Training/Testing Materials – City of Lethbridge Outreach

Version 3: Updated March 11, 2025

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

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.

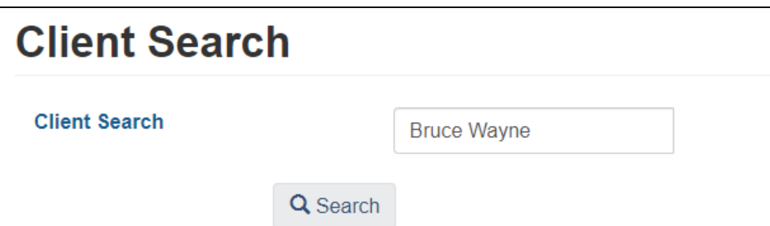
2. **View All Client Case Session Details or Add Session** – (Front Desk > Clients > Seach Client > Client Vitals > Client Management – Case Management > Sessions > View All Sessions Details or Add Session).

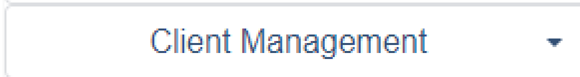
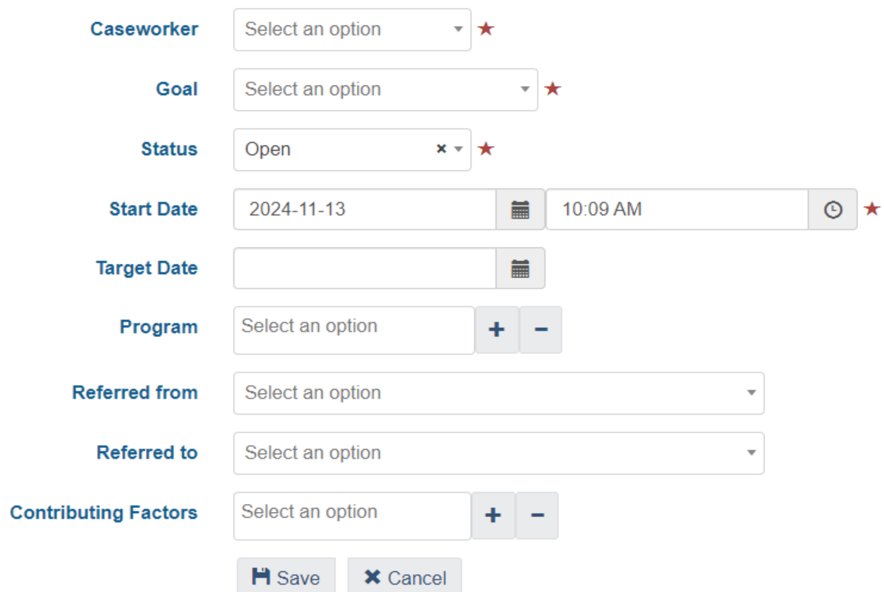
- Displays all case session details for a client's case plan or add a new case session.

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.
Case Management (Optional – Use if Applicable)	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 (Optional – Use if Applicable)	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

<u>Procedure to Add Case Goal</u>

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

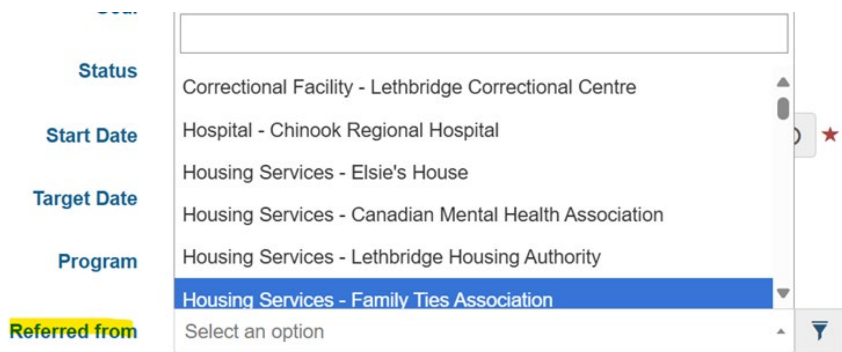
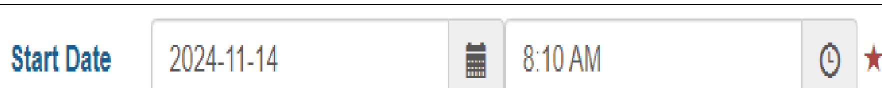
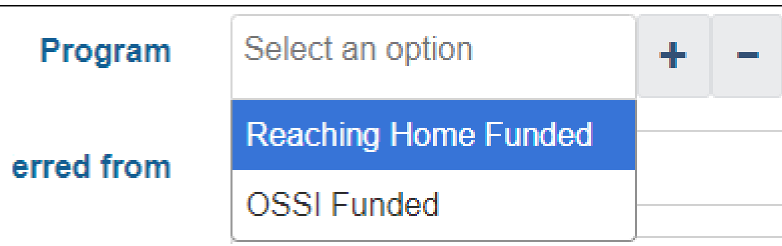
<table>
<tr>
<td>2. From the Client Management drop down menu, click on Case Management.</td>
<td>
</td>
</tr>
<tr>
<td>3. From the Client – Case Management List page, select the + Add Case Button.</td>
<td>
</td>
</tr>
<tr>
<td>4. From the Client - Add Case Management page, fill in all required fields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

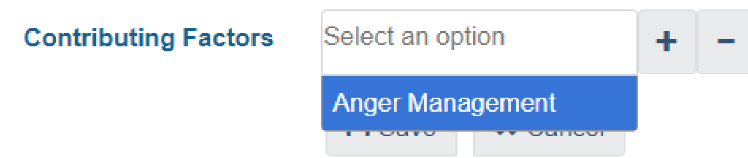
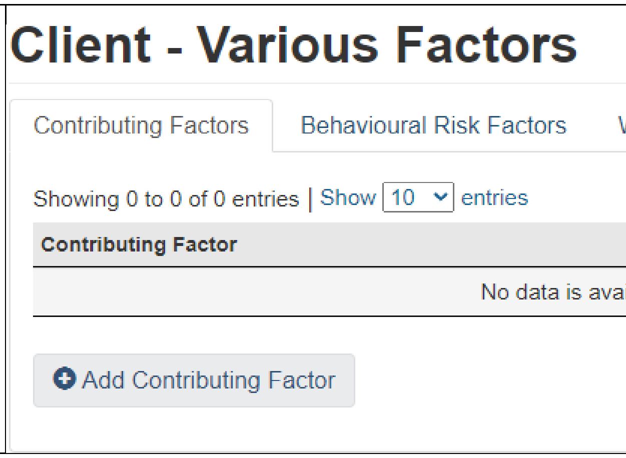
Referred From / Referred By

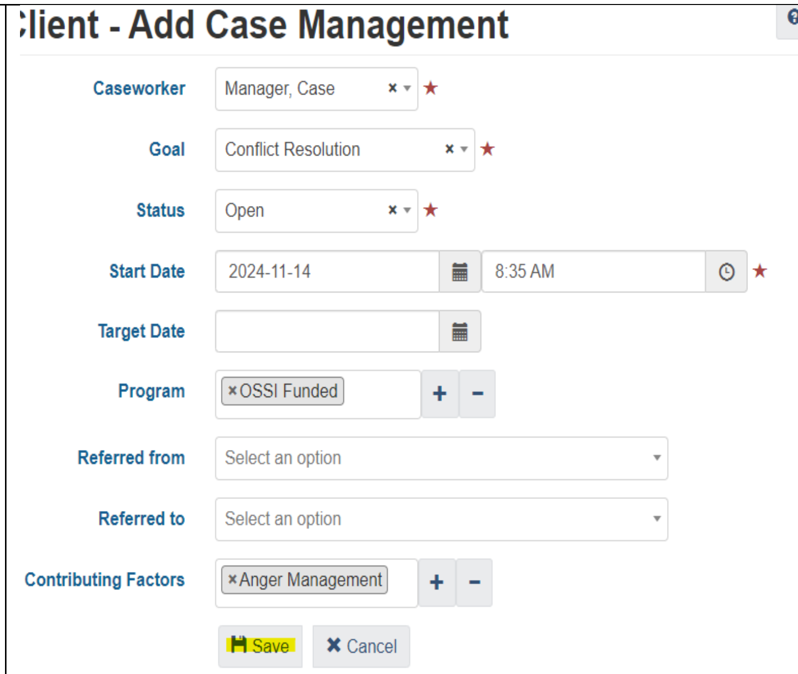
Note: The Geographic Region Toggle must be selected as Lethbridge to filter the Referral source options.

See the Referral Training Material for further guidance.</td>
<td>Think of the "Referred From", "Referred To" and "Agency Involved/Referral" fields as a journey for the client:

Referred From = Where the client commenced their journey (likely your agency, as the agency doing the work; the Initiate Survey will document intake-referral documentation. See Referrals Training Materials for more information).
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
</td>
</tr>
</table>

Once the options are available, choose the appropriate Referred By source. Referred To will be left blank until "Procedure to Close a Goal" section below.	with the client during the Case Session. They are not necessarily the starting or ending referral points but are involved in the case. 
5. Select the case worker that is 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	

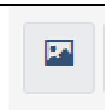
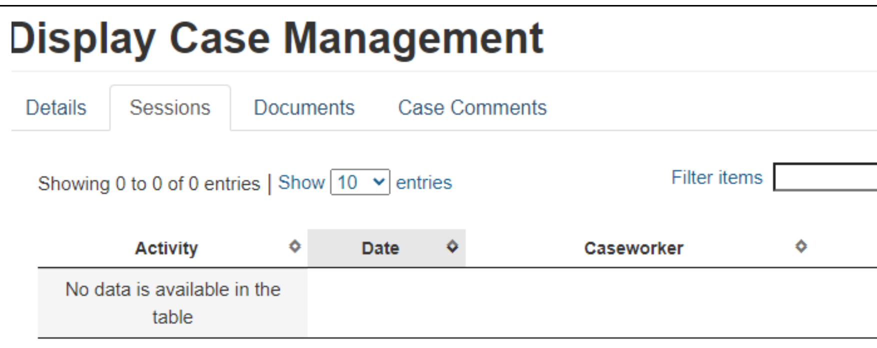
<table>
<tr><td>(Reaching Homes or OSSI).</td><td></td></tr>
<tr><td>10. Pick the Contributing Factors that are related to the main Goal.</td><td>
</td></tr>
<tr><td colspan="2"></td></tr>
<tr><td colspan="2">*Note – Contributing Factors will only appear in the dropdown box if they have been pre-entered in the Various Factors option, see example below:</td></tr>
<tr><td colspan="2"></td></tr>
<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 colspan="2"></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 colspan="2"></td></tr>
</table>

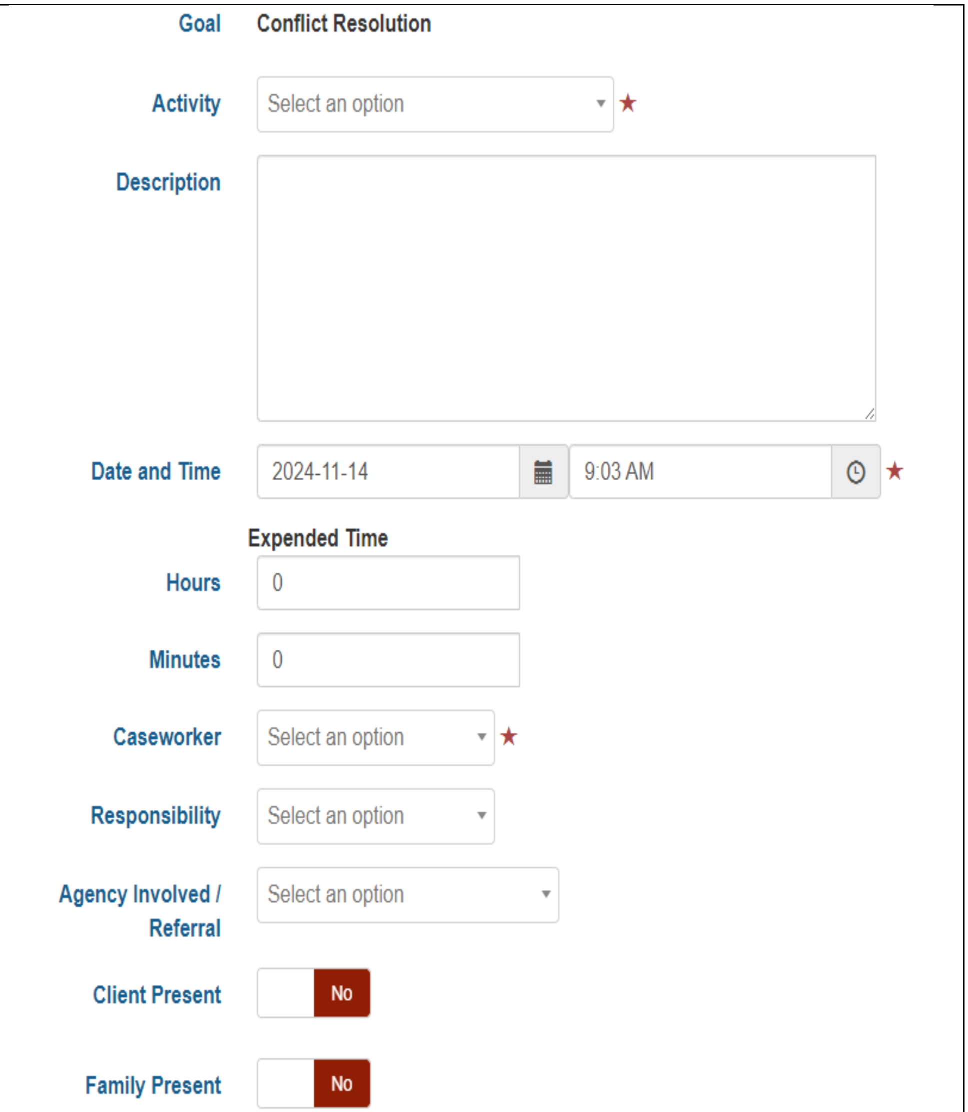
12. Click Save	

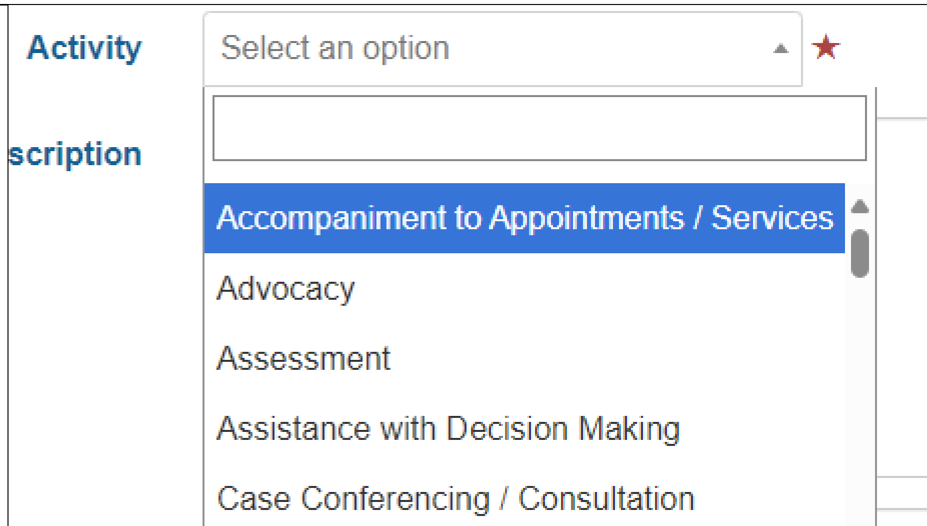
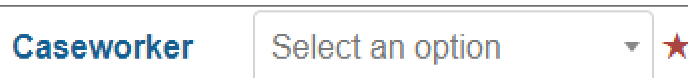
- The Process presented above is one of 2 ways to create a Case Management profile in HIFIS. Another quick process to add a Case Management profile is navigating to Front Desk > Case Management > + Add Case.
- Once the Goal for case management has been inputted, activities performed to meet the goal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

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.	

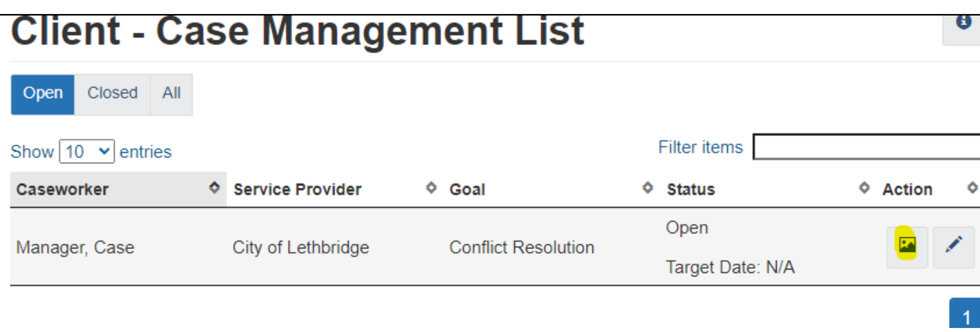
4. From the Client - Add Case Session page, fill in all required fields marked with a red star and any additional/optional fields to fill in on behalf of client:	
Note – The selected Goal from adding a Case Goal will automatically populate when adding a Case Session.	

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.	

Procedure to Add a Document

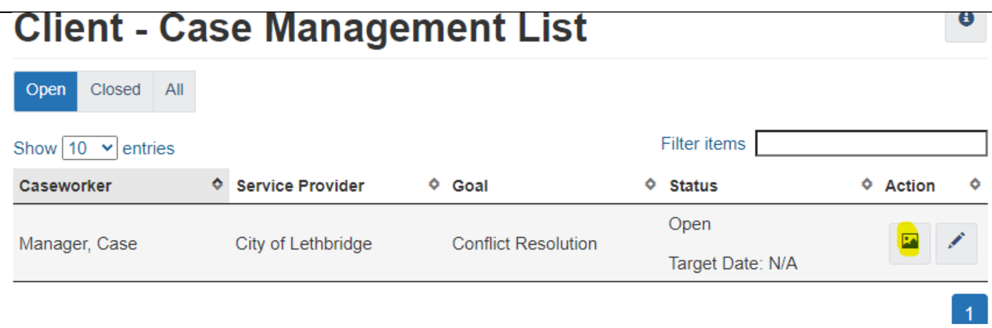
*Please Note - Service providers should only upload documents to HIFIS that help clients navigate the system of supports. This information must be uploaded to modules in the ***Client Management*** drop down menu of the application (with the exception of consent forms, which can be uploaded on the Client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

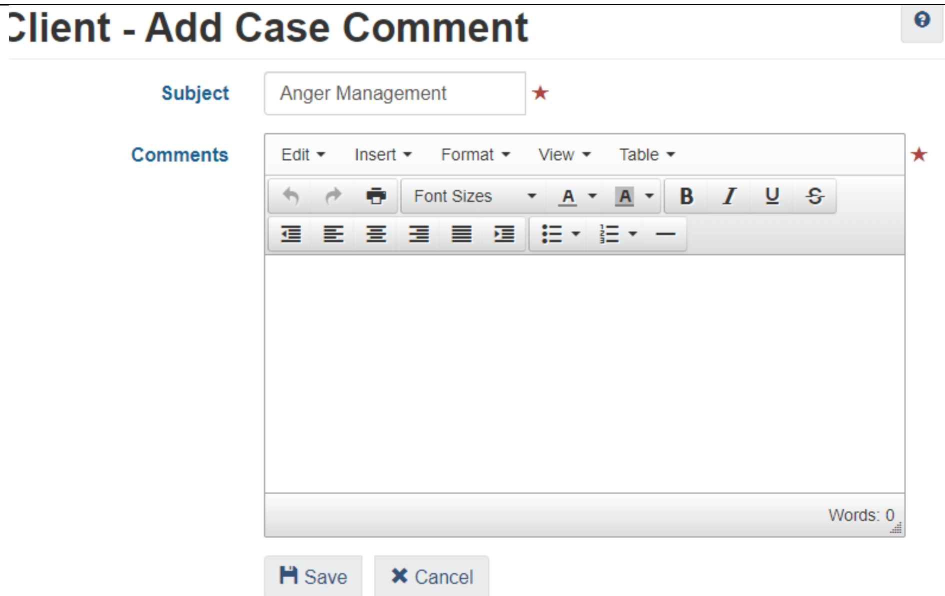
- Housing Placements > Housing Placement Details > Documents
- Housing Loss Prevention > Housing Loss Prevention Details > Documents
- Incidents > Add Incidents > Attachments

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	

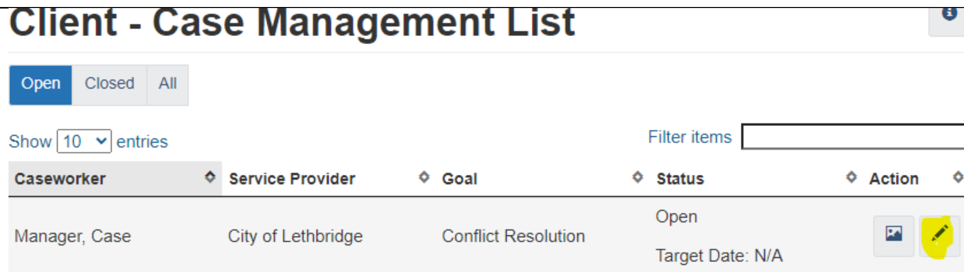
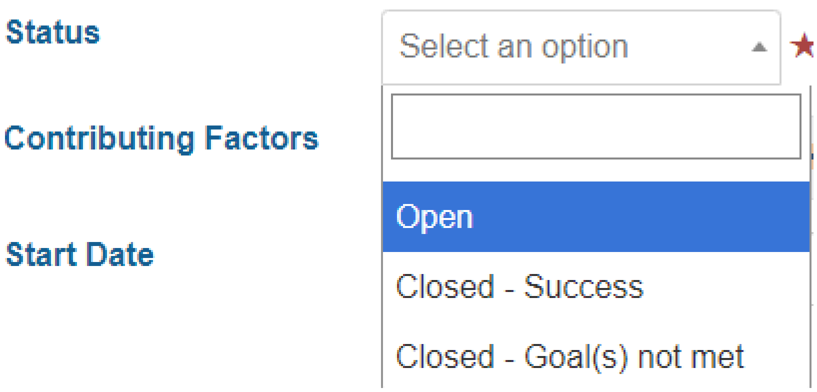
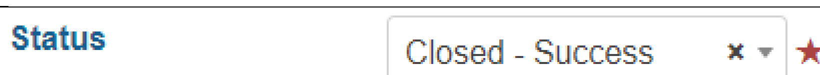
***Note – Scanned client identification documents (Driver's License, Passport etc.) are useful documents to store in this module. However, a client's health records are prohibited from being uploaded into HIFIS.**
****Note – Users can multi-select files for a maximum of 5MB per upload. Not all file types are permitted (e.g. pptx).***

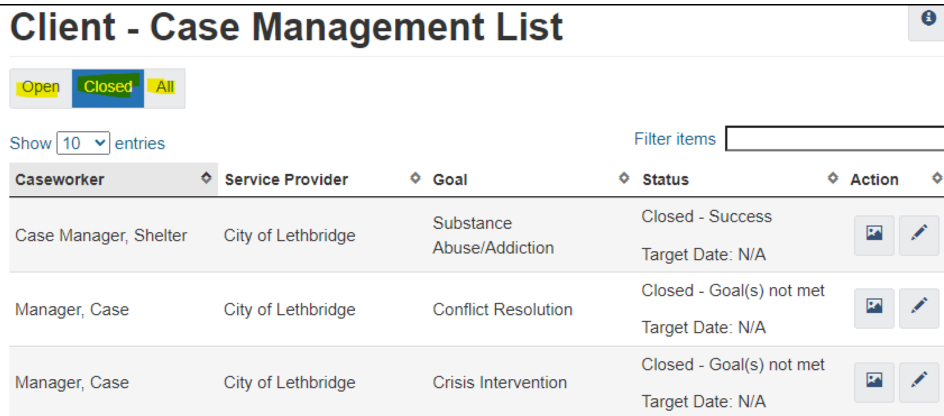
<u>Procedure to Add a Case Comment (Case Notes)</u>

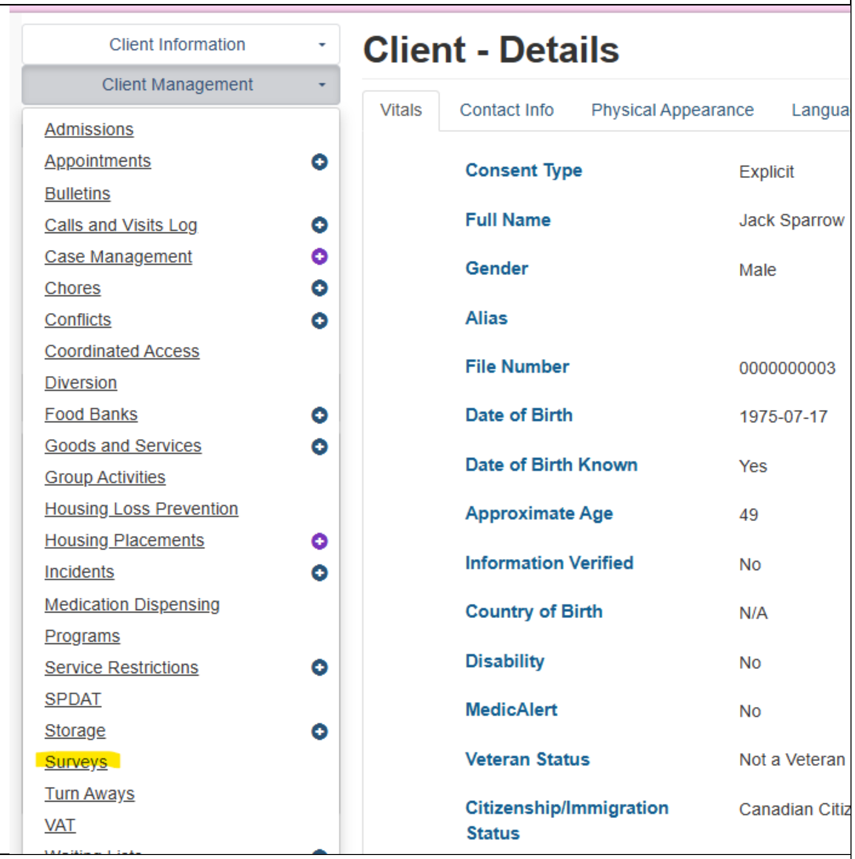
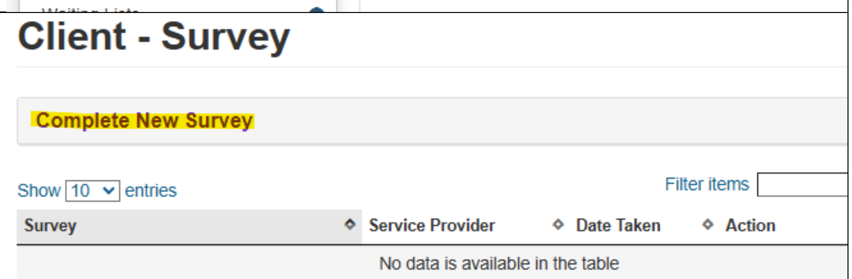
Action	
1. From the Client Management drop down list, click on Case Management and navigate/click on Display Case Management Icon	
2. On the Display Case Management page, navigate and click on Case Comments > + Add Comment	

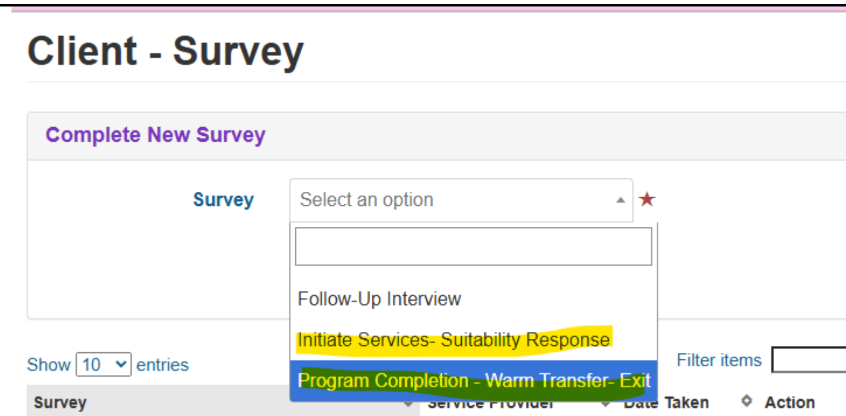
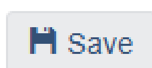
3. Enter a subject for Case Comment and proceed with entering Comments.	
4. Click Save once you have completed adding Subject and Comments to case.	
***Note – When going back to Display Case Comments, the caseworker who was involved in the activity will show up as under User Name.**	

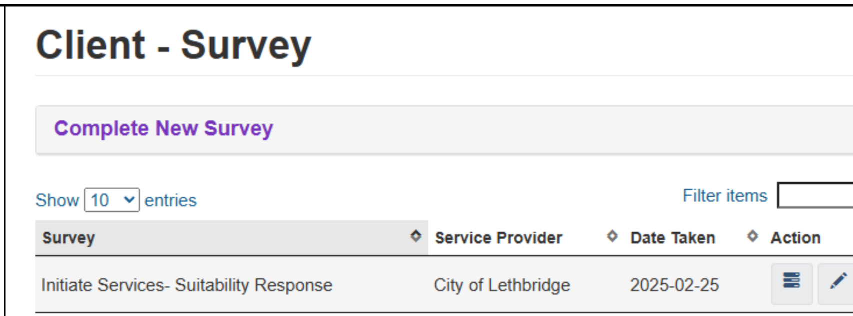
Procedure to close a Goal

<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.</td><td>
</td></tr>
<tr><td>3. Add the Referred To field</td><td>
</td></tr>
<tr><td>4. Change Status field to Closed – Success or Closed – Goal(s) not met.</td><td>
</td></tr>
<tr><td>5. Click Save</td><td>
</td></tr>
</table>

<table>
<tr><td></td><td></td></tr>
<tr><td>6. 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>

<table>
<tr><th>Action</th><th></th></tr>
<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>
</table>

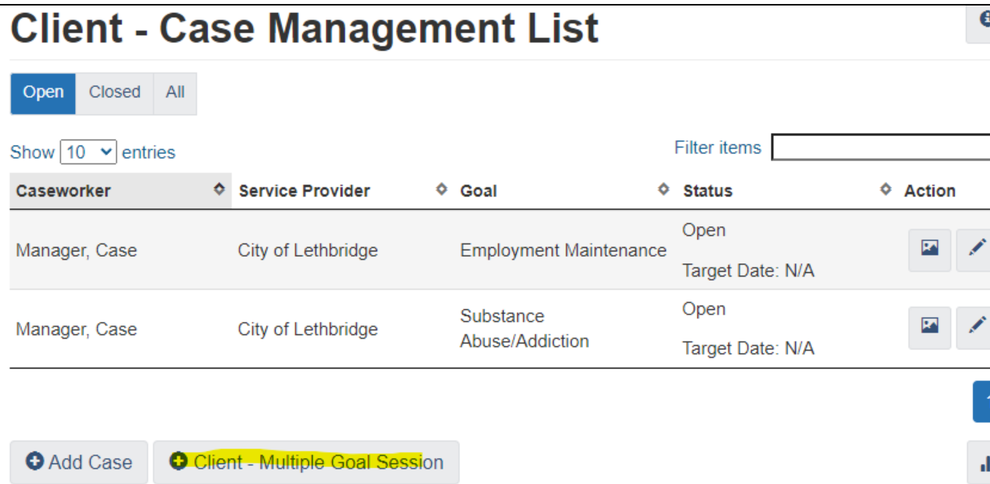
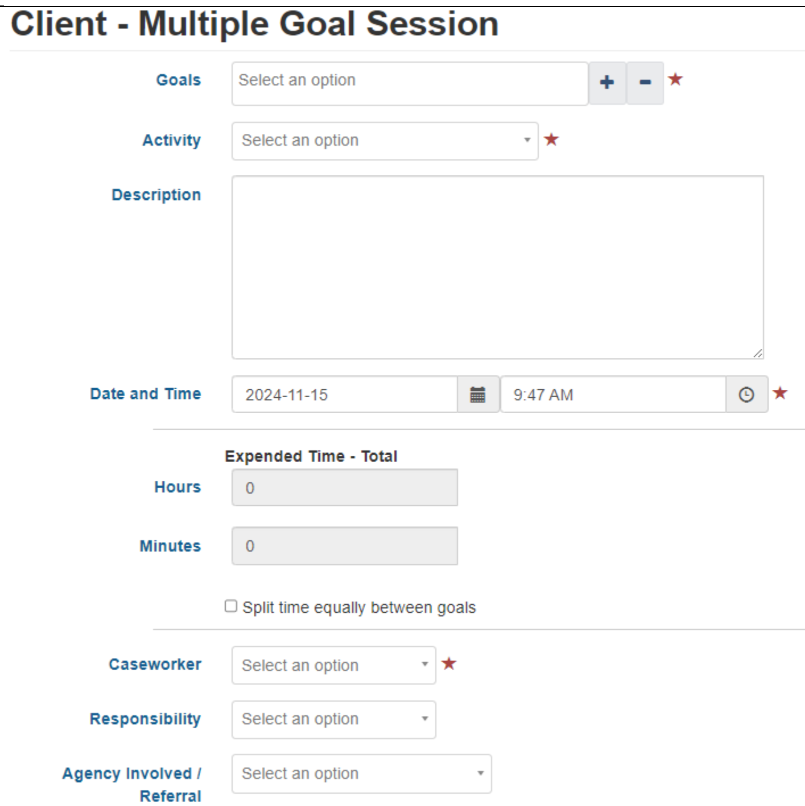
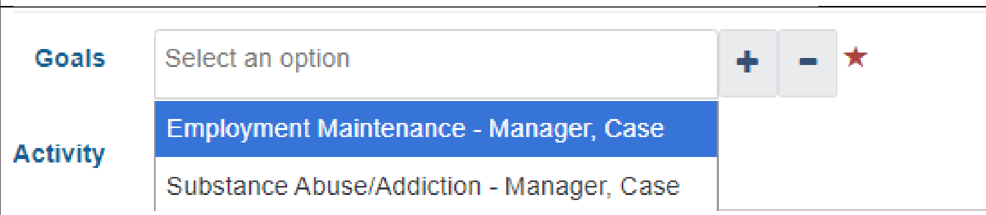
	3. In the "Survey" field, click in the text box "Select an Option" and select your option and then click "+ Begin Survey".	
	4. After selecting this option, the survey will prompt open and can begin filling in all the fields available.	
	5. Once you have filled in all the fields of the survey, click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

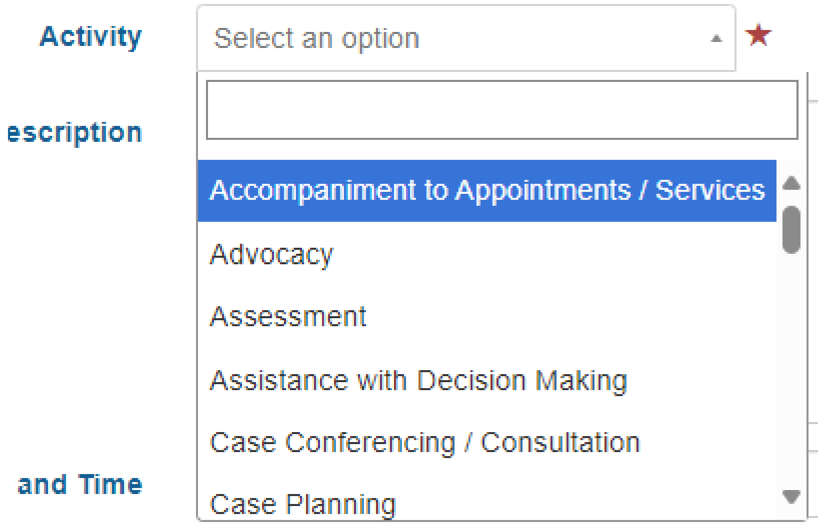
	6. Once clicking Save, you will be redirected back to the Client-Survey page showing that the survey has been completed. All surveys will now stay with the client in Client – Survey.	

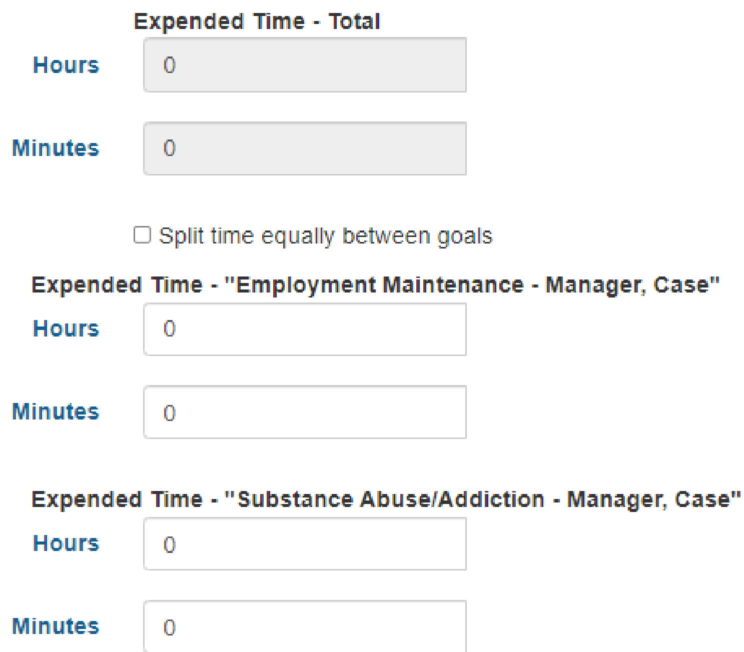
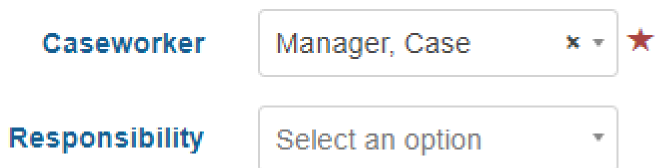
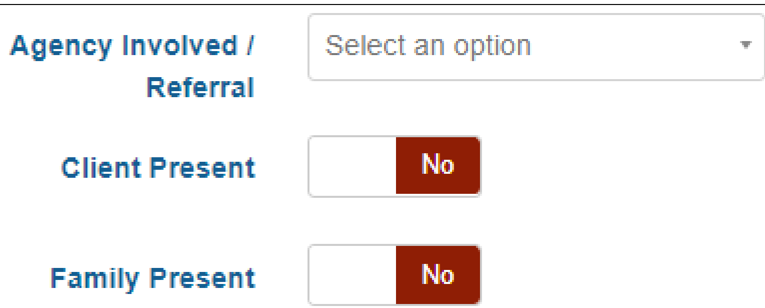
<u>Procedure to Add Multiple Goal Session</u>

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.***

<table>
<tr><th>Action</th><th></th></tr>
<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>
</td></tr>
<tr><td>3. In the Goals field, select the relevant goals from the drop down list or click Select All button (+)</td><td>
</td></tr>
</table>

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.	

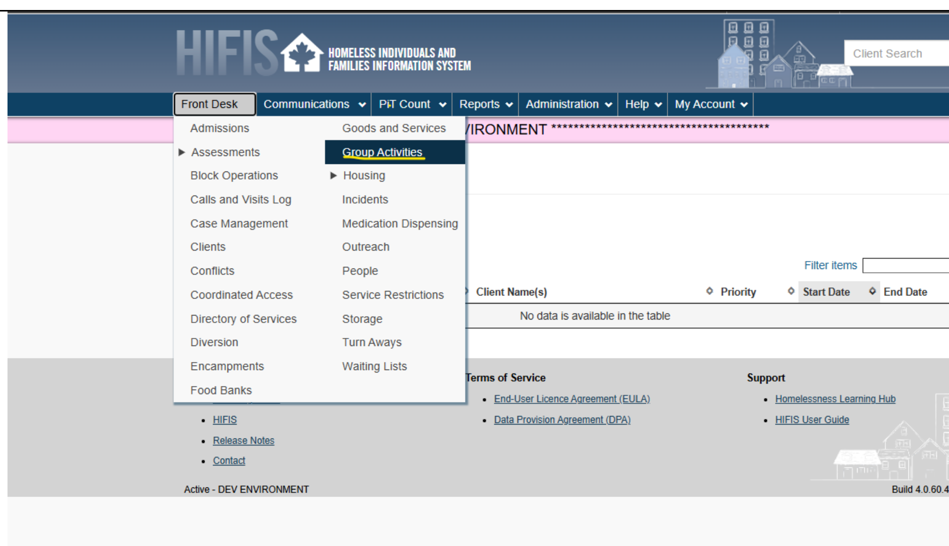
6. Indicate, in hours and minutes, how much time was spent on the session (Goal) in the Expended Hours and Expended Minutes fields. This includes the option to split time equally between goals.	
7. Select the Caseworker that was assigned to the sessions and if applicable, the individual who was responsible for the session (either Client or Caseworker).	
8. If applicable, select the Agency or Referral Involved with the case session. This includes indicating if	

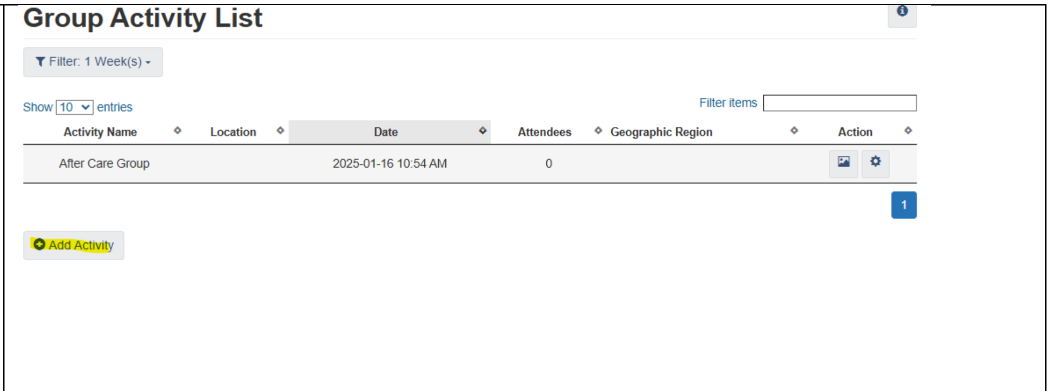
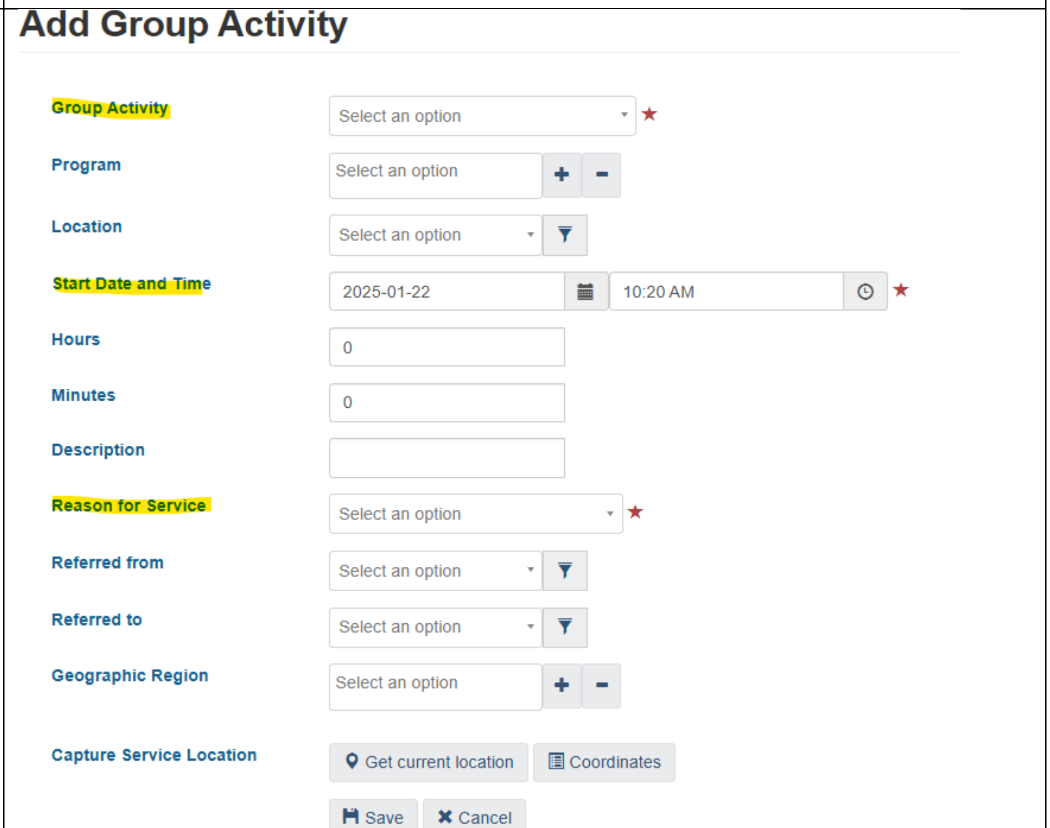
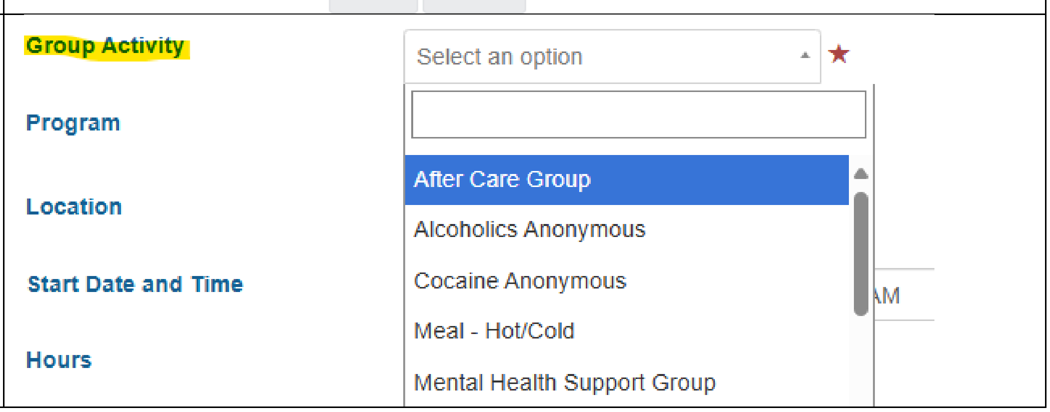
the client and/or family were present for session.	
9. Click the Save button.	

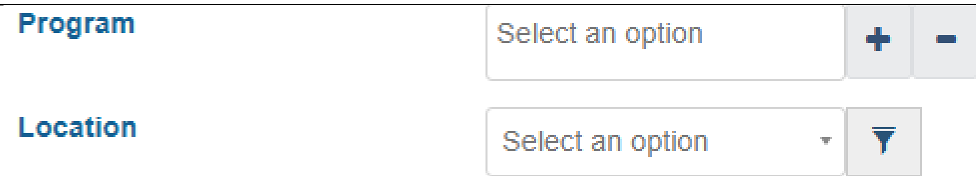
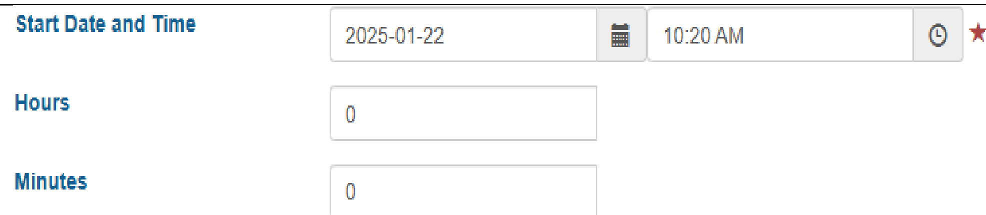
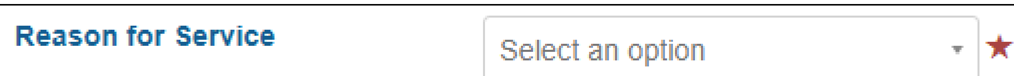
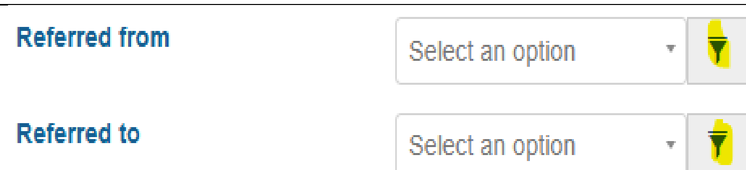
*Will use Group Activities Module for clients that decline consent – Declined Anonymous

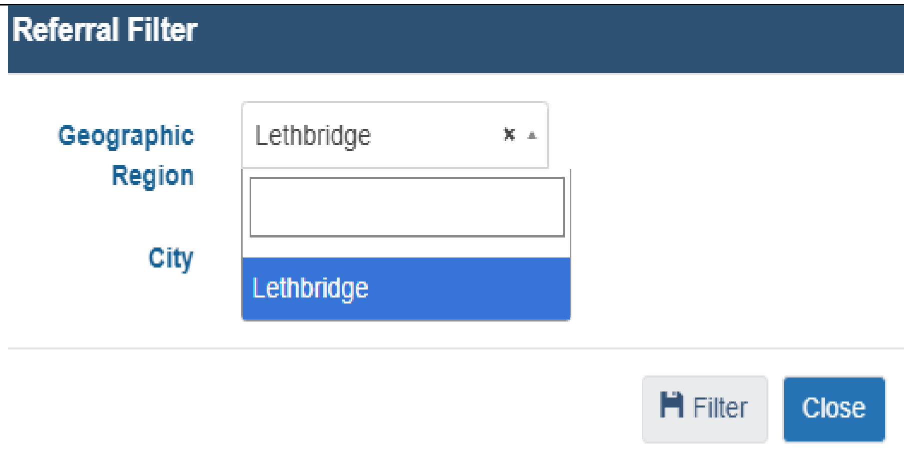
Group Activities – Process & Procedure

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.

Action	
1. From the HIFIS main page, navigate to the Front Desk drop down menu and select Group Activities.	

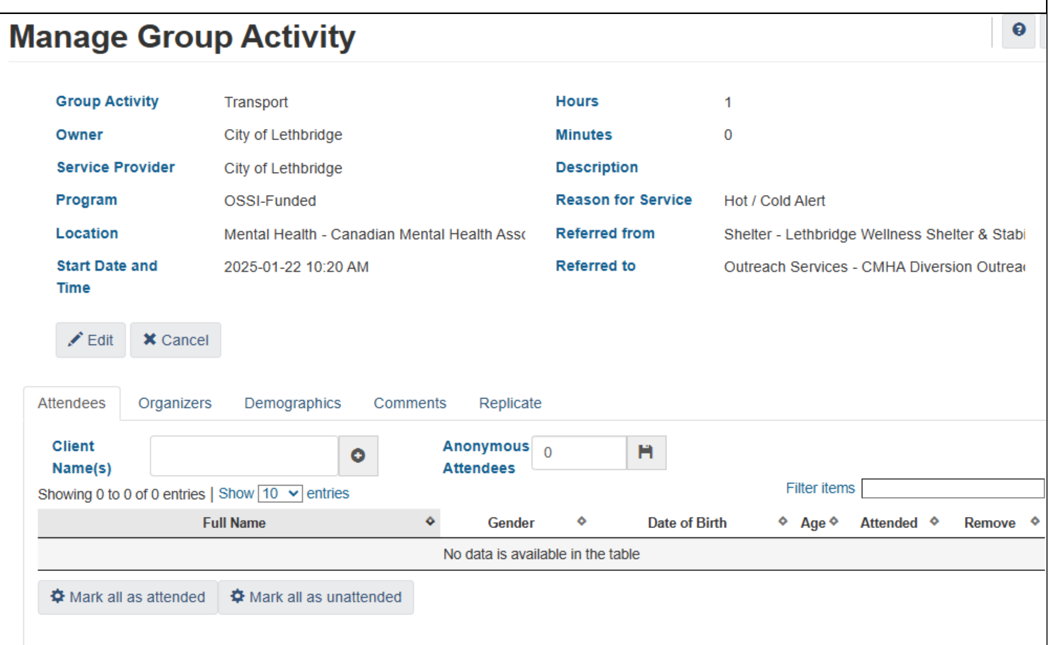
2. From the Group Activities List page, select the "+ Add Activity" button to begin the process.	
3. From the "Add Group Activity" page, fill in all required fields marled with a red star and any optional fields if applicable for additional information.	
4. Select the Group Activity provided.	

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

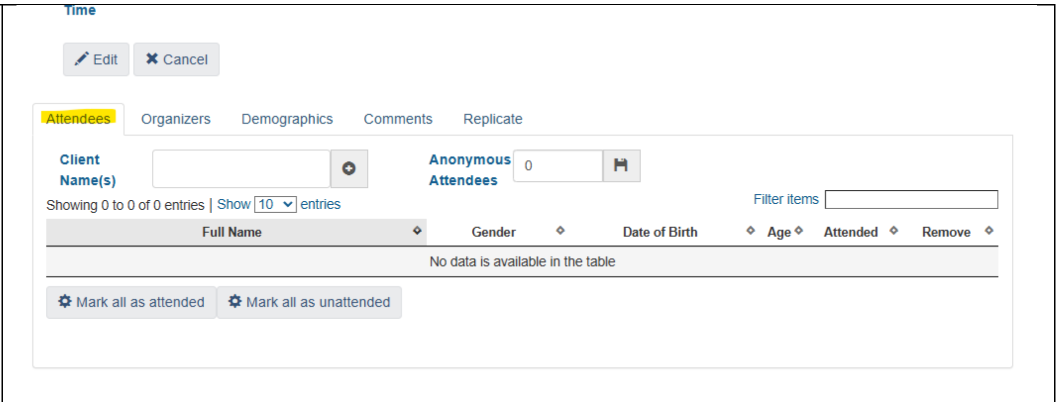
	
10. Click Save.	

Manage Group Activity

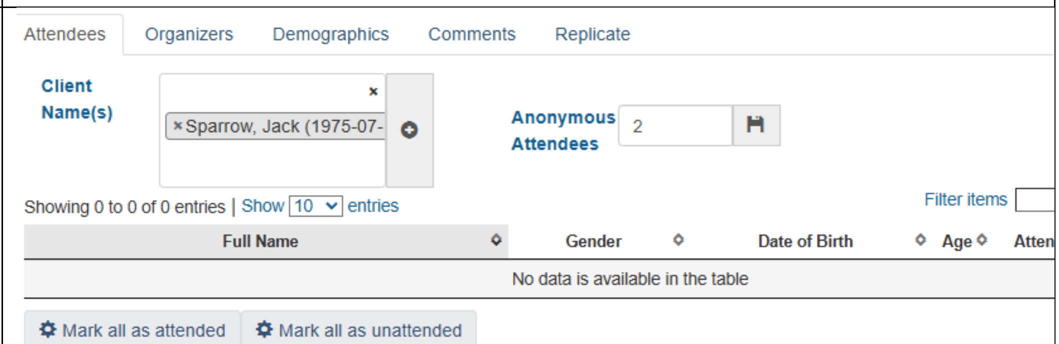
****Please Note – From the Manage Group activity page, when entering a client in the "Client Name(s) filed, the cline must already be a preexisting client tin the system for this function to work.***

Action	
1. Once clicking Save, user will be redirected to the Manage Group Activity page.	

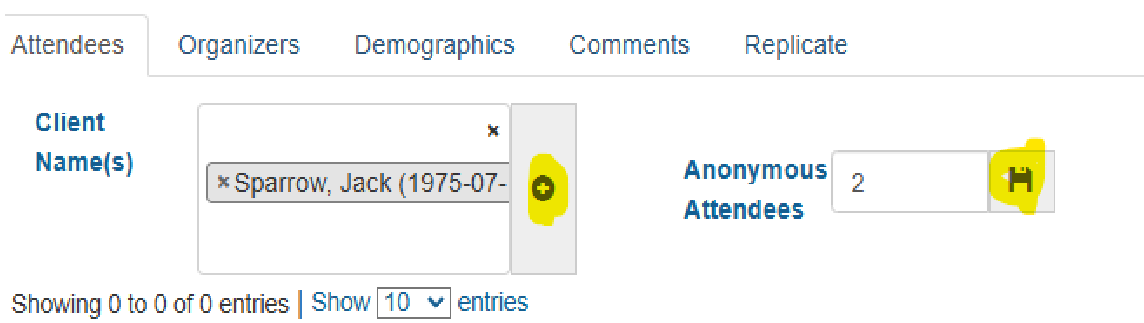
2. From the Manage Group Activity page, select the “Attendees” tab.

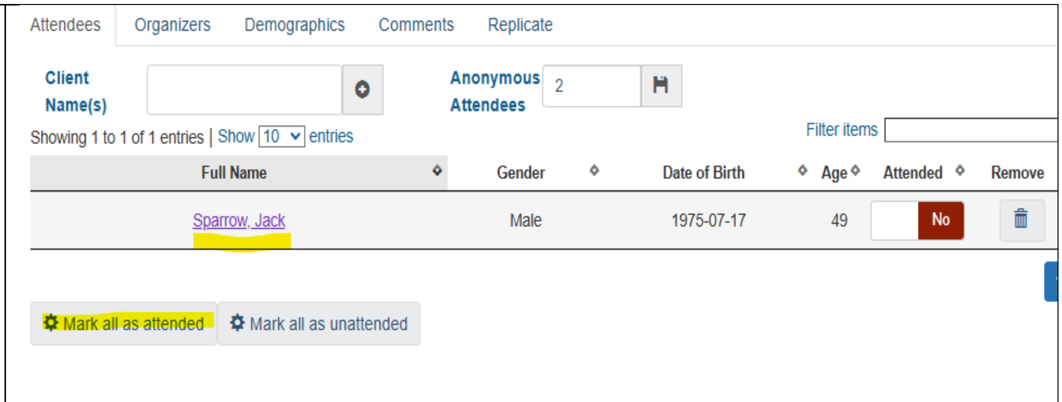
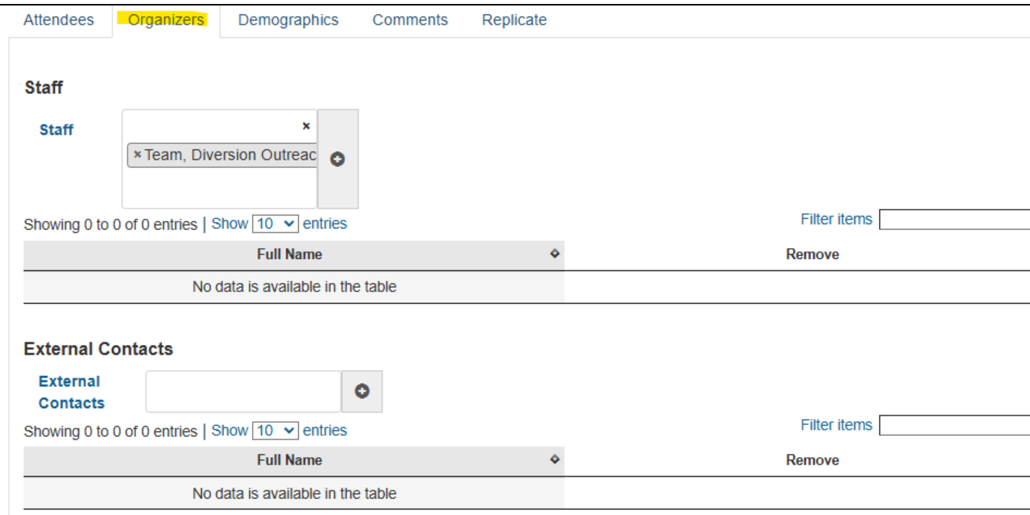


3. From the Attendees tab, users can now mark down in the Client Name(s) field or Anonymous Attendees.

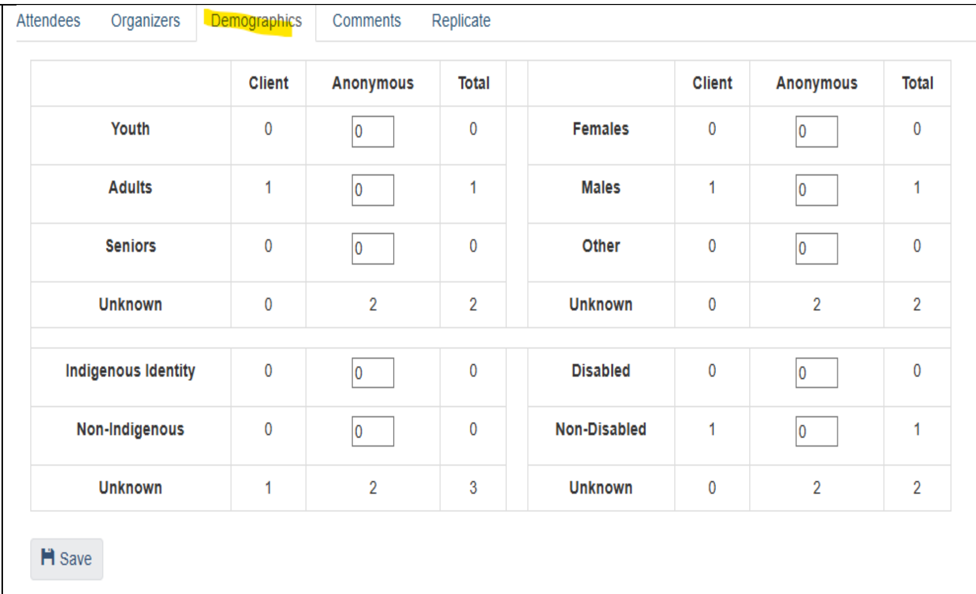


Please Note – For the user to successfully add a pre-existing client in the client Name(s) and anonymous Attendees boxes, after typing in the client’s name, ensure you click the “+ and save” buttons after entering their name in as this will save their name and/or anonymous as attended to the Group activity. 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:

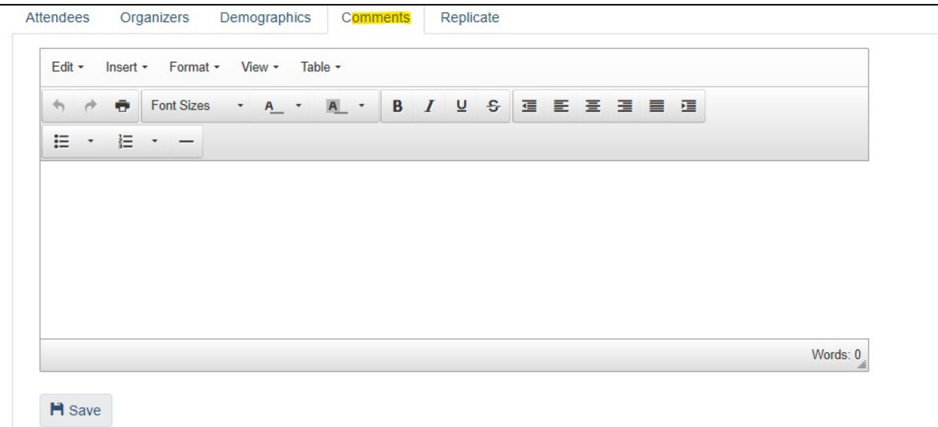


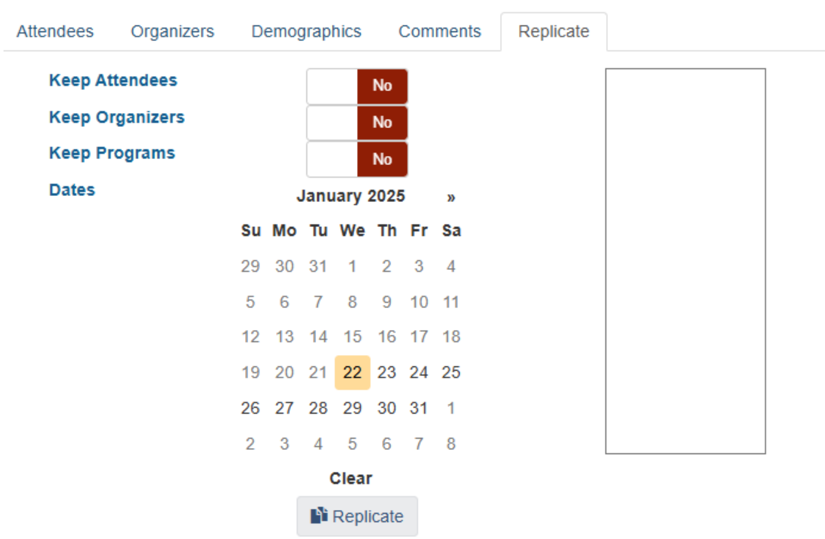
<table>
<tr>
<td>4. After clicking both the “+” and “save” icons for client and anonymous attendees, click on the “Marl all as attended” button below.</td>
<td>
</td>
</tr>
<tr>
<td>5. Once clicking save, include the Organizers and/or External Contacts involved in the Group Activity if applicable. This is how to indicate which staff are involved with the activity.</td>
<td>
</td>
</tr>
</table>

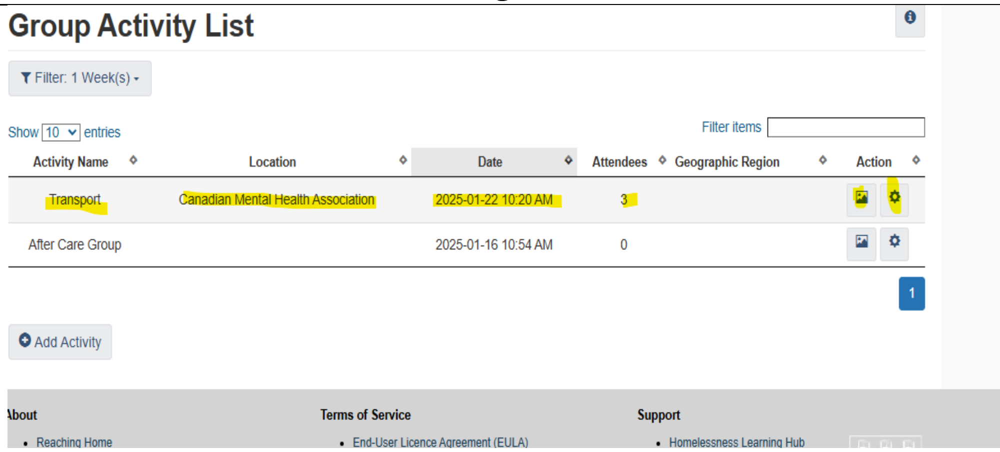
6. Users can also review or edit the Demographics of the clients or anonymous attendees from the Group activity.



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





<table>
<tr><td></td><td></td></tr>
<tr><td colspan="2">*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.</td></tr>
<tr><td>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.</td><td>
</td></tr>
</table>