

Prerequisite	Client Profile/Record has been created in advance before performing Case Management module.
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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.

****Please Note – This module will only be utilized for Client’s that provide the Coordinated Access + Explicit Consent when added to HIFIS.***

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.

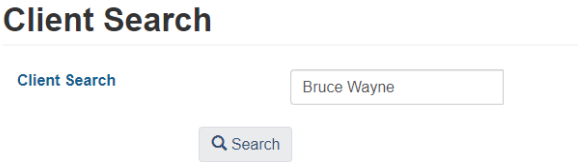
Quick steps to become comfortable with for Case Management in HIFIS:

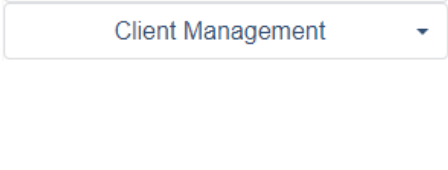
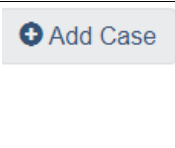
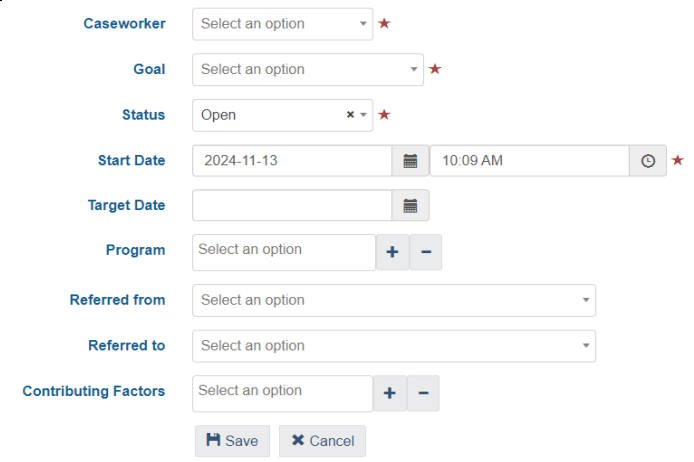
1. **Case Management Summary List** - (Front Desk > Case Management)
 - Shows a list of all case plans under your agency created at the site for a given period of time.
2. **View All Client Case Session Details or Add Session** – (Front Desk > Clients > Search Client > Client Vitals > Client Management – 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 (Optional – Use if Applicable)	New Record (Add Comment) under the Case Comments tab in Display Case Management is created <ul style="list-style-type: none"> Client – Case Management List > Display Case Management > Case Comments > Add Comment.
Case Management (Optional – Use if Applicable)	New Record (Add Document) under the Display Case Management list is uploaded: <ul style="list-style-type: none"> Client – Case Management List > Display Case Management > Documents > Upload Document.
Case Management	New Record (Add Multiple Goal Session) under Client - Case Management List <ul style="list-style-type: none"> Client – Details > Client Management > Case Management > Client - Case Management List > Client – Multiple Goal Session

Procedure to Add Case Goal

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

<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>4A. Referrals</p> <p>Referred From / Referred By</p> <p>Note: The Geographic Region Toggle must be selected as Lethbridge to filter the Referral source options.</p>	<p>Think of the “Referred From”, “Referred To” and “Agency Involved/Referral” fields as a journey for the client:</p> <ul style="list-style-type: none"> - Referred From = Where the client commenced their journey (who (agency) sent them to you). - Referred To = Where the client is going next for additional support (where (agency) are they going to get the services they require). - Agency Involved/Referral = Who (agency) is helping the client along the way and/or the agency actively working with the client during the Case Session. They are not necessarily the starting or ending referral points but are involved in the case.

<p>See the Referral Training Material for further guidance.</p> <p>Once the options are available, choose the appropriate Referred By source.</p> <p>Referred To will be left blank until “Procedure to Close a Goal” section below.</p>	<p>-----</p> <p>Status <input type="text"/></p> <p>Start Date <input type="text"/></p> <p>Target Date <input type="text"/></p> <p>Program <input type="text"/></p> <p>Referred from <input type="text"/></p> <ul style="list-style-type: none"> Correctional Facility - Lethbridge Correctional Centre Hospital - Chinook Regional Hospital Housing Services - Elsie's House Housing Services - Canadian Mental Health Association Housing Services - Lethbridge Housing Authority Housing Services - Family Ties Association Select an option
<p>5. Select the case worker that is working with the client.</p>	<p>Caseworker <input type="text"/></p>
<p>6. Select the appropriate goal the client is trying to achieve.</p>	<p>Goal <input type="text"/></p>
<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>	
<p>7. Leave “Status” field set to Open</p>	<p>Status <input type="text"/></p>
<p>8. In Start Date field, enter the date the Case Management record is being created.</p>	<p>Start Date <input type="text"/></p>

<p>9. In the Program field, enter the program that is funding the services provided to client (Reaching Homes or OSSI).</p>	<p>Program</p> <p>erred from</p> <p>Select an option</p> <p>+ -</p> <p>Reaching Home Funded</p> <p>OSSI Funded</p>
<p>10. Pick the Contributing Factors that are related to the main Goal.</p>	<p>Contributing Factors</p> <p>Select an option</p> <p>+ -</p> <p>Anger Management</p>

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

<p>11. Various Factors (Contributing Factors) option, navigate to Client Information drop down list > Various Factors > + Add Contributing Factor</p>	<p>Client - Various Factors</p> <p>Contributing Factors Behavioural Risk Factors</p> <p>Showing 0 to 0 of 0 entries Show 10 entries</p> <p>Contributing Factor</p> <p>No data is available</p> <p>+ Add Contributing Factor</p>
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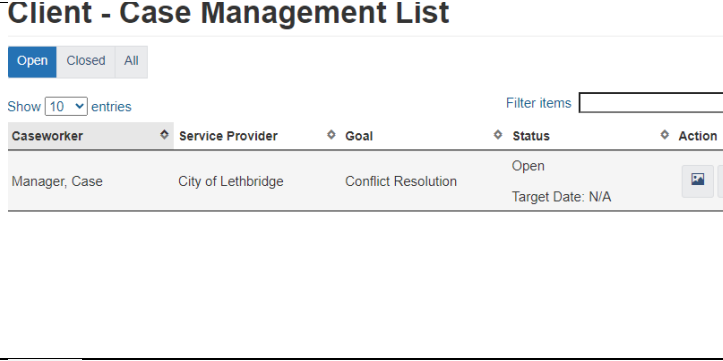
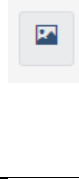
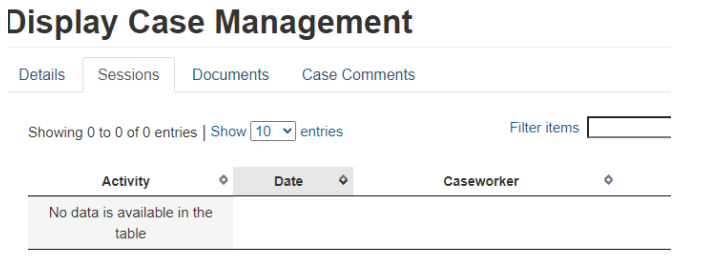
***Note – Once selecting a Contributing Factor from Various Factors page, return to Client – Add Case Management page and will see the selected option from Various Factors show up when inputting Contributing Factors.**

12. Click Save	<h3>Client - Add Case Management</h3> <p>Caseworker Manager, Case x v ★</p> <p>Goal Conflict Resolution x v ★</p> <p>Status Open x v ★</p> <p>Start Date 2024-11-14 [calendar] 8:35 AM [clock] ★</p> <p>Target Date [calendar]</p> <p>Program *OSSI Funded + -</p> <p>Referred from Select an option v</p> <p>Referred to Select an option v</p> <p>Contributing Factors *Anger Management + -</p> <p>Save Cancel</p>
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- 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.***

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	Select an option ★
Description	<div style="border: 1px solid #ccc; height: 80px;"></div>
Date and Time	2024-11-14  9:03 AM  ★
Expended Time	
Hours	<input type="text" value="0"/>
Minutes	<input type="text" value="0"/>
Caseworker	Select an option ★
Responsibility	Select an option
Agency Involved / Referral	Select an option
Client Present	<input type="checkbox"/> <input checked="" type="checkbox"/> No
Family Present	<input type="checkbox"/> <input checked="" type="checkbox"/> No

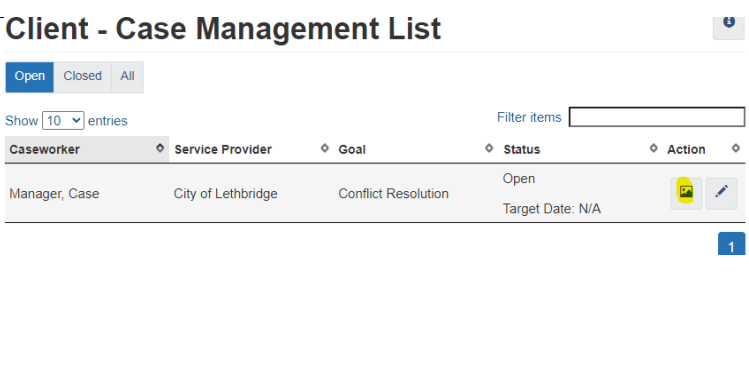
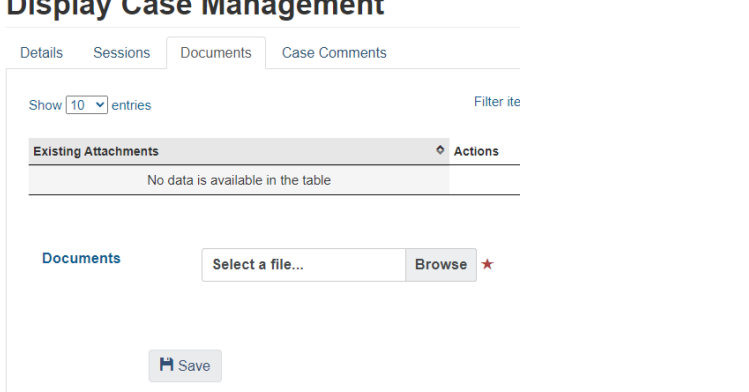

****Note – The selected Goal from adding a Case Goal will automatically populate when adding a Case Session.***

<p>5. Select what the Activity was</p>	<p>Activity <input type="text" value="Select an option"/> ★</p> <p>Description <input type="text"/></p> <ul style="list-style-type: none"> 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 <input type="text"/></p>
<p>7. Select the Case Worker that was involved in the Activity</p>	<p>Caseworker <input type="text" value="Select an option"/> ★</p>
<p>8. Click Save</p>	<p><input type="button" value="Save"/></p>
<p>*Note – Once the Session has been saved to a Case Management record, the goal cannot be changed.</p>	

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:

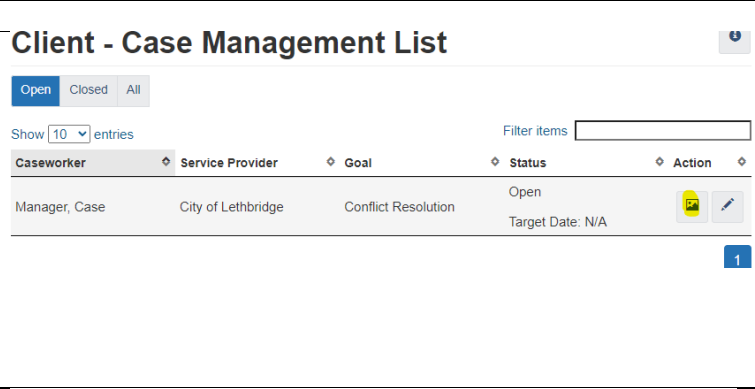
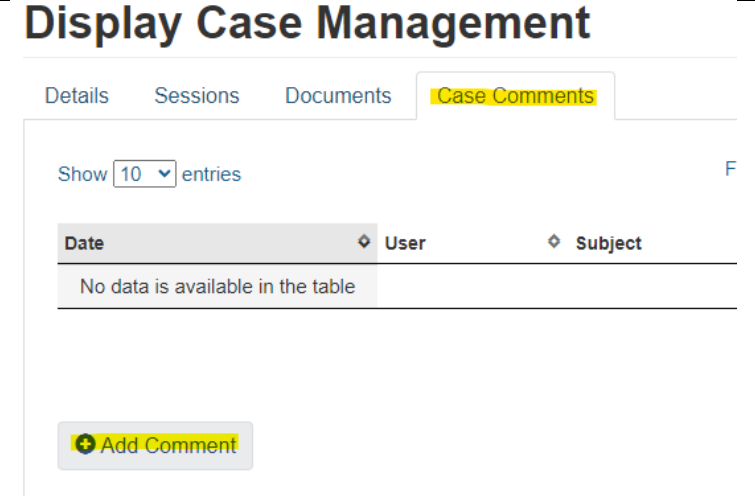
- Housing Placements > Housing Placement Details > Documents
- Housing Loss Prevention > Housing Loss Prevention Details > Documents
- Incidents > Add Incidents > Attachments

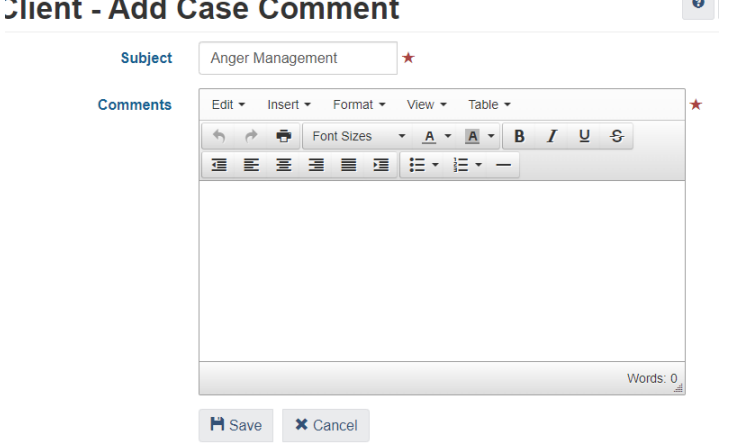
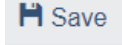
<p>Action</p> <p>1. From the Client Management drop down list, click on Case Management and navigate/click on Display Case Management Icon</p>	
<p>2. On the Display Case Management page, navigate and click on Documents > Select a file / Browse to find the documents you want to upload to this case.</p>	
<p>3. Click Save</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.**

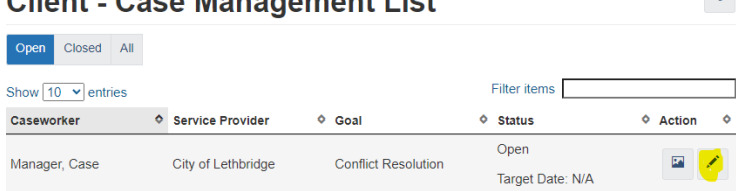
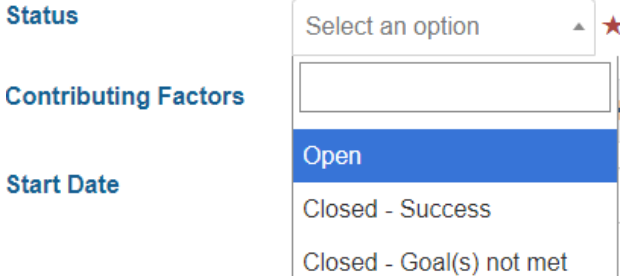

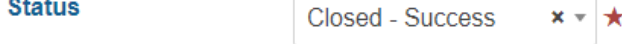
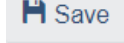
****Note – Users can multi-select files for a maximum of 5MB per upload. Not all file types are permitted (e.g. pptx).***

Procedure to Add a Case Comment (Case Notes)

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

<p>3. Enter a subject for Case Comment and proceed with entering Comments.</p>	
<p>4. Click Save once you have completed adding Subject and Comments to case.</p>	
<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>	

Procedure to close a Goal

Action	Client - Case Management List
<p>1. Navigate to client record/profile and navigate to Client Management drop down list and select Case Management, select Edit icon.</p>	
<p>2. On the Client - Edit Case Management > Details page, navigate down to Status drop down field.</p>	
<p>3. Add the Referred To field</p>	
<p>4. Change Status field to Closed – Success or Closed – Goal(s) not met.</p>	
<p>5. Click Save</p>	

6. Navigate back to Case Management main page – Client Management > Case Management > Client Case Management List to review Open, closed or All entries.

Client - Case Management List

Open Closed All

Show 10 entries Filter items

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	

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

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 ★

Expended Time - Total

Hours

Minutes

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 click Select All button (+) to select all the goals created for client.

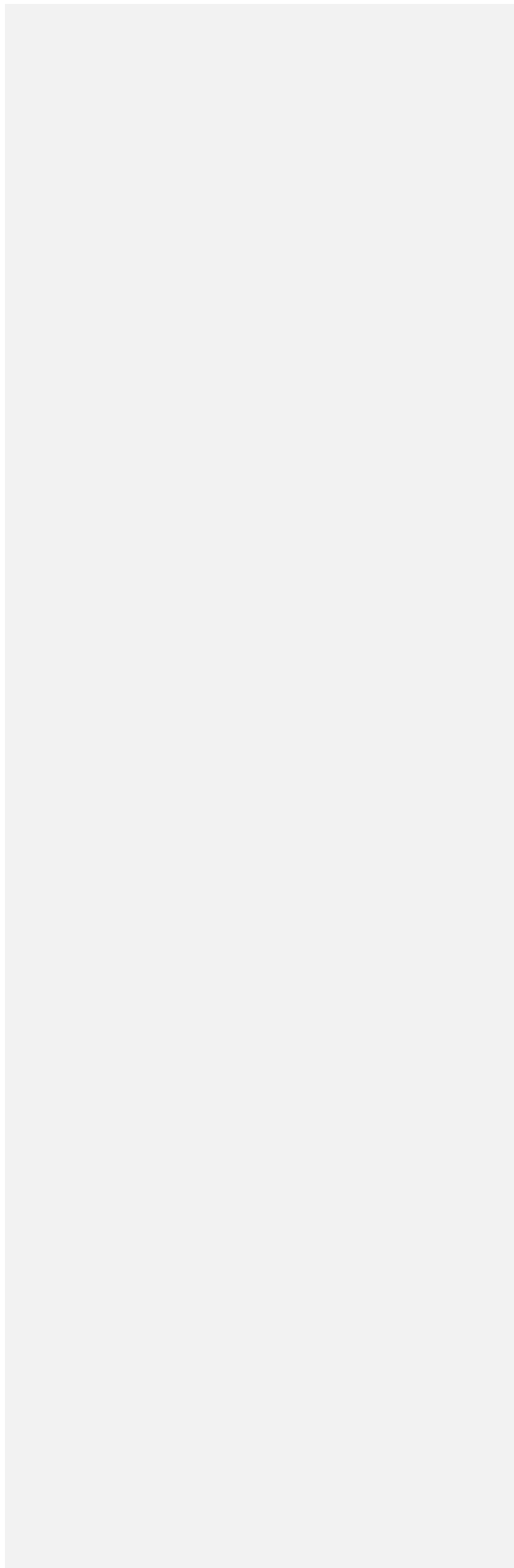
Goals Select an option ★

Activity

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

<p>4. Enter the sessions Activity and if applicable, enter a description of Activity.</p>	<p>Activity Select an option ★</p> <p>Description</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Accompaniment to Appointments / Services</p> <p>Advocacy</p> <p>Assessment</p> <p>Assistance with Decision Making</p> <p>Case Conferencing / Consultation</p> <p>Case Planning</p> </div> <p>and Time</p>
<p>5. Confirm the Start Date and Time of the Activity, and if needed, you can change the date/time manually.</p>	<p>Date and Time 2024-11-15 9:47 AM ★</p>
<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>	<p>Expended Time - Total</p> <p>Hours <input type="text" value="0"/></p> <p>Minutes <input type="text" value="0"/></p> <p><input type="checkbox"/> Split time equally between goals</p> <p>Expended Time - "Employment Maintenance - Manager, Case"</p> <p>Hours <input type="text" value="0"/></p> <p>Minutes <input type="text" value="0"/></p> <p>Expended Time - "Substance Abuse/Addiction - Manager, Case"</p> <p>Hours <input type="text" value="0"/></p> <p>Minutes <input type="text" value="0"/></p>

<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>	<p>Caseworker <input type="text" value="Manager, Case"/> x </p> <p>Responsibility <input type="text" value="Select an option"/></p>
<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>	<p>Agency Involved / Referral <input type="text" value="Select an option"/></p> <p>Client Present <input type="checkbox"/> <input checked="" type="checkbox" value="No"/></p> <p>Family Present <input type="checkbox"/> <input checked="" type="checkbox" value="No"/></p>
<p>9. Click the Save button.</p>	<p> Save</p>

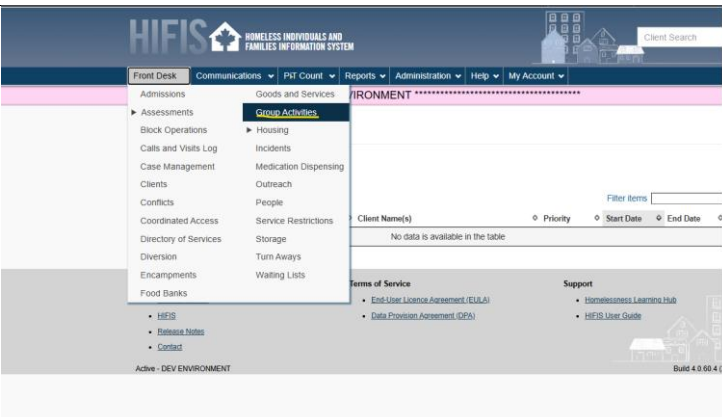
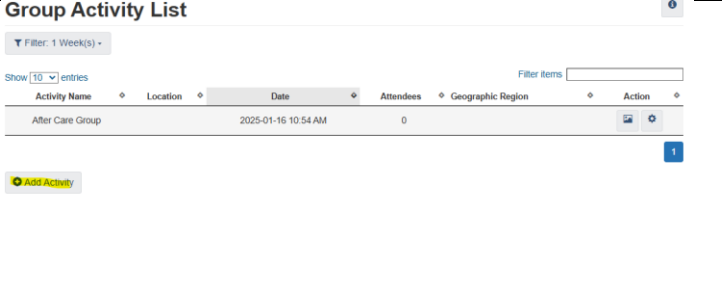


*Will use Group Activities Module for clients that decline consent – Declined Anonymous

Group Activities – Process & 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.

Commented [AP1]: Need to include Diversion Module as well depending on level of Consent from Client.

<p>Action</p> <p>1. From the HIFIS main page, navigate to the Front Desk drop down menu and select Group Activities.</p>	 <p>The screenshot shows the HIFIS Homeless Individuals and Families Information System interface. The 'Front Desk' menu is open, and 'Group Activities' is highlighted. The main content area shows a search filter for 'IRONMENT' with no results displayed.</p>
<p>2. From the Group Activities List page, select the “+ Add Activity” button to begin the process.</p>	 <p>The screenshot shows the 'Group Activity List' page. It features a table with columns for Activity Name, Location, Date, Attendees, Geographic Region, and Action. One entry is visible: 'After Care Group' on '2025-01-16 10:54 AM' with '0' attendees. A '+ Add Activity' button is located at the bottom left of the table.</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.

Group Activity ★

Program

Location

Start Date and Time

Hours

Minutes

Description

Reason for Service ★

Referred from

Referred to






Geographic Region

Capture Service Location

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

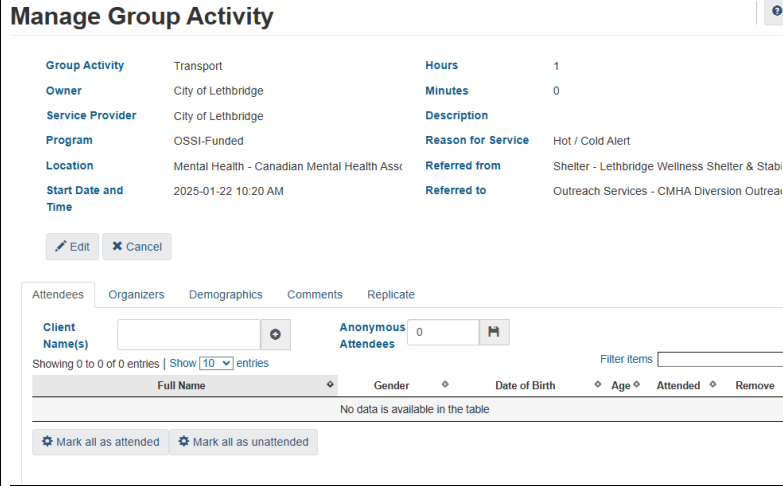
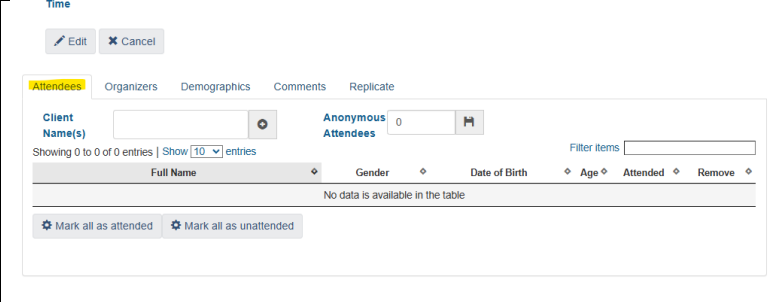
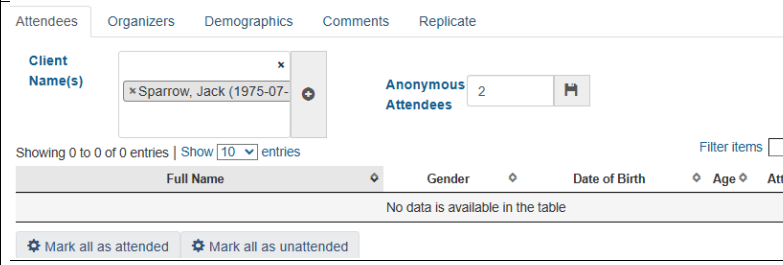
Program

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.</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="310 1136 992 1482" style="border: 1px solid #ccc; padding: 5px;"> <p>Referral Filter</p> <p>Geographic Region <input type="text" value="Lethbridge"/> x ▲</p> <p>City <input type="text" value="Lethbridge"/></p> <p style="text-align: right;"> Filter <input type="button" value="Close"/></p> </div>
<p>10. Click Save.</p>	<p><input type="button" value="Save"/></p>

Manage Group Activity

***Please Note – From the Manage Group activity page, when entering a client in the “Client Name(s) filed, the client must already be a preexisting client in the system for this function to work.**

Action	Manage Group Activity
<p>1. Once clicking Save, user will be redirected to the Manage Group Activity page.</p>	
<p>2. From the Manage Group Activity page, select the “Attendees” tab.</p>	
<p>3. From the Attendees tab, users can now mark down in the Client Name(s) field or</p>	

Anonymous Attendees.

***Please Note – For the user to successfully add a pre-existing client in the client Name(s) and anonymous Attendees boxes, after typing in the client’s name, ensure you click the “+ and save” buttons after entering their name in as this will save their name and/or anonymous as attended to the Group activity. If you do not click the “+ or save” button next to the Client Name(s) and Anonymous Attendees box, it will not save and will not show up as attended to the activity:**

Attendees Organizers Demographics Comments Replicate

Client Name(s) Anonymous Attendees

Showing 0 to 0 of 0 entries | Show 10 entries

4. After clicking both the “+” and “save” icons for client and anonymous attendees, click on the “Mark all as attended” button below.

Attendees Organizers Demographics Comments Replicate

Client Name(s) Anonymous Attendees

Showing 1 to 1 of 1 entries | Show 10 entries Filter items

Full Name	Gender	Date of Birth	Age	Attended	Remove
Sparrow, Jack	Male	1975-07-17	49	No	

5. Once clicking save, you can include the Organizers and/or External Contacts involved in the Group Activity if applicable.

Attendees **Organizers** Demographics Comments Replicate

Staff

Staff

Showing 0 to 0 of 0 entries | Show 10 entries Filter items

Full Name Remove

No data is available in the table

External Contacts

External Contacts

Showing 0 to 0 of 0 entries | Show 10 entries Filter items

Full Name Remove

No data is available in the table

6. Users can also review or edit the Demographics of the clients or anonymous attendees from the Group activity.

Attendees Organizers **Demographics** Comments Replicate

	Client	Anonymous	Total		Client	Anonymous	Total
Youth	0	<input type="text" value="0"/>	0	Females	0	<input type="text" value="0"/>	0
Adults	1	<input type="text" value="0"/>	1	Males	1	<input type="text" value="0"/>	1
Seniors	0	<input type="text" value="0"/>	0	Other	0	<input type="text" value="0"/>	0
Unknown	0	2	2	Unknown	0	2	2
Indigenous Identity	0	<input type="text" value="0"/>	0	Disabled	0	<input type="text" value="0"/>	0
Non-Indigenous	0	<input type="text" value="0"/>	0	Non-Disabled	1	<input type="text" value="0"/>	1
Unknown	1	2	3	Unknown	0	2	2

7. User can also add any Comments or Replicate the same Group Activity with number of attendees organizers, dates and programs

Attendees Organizers Demographics **Comments** Replicate

Edit - Insert - Format - View - Table -

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Words: 0

for future processes.

Attendees Organizers Demographics Comments Replicate

Keep Attendees No

Keep Organizers No

Keep Programs No

Dates

January 2025 »

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Clear

Replicate

***Please Note – For the Attendees, Organizers, Demographics and Comments tabs, when entering information in the fields, ensure you incorporate the habit of clicking the “Save” button each time when entering information from these tabs.**

8. Once user has filled and saved information for Group Activity, you can return to the Front Desk drop down menu and select “Group Activities” to display or manage the logged activity conducted.

Group Activity List

Filter: 1 Week(s) -

Show 10 entries

Filter items

Activity Name	Location	Date	Attendees	Geographic Region	Action
Transport	Canadian Mental Health Association	2025-01-22 10:20 AM	3		
After Care Group		2025-01-16 10:54 AM	0		

Add Activity

About Terms of Service Support

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- End-User Licence Agreement (EULA)
- Homelessness Learning Hub