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.

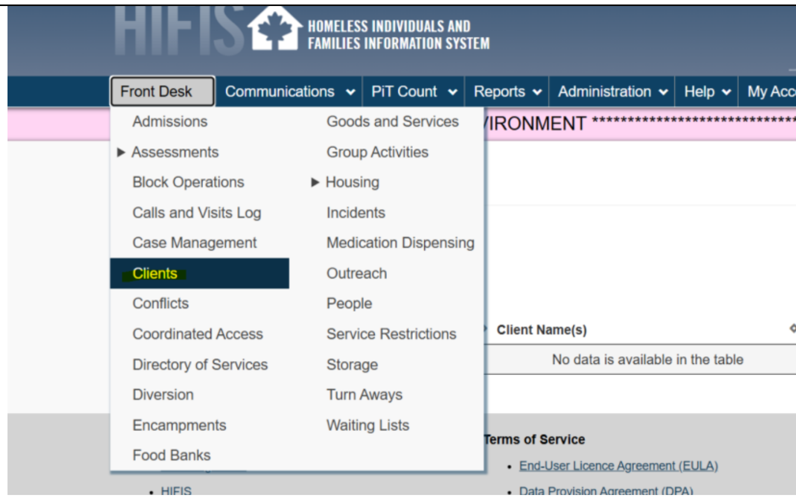
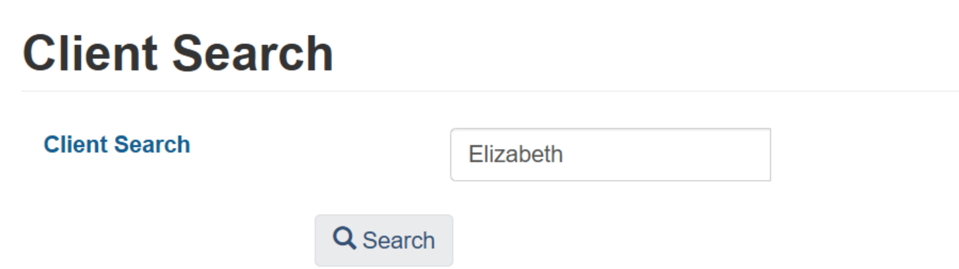
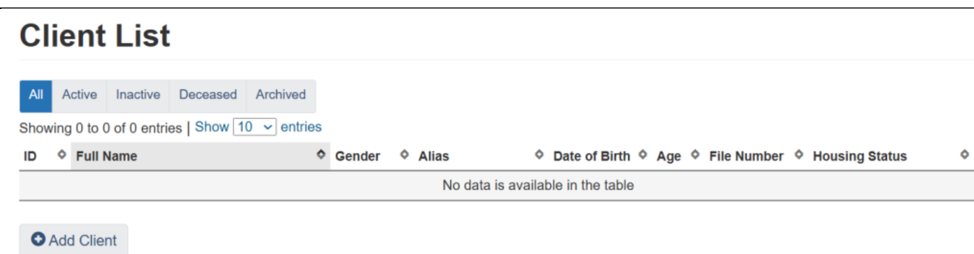
Training Module	Action
Case Management	New Record ***(Add Case/Goal)*** in Client Profile – Case Management List is created • Seach Client > Client Vitals > Client Management – Case Management > Client – Case Management List > Add Case.
Case Management	New Record ***(Add Session)*** under the Sessions tab in Display Case Management is created • Client – Case Management List > Sessions > Add Session.

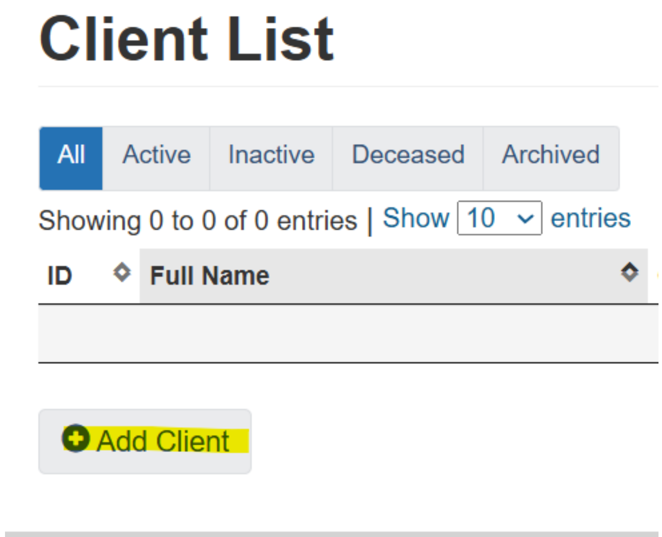
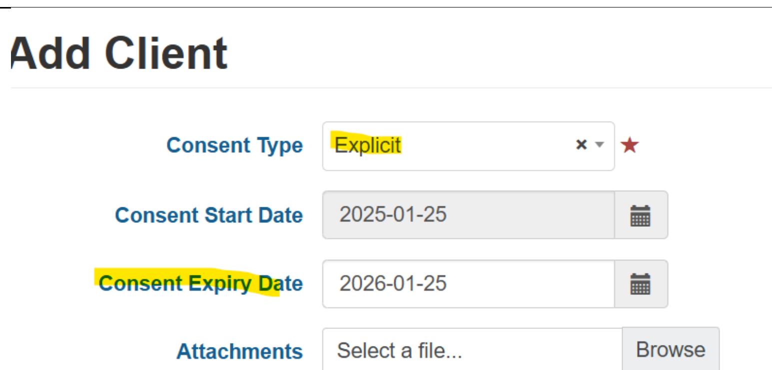
Enter a Consent for Client

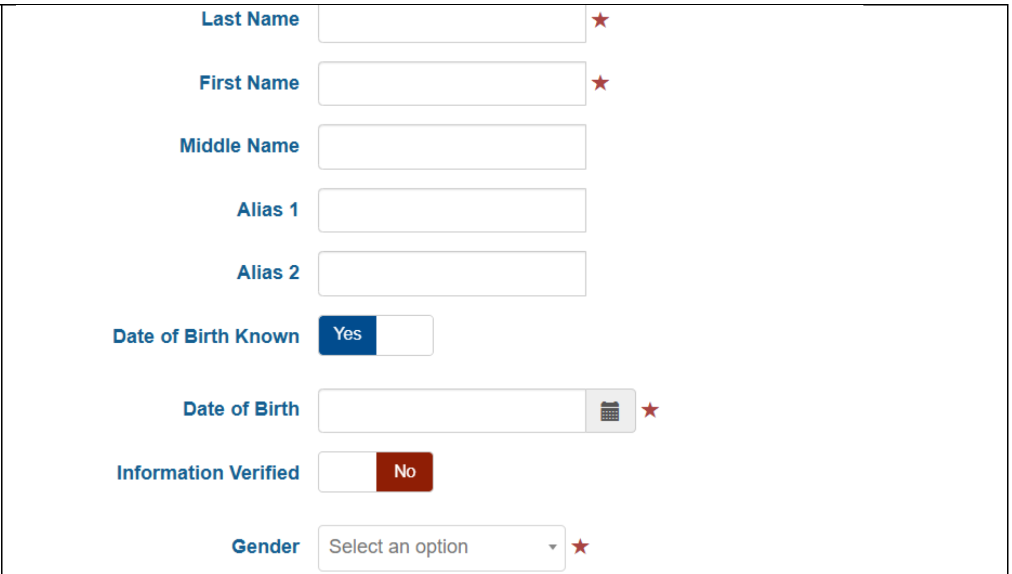
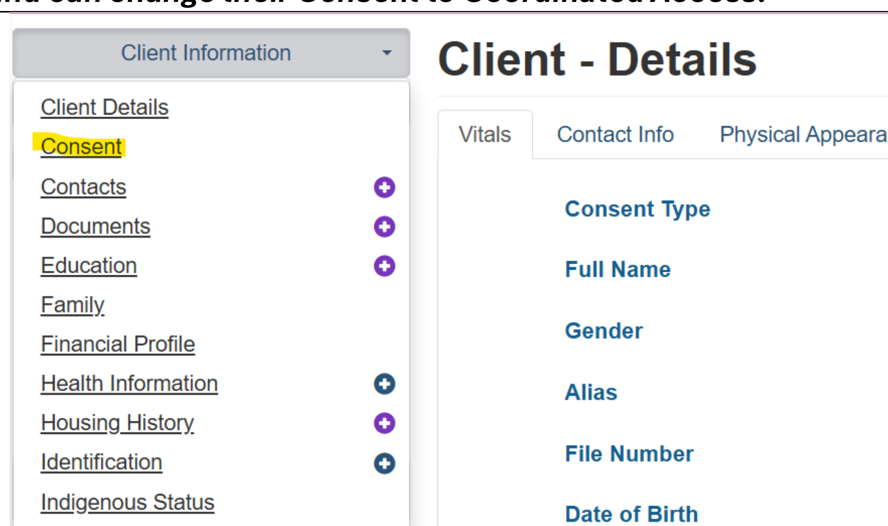
****Note - This process will be performed before entering the Case Management and Group Activities.***

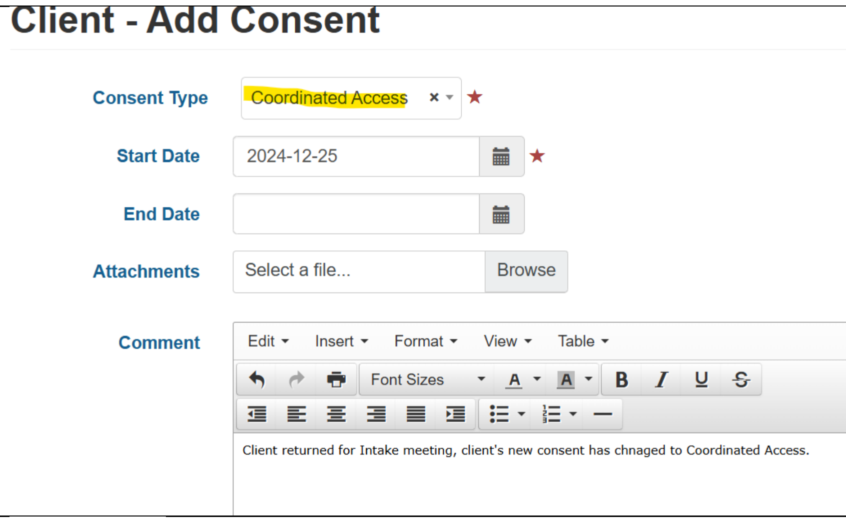
<u>Client calls/walks up, they want to proceed with formal Intake - Client search / creation:</u>

- 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.

<table>
<tr><th><u>Action</u></th><th></th></tr>
<tr><td>1. From the HIFIS main page, navigate to Front Desk and select Clients.</td><td>
</td></tr>
<tr><td>2. From the Client Search page, type in a random name at the top of your head in the Client Seach box and click Search.</td><td>
</td></tr>
<tr><td colspan="2">*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.</td></tr>
<tr><td>3. Once clicking Search, the page will re-direct to the Client List page and will see that there are no results</td><td>
</td></tr>
</table>

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

<table>
<tr><td>6. Continue to fill in the rest of the required fields marked with a red star and click Save when done.</td><td>
</td></tr>
<tr><td colspan="2">*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.</td></tr>
<tr><td>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”</td><td>
</td></tr>
</table>

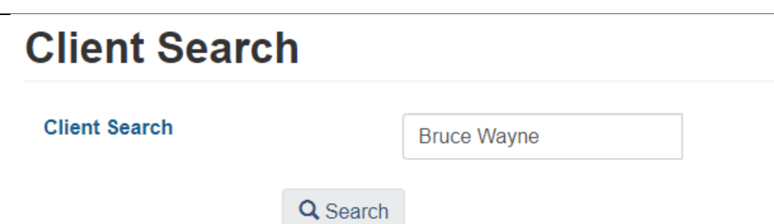
8. Client returns for Intake Meeting – add Coordinated Access + Explicit for Consent Type.	
3. Click Save.	
Please Note – User may now proceed with performing Case Management and Group Activities module for client.	

<u>1. Case Management - Procedure to Add Case Goal</u>

Prerequisite	Client Profile/Record has been created in advance.

Benefits of Case Management in HIFIS:

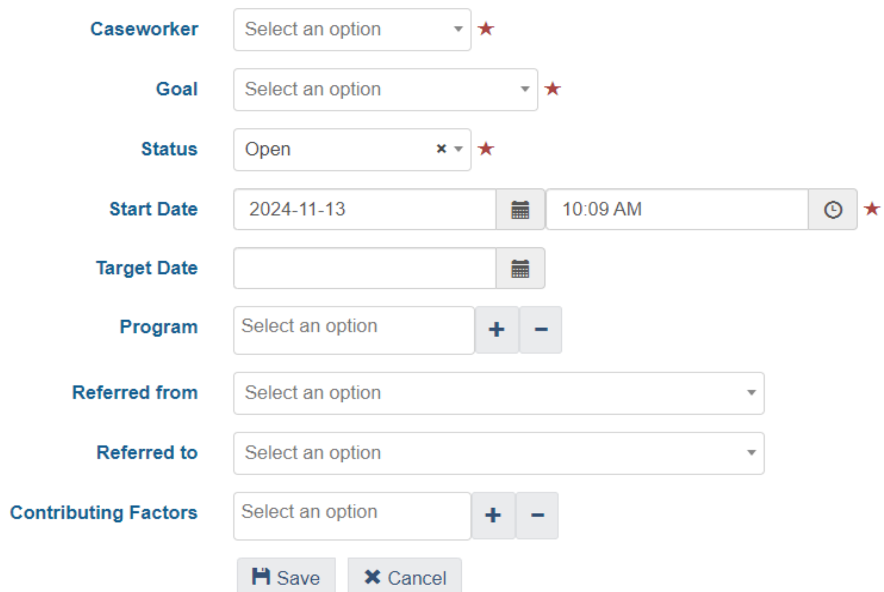
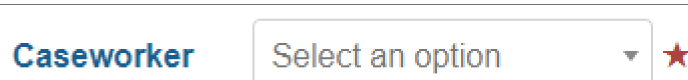
- Enables user to create goal setting (i.e. Child Welfare, Crisis Intervention, Conflict Resolution, Employment, housing Placement, Financial Stability etc.).
- All session details can be recorded.

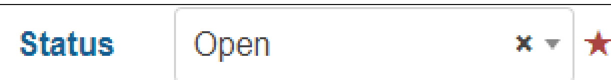
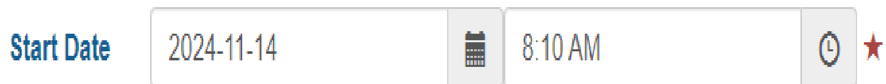
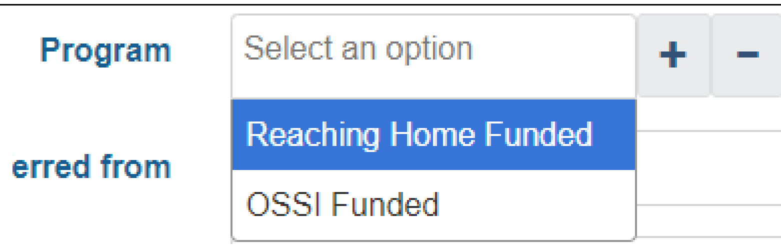
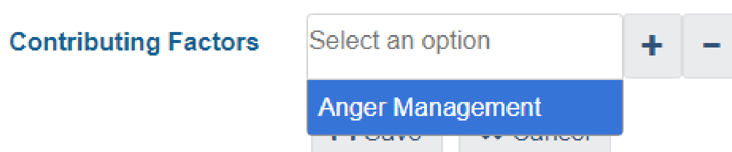
Action	
1. From the HIFIS main page, navigate to Front Desk > Clients> Search Client >Client - Details.	

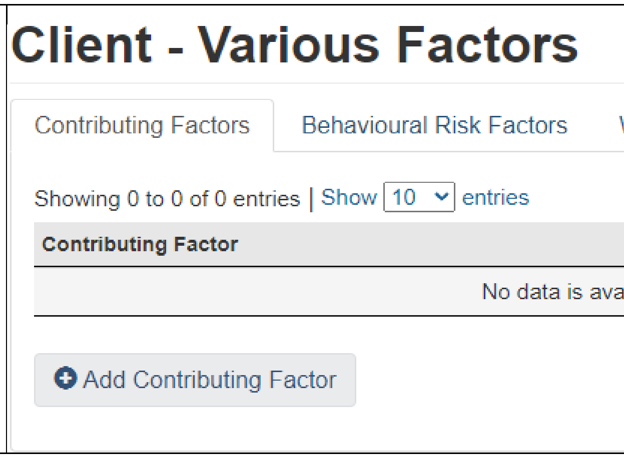
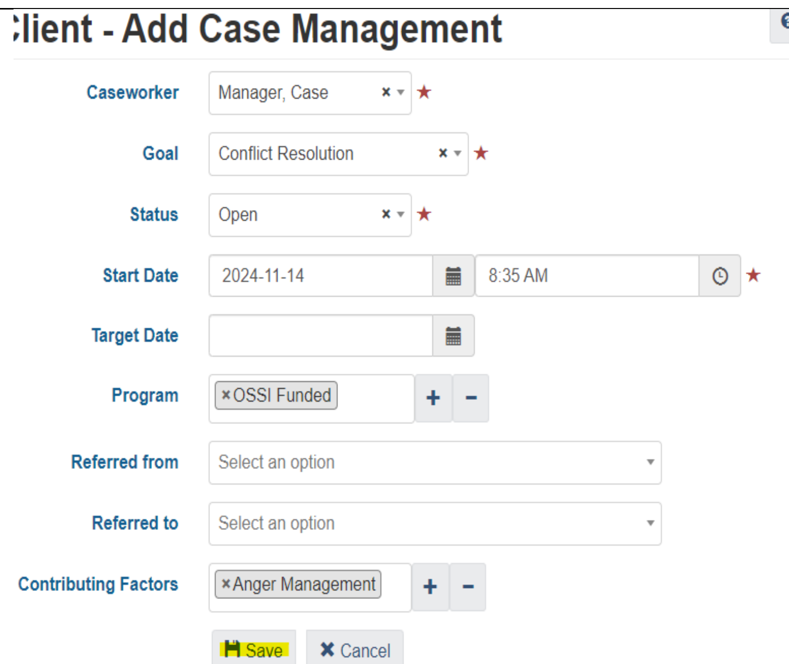
<table>
<tr>
<td>2. From the Client Management drop down menu, click on Case Management.</td>
<td>
</td>
</tr>
<tr>
<td>3. From the Client – Case Management List page, select the + Add Case Button.</td>
<td>
</td>
</tr>
<tr>
<td>4. From the Client - Add Case Management page, fill in all required fields marked with a red star and any additional/optional fields to fill in on behalf of client.

The optional field Referred From needs to be populated at this time.

To filter: Press the filter button, and select Geographic Region – Lethbridge.

See the Referral training materials for more details on Referrals in HIFIS (www.lethbridge.ca/hifis)</td>
<td>
</td>
</tr>
<tr>
<td>5. Select the case worker that is working with the client.</td>
<td>
</td>
</tr>
</table>

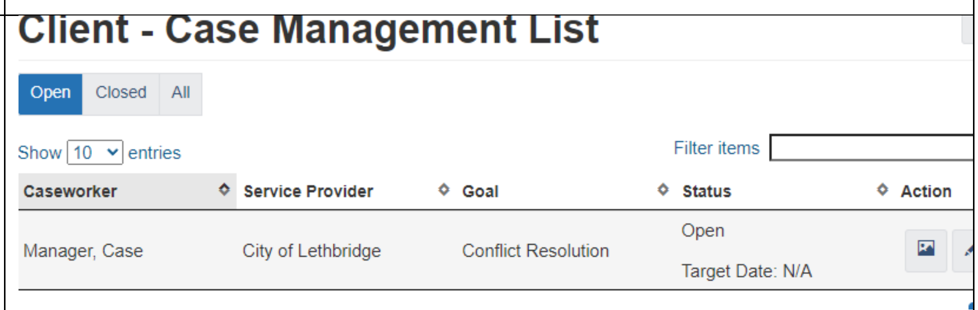
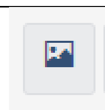
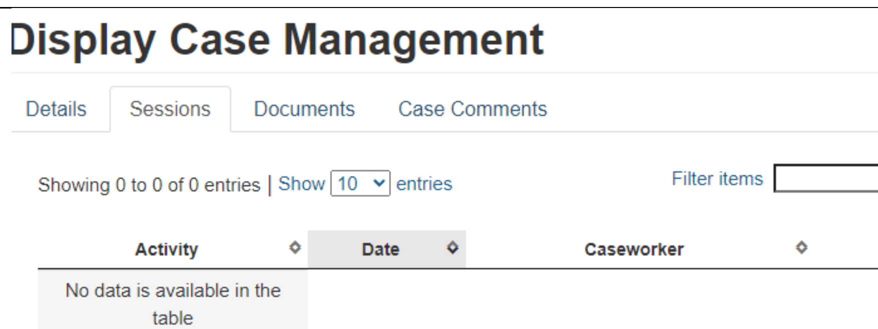
6. Select the appropriate goal the client is trying to achieve.	
Note – *If there are several goals that a client is trying to pursue, a Case Management Record will need to be created for each goal.	
7. Leave “Status” field set to Open	
8. In Start Date field, enter the date the Case Management record 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:	

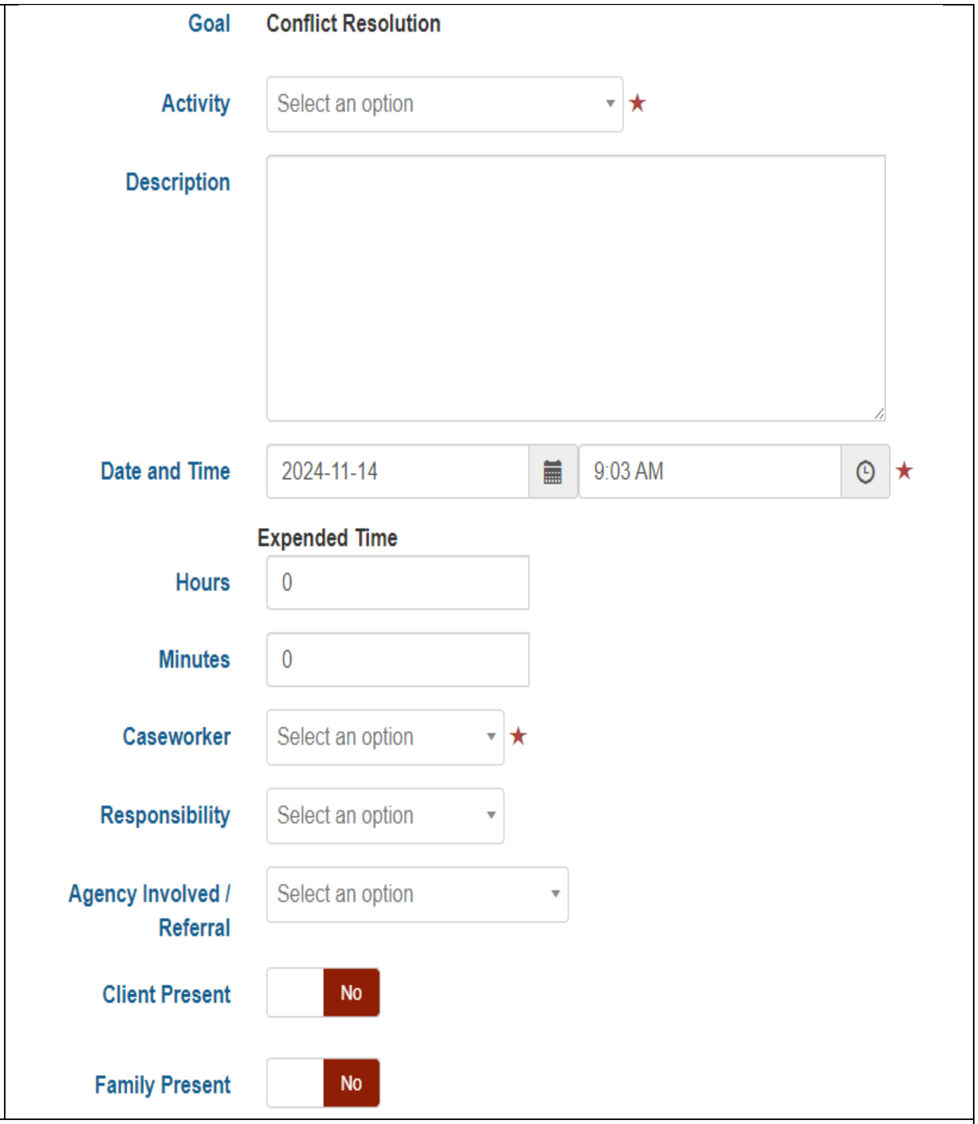
<table>
<tr><td>11. Various Factors (Contributing Factors) option, navigate to Client Information drop down list > Various Factors > + Add Contributing Factor</td><td>
</td></tr>
<tr><td></td><td></td></tr>
<tr><td colspan="2">*Note – Once selecting a Contributing Factor from Various Factors page, return to Client – Add Case Management page and will see the selected option from Various Factors show up when inputting Contributing Factors.</td></tr>
<tr><td></td><td></td></tr>
<tr><td>12. Click Save</td><td>
</td></tr>
</table>

- 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.***

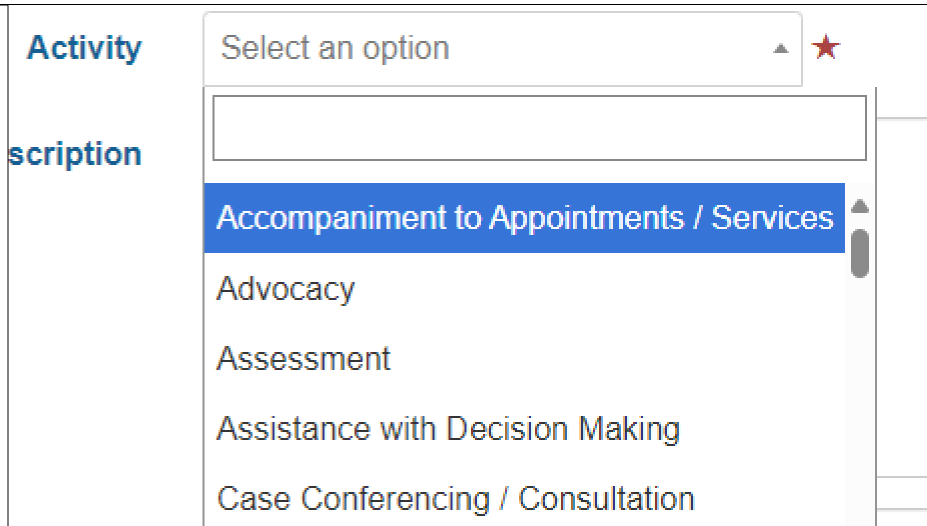
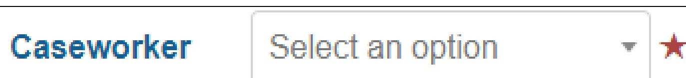
Note – To perform this process there must already be a pre-existing client profile already entered in the system.

2. Procedure to Add a Case Session

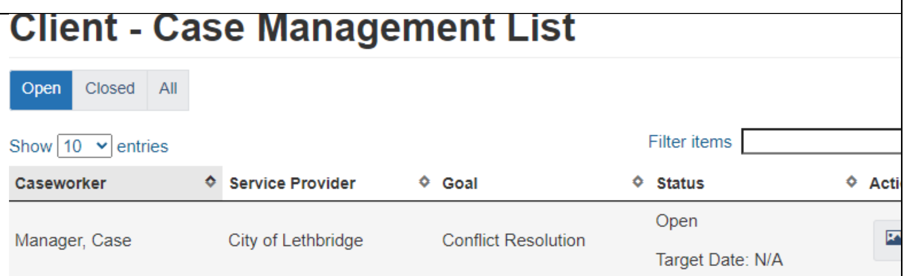
<table>
<tr><th>Action</th><th></th></tr>
<tr><td>1. From the Client Management drop down list, click on Case Management. This will display the Client – Case Management List with the case you had just previously entered and save.</td><td>
</td></tr>
<tr><td>2. Select the Display icon to enter the Display Case Management page.</td><td></td></tr>
<tr><td>3. From the Display case Management page, select the Sessions tab and click on + Add Session button.</td><td>
</td></tr>
</table>

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.

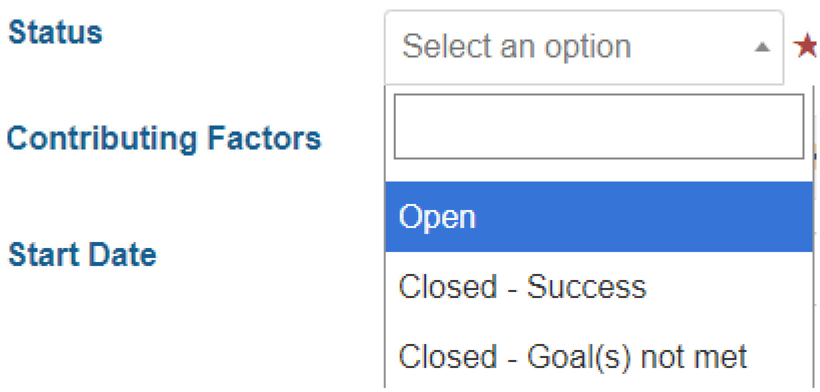
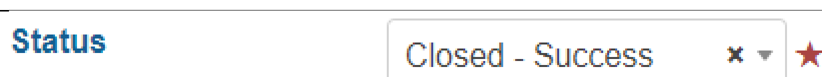
5. Select what the Activity was	
6. Input any comments or details towards the activity (optional)	
7. Select the Case Worker that was involved in the Activity	
8. Click Save	
Note – Once the Session has been saved to a Case Management record, the goal cannot be changed.	

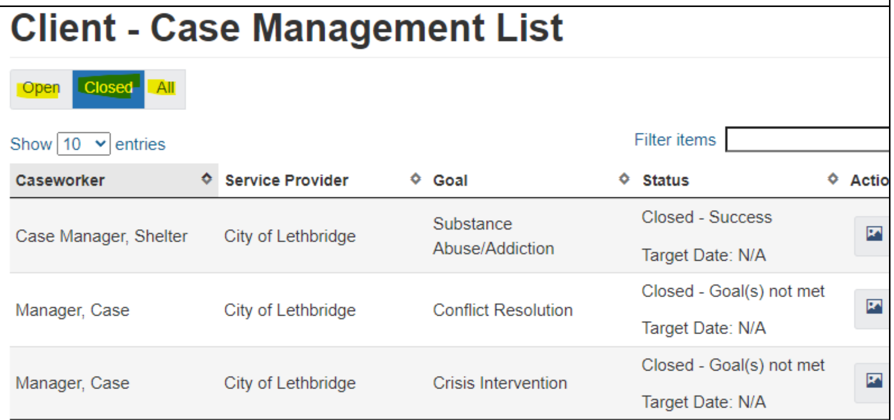
3. Procedure to close a Goal

<table>
<tr><th>Action</th><th></th></tr>
<tr><td>1. Navigate to client record/profile and navigate to Client Management drop down list and select Case Management, select Edit icon.</td><td>
</td></tr>
<tr><td>2. On the Client - Edit Case Management > Details page, navigate down to Status drop down field.

The optional field Referred To needs to be populated at this time.

To filter: Press the filter button and select Geographic Region – Lethbridge.

See the Referral training materials for more details on Referrals in HIFIS (www.lethbridge.ca/hifis)</td><td>
</td></tr>
<tr><td>3. Change Status field to Closed – Success or Closed – Goal(s) not met.</td><td>
</td></tr>
</table>

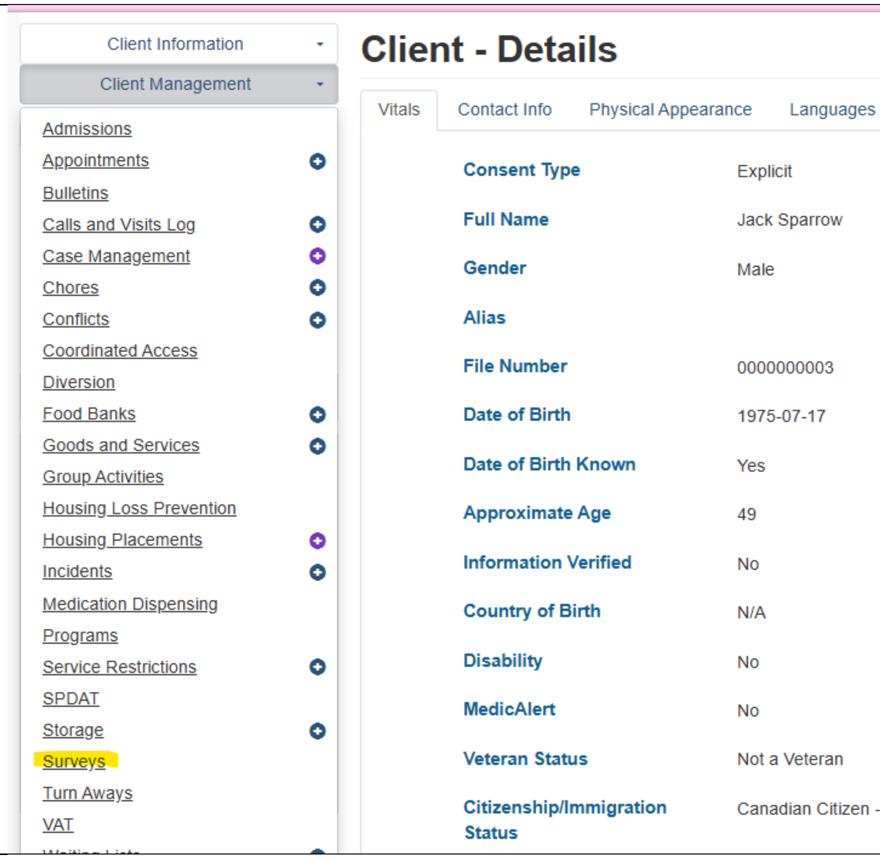
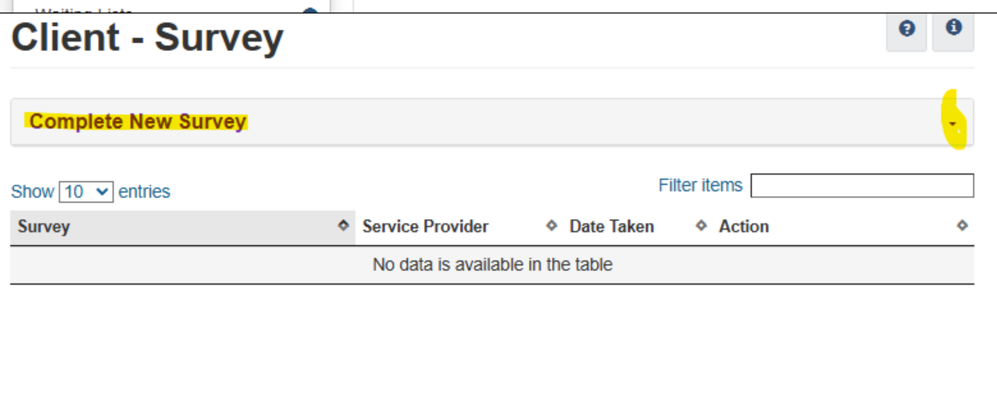
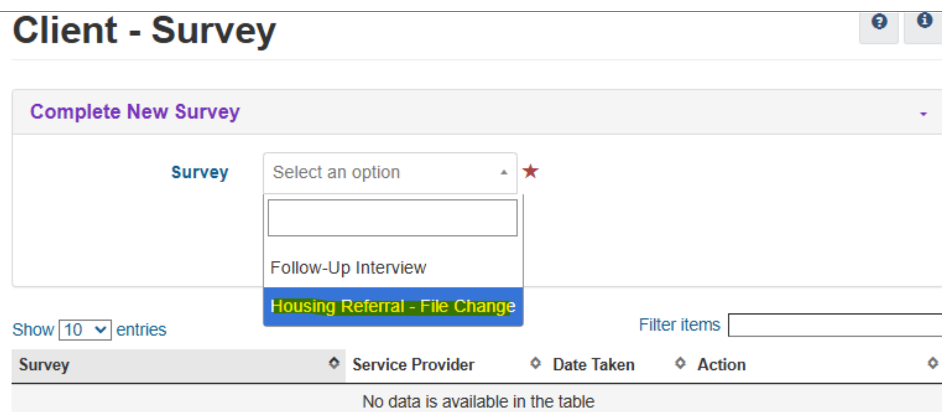
4. Click Save	
5. Navigate back to Case Management main page – Client Management > Case Management > Client Case Management List to review Open, closed or All entries.	

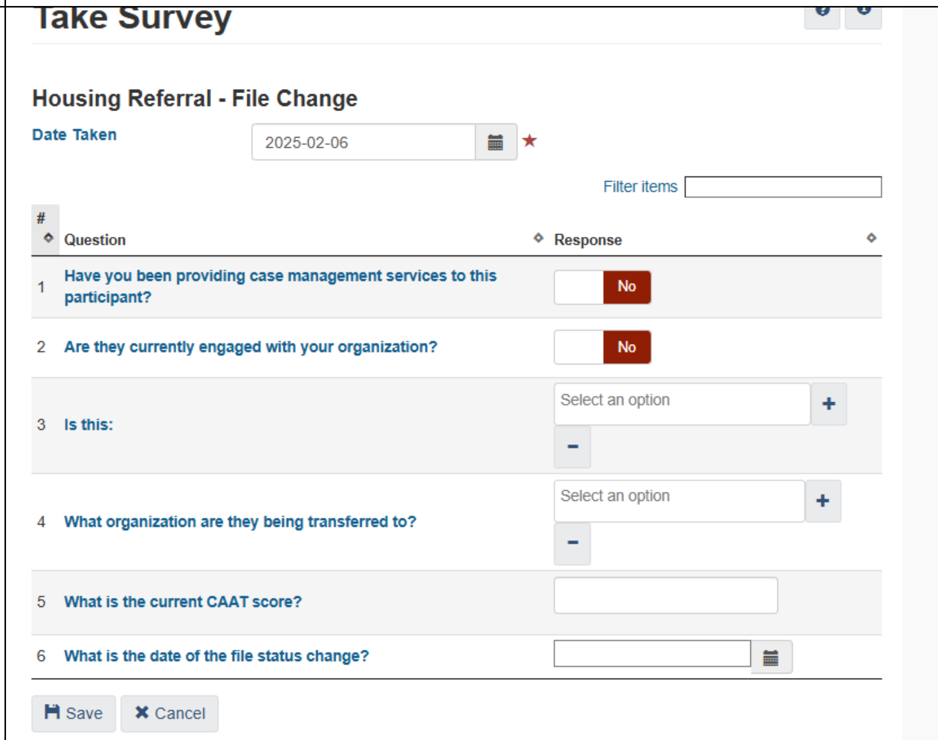
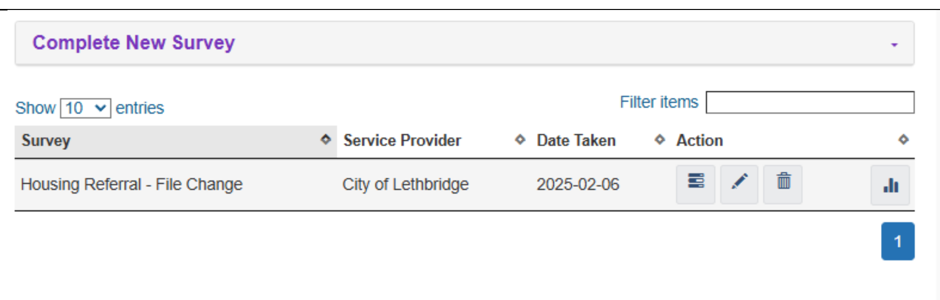
4. Procedure to Administering a Survey

***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.

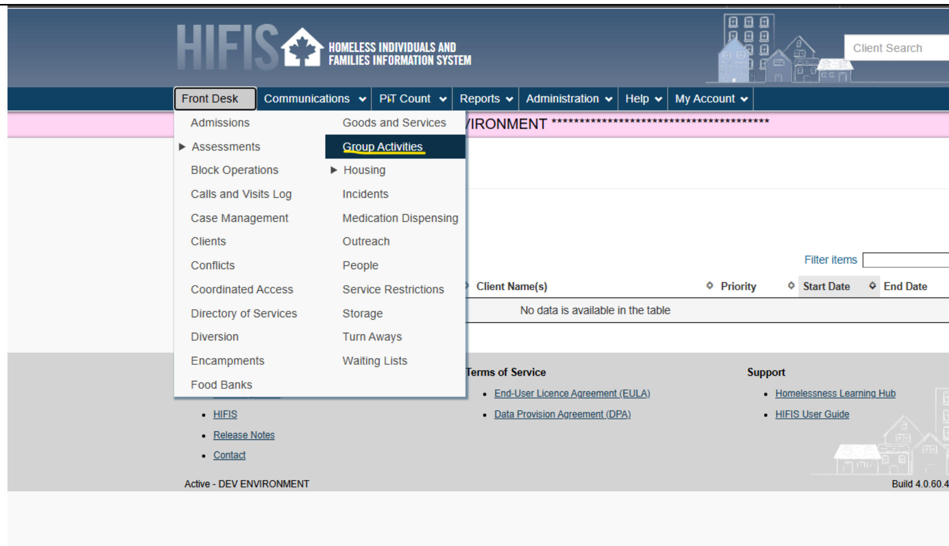
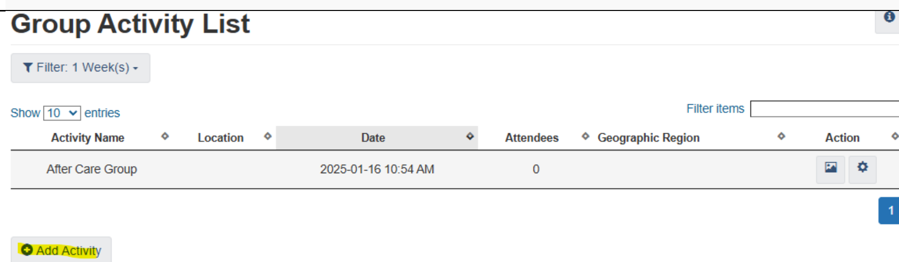
Action	

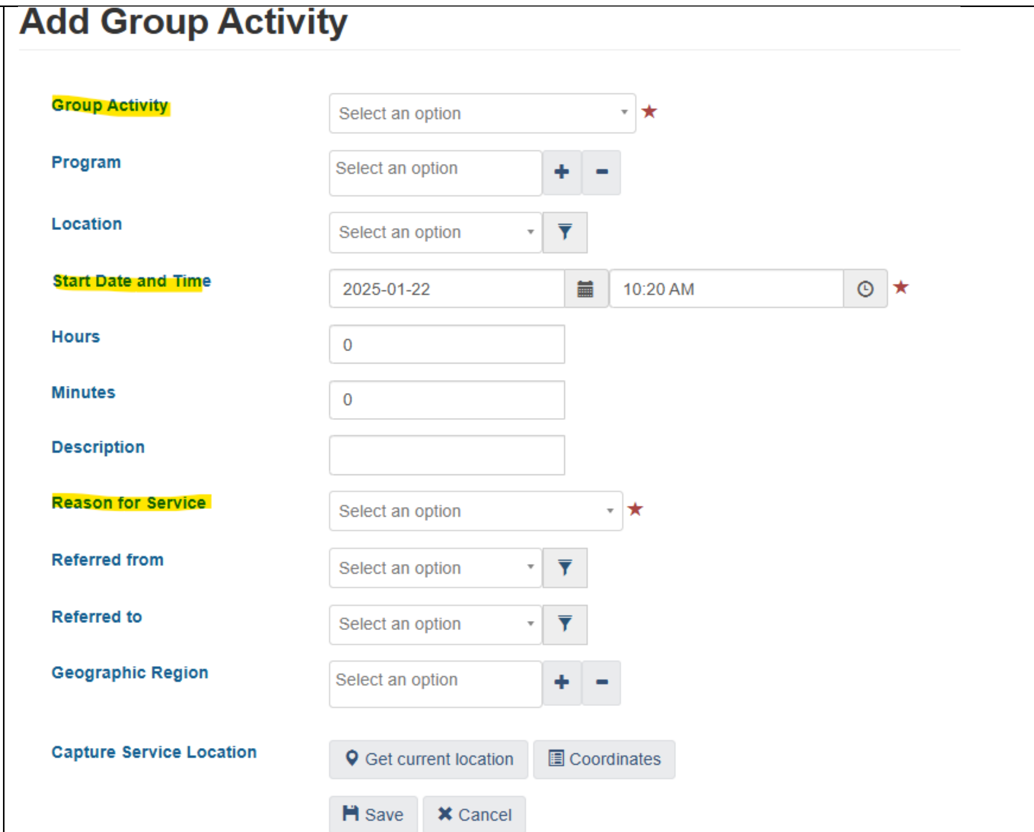
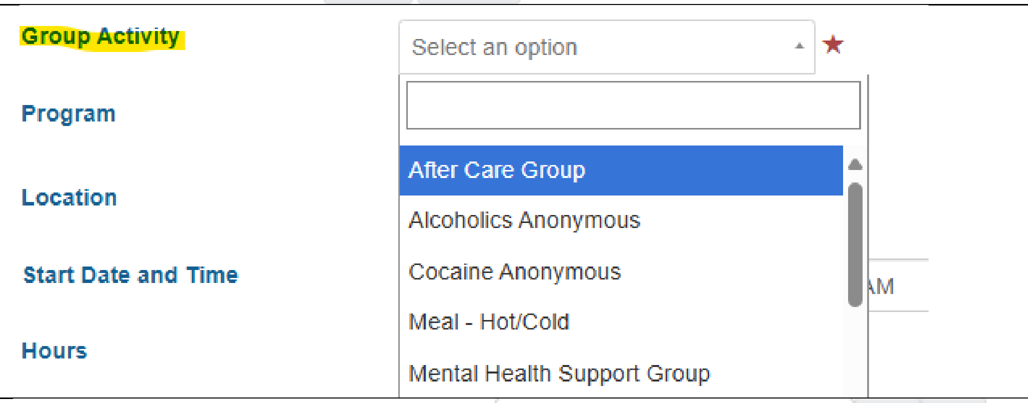
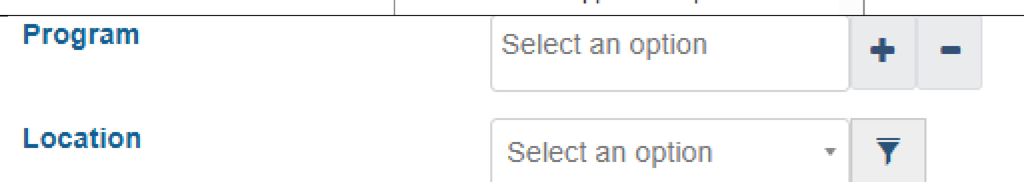
<table>
<tr>
<td>1. From the Client – Details page, navigate over to the Client Management drop down menu and select the “Surveys” option.</td>
<td>
</td>
</tr>
<tr>
<td>2. From the Client – Survey page, click on the drop down arrow next to the “Complete New Survey” tab.</td>
<td>
</td>
</tr>
<tr>
<td>3. In the “Survey” field, click in the text box “Select an Option” and select “Housing Referral – File Change” and then</td>
<td>
</td>
</tr>
</table>

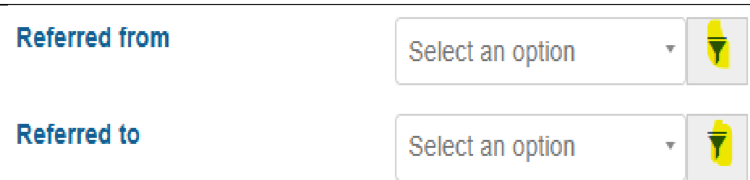
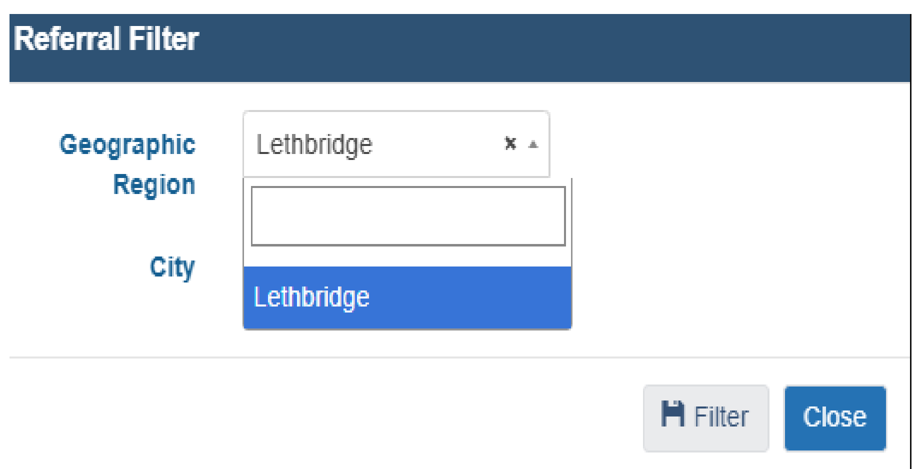
<table>
<tr><td>click “+ Begin Survey”.</td><td></td></tr>
<tr><td>4. After selecting this option, the survey will prompt open and can begin filling in all the fields available.</td><td>
</td></tr>
<tr><td>5. Once you have filled in all the fields of the survey, click Save.</td><td>
</td></tr>
<tr><td>6. Once clicking Save, you will be redirected back to the Client-Survey page showing that the survey has been completed.</td><td>
</td></tr>
</table>

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)

<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 Group Activities.</td><td>
</td></tr>
<tr><td>2. From the Group Activities List page, select the "+ Add Activity" button to begin the process.</td><td>
</td></tr>
</table>

<table>
<tr>
<td>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.</td>
<td>
</td>
</tr>
<tr>
<td>4. Select the Group Activity provided. For Community Links, choose “Information & Referral.”</td>
<td>
</td>
</tr>
<tr>
<td>5. If applicable, select the program that is funding this process and Location by which the activity took place.</td>
<td>
</td>
</tr>
</table>

6. Select the Start Date and Time for when the Group activity commenced, and the number of hours or minutes expended for this activity.	
7. Select the Reason for Service for activity.	
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”	 

10. Click Save.