

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.

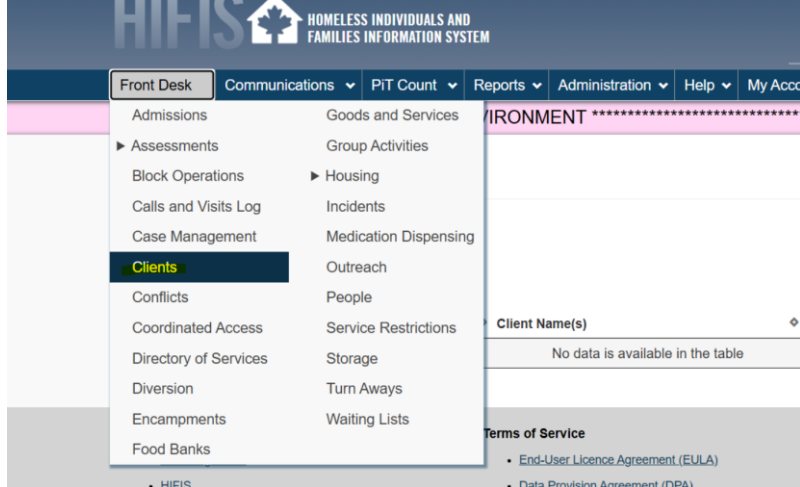
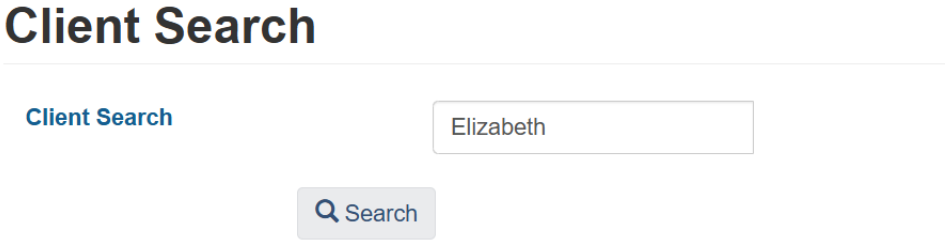
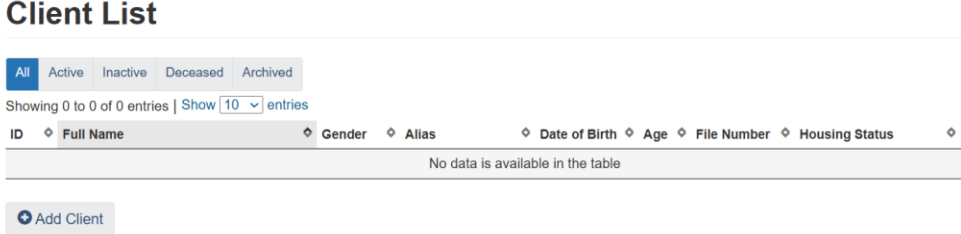
Training Module	Action
Case Management	New Record (Add Case/Goal) in Client Profile – Case Management List is created <ul style="list-style-type: none"> • Search Client > Client Vitals > Client Management – Case Management > Client – Case Management List > Add Case.
Case Management	New Record (Add Session)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

Enter a Consent for Client

****Note - This process will be performed before entering the Case Management and Group Activities.***

Client calls/walks up, they want to proceed with formal Intake - Client search / creation:

- Add Explicit consent with an expiry for Intake appointment
- Client comes back for intake meeting – then add CA + Explicit and record efforts as Case Sessions in CM Module.

Action	
<p>1. From the HIFIS main page, navigate to Front Desk and select Clients.</p>	 <p>The screenshot shows the HIFIS Homeless Individuals and Families Information System interface. The 'Front Desk' menu is open, and 'Clients' is highlighted in blue. Other menu items include Admissions, Assessments, Block Operations, Calls and Visits Log, Case Management, Conflicts, Coordinated Access, Directory of Services, Diversion, Encampments, Food Banks, Goods and Services, Group Activities, Housing, Incidents, Medication Dispensing, Outreach, People, Service Restrictions, Storage, Turn Aways, and Waiting Lists.</p>
<p>2. From the Client Search page, type in a random name at the top of your head in the Client Search box and click Search.</p>	 <p>The screenshot shows the 'Client Search' page. The search box contains the name 'Elizabeth' and the 'Search' button is visible.</p>
<p><i>*Please Note – The reason for this process is to ensure there is not already a pre-existing client in the system with the same name to avoid any duplication of Client Profiles/Records.</i></p>	
<p>3. Once clicking Search, the page will re-direct to the Client List page and will see that there are no results</p>	 <p>The screenshot shows the 'Client List' page. It features a table with columns for ID, Full Name, Gender, Alias, Date of Birth, Age, File Number, and Housing Status. The table is empty, displaying the message 'No data is available in the table'. There are also filter tabs for 'All', 'Active', 'Inactive', 'Deceased', and 'Archived', and an 'Add Client' button.</p>

for the name entered.

***Please Note – By performing this function the system (HIFIS) will detect that there is no current client profile/record already in the system with the name entered.**

4. From the Client List page, user will see that the “+ Add Client” button has populated and can now proceed with clicking + Add Client button to add new profile/record to the system.

Client List

All Active Inactive Deceased Archived

Showing 0 to 0 of 0 entries | Show 10 entries

ID Full Name

+ Add Client

5. Add Explicit Consent with an expiry date for Intake Appointment.

Add Client

Consent Type Explicit x ★

Consent Start Date 2025-01-25

Consent Expiry Date 2026-01-25

Attachments Select a file... Browse

6. Continue to fill in the rest of the required fields marked with a red star and click Save when done.

Last Name ★
 First Name ★
 Middle Name
 Alias 1
 Alias 2
 Date of Birth Known Yes
 Date of Birth ★
 Information Verified No
 Gender ★

***Please Note – Once the client profile/record has been created, from this point on, the user will return to the client profile/record when they return for intake meeting and can change their Consent to Coordinated Access.**

7. When searching up previously entered client profile/record, user will navigate to the “Client Information” drop down menu from Client – Details and select “Consent”

Client Information ▾

- [Client Details](#)
- [Consent](#)
- [Contacts](#) +
- [Documents](#) +
- [Education](#) +
- [Family](#)
- [Financial Profile](#)
- [Health Information](#) +
- [Housing History](#) +
- [Identification](#) +
- [Indigenous Status](#)

Client - Details

Vitals
Contact Info
Physical Appearance

- Consent Type**
- Full Name**
- Gender**
- Alias**
- File Number**
- Date of Birth**

<p>8. Client returns for Intake Meeting – add Coordinated Access + Explicit for Consent Type.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <h3 style="margin: 0;">Client - Add Consent</h3> <p>Consent Type Coordinated Access ✕ ★</p> <p>Start Date 2024-12-25 📅 ★</p> <p>End Date 📅</p> <p>Attachments Select a file... Browse</p> <p>Comment</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Edit Insert Format View Table </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ↶ ↷ 🖨 Font Sizes A A B I U 🔗 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ </div> <p style="font-size: small; margin: 0;">Client returned for Intake meeting, client's new consent has chnaged to Coordinated Access.</p> </div>
<p>3. Click Save.</p>	<div style="border: 1px solid #ccc; padding: 10px; text-align: center;"> 📁 Save </div>
<p><i>*Please Note – User may now proceed with performing Case Management and Group Activities module for client.</i></p>	


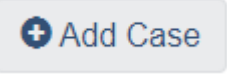
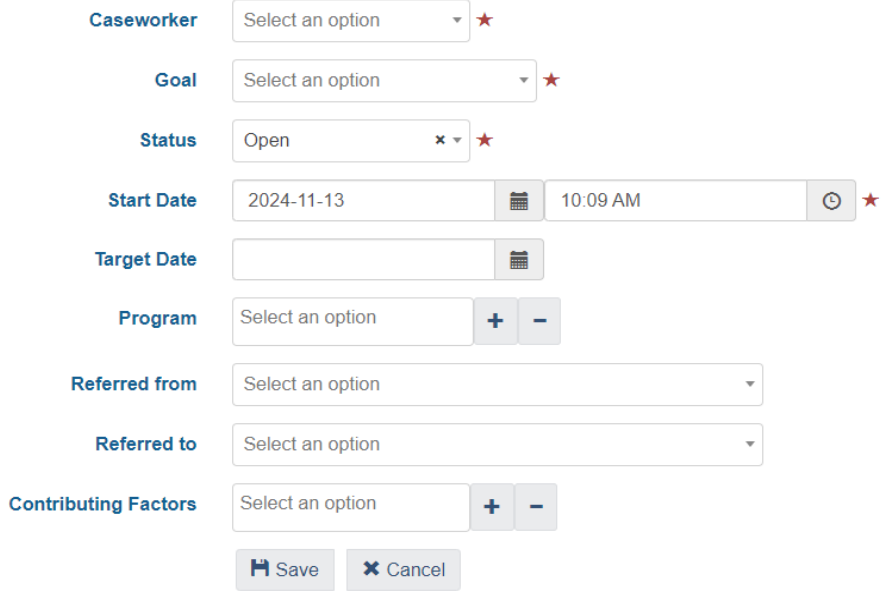

1. Case Management - Procedure to Add Case Goal

<p>Prerequisite</p>	<p>Client Profile/Record has been created in advance.</p>
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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.

<p>Action</p> <p>1. From the HIFIS main page, navigate to Front Desk > Clients> Search Client >Client - Details.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <h3 style="margin: 0;">Client Search</h3> <p>Client Search Bruce Wayne</p> <p style="text-align: center; margin-top: 10px;"> 🔍 Search </p> </div>
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<p>2. From the Client Management drop down menu, click on Case Management.</p>	
<p>3. From the Client – Case Management List page, select the + Add Case Button.</p>	
<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> <p>The optional field Referred From needs to be populated at this time.</p> <p>To filter: Press the filter button, and select Geographic Region – Lethbridge.</p> <p>See the Referral training materials for more details on Referrals in HIFIS (www.lethbridge.ca/hifis)</p>	
<p>5. Select the case worker that is working with the client.</p>	

6. Select the appropriate goal the client is trying to achieve.	Goal <input type="text" value="Select an option"/> ★
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***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	Status <input type="text" value="Open"/> × ▼ ★
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8. In Start Date field, enter the date the Case Management record is being created.	Start Date <input type="text" value="2024-11-14"/> <input type="text" value="8:10 AM"/> ★
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9. In the Program field, enter the program that is funding the services provided to client (Reaching Homes or OSSI).	Program <input type="text" value="Select an option"/> + - erred from <input type="text" value="Reaching Home Funded"/> <input type="text" value="OSSI Funded"/>
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10. Pick the Contributing Factors that are related to the main Goal.	Contributing Factors <input type="text" value="Select an option"/> + - <input type="text" value="Anger Management"/>
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***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: x OSSI Funded

Referred from: Select an option

Referred to: Select an option

Contributing Factors: x 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	
<p>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.</p>	
<p>2. Select the Display icon to enter the Display Case Management page.</p>	
<p>3. From the Display case Management page, select the Sessions tab and click on + Add Session button.</p>	

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:

Goal Conflict Resolution

Activity ★

Description

Date and Time ★

Expended Time

Hours

Minutes

Caseworker ★






Responsibility

Agency Involved / Referral

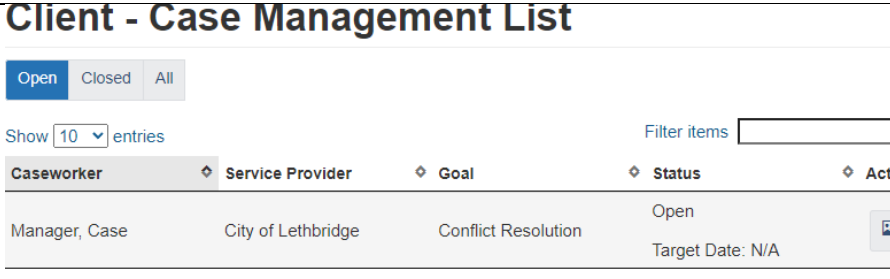
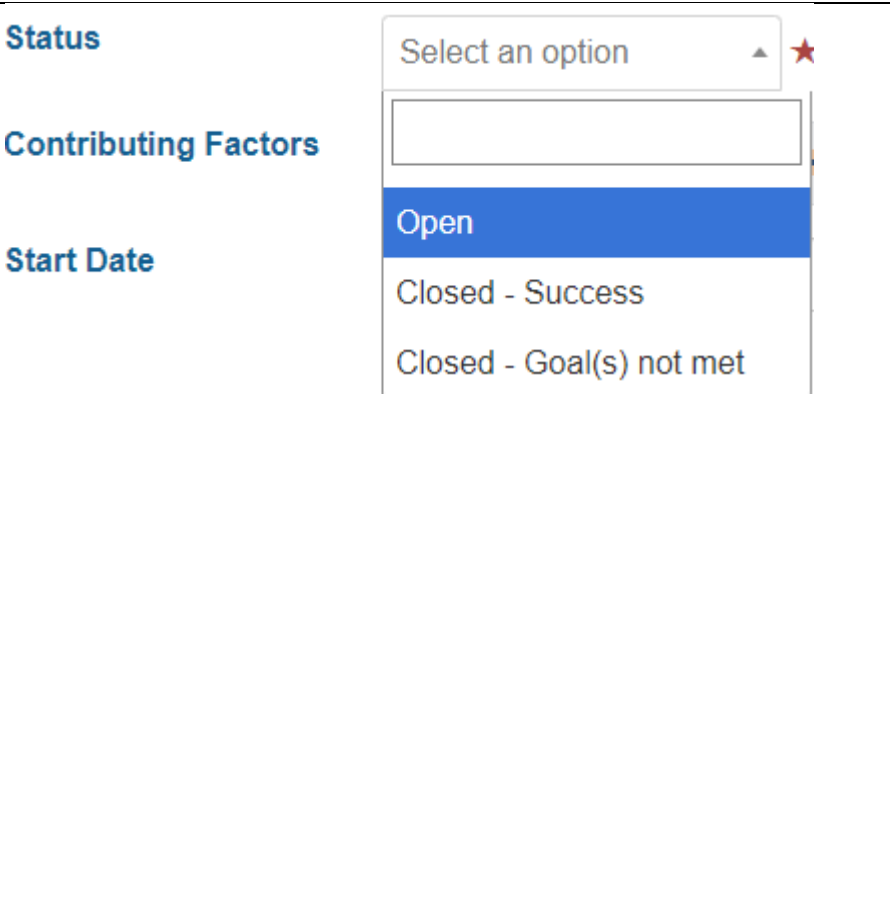
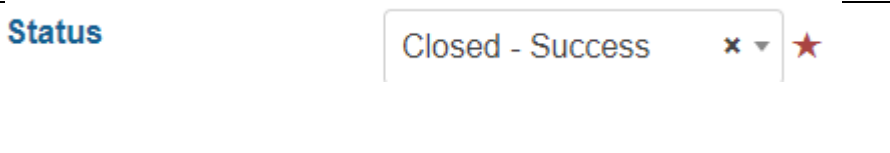
Client Present No


Family Present No

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

<p>5. Select what the Activity was</p>	<p>Activity</p> <p>Select an option  </p> <p>Description</p> <p><input type="text"/></p> <ul style="list-style-type: none"> <li style="background-color: #4a7ebb; color: white; padding: 2px;">Accompaniment to Appointments / Services Advocacy Assessment Assistance with Decision Making Case Conferencing / Consultation
<p>6. Input any comments or details towards the activity (optional)</p>	<p>Description</p> <p><input style="width: 100%; height: 100%;" type="text"/></p>
<p>7. Select the Case Worker that was involved in the Activity</p>	<p>Caseworker</p> <p>Select an option  </p>
<p>8. Click Save</p>	<p></p>
<p><i>*Note – Once the Session has been saved to a Case Management record, the goal cannot be changed.</i></p>	

3. Procedure to close a Goal

Action	
<p>1. Navigate to client record/profile and navigate to Client Management drop down list and select Case Management, select Edit icon.</p>	 <p>Client - Case Management List</p> <p>Open Closed All</p> <p>Show 10 entries Filter items</p> <p>Caseworker Service Provider Goal Status Acti</p> <p>Manager, Case City of Lethbridge Conflict Resolution Open Target Date: N/A</p>
<p>2. On the Client - Edit Case Management > Details page, navigate down to Status drop down field.</p> <p>The optional field Referred To needs to be populated at this time.</p> <p>To filter: Press the filter button and select Geographic Region – Lethbridge.</p> <p>See the Referral training materials for more details on Referrals in HIFIS (www.lethbridge.ca/hifis)</p>	 <p>Status</p> <p>Select an option</p> <p>Contributing Factors</p> <p>Start Date</p> <p>Open</p> <p>Closed - Success</p> <p>Closed - Goal(s) not met</p>
<p>3. Change Status field to Closed – Success or Closed – Goal(s) not met.</p>	 <p>Status</p> <p>Closed - Success</p>

4. Click Save																					
5. Navigate back to Case Management main page – Client Management > Case Management > Client Case Management List to review Open, closed or All entries.	<h3 data-bbox="553 325 1109 367">Client - Case Management List</h3> <div data-bbox="553 388 1432 730"> <p data-bbox="553 388 730 430"> Open Closed All </p> <p data-bbox="553 441 714 472">Show 10 entries</p> <p data-bbox="1177 441 1432 472">Filter items <input type="text"/></p> <table border="1" data-bbox="553 478 1432 730"> <thead> <tr> <th data-bbox="553 478 730 510">Caseworker</th> <th data-bbox="730 478 941 510">Service Provider</th> <th data-bbox="941 478 1153 510">Goal</th> <th data-bbox="1153 478 1380 510">Status</th> <th data-bbox="1380 478 1432 510">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="553 520 730 583">Case Manager, Shelter</td> <td data-bbox="730 520 941 583">City of Lethbridge</td> <td data-bbox="941 520 1153 583">Substance Abuse/Addiction</td> <td data-bbox="1153 520 1380 583">Closed - Success Target Date: N/A</td> <td data-bbox="1380 520 1432 583"></td> </tr> <tr> <td data-bbox="553 594 730 657">Manager, Case</td> <td data-bbox="730 594 941 657">City of Lethbridge</td> <td data-bbox="941 594 1153 657">Conflict Resolution</td> <td data-bbox="1153 594 1380 657">Closed - Goal(s) not met Target Date: N/A</td> <td data-bbox="1380 594 1432 657"></td> </tr> <tr> <td data-bbox="553 667 730 730">Manager, Case</td> <td data-bbox="730 667 941 730">City of Lethbridge</td> <td data-bbox="941 667 1153 730">Crisis Intervention</td> <td data-bbox="1153 667 1380 730">Closed - Goal(s) not met Target Date: N/A</td> <td data-bbox="1380 667 1432 730"></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	
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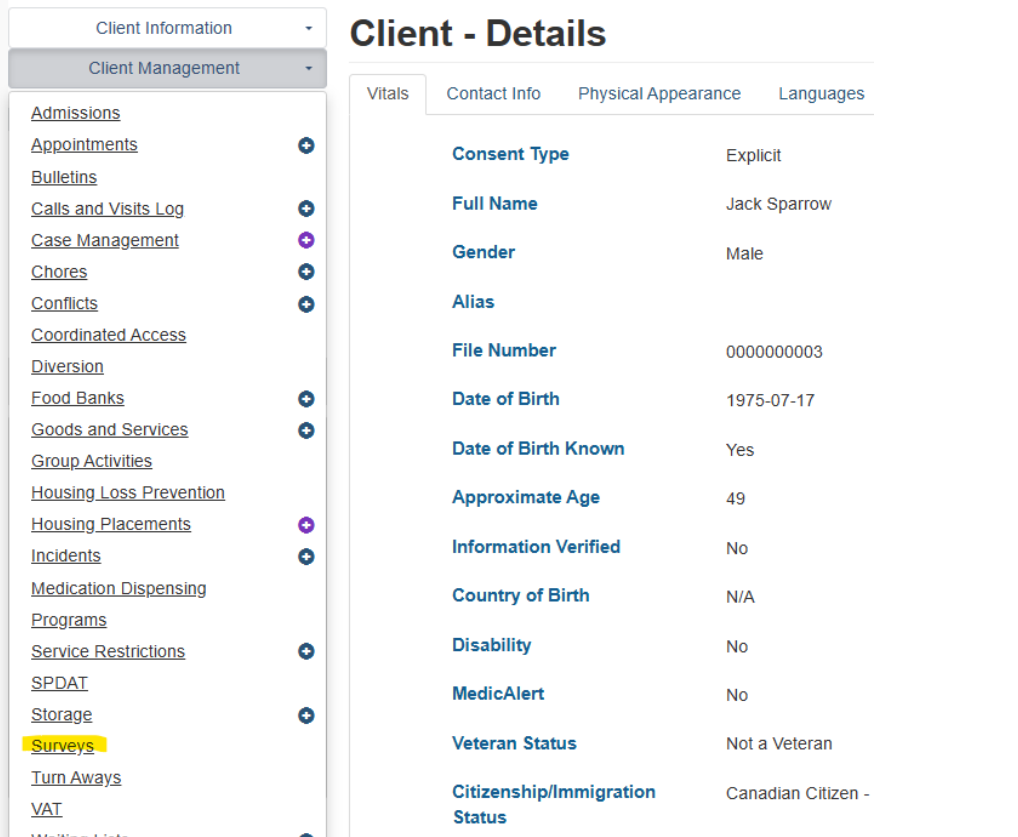
4. Procedure to Administering a Survey

***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 “Housing Referral – File Change” survey, when referring out to a housing support, this is another step in closing a case file.

Action	
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1. From the Client – Details page, navigate over to the Client Management drop down menu and select the “Surveys” option.



Client - Details

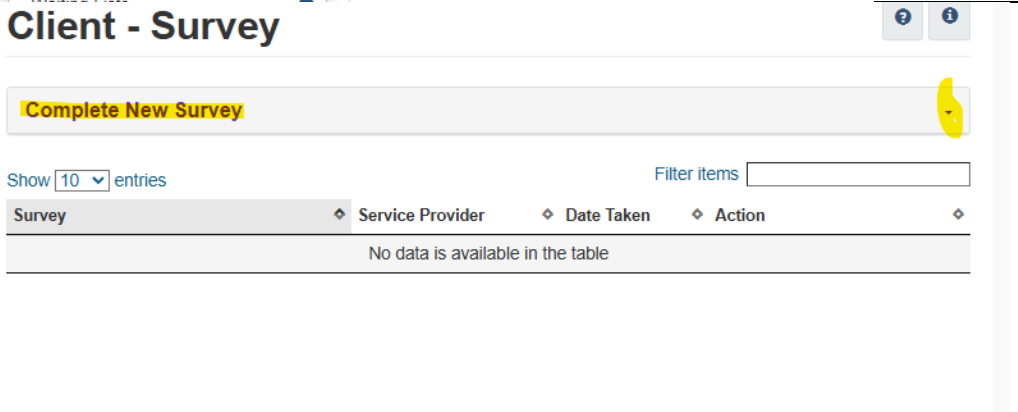
Client Information
Client Management

- 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**
- Turn Aways
- VAT

Vitals | Contact Info | Physical Appearance | Languages

Consent Type: Explicit
Full Name: Jack Sparrow
Gender: Male
Alias:
File Number: 0000000003
Date of Birth: 1975-07-17
Date of Birth Known: Yes
Approximate Age: 49
Information Verified: No
Country of Birth: N/A
Disability: No
MedicAlert: No
Veteran Status: Not a Veteran
Citizenship/Immigration Status: Canadian Citizen -

2. From the Client – Survey page, click on the drop down arrow next to the “Complete New Survey” tab.



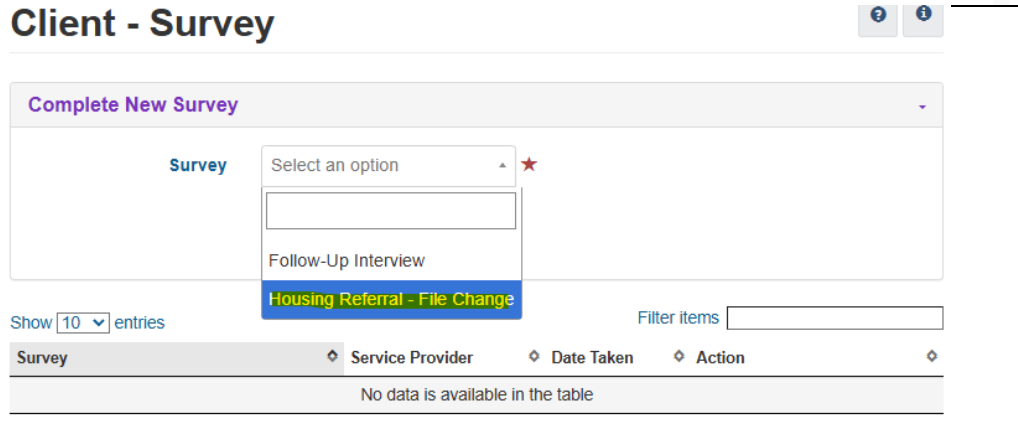
Client - Survey

Complete New Survey

Show 10 entries | Filter items

Survey	Service Provider	Date Taken	Action
No data is available in the table			

3. In the “Survey” field, click in the text box “Select an option” and select “Housing Referral – File Change” and then



Client - Survey

Complete New Survey

Survey: Select an option (★)
 Follow-Up Interview
Housing Referral - File Change

Show 10 entries | Filter items

Survey	Service Provider	Date Taken	Action
No data is available in the table			

click “+ Begin Survey”.

4. After selecting this option, the survey will prompt open and can begin filling in all the fields available.

The screenshot shows the 'Take Survey' page for a survey titled 'Housing Referral - File Change'. At the top, there is a 'Date Taken' field with the value '2025-02-06' and a calendar icon. Below this is a 'Filter items' search bar. The main content area is a list of questions with their corresponding responses:

#	Question	Response
1	Have you been providing case management services to this participant?	No
2	Are they currently engaged with your organization?	No
3	Is this:	Select an option
4	What organization are they being transferred to?	Select an option
5	What is the current CAAT score?	
6	What is the date of the file status change?	

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

5. Once you have filled in all the fields of the survey, click Save.

The screenshot shows a single 'Save' button with a floppy disk icon.

6. Once clicking Save, you will be redirected back to the Client-Survey page showing that the survey has been completed.

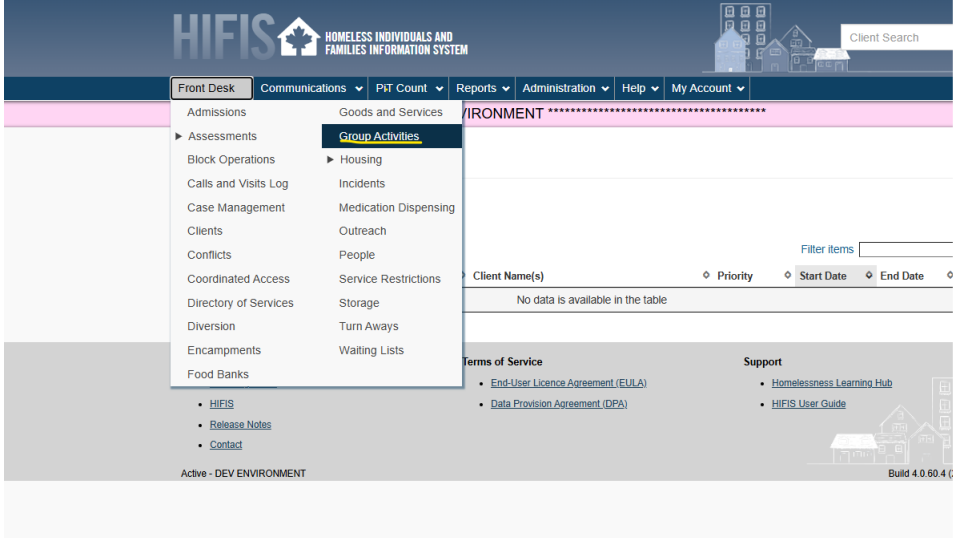
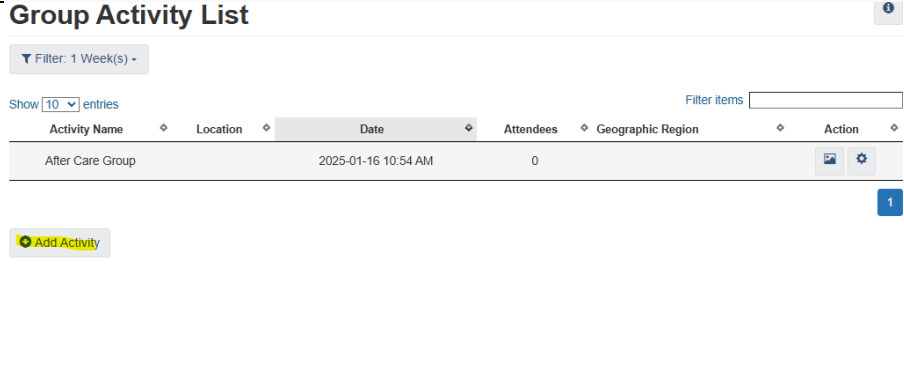
The screenshot shows the 'Complete New Survey' page. At the top, there is a dropdown menu with the text 'Complete New Survey'. Below this is a 'Show 10 entries' label and a 'Filter items' search bar. The main content is a table with the following columns: Survey, Service Provider, Date Taken, and Action.

Survey	Service Provider	Date Taken	Action
Housing Referral - File Change	City of Lethbridge	2025-02-06	[Icons: List, Edit, Delete, Chart]

At the bottom right of the table, there is a blue button with the number '1'.

Group Activities – Process and Procedure

This module enables users to record group activities conducted at the agency/service provider for clients. This includes activities such as a hot/cold meal, alcoholics anonymous, transportation etc.) that can be recorded. Community Links utilize the Group Activities Module for clients that do not consent for a follow-up intake appointment – to record ‘interactions’ (light-touch)

Action	
<p>1. From the HIFIS main page, navigate to the Front Desk drop down menu and select Group Activities.</p>	
<p>2. From the Group Activities List page, select the “+ Add Activity” button to begin the process.</p>	

3. From the “Add Group Activity” page, fill in all required fields marled with a red star and any optional fields if applicable for additional information.

Add Group Activity

Group Activity ★

Program

Location

Start Date and Time ★

Hours

Minutes

Description

Reason for Service ★

Referred from

Referred to

Geographic Region

Capture Service Location

4. Select the Group Activity provided. For Community Links, choose “Information & Referral.”

Group Activity ★

Program

Location

Start Date and Time

Hours

After Care Group

Alcoholics Anonymous

Cocaine Anonymous













Meal - Hot/Cold

Mental Health Support Group

5. If applicable, select the program that is funding this process and Location by which the activity took place.

Program

Location

<p>6. Select the Start Date and Time for when the Group activity commenced , and the number of hours or minutes expended for this activity.</p>	<p>Start Date and Time <input type="text" value="2025-01-22"/>  <input type="text" value="10:20 AM"/>  </p> <p>Hours <input type="text" value="0"/></p> <p>Minutes <input type="text" value="0"/></p>
<p>7. Select the Reason for Service for activity.</p>	<p>Reason for Service <input type="text" value="Select an option"/> </p>
<p>8. If applicable, filter the Geographic Region for Referred From and referred To as Lethbridge to select the drop down options. For Community Links, please select either "ICA System Partner", "Non-ICA System Partner", or "Self-Referred"</p>	<p>Referred from <input type="text" value="Select an option"/>  </p> <p>Referred to <input type="text" value="Select an option"/>  </p> <div data-bbox="407 1161 1305 1621"> <p>Referral Filter</p> <p>Geographic Region <input type="text" value="Lethbridge"/>  </p> <p>City <input type="text" value="Lethbridge"/></p> <p> </p> </div>

10. Click
Save.

 Save