would like to use (e.g., + Adult v4)- (v4 = Version 4).	Start a new SPDAT assessment by selecting one of the following: + Adult v3 + Adult v4 + Family v1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

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.	
5. Under Client Name, type to search for existing client, then select the client from search results.	
6. Select the caseworker conducting the assessment with cline from drop down list.	

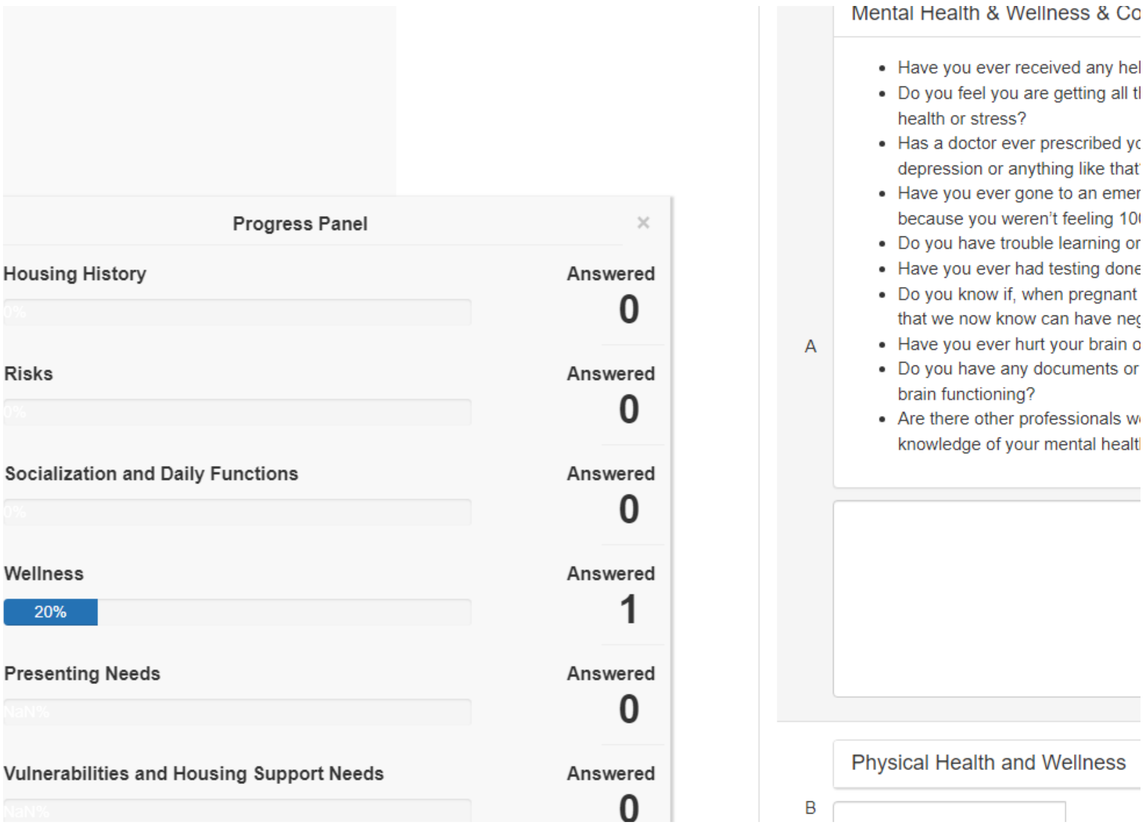
7. Confirm the Start Date and Time of the assessment taking place.	
8. Select the Assessment Period by which period this assessment for the client is being conducted: • 1st Assessment • Move-In • 30 Day Scores • 90 Day Scores • Etc.	
9. Select the Assessment Pre-Screen Period to indicate if the assessment has been completed before (first time, second time, etc.)	

10. Indicate whether the client has given their Consent to perform assessment.	
11. If applicable, fill in remaining optional fields. In the Description field, if applicable, add any additional information concerning the SPDAT assessment in text box.	
Note – From this point on, the caseworker and client can now proceed with answering and completing the SPDAT Assessment.	
12. For each question in SPDAT Assessment, select a number (1, 2, 3, 4) to indicate the score wit the option to provide an additional written justification for reason of score.	

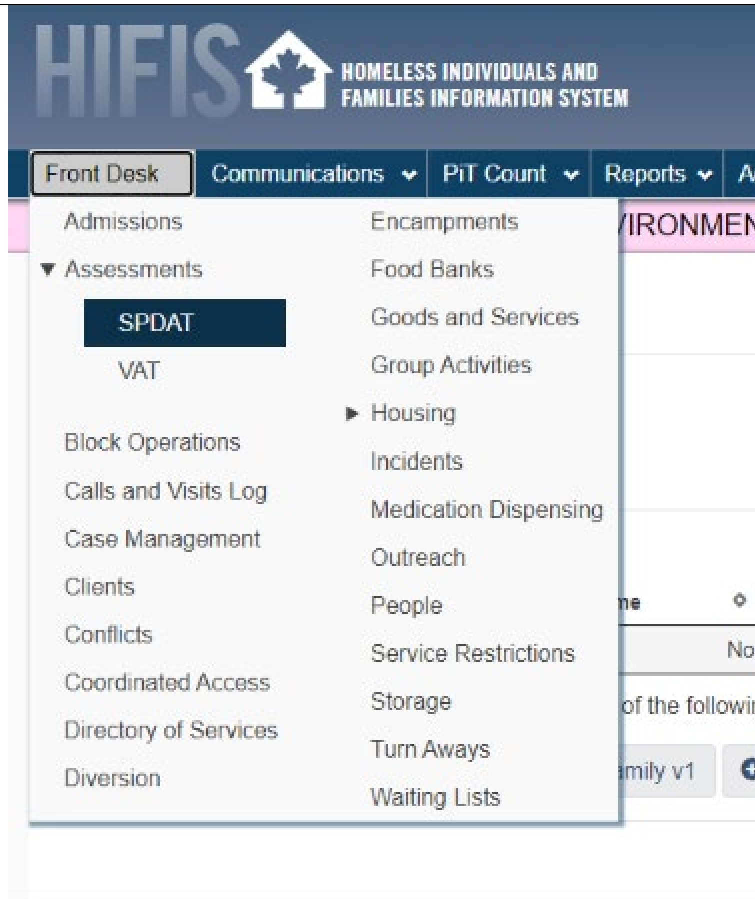
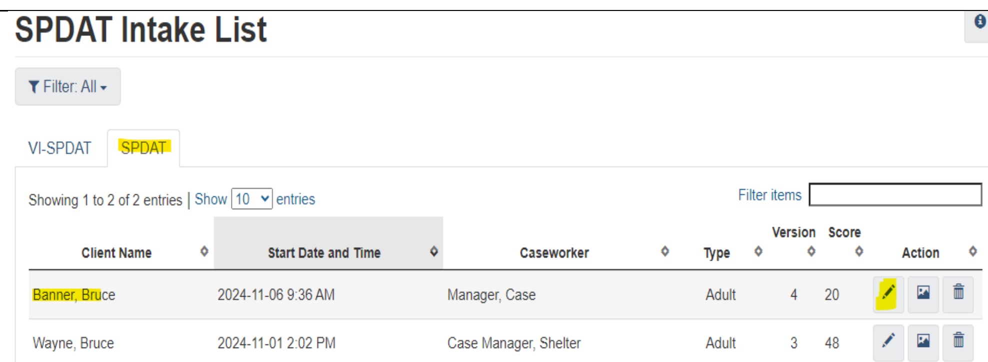
Note – To view the full description of the question for each section, click on the arrow next to the title to expand it. You can also hover over each score (1, 2, 3, 4) in the answer column to see the description of that number selected indicates. This will ensure the assessment is being answered in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

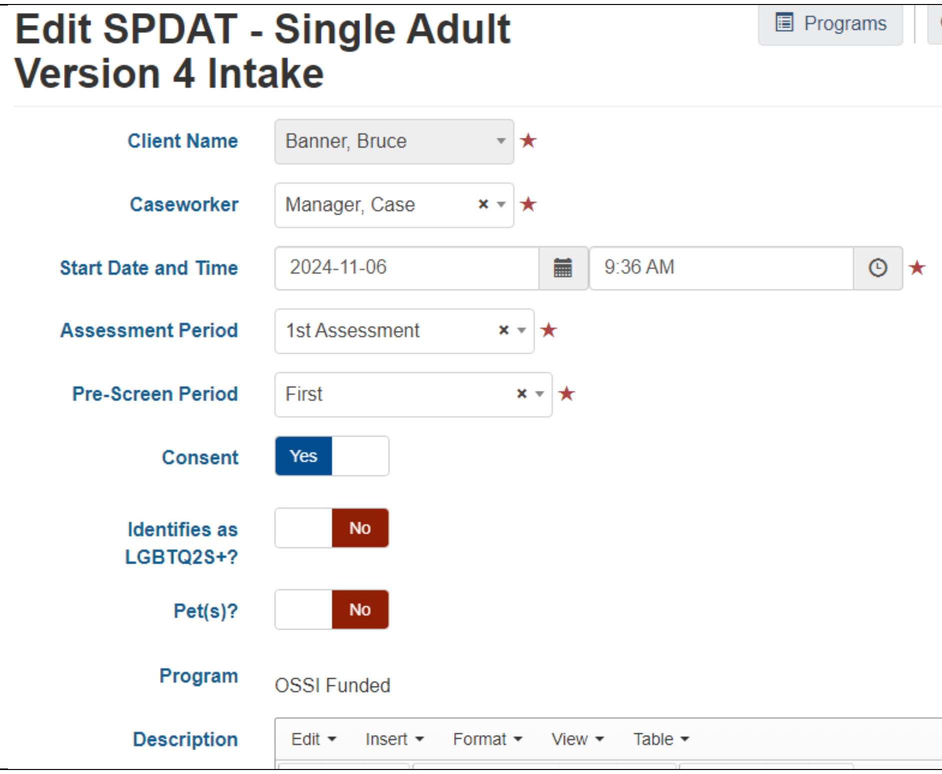


Note – There is a Progress Panel on the left side of your SPDAT Assessment page in which allows you to keep track of your progress through the whole

assessment. Hovering or click on this panel will expand it, revealing more details of your progress and highlight incomplete sections. 	
13. Once the assessment has been completed, click Save.	

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

<table>
<tr><th>Action</th><th></th></tr>
<tr><td>1. From the HIFIS main page, navigate to the Front Desk drop down menu and select the Assessments drop down and select SPDAT.</td><td>
</td></tr>
<tr><td>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.</td><td>
</td></tr>
</table>

<table>
<tr><td>3. From the Edit Intake page, you can edit existing information or add any additional information missed.</td><td>
</td></tr>
<tr><td colspan="2">*Note – On the Edit Intake Page, you can also edit the existing scores inputted previously or return where you left off on the Assessment.</td></tr>
<tr><td>4. Click Save.</td><td>
</td></tr>
</table>