Training Materials – Entering Case Management & Record/Related Activities

This training module provides an overview of case management processes within the HIFIS system. It covers the fundamental aspects of client intake, assessment, case planning, and documentation within the system. By the end of this module, case managers will be equipped with the knowledge and skills to effectively use HIFIS for managing client data and supporting individuals experiencing homelessness.

The Case Management module allows the service provider to keep records of the activities done with a client to reach pre-determined goals. Each goal (desired outcome) that a caseworker and client work towards is a separate record in the Case Management module. For example, if a client has a mental health issue they would like to work on and they would also like to find employment, two Case Management records would be created for the client.

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

1. **Case Management Summary List** - (Front Desk > Case Management)

- Shows a list of all case plans under your agency created at the site for a given period of time.

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

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

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

	• Client – Case Management List > Display Case Management > Case Comments > Add Comment.
Case Management	New Record ***(Add Document)*** under the Display Case Management list is uploaded: • Client – Case Management List > Display Case Management > Documents > Upload Document.
Case Management	New Record ***(Add Multiple Goal Session)*** under Client - Case Management List • Client – Details > Client Management > Case Management > Client - Case Management List > Client – Multiple Goal Session

<u>Enter a Case Management & Record Related Activities</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.
- Comments (Case Comments) regarding each case and session can be recorded.
- Documents for backup can be uploaded and kept with the case.

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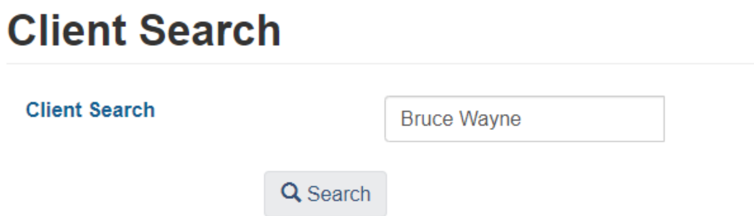
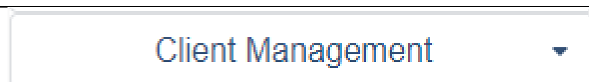
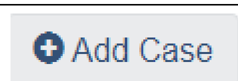
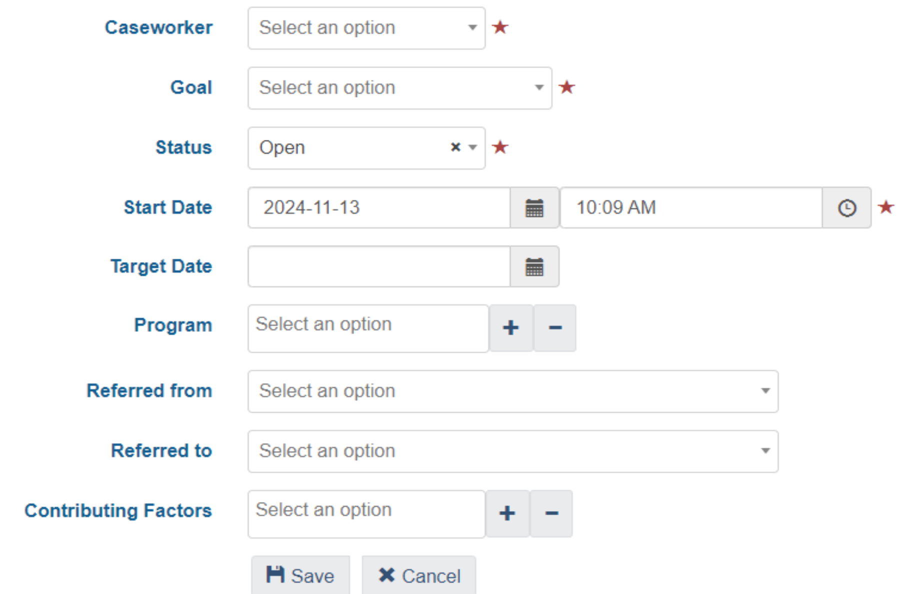
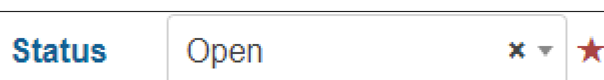
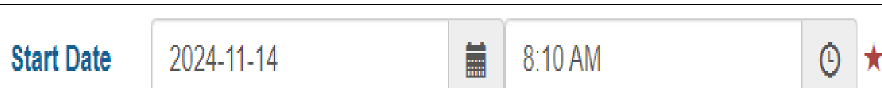
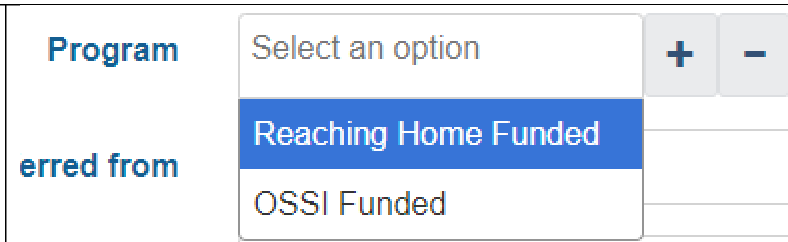
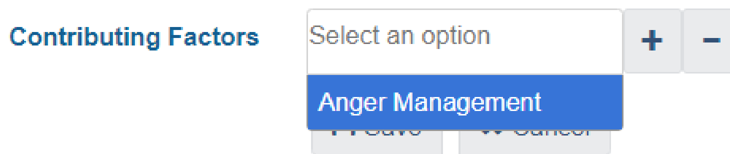
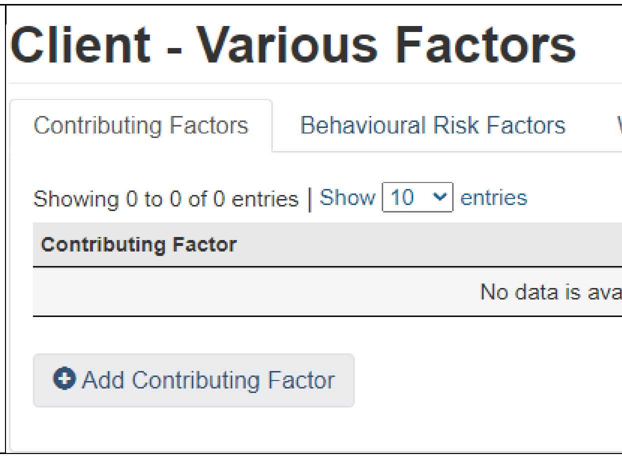
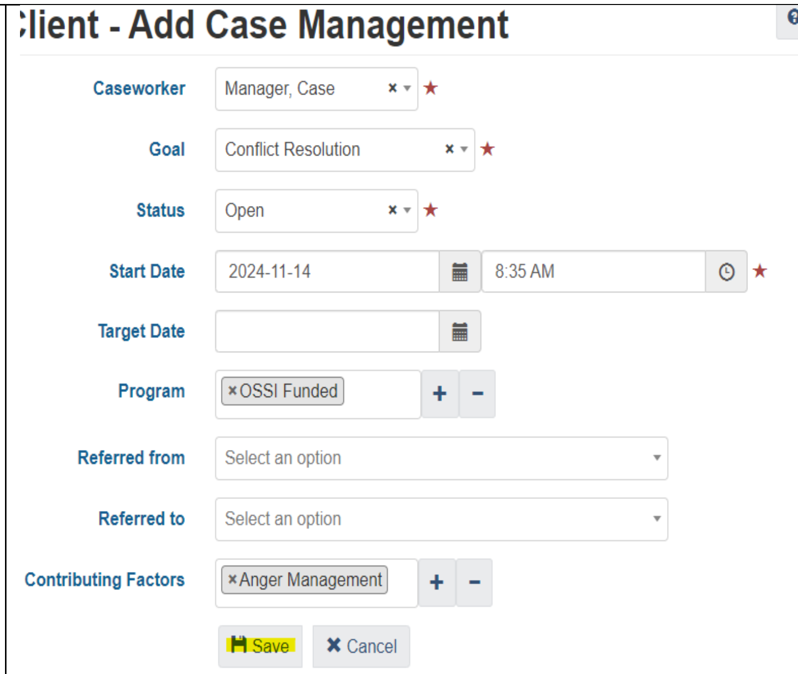
- Comments (Case Comments) regarding each case and session can be recorded.
- Documents for backup can be uploaded and kept with the case.

1. Procedure to Add Case Goal

Action	
1. From the HIFIS main page, navigate to Front Desk > Clients> Search Client >Client - Details.	
2. From the Client Management drop down menu, click on Case Management.	
3. From the Client – Case Management List page, select the + Add Case Button.	

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:	
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.	

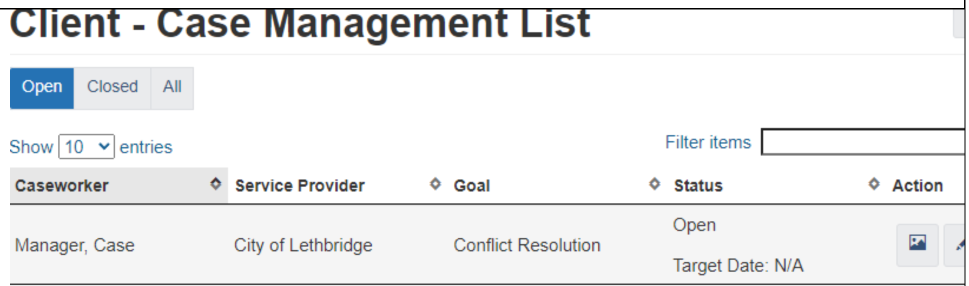
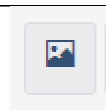
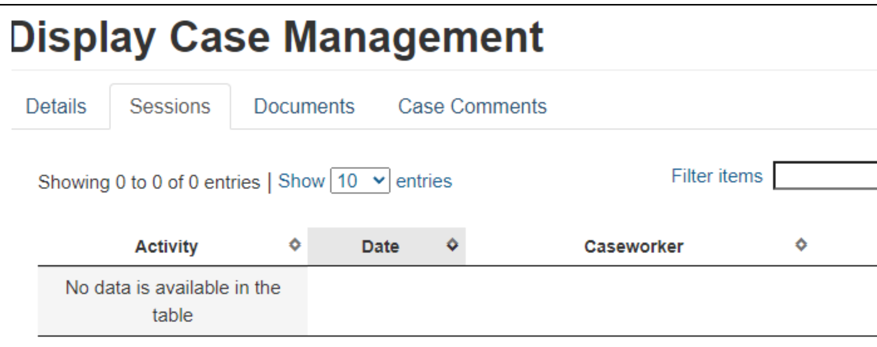
<table>
<tr>
<td>9. In the Program field, enter the program that is funding the services provided to client (Reaching Homes or OSSI).</td>
<td>
</td>
</tr>
<tr>
<td>10. Pick the Contributing Factors that are related to the main Goal.</td>
<td>
</td>
</tr>
<tr><td colspan="2"></td></tr>
<tr><td colspan="2">*Note – 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>

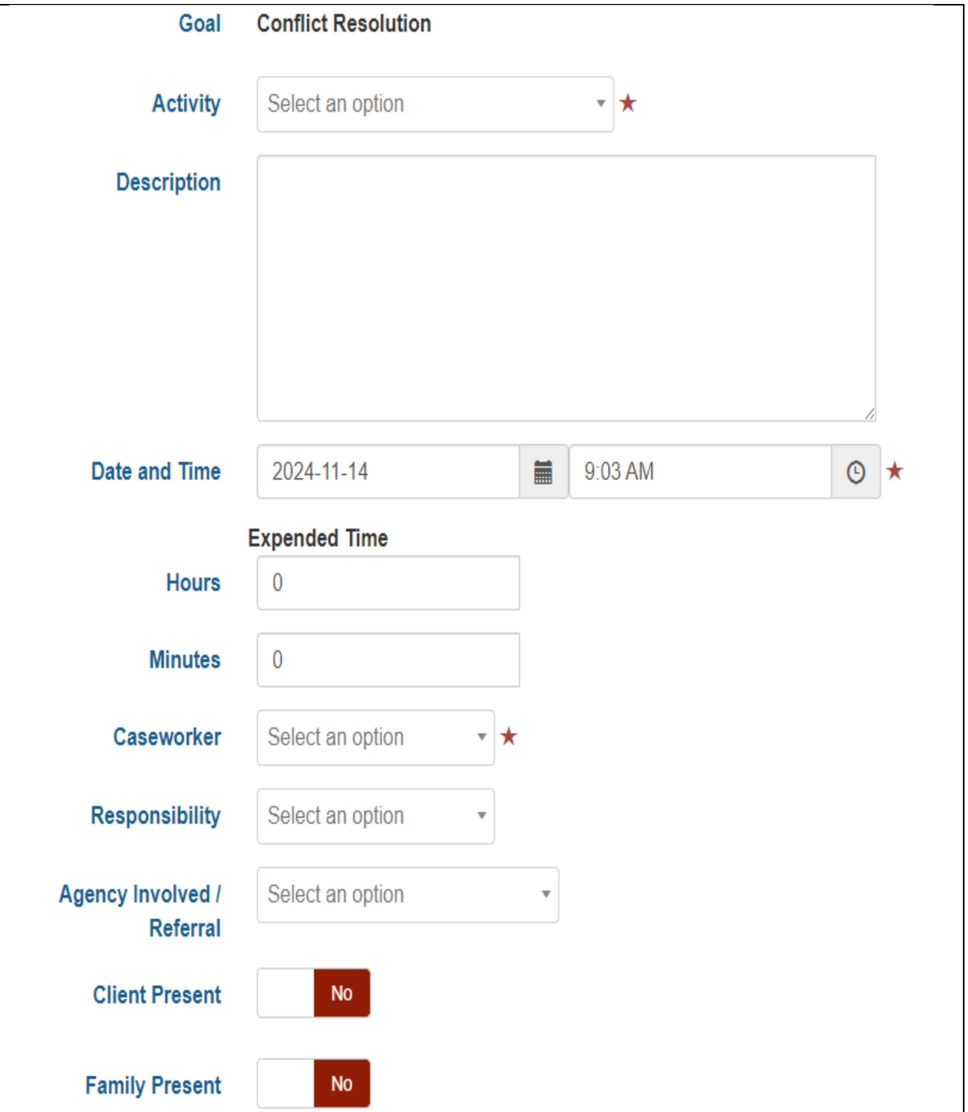
12. Click Save	

- 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.***

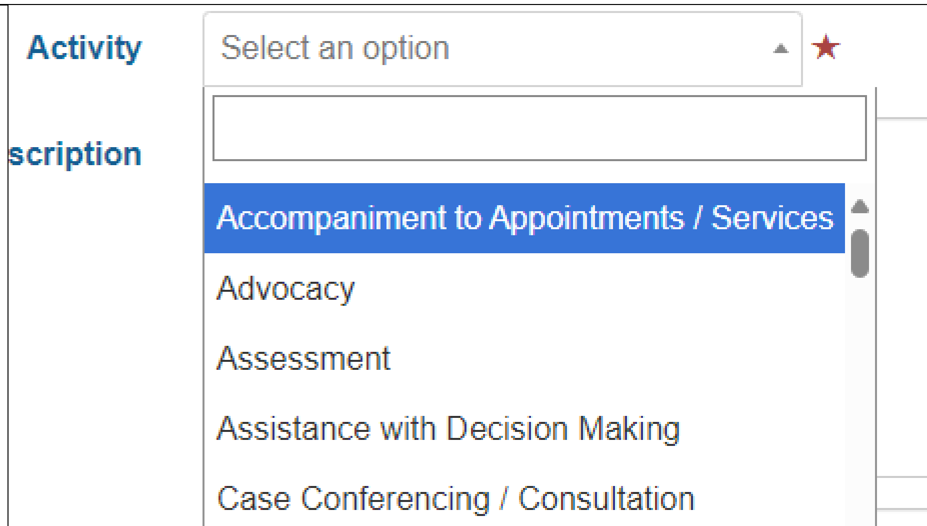
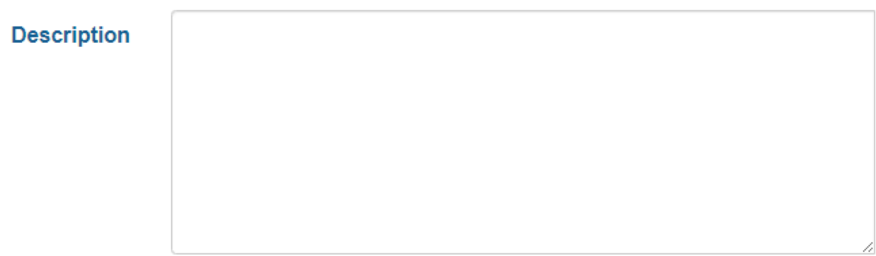
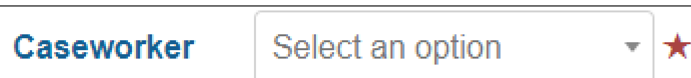
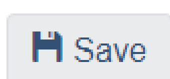
****Note – To perform this process there must already be a pre-existing client profile already entered in the system.***

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:	

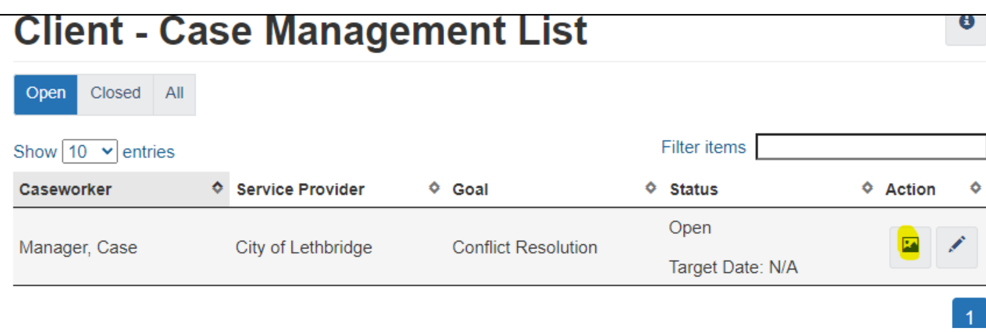
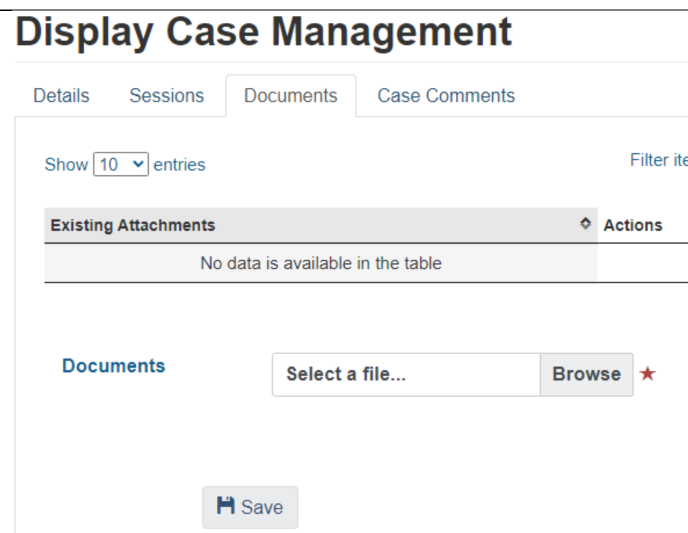
***Note – The selected Goal from adding a Case Goal will automatically populate when adding a Case Session.**

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 Add a Document

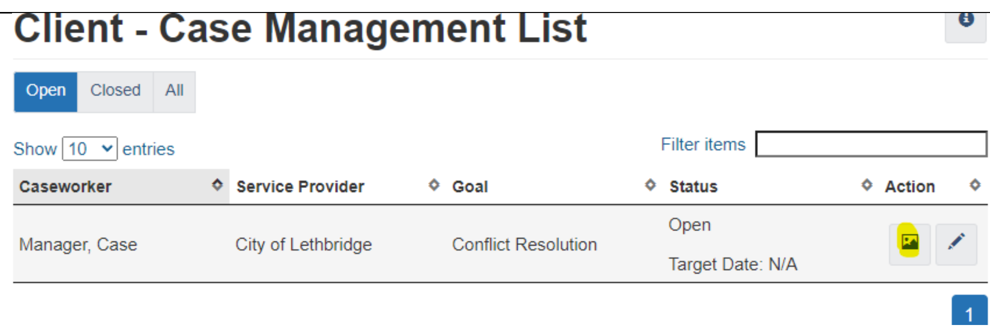
*Please Note - Service providers should only upload documents to HIFIS that help clients navigate the system of supports. This information must be uploaded to modules in the ***Client Management*** drop down menu of the application (with the exception of consent forms, which can be uploaded on the Client Vitals page when creating or after creating a new client). The following process is for Case Management testing only, other modules that have a "Documents" upload process include:

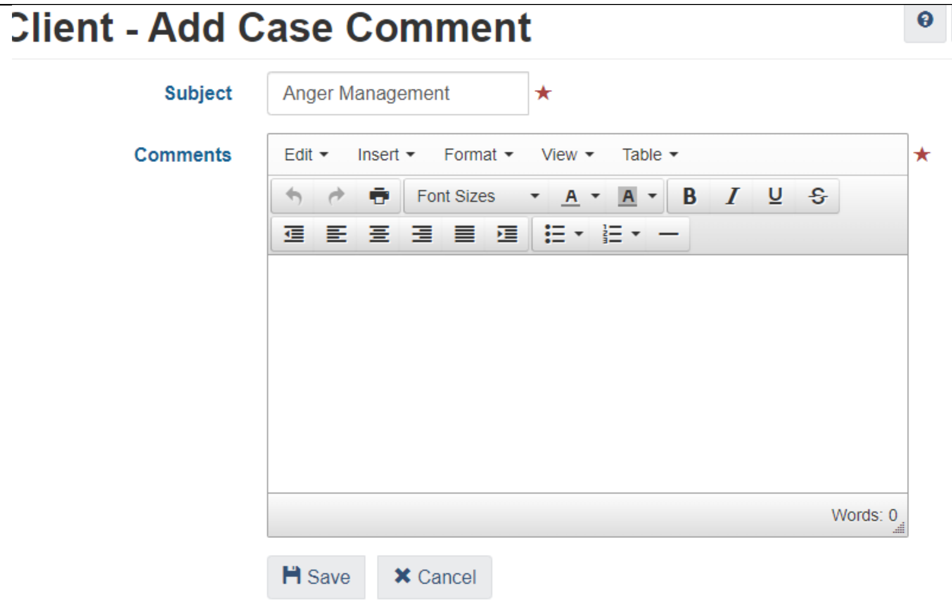
- Housing Placements > Housing Placement Details > Documents
- Housing Loss Prevention > Housing Loss Prevention Details > Documents
- Incidents > Add Incidents > Attachments

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

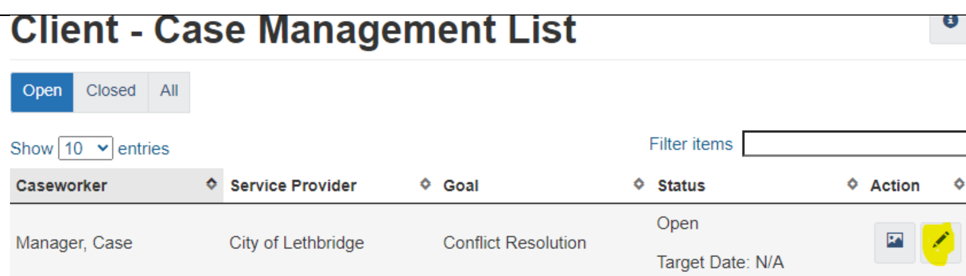
*Note – Scanned client identification documents (Driver's License, Passport etc.) are useful documents to store in this module. However, a client's health records are prohibited from being uploaded into HIFIS.
Note – Users can multi-select files for a maximum of 5MB per upload. Not all file types are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

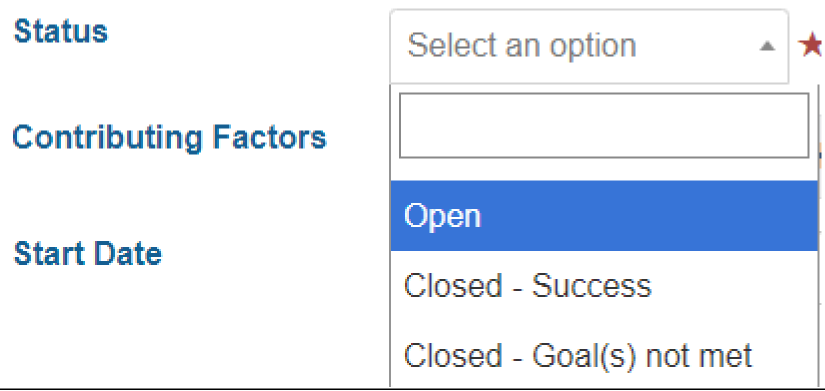
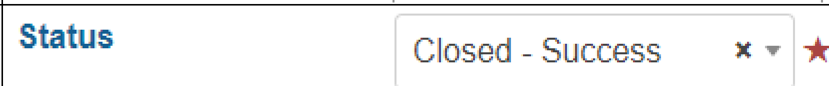
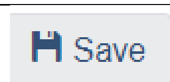
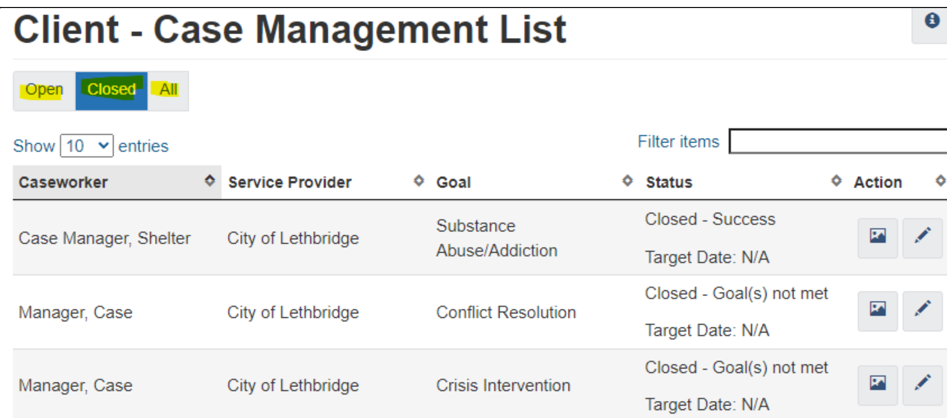
4. Procedure to Add a Case Comment (Case Notes)

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

<table>
<tr><td>3. Enter a subject for Case Comment and proceed with entering Comments.</td><td>
</td></tr>
<tr><td>4. Click Save once you have completed adding Subject and Comments to case.</td><td>
</td></tr>
<tr><td colspan="2"></td></tr>
<tr><td colspan="2">*Note – When going back to Display Case Comments, the caseworker who was involved in the activity will show up as under User Name.</td></tr>
<tr><td colspan="2"></td></tr>
</table>

<u>5. Procedure to close a Goal</u>

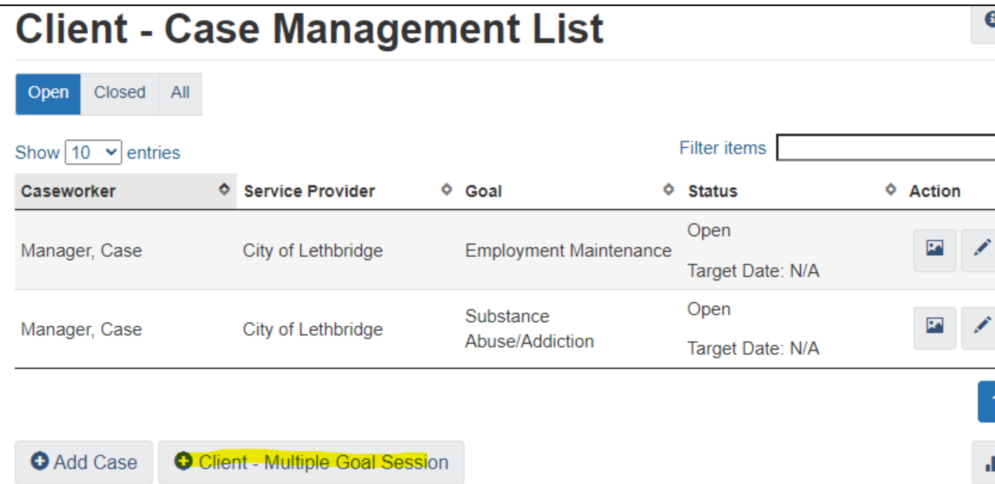
<table>
<tr><th>Action</th><th></th></tr>
<tr><td>1. Navigate to client record/profile and navigate to Client Management drop down list and select Case Management, select Edit icon.</td><td>
</td></tr>
</table>

2. On the Client - Edit Case Management > Details page, navigate down to Status drop down field.	
3. Change Status field to Closed – Success or Closed – Goal(s) not met.	
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.	

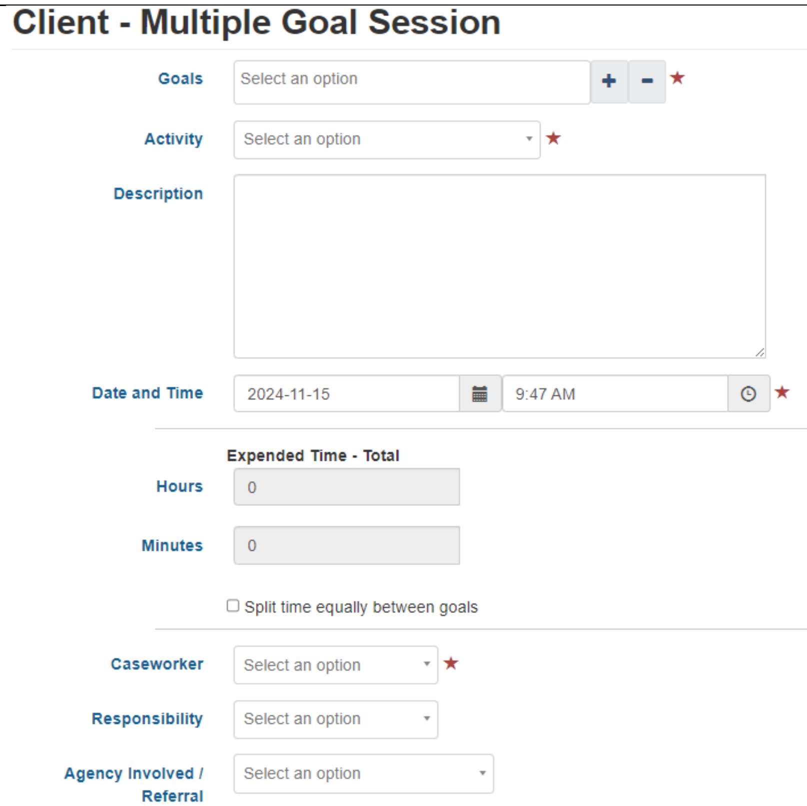
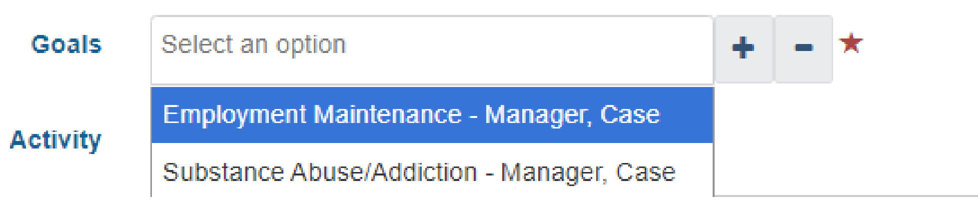
6. Procedure to Add Multiple Goal Session

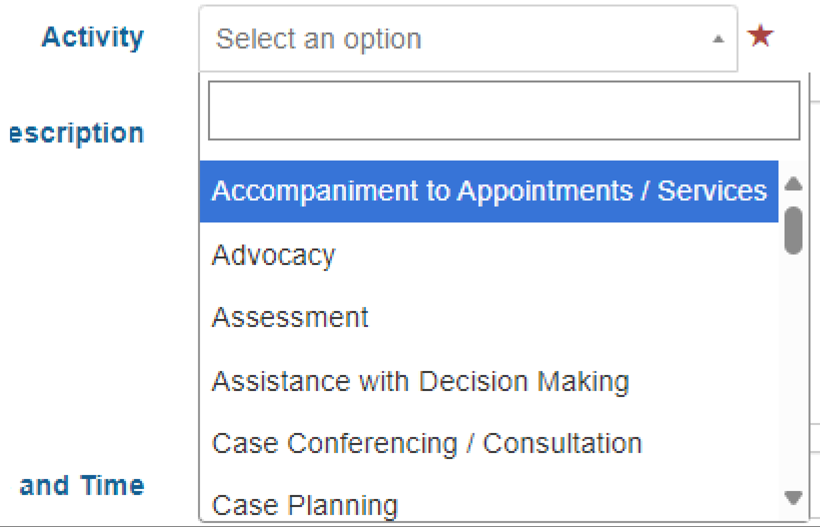
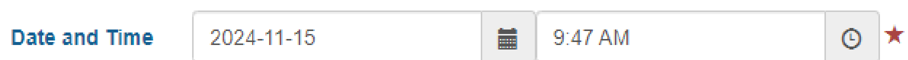
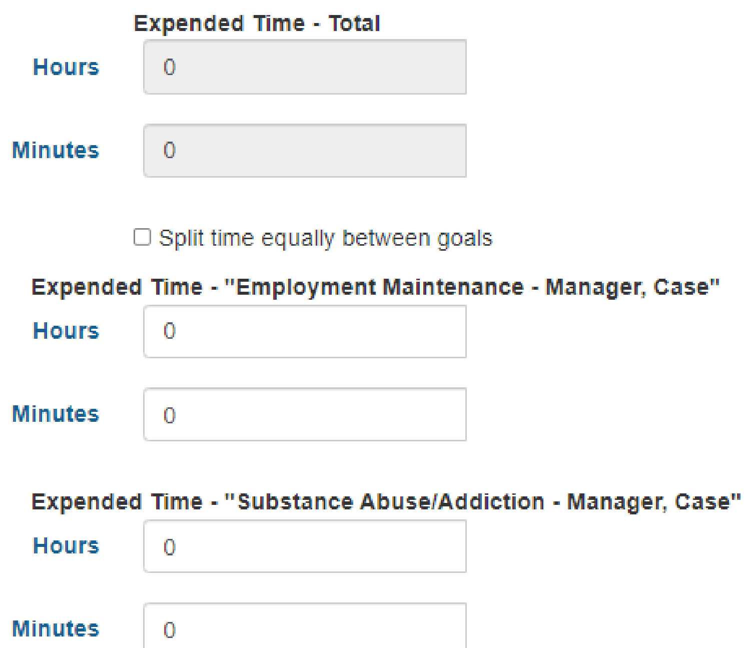
This module will be utilized for client's that have sub-goals to a main goal that they are looking to achieve. For example, if a client has a main goal for wanting to become Financially stable, the Multiple Goal Sessions would be utilized to categorize sub-goals such as Employment, Budget, Applications etc. that can be entered to reach their main goal.

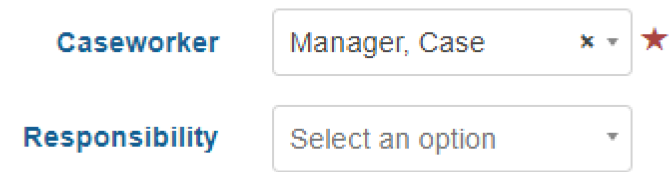
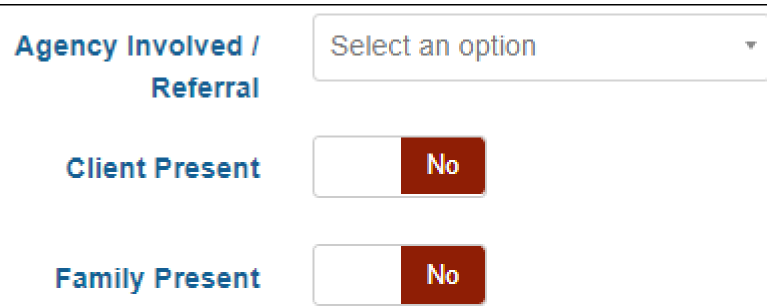
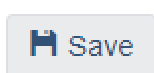
****Note – To perform this function successfully, the Client Status (Display Case Management) must be set as OPEN. Goals (2 or more) must be previously created separately before proceeding with function.***

<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>
</table>

2. In the Client – Multiple Goal Session, fill in all required fields and optional ***(*Note – previously inputted goals must have Status set to Open).***	
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.	

<table>
<tr>
<td>4. Enter the sessions Activity and if applicable, enter a description of Activity.</td>
<td>
</td>
</tr>
<tr>
<td>5. Confirm the Start Date and Time of the Activity, and if needed, you can change the date/time manually.</td>
<td>
</td>
</tr>
<tr>
<td>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.</td>
<td>
</td>
</tr>
</table>

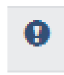
7. Select the Caseworker that was assigned to the sessions and if applicable, the individual who was responsible for the session (either Client or Caseworker).	
8. If applicable, select the Agency or Referral Involved with the case session. This includes indicating if the client and/or family were present for session.	
9. Click the Save button.	

7. Procedure to add an Alert under Client Record

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

- *Service Restrictions*
- *Behavioural Risk Factor*
- *Watch Concerns*

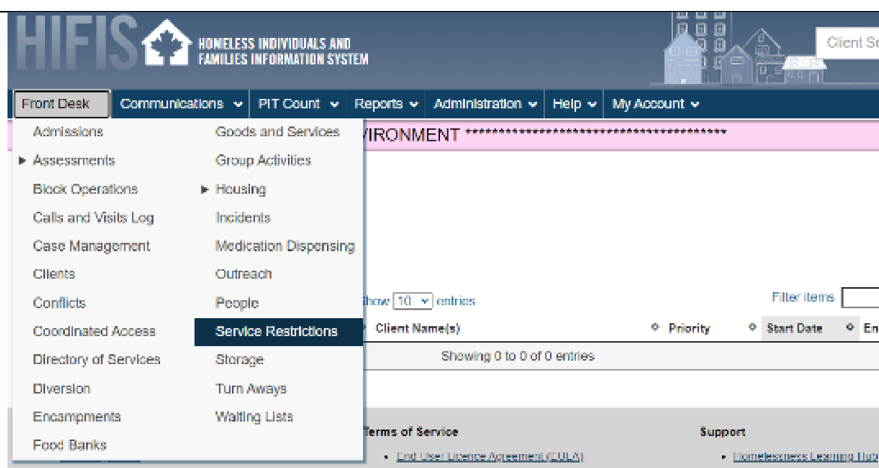
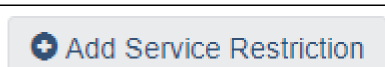
This Training Module will go through all 3 Alerts that will show up on a client's

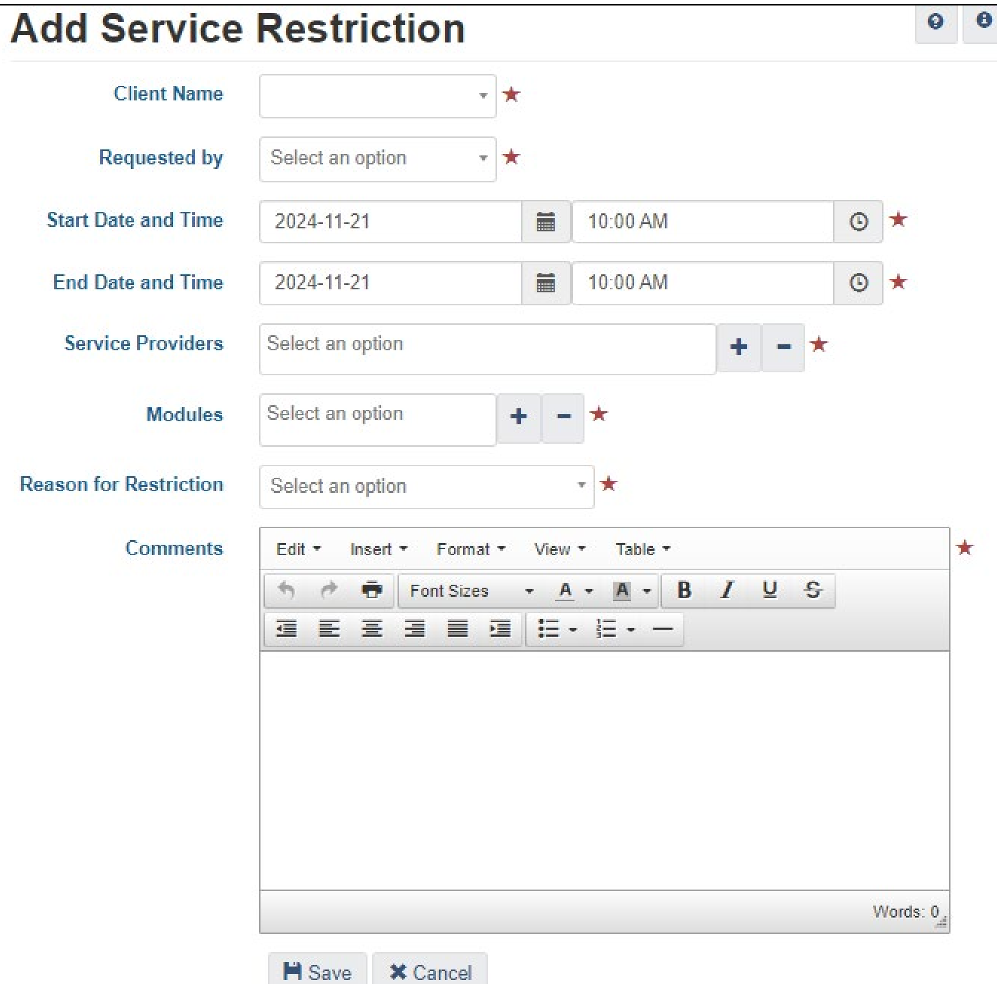
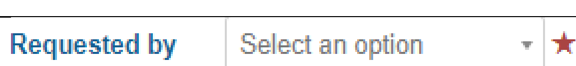
profile/record. **Service Restrictions** 

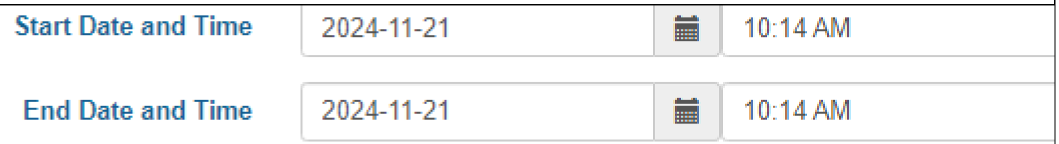
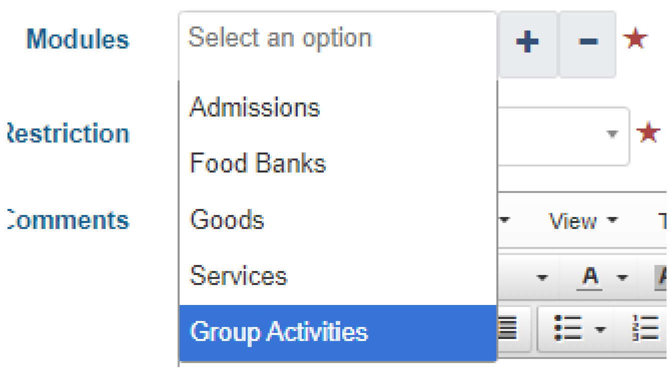
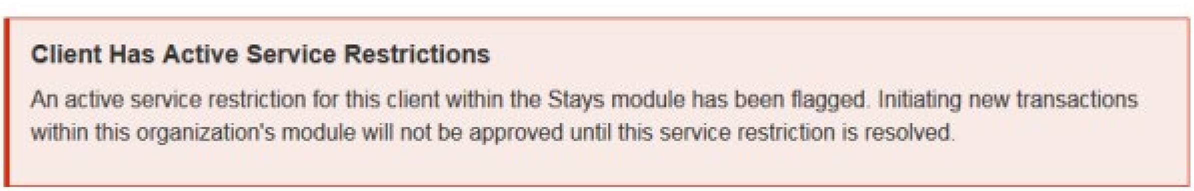
The Service Restrictions List shows all service restrictions for a client for a given period of time.

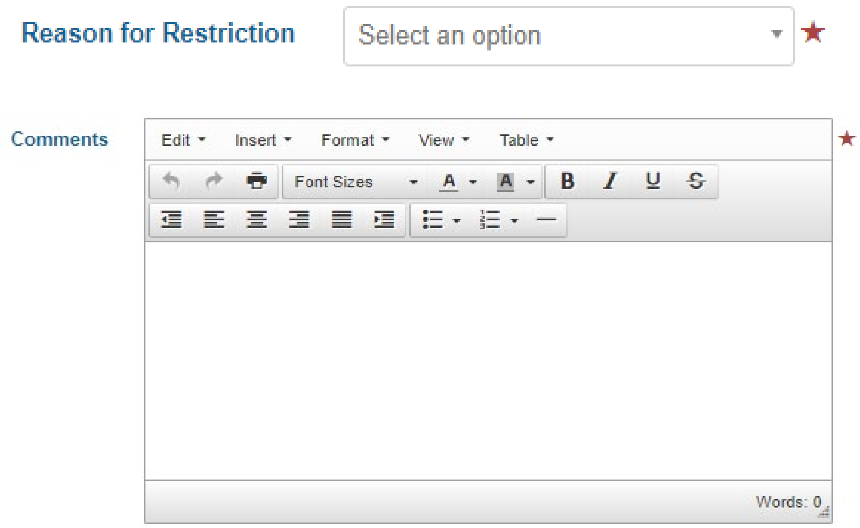
*Note – There are 2 ways for you to add a Service Restriction to a Client's record/profile. The walkthrough below is one way to navigate and successfully add a Service Restriction to their record/profile. See below for another way to navigate and enter the service:

- Front Desk > Clients > Search Client > Client- Details > Client Management > Service Restrictions > + Add Service Restriction

Action	
1. From the HIFIS main page, navigate to the Front Desk drop down menu and select Service Restrictions.	
2. From the Service Restriction	

<table>
<tr><td>s List, select the + Add Service Restriction button.</td><td></td></tr>
<tr><td>3. Under the Add Service Restriction page, fill in all required fields marked with a red star.</td><td>
</td></tr>
<tr><td>4. Search and select the client in client Name field</td><td>
</td></tr>
<tr><td>5. Enter who requested the Service Restriction in the</td><td>
</td></tr>
</table>

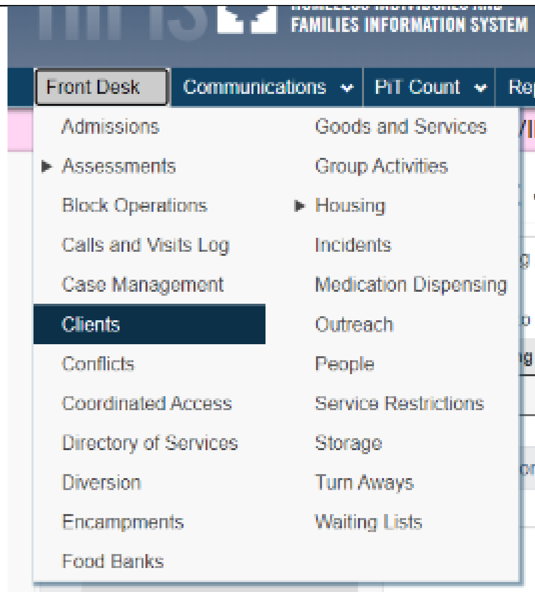
<table>
<tr><td>Requested By field.</td><td></td></tr>
<tr><td>6. Enter the dates for when the service restriction starts and ends for the client.</td><td>
</td></tr>
<tr><td>7. Select the Service Providers for which the Service Restriction applies to.</td><td>
</td></tr>
<tr><td>8. Enter the Modules for which the Service Restriction applies to.</td><td>
</td></tr>
<tr><td colspan="2">*Note – Once a Service Restriction is entered for a Module, HIFIS will not allow an entry to be made for the client in that module if the Start and End Date of the service restriction is active.</td></tr>
<tr><td colspan="2">*Additional Note – Users with Site Administrator rights can override a service restriction (e.g., user selected “Admissions” for the Modules field, a Service Restriction for Shelter Stays, the client will not be able to be booked into the shelter and will be prompted with the following message:

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

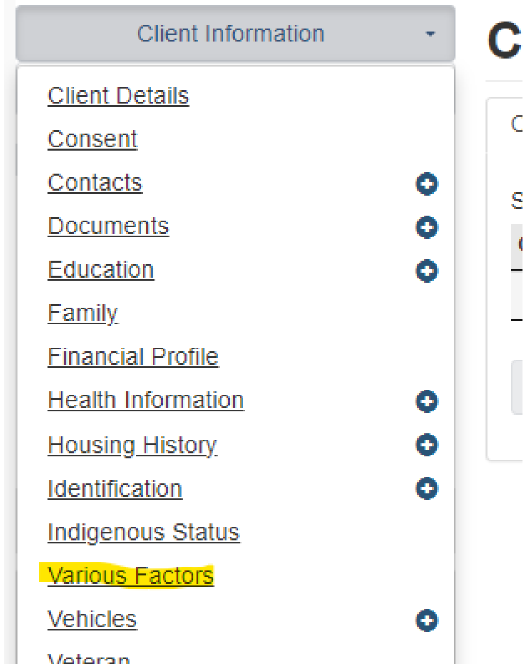
9. Enter the Reason for Restriction and then additional information below that will provide context for why the cline tis being restricted.	
9. Click Save.	

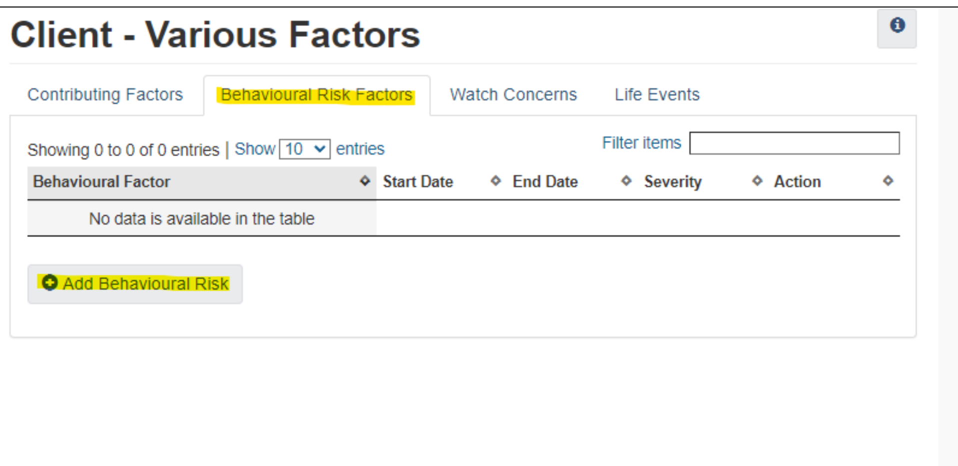
****Note – Once a Service Restriction has been entered, an Alert sign is displayed in the client's profile/record under Vitals. Clicking on the link will take you to the service restriction entered:***

Behavioural Risk Factor

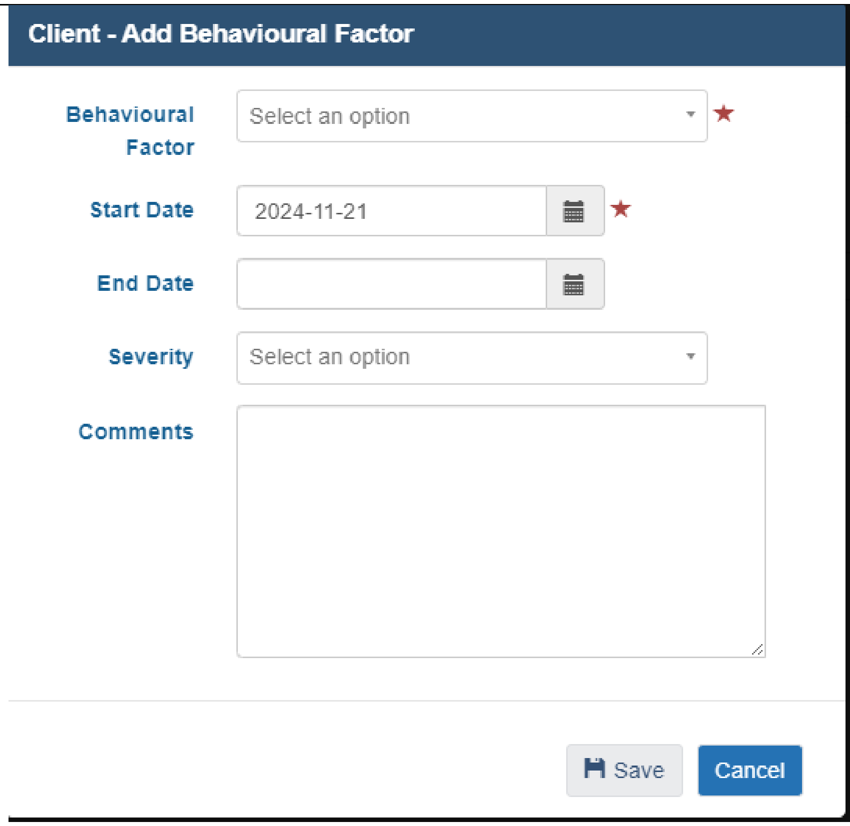
The Behavioural Risk Factor module is client behaviour's that HIFIS users (case managers, outreach, systems navigator etc.) may need to be aware of for the safety of the client, staff members, or other clients. Behavioural Factors include Vandalism, Drug use, Staff Dependency and Theft.

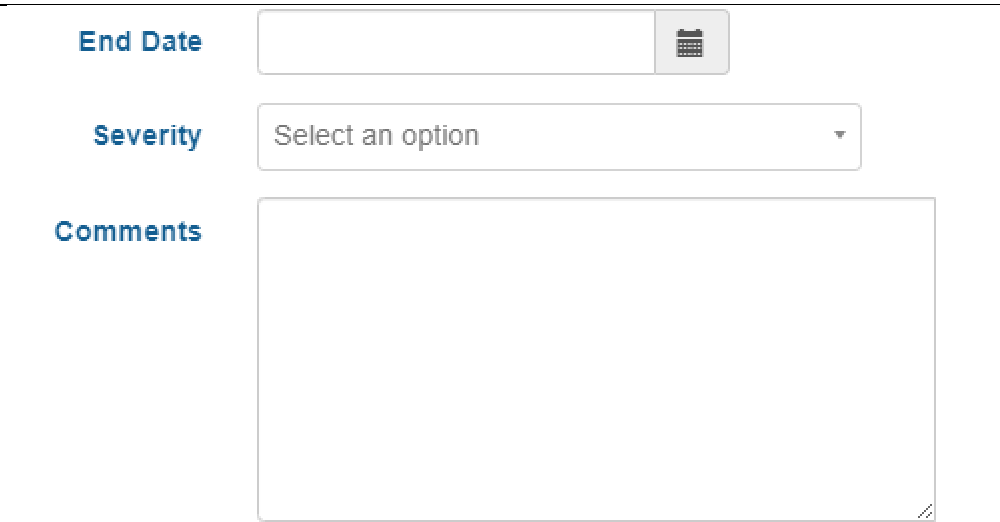
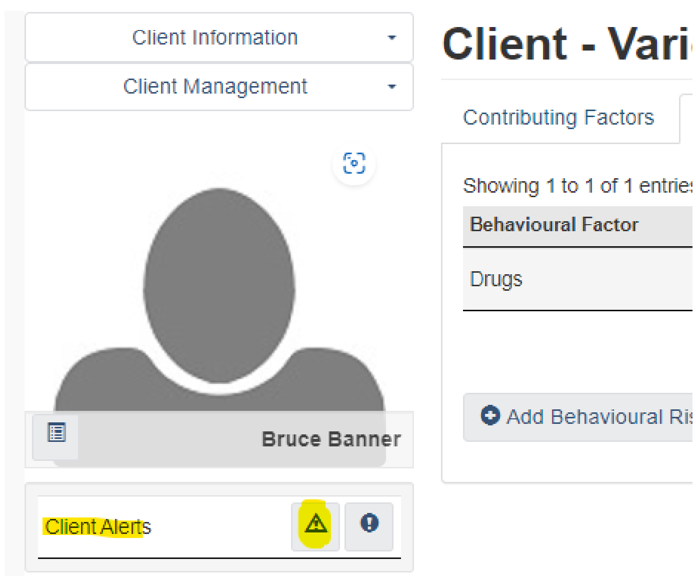
Action	
1. Navigate to Front Desk and select the Clients option, search up existing client in system.	

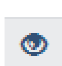
<table>
<tr>
<td>2. From the Client – Details pages, navigate to Client Information and select Various Factors.</td>
<td>


</td>
</tr>
<tr>
<td>3. From the Client- Various Factors page, select the Behavioural Risk Factors tab and select the + Add Behavioural Risk button.</td>
<td>


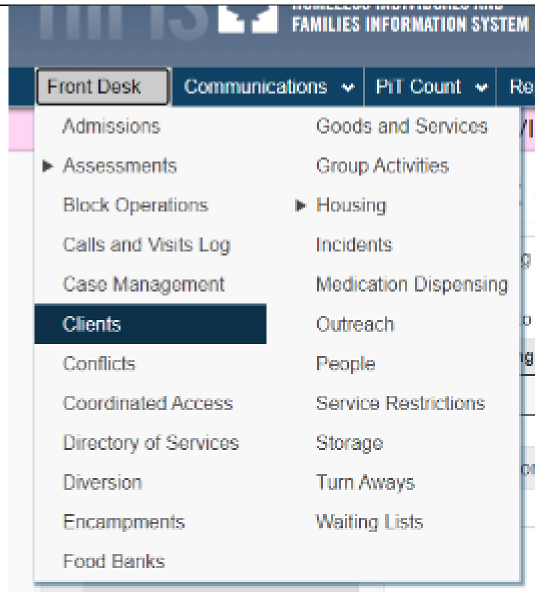
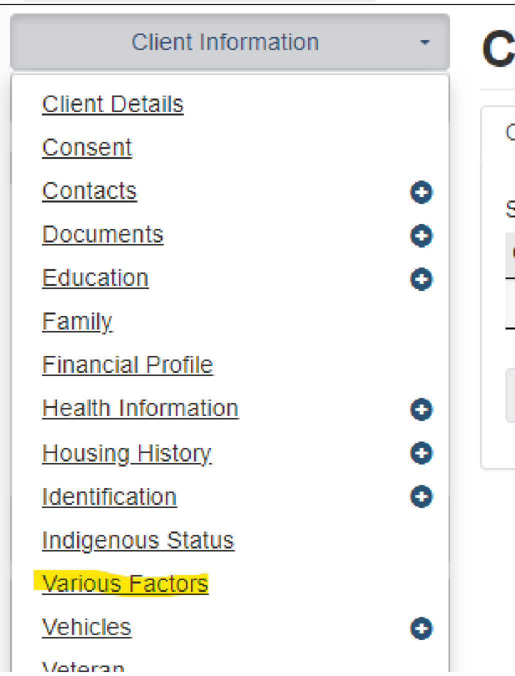
</td>
</tr>
</table>

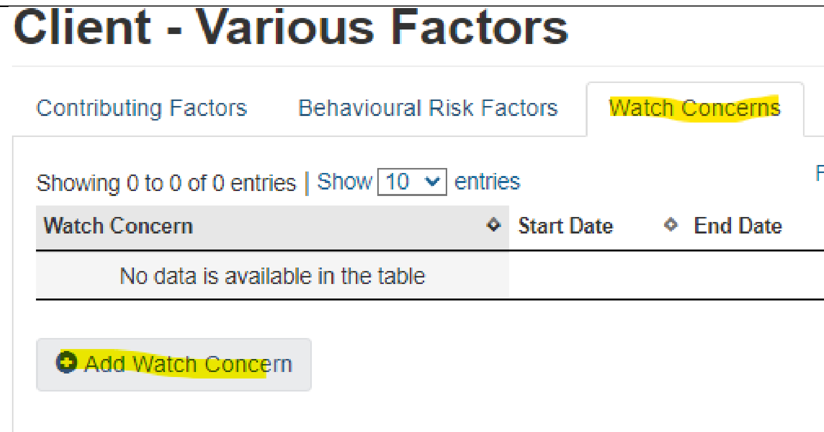
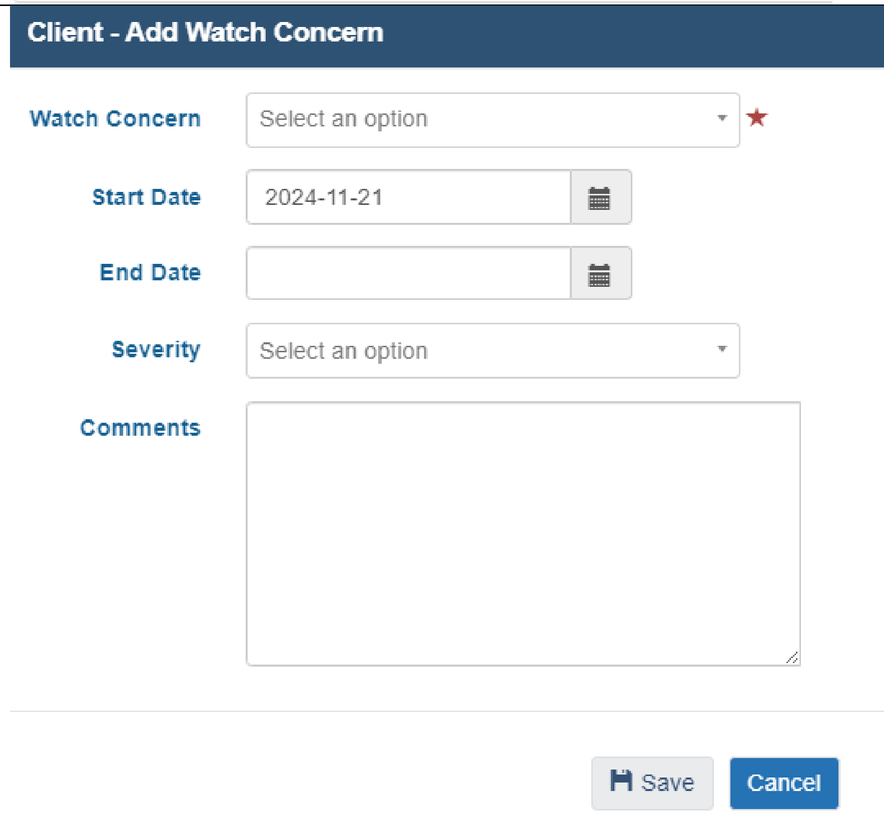
4. Proceed with filling out all required fields and if applicable, optional fields.	
5. Enter the Behavioural Risk Factor of the client.	
6. Confirm the Start Date and if applicable, you can manually change the start date.	

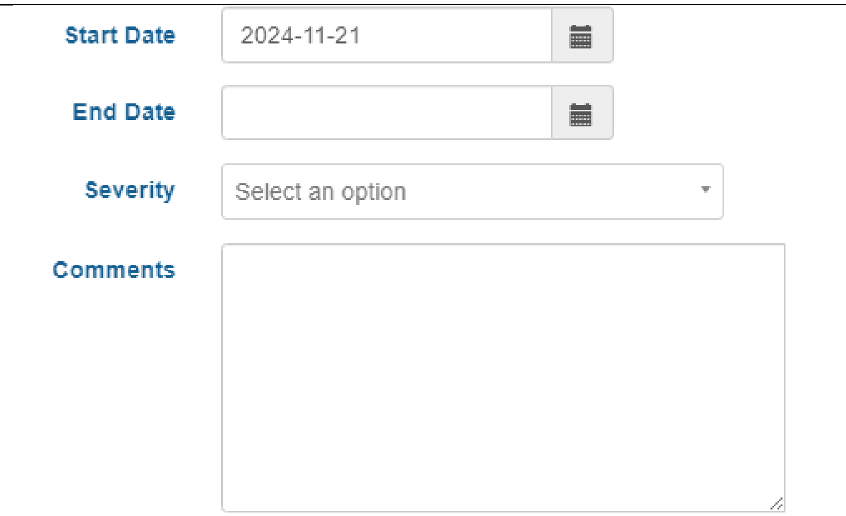
7. If applicable, enter the End Date, Severity of the behavioural factor and any additional comments concerning the behavioural factor (optional).	
8. Click Save.	
Note – The Behavioural Risk Factor Alert will show up next to Client Alerts for users to view: 	

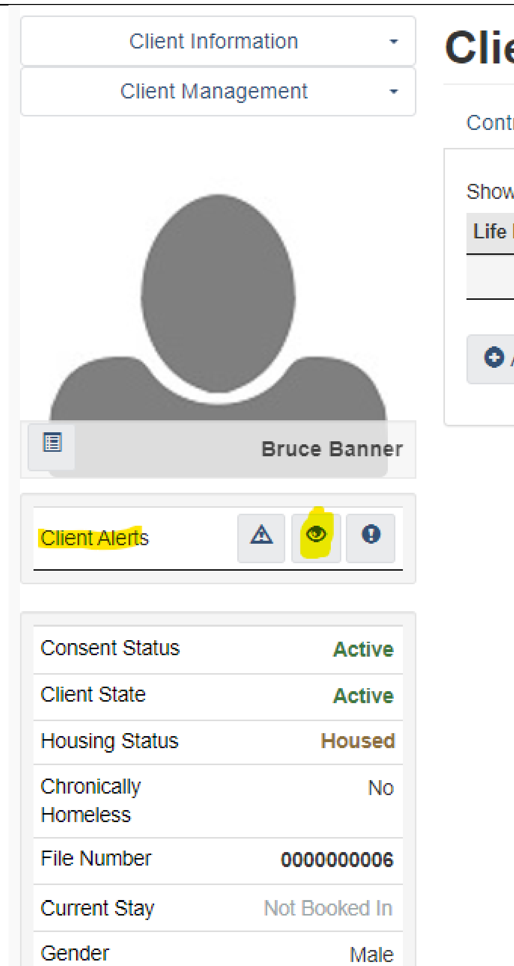
Watch Concerns 

The Watch Concern module is utilized for informing Case Manager, Systems Navigators, Shelter Workers, Outreach etc. of contributing factors that they must be aware of pertaining to the client (e.g., Drugs, Injecting Drugs, Medical Alert, Medication None-compliance etc.).

Action	
1. From the HIFIS main page, navigate to the Front Desk drop down menu and select the clients options, and perform the existing client search.	
2. From the Client- Details under Vitals page, select Client Information and click on Various factors.	

<table>
<tr>
<td>3. Under Client – Various Factors page, navigate to Watch Concerns tab and click on + Add Watch Concern.</td>
<td>
</td>
</tr>
<tr>
<td>4. In the Client – Add Watch Concern page, fill in the required fields.</td>
<td>
</td>
</tr>
<tr>
<td>5. Select the Watch Concern pertaining to client.</td>
<td>
</td>
</tr>
</table>

6. If applicable, fill in the optional fields; • Start Date • End Date • Severity of the Watch Concern and; • Additional Comments concerning the Watch Concern	
7. Click Save.	
Note – The active Watch Concern Alert will now show up next to Client Alerts from client profile/record:	



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