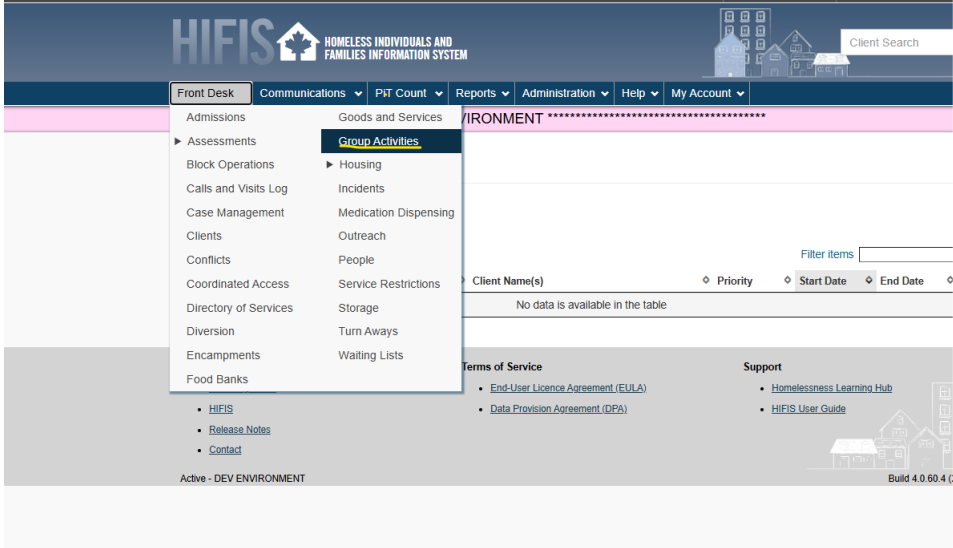
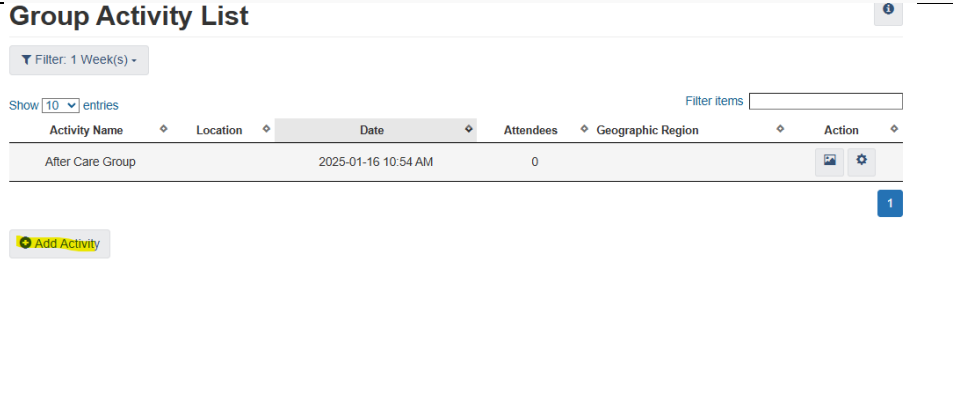


## **1. System Navigation - Group Activities – Process & Procedure**

This module enables users to input the number of participants that received Social and Community Integration services within the reporting period. This datapoint refers to the Reaching Home directive the Y-PSN is classified under and is mandatory to report back to the Government of Canada. **In HIFIS, this data is recorded via the Group Activities module. Please input the total number of these types of activities provided to participants in aggregate, for the quarter.**

**Group Activities – record total number of participants attending any of the following Social and Community Integration activities:**

- Supports to improve social integration, for example, costs of participation or provision of recreational/sports activities, cultural programs, support groups, and access to peer supports and mentorship for youth.
- Enhancing family and natural supports for youth.
- Indigenous Elder consultation, gathering and preparation of traditional foods.
- Establishing and maintaining culturally relevant responses and supports to help Indigenous individuals and families (e.g., navigation of urban services, including to help establish and maintain culturally relevant support networks within an urban environment; Indigenous language and culture classes).

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

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

### Add Group Activity

**Group Activity** ★

**Program**

**Location**

**Start Date and Time**     ★

**Hours**

**Minutes**

**Description**

**Reason for Service** ★

**Referred from**

**Referred to**

**Geographic Region**

**Capture Service Location**

4. Select the Group Activity provided.

**Group Activity** ★

**Program**

**Location**

**Start Date and Time**

**Hours**

After Care Group

Alcoholics Anonymous

Cocaine Anonymous














Meal - Hot/Cold

Mental Health Support Group

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

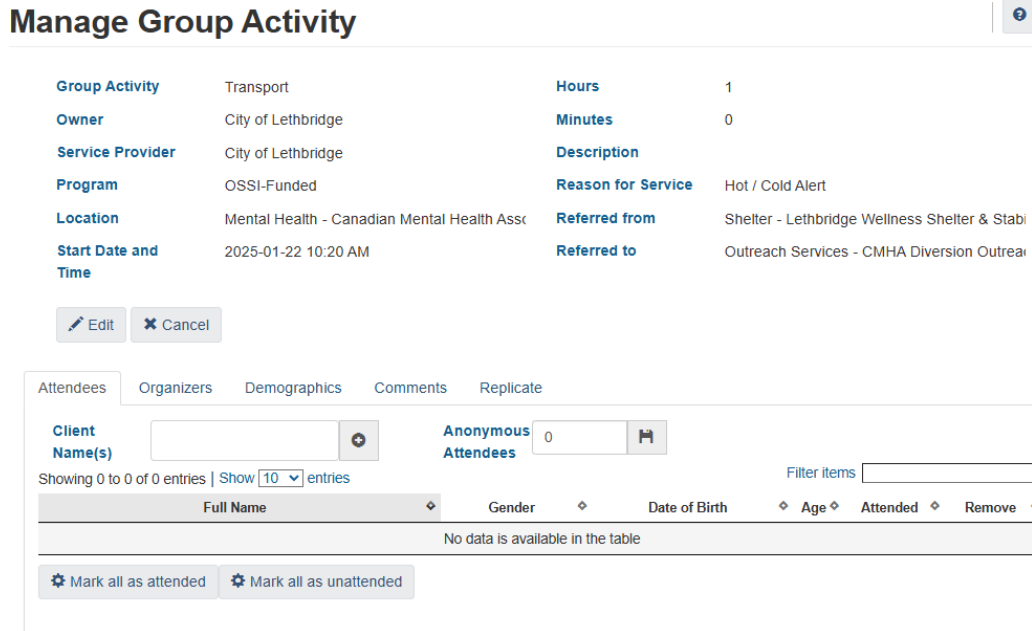
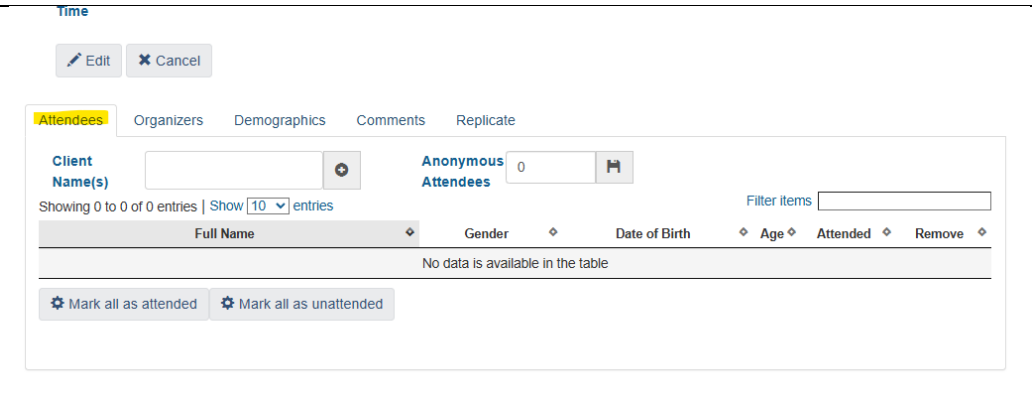
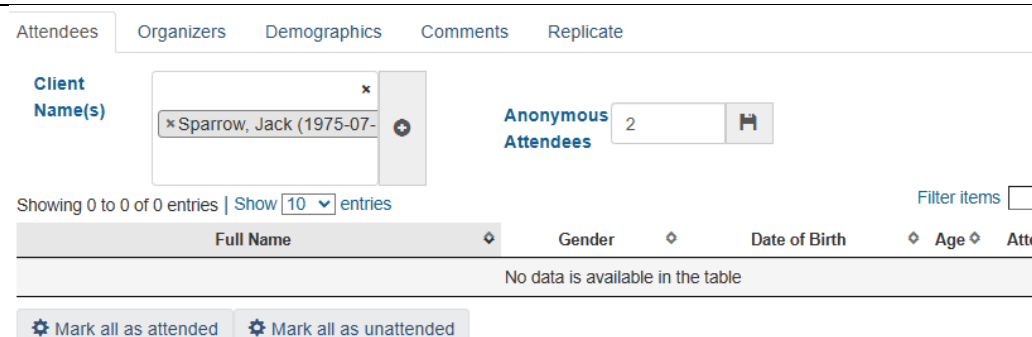
**Program**

**Location**

<p>6. Select the Start Date and Time for when the Group activity commenced , and the number of hours or minutes expended for this activity.</p>	<p><b>Start Date and Time</b> <input type="text" value="2025-01-22"/>  <input type="text" value="10:20 AM"/>  </p> <p><b>Hours</b> <input type="text" value="0"/></p> <p><b>Minutes</b> <input type="text" value="0"/></p>
<p>7. Select the Reason for Service for activity.</p>	<p><b>Reason for Service</b> <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><b>Referred from</b> <input type="text" value="Select an option"/>  </p> <p><b>Referred to</b> <input type="text" value="Select an option"/>  </p> <div data-bbox="407 1161 1307 1602" style="border: 1px solid #ccc; padding: 10px;"> <p><b>Referral Filter</b></p> <p><b>Geographic Region</b> <input type="text" value="Lethbridge"/>  </p> <p><b>City</b> <input type="text" value="Lethbridge"/></p> <p style="text-align: right;"> Filter  Close</p> </div>
<p>10. Click Save.</p>	<p> Save</p>

## Manage Group Activity


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


Action	Screenshot												
<p>1. Once clicking Save, user will be redirected to the Manage Group Activity page.</p>	 <p>The screenshot shows the 'Manage Group Activity' page with the following details:</p> <ul style="list-style-type: none"> <li><b>Group Activity:</b> Transport</li> <li><b>Owner:</b> City of Lethbridge</li> <li><b>Service Provider:</b> City of Lethbridge</li> <li><b>Program:</b> OSSI-Funded</li> <li><b>Location:</b> Mental Health - Canadian Mental Health Assc</li> <li><b>Start Date and Time:</b> 2025-01-22 10:20 AM</li> <li><b>Hours:</b> 1</li> <li><b>Minutes:</b> 0</li> <li><b>Description:</b></li> <li><b>Reason for Service:</b> Hot / Cold Alert</li> <li><b>Referred from:</b> Shelter - Lethbridge Wellness Shelter &amp; Stabi</li> <li><b>Referred to:</b> Outreach Services - CMHA Diversion Outrea</li> </ul> <p>Buttons: Edit, Cancel</p> <p>Tabs: Attendees, Organizers, Demographics, Comments, Replicate</p> <p>Client Name(s) field: [Empty]</p> <p>Anonymous Attendees: 0</p> <p>Showing 0 to 0 of 0 entries   Show 10 entries</p> <table border="1"> <thead> <tr> <th>Full Name</th> <th>Gender</th> <th>Date of Birth</th> <th>Age</th> <th>Attended</th> <th>Remove</th> </tr> </thead> <tbody> <tr> <td colspan="6">No data is available in the table</td> </tr> </tbody> </table> <p>Buttons: Mark all as attended, Mark all as unattended</p>	Full Name	Gender	Date of Birth	Age	Attended	Remove	No data is available in the table					
Full Name	Gender	Date of Birth	Age	Attended	Remove								
No data is available in the table													
<p>2. From the Manage Group Activity page, select the “Attendees” tab.</p>	 <p>The screenshot shows the 'Attendees' tab selected in the Manage Group Activity page. The details and buttons are the same as in the previous screenshot. The Client Name(s) field is still empty, and the Anonymous Attendees count is 0.</p>												
<p>3. From the Attendees tab, users can now mark down in the Client Name(s) field or</p>	 <p>The screenshot shows the 'Attendees' tab with a client name entered in the Client Name(s) field:</p> <ul style="list-style-type: none"> <li><b>Client Name(s):</b> * Sparrow, Jack (1975-07-</li> <li><b>Anonymous Attendees:</b> 2</li> </ul> <p>The table below the form is still empty, showing 'No data is available in the table'.</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  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  entries Filter items

Full Name	Gender	Date of Birth	Age	Attended	Remove
<a href="#">Sparrow, Jack</a>	Male	1975-07-17	49	<input type="checkbox"/> No	

 Mark all as attended  Mark all as unattended

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

Font Sizes   **B** *I* U

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

- Reaching Home

Terms of Service

- End-User Licence Agreement (EULA)

Support

- Homelessness Learning Hub



## **2. System Navigation – Create Financial History and Education Record**

Prerequisite	Client Profile/Record has been created in advance.
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Before performing Case Management, it is highly recommended that System Navigator's enter a client's Financial History and Education Record before commencing the Case Management module.

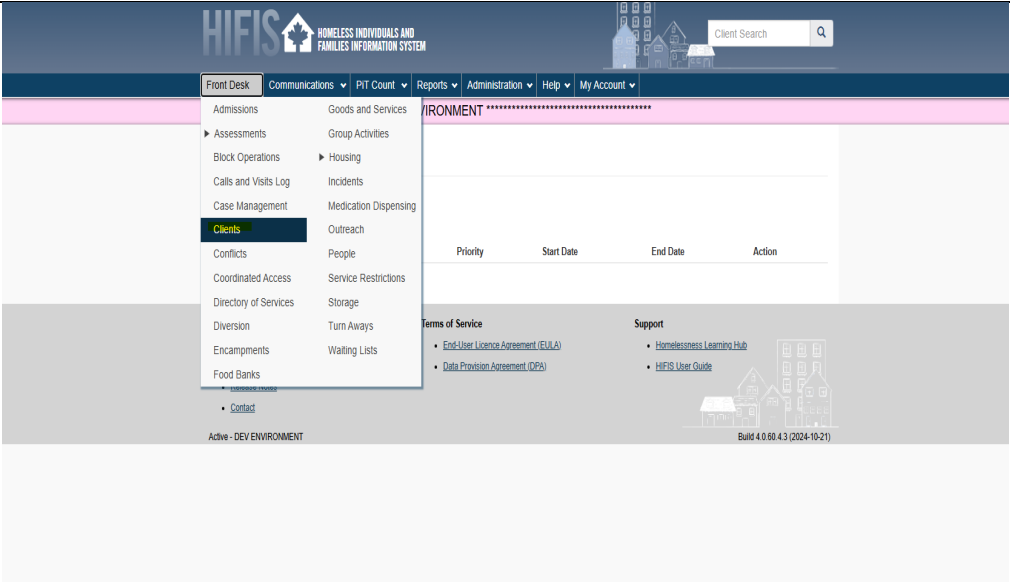
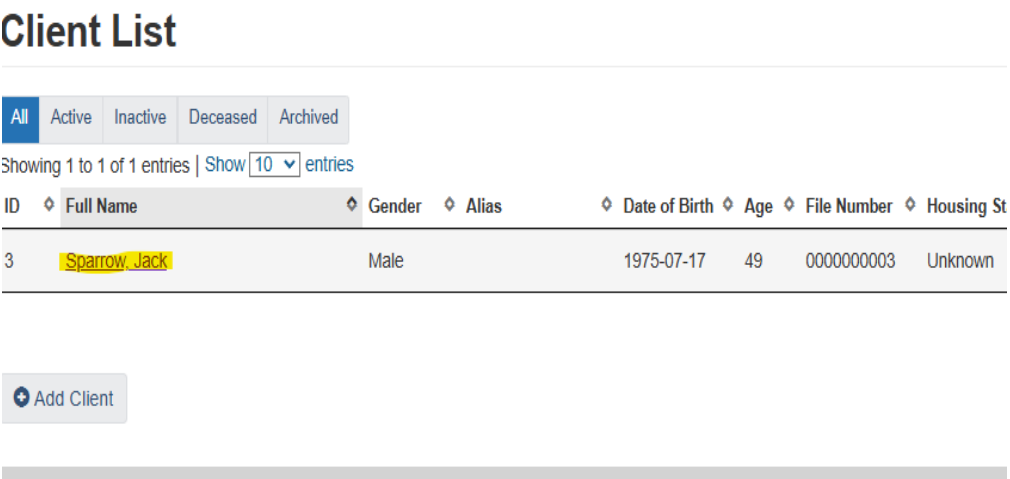
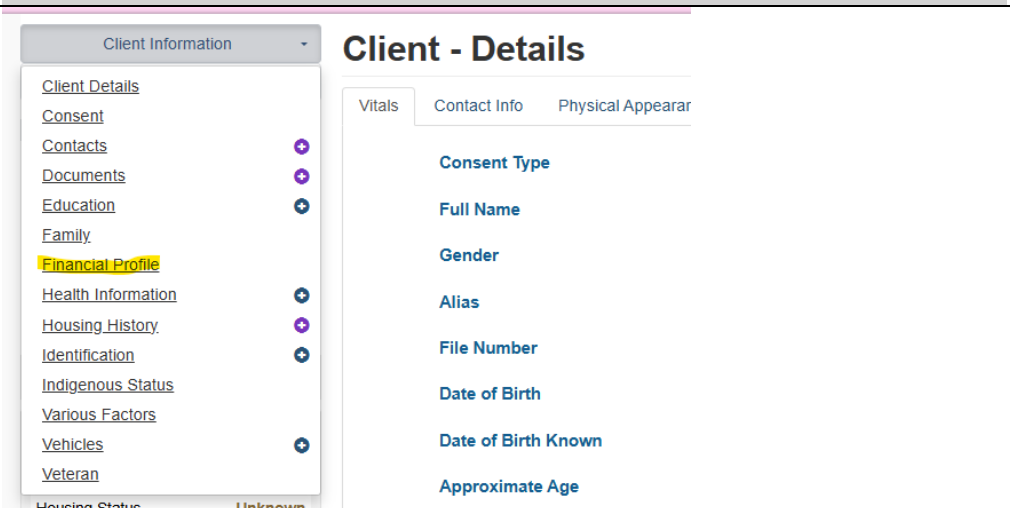
Number of participants that engaged in services to for existing income benefits and financial assistance (e.g., provincial/territorial social assistance, child benefits, disability benefits, or employment insurance). **In HIFIS, this data is recorded via the Case Management module. Please create an Income record, then input Financial Stability as the Case Goal with applicable Case Sessions.**

Number of participants that started new paid employment this quarter. **In HIFIS, this data is recorded via the Case Management module. Please create an Income record (with an employment type), then input Employment as the Case Goal with applicable Case Sessions.**

Number of participants that received educational programming this quarter. **In HIFIS, this data is recorded via the Case Management module. Please create an Education record, then input Skill Enhancement as the Case Goal with applicable Case Sessions.**

Number of participants that engaged in job training this quarter. **In HIFIS, this data is recorded via the Case Management module. Please create an Education record, then input Employment as the Case Goal with the Case Session as Career Decision Making.**

## 2. System Navigation - Enter Financial History Record

Action																	
<p>1. From the HIFIS main page, navigate over to Front Desk and select Clients.</p>	 <p>The screenshot shows the HIFIS Homeless Individuals and Families Information System main page. The 'Front Desk' menu is open, and 'Clients' is highlighted. Other menu items include Admissions, Assessments, Block Operations, Calls and Visits Log, Case Management, Conflicts, Coordinated Access, Directory of Services, Diversion, Encampments, Food Banks, Goods and Services, Group Activities, Housing, Incidents, Medication Dispensing, Outreach, People, Service Restrictions, Storage, Turn Aways, and Waiting Lists. The page also features a search bar, a table with columns for Priority, Start Date, End Date, and Action, and a footer with the text 'Active - DEV ENVIRONMENT' and 'Build 4.0.60.4.3 (2024-10-21)'.</p>																
<p>2. From the Client Search page, enter the name of the client you have already created in the system and select their name.</p>	 <p>The screenshot shows the 'Client List' search results page. It includes filter tabs for 'All', 'Active', 'Inactive', 'Deceased', and 'Archived'. Below the filters, it says 'Showing 1 to 1 of 1 entries   Show 10 entries'. A table displays the search results:</p> <table border="1"> <thead> <tr> <th>ID</th> <th>Full Name</th> <th>Gender</th> <th>Alias</th> <th>Date of Birth</th> <th>Age</th> <th>File Number</th> <th>Housing St</th> </tr> </thead> <tbody> <tr> <td>3</td> <td>Sparrow, Jack</td> <td>Male</td> <td></td> <td>1975-07-17</td> <td>49</td> <td>0000000003</td> <td>Unknown</td> </tr> </tbody> </table> <p>There is also an 'Add Client' button at the bottom left of the results area.</p>	ID	Full Name	Gender	Alias	Date of Birth	Age	File Number	Housing St	3	Sparrow, Jack	Male		1975-07-17	49	0000000003	Unknown
ID	Full Name	Gender	Alias	Date of Birth	Age	File Number	Housing St										
3	Sparrow, Jack	Male		1975-07-17	49	0000000003	Unknown										
<p>3. From the Client Details page, select the Client Information drop down menu and select "Financial Profile"</p>	 <p>The screenshot shows the 'Client - Details' page. On the left, there is a 'Client Information' dropdown menu with various tabs: Client Details, Consent, Contacts, Documents, Education, Family, Financial Profile (highlighted), Health Information, Housing History, Identification, Indigenous Status, Various Factors, Vehicles, and Veteran. The main content area shows the 'Financial Profile' details for the client, including fields for Consent Type, Full Name, Gender, Alias, File Number, Date of Birth, Date of Birth Known, and Approximate Age.</p>																

4. From the Financial Profile page, users can navigate between Incomes, Expenses, Assets and Debts that the client is experiencing.

### Client - Financial Profile

**Incomes** Expenses Assets Debts

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

Monthly Primary					
Income	Income Amount	Start Date	End Date	Primary	Action
No data is available in the table					

\* - Calculated from Daily or Hourly (Amount \* Number of Days or Hours) see details for actual amount.  
 † - Calculated from Weekly (Amount \* 52 / 12) see details for actual amount.  
 ‡ - Calculated Bi-Weekly (Amount \* 26 / 12) see details for actual amount.

**Total Income: \$0.00**

**Income/Expense**

**Assets/Debts**

5. From the "Incomes" tab, select the "+ Add Income" button.

**Incomes** Expenses Assets Debts

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

Monthly Primary				
Income	Income Amount	Start Date	End Date	Primary
No data is available in the table				

\* - Calculated from Daily or Hourly (Amount \* Number of Days or Hours) see details for actual amount.  
 † - Calculated from Weekly (Amount \* 52 / 12) see details for actual amount.  
 ‡ - Calculated Bi-Weekly (Amount \* 26 / 12) see details for actual amount.

**Total Income: \$0.00**

6. From the "Add Financial Income" prompted page, enter the client's income record filling in all required fields marked with a red star.

**Add Financial Income**

Income Type  ★

Pay Frequency  x ▼ ★

Hours per Month  ★

Hourly Wage  ★

Start Date  📅 ★

End Date  📅

Primary  No

7. For Income Type, select one of the options from drop down the type of income the client is currently receiving.

**Add Financial Income**

Income Type  ▲ ★

Pay Frequency

Hours per Month

Hourly Wage

Start Date

**\*Please Note – If user selects one of the Employment options (Casual, Part-Time, Full-Time), additional (Optional) fields will populate to identify more details regarding the client's employment:**

Income Type  x ▼ ★

Employment Type

Employer Type

Employer Name

<p>8. Select the Pay Frequency the client is receiving for their Income Type.</p>	<p><b>Pay Frequency</b> Hourly x ▲ ★</p> <p><b>Hours per Month</b> <input type="text"/></p> <p><b>Hourly Wage</b></p> <p><b>Start Date</b></p> <p><b>End Date</b></p> <p><b>Primary</b></p> <div style="border: 1px solid gray; padding: 5px;"> <p>Hourly</p> <p>Daily</p> <p>Weekly</p> <p>Bi-Weekly</p> <p style="background-color: #0070C0; color: white;">Monthly</p> <p>Yearly</p> </div>		
<p><b>*Please Note – If Income Type for Client is Employment and their Pay Frequency is Hourly or Daily, additional (Required) fields will populate to provide more details regarding their Daily or Hourly Pay Frequency they receive:</b></p>			
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid gray; padding: 5px;"> <p><b>Pay Frequency</b> Hourly x ▼ ★</p> <p><b>Hours per Month</b> <input type="text" value="0"/> ★</p> <p><b>Hourly Wage</b> \$ <input type="text" value="0"/> ★</p> </td> <td style="width: 50%; padding: 5px;"> <p><b>Pay Frequency</b> Daily x ▼ ★</p> <p><b>Days per Month</b> <input type="text" value="0"/> ★</p> <p><b>Daily Wage</b> \$ <input type="text" value="0"/> ★</p> </td> </tr> </table>		<p><b>Pay Frequency</b> Hourly x ▼ ★</p> <p><b>Hours per Month</b> <input type="text" value="0"/> ★</p> <p><b>Hourly Wage</b> \$ <input type="text" value="0"/> ★</p>	<p><b>Pay Frequency</b> Daily x ▼ ★</p> <p><b>Days per Month</b> <input type="text" value="0"/> ★</p> <p><b>Daily Wage</b> \$ <input type="text" value="0"/> ★</p>
<p><b>Pay Frequency</b> Hourly x ▼ ★</p> <p><b>Hours per Month</b> <input type="text" value="0"/> ★</p> <p><b>Hourly Wage</b> \$ <input type="text" value="0"/> ★</p>	<p><b>Pay Frequency</b> Daily x ▼ ★</p> <p><b>Days per Month</b> <input type="text" value="0"/> ★</p> <p><b>Daily Wage</b> \$ <input type="text" value="0"/> ★</p>		
<p>9. Provide the Start Date by which the client commenced their Income Type and if applicable, select the End Date (i.e., past employment history).</p>	<p><b>Start Date</b> <input type="text" value="2025-01-25"/>  ★</p> <p><b>End Date</b> <input type="text"/> </p>		
<p>10. finally, select Yes or No whether this is the client's</p>	<p><b>Primary</b> <input type="checkbox"/> <input checked="" type="checkbox"/> No</p>		

Primary Source of Income they receive.

11. Click Save.



12. User will be re-directed back to the Client – Financial Profile page providing the summary of the client’s Incomes they are currently receiving or have received in the past (if a past employment was recorded).

### Client - Financial Profile

Incomes Expenses Assets Debts

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

Income	Monthly Primary Income Amount	Start Date	End Date	Primary	Action
Disability Benefits	800.00	2020-01-28		Yes	

1 - Calculated from Daily or Hourly (Amount \* Number of Days or Hours) see details for actual amount.  
2 - Calculated from Weekly (Amount \* 52 / 12) see details for actual amount.  
3 - Calculated Bi-Weekly (Amount \* 26 / 12) see details for actual amount.

**Total Income: \$800.00**

#### Income/Expense

Income	800.00
Expenses	0

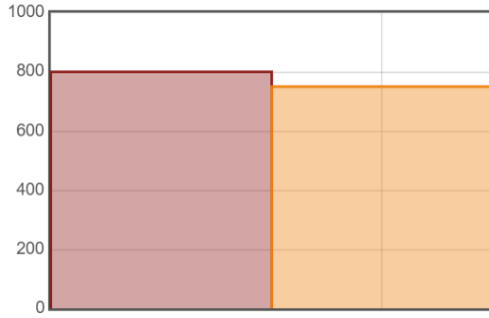
#### Assets/Debts

Assets	0
Debts	0

**\*Please Note – the other tabs (Expenses, Debts and Assets) will have similar processes of entering information for a client. Once clicking save, user will always be re-directed back to the Client – financial Profile page to review entered information with displayed**

**graph of their Income, Expenses, Debts and Assets they are experiencing or have experienced in the past:**

**Income/Expense**



■ Income  
■ Expenses

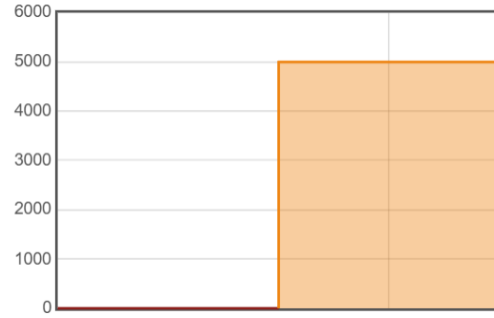
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**Income** 800.00

---

**Expenses** 750.00

**Assets/Debts**



■ Assets  
■ Debts

---

**Assets** 0

---

**Debts** 5000.00

### **3. System Navigation – Case Management- Entering Case Management & Record/Related Activities**

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

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

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

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

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

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

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

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



	<ul style="list-style-type: none"> <li>Client – Case Management List &gt; Display Case Management &gt; Case Comments &gt; Add Comment.</li> </ul>
Case Management	<p>New Record (<b>Add Document</b>) under the Display Case Management list is uploaded:</p> <ul style="list-style-type: none"> <li>Client – Case Management List &gt; Display Case Management &gt; Documents &gt; Upload Document.</li> </ul>
Case Management	<p>New Record (<b>Add Multiple Goal Session</b>) under Client - Case Management List</p> <ul style="list-style-type: none"> <li>Client – Details &gt; Client Management &gt; Case Management &gt; Client - Case Management List &gt; Client – Multiple Goal Session</li> </ul>
Case Management	<p>New Record (<b>Add Service Restriction/Alert</b>) under Client Record</p> <ul style="list-style-type: none"> <li>Front Desk &gt; Service Restrictions &gt; + Add Service Restriction</li> </ul>
Case Management	<p>New Record (<b>Add SPDAT Assessment to Client Record/Profile</b>)</p> <ul style="list-style-type: none"> <li>Front Desk &gt; Clients &gt; Client Search &gt; Client – Details (Vitals) &gt; Client Management &gt; SPDAT</li> </ul>

**Enter a Case Management & Record Related Activities**

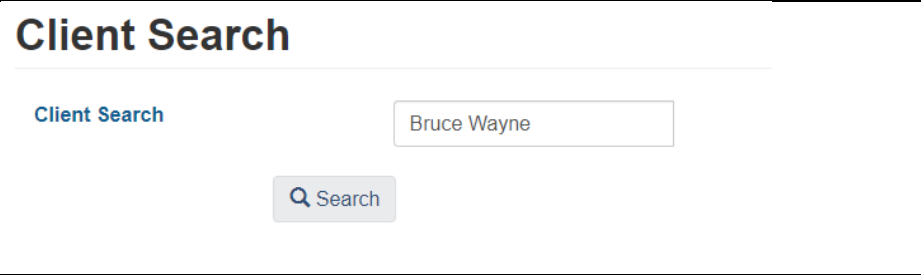
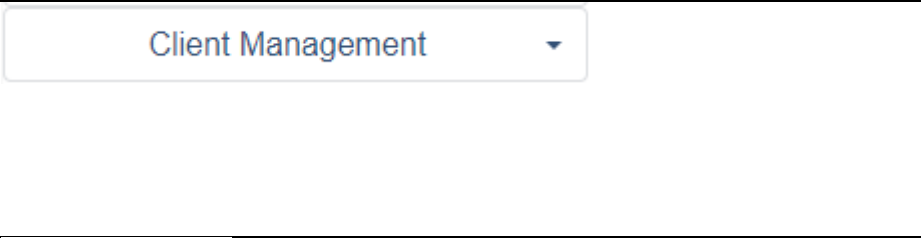

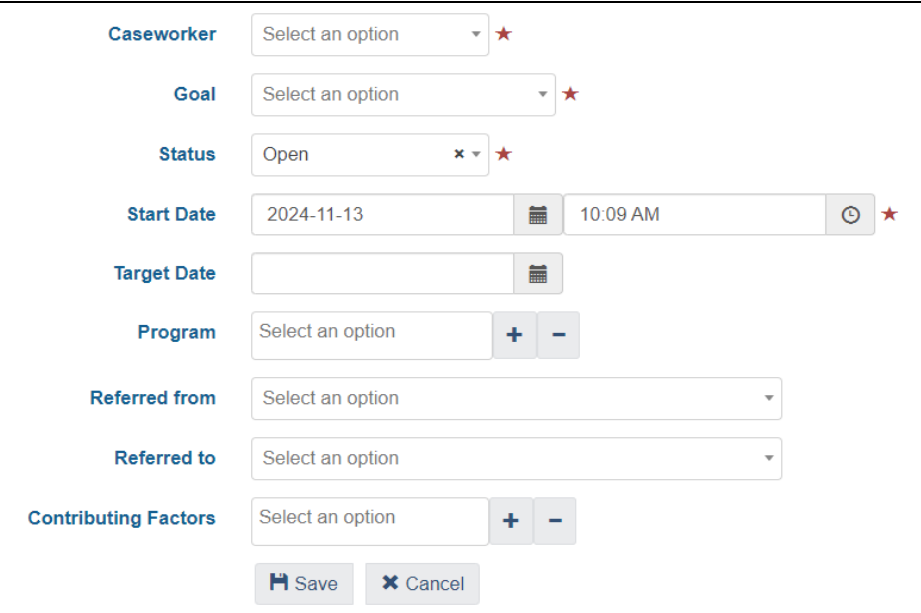
Prerequisite	Client Profile/Record has been created in advance.
--------------	--

*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.

### 1. Procedure to Add Case Goal

Action	
1. From the HIFIS main page, navigate to Front Desk > Clients> Search Client >Client - Details.	 <p>The screenshot shows the 'Client Search' page. At the top, there is a search bar with the text 'Bruce Wayne' entered. Below the search bar is a 'Search' button with a magnifying glass icon.</p>
2. From the Client Management drop down menu, click on Case Management.	 <p>The screenshot shows a dropdown menu with the text 'Client Management' and a downward arrow on the right side.</p>
3. From the Client – Case Management List page, select the + Add Case Button.	 <p>The screenshot shows a button with a plus sign icon and the text '+ Add Case'.</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>The screenshot shows the 'Add Case' form with the following fields and controls:</p> <ul style="list-style-type: none"> <li><b>Caseworker:</b> Select an option (dropdown), marked with a red star.</li> <li><b>Goal:</b> Select an option (dropdown), marked with a red star.</li> <li><b>Status:</b> Open (dropdown), marked with a red star.</li> <li><b>Start Date:</b> 2024-11-13 (calendar icon), 10:09 AM (clock icon), marked with a red star.</li> <li><b>Target Date:</b> (calendar icon).</li> <li><b>Program:</b> Select an option (dropdown), with '+' and '-' buttons.</li> <li><b>Referred from:</b> Select an option (dropdown).</li> <li><b>Referred to:</b> Select an option (dropdown).</li> <li><b>Contributing Factors:</b> Select an option (dropdown), with '+' and '-' buttons.</li> <li>Buttons: Save (with a house icon), Cancel (with an 'x' icon).</li> </ul>

5. Select the case worker that is working with the client.	<b>Caseworker</b> <input type="text" value="Select an option"/> ★
6. Select the appropriate goal the client is trying to achieve.	<b>Goal</b> <input type="text" value="Select an option"/> ★
<b>*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.</b>	
7. Leave “Status” field set to Open	<b>Status</b> <input type="text" value="Open"/> × ▼ ★
8. In Start Date field, enter the date the Case Management record is being created.	<b>Start Date</b> <input type="text" value="2024-11-14"/> <input type="text" value="8:10 AM"/> ★
9. In the Program field, enter the program that is funding the services provided to client (Reaching Homes or OSSI).	<b>Program</b> <input type="text" value="Select an option"/> + - <b>erred from</b> <input type="text" value="Reaching Home Funded"/> <input type="text" value="OSSI Funded"/>
10. Pick the Contributing Factors that are related to the main Goal.	<b>Contributing Factors</b> <input type="text" value="Select an option"/> + - <input type="text" value="Anger Management"/>
<b>*Note – Contributing Factors will only appear in the dropdown box if they have been pre-entered in the Various Factors option, see example below:</b>	

11. Various Factors (Contributing Factors) option, navigate to Client Information drop down list > Various Factors > + Add Contributing Factor

## Client - Various Factors

Contributing Factors Behavioural Risk Factors

Showing 0 to 0 of 0 entries | Show 10 entries

Contributing Factor
No data is available

+ Add Contributing Factor

**\*Note – Once selecting a Contributing Factor from Various Factors page, return to Client – Add Case Management page and will see the selected option from Various Factors show up when inputting Contributing Factors.**

12. Click Save

## Client - Add Case Management

Caseworker: Manager, Case

Goal: Conflict Resolution

Status: Open

Start Date: 2024-11-14 8:35 AM

Target Date:

Program: x OSSI Funded

Referred from: Select an option

Referred to: Select an option

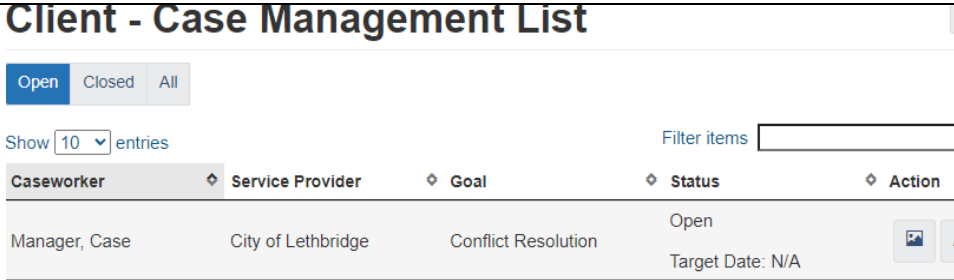
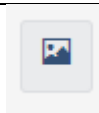
Contributing Factors: x Anger Management

Save Cancel

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

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

**2. Procedure to Add a Case Session**

Action	
<p>1. From the Client Management drop down list, click on Case Management. This will display the Client – Case Management List with the case you had just previously entered and save.</p>	
<p>2. Select the Display icon to enter the Display Case Management page.</p>	

3. From the Display case Management page, select the Sessions tab and click on + Add Session button.

## Display Case Management

Details Sessions Documents Case Comments

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

Activity	Date	Caseworker
No data is available in the 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:

**Goal** Conflict Resolution

**Activity** Select an option \*

**Description**

**Date and Time** 2024-11-14 9:03 AM \*

**Expend Time**

**Hours** 0

**Minutes** 0

**Caseworker** Select an option \*

**Responsibility** Select an option

**Agency Involved / Referral** Select an option

**Client Present** No

**Family Present** No

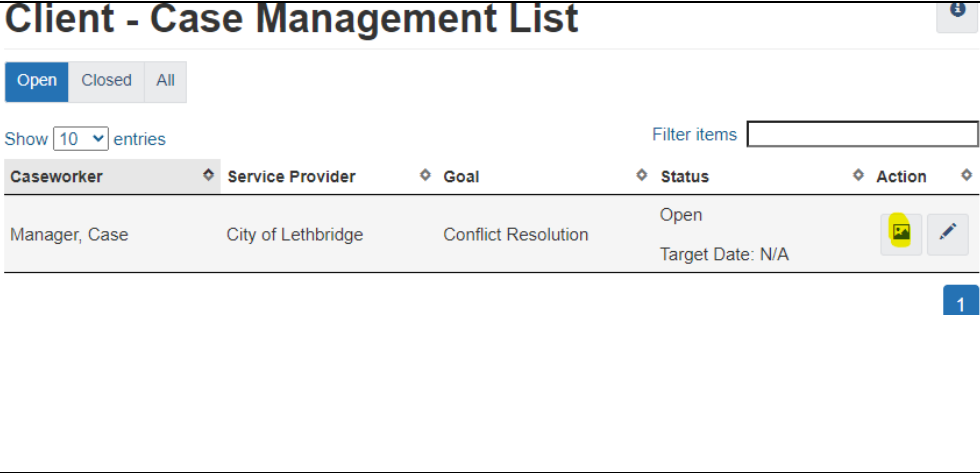
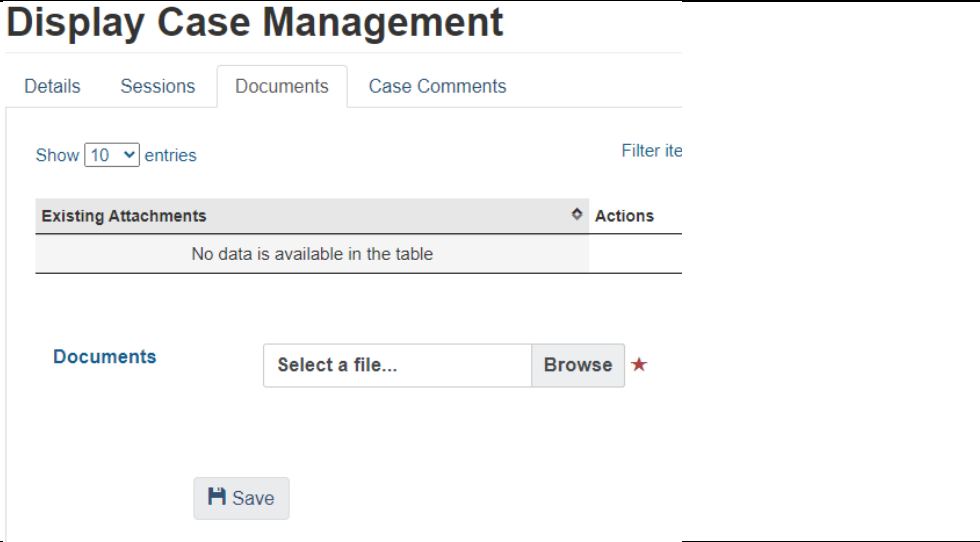

**\*Note – The selected Goal from adding a Case Goal will automatically populate when adding a Case Session.**

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

### 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

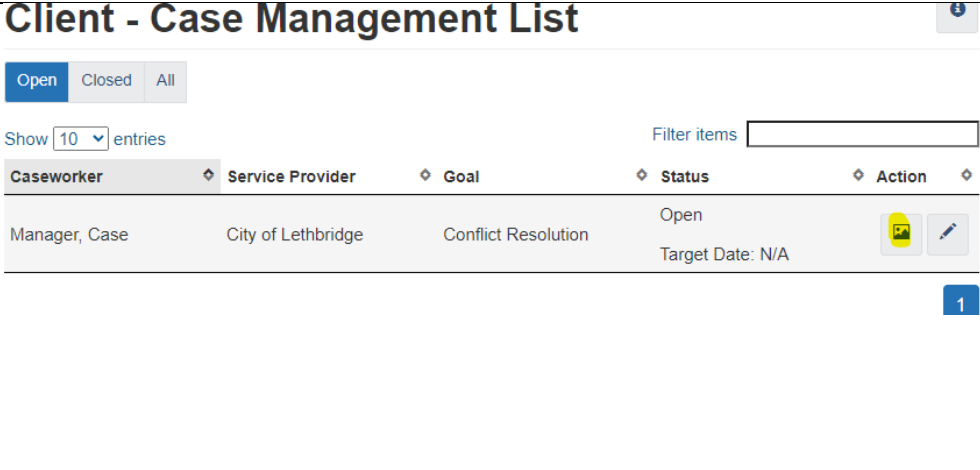

Action	
<p>1. From the Client Management drop down list, click on Case Management and navigate/click on Display Case Management Icon</p>	
<p>2. On the Display Case Management page, navigate and click on Documents &gt; Select a file / Browse to find the documents you want to upload to this case.</p>	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

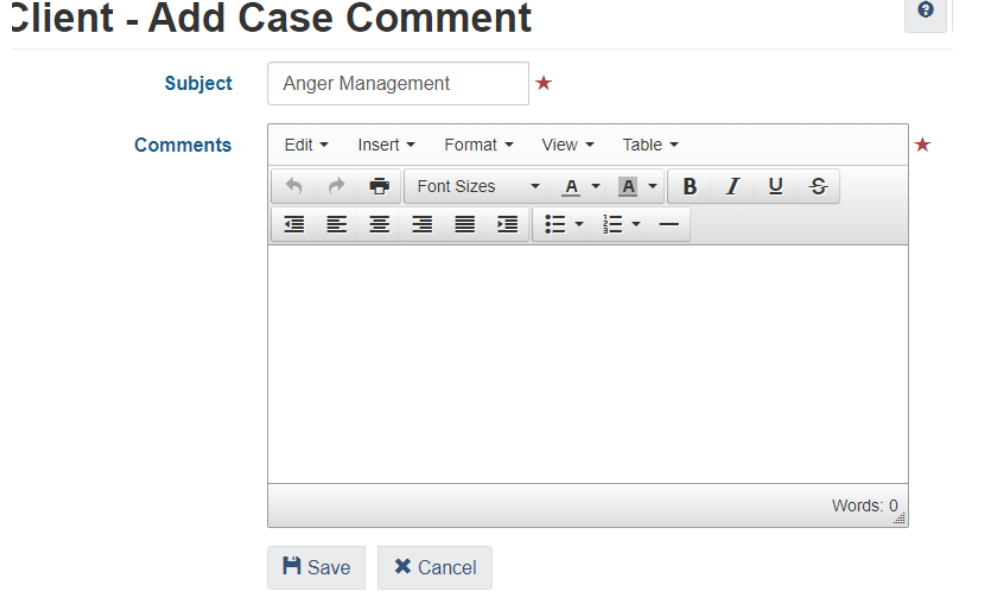



**\*Note – Scanned client identification documents (Driver’s License, Passport etc.) are useful documents to store in this module. However, a client’s health records are prohibited from being uploaded into HIFIS.**

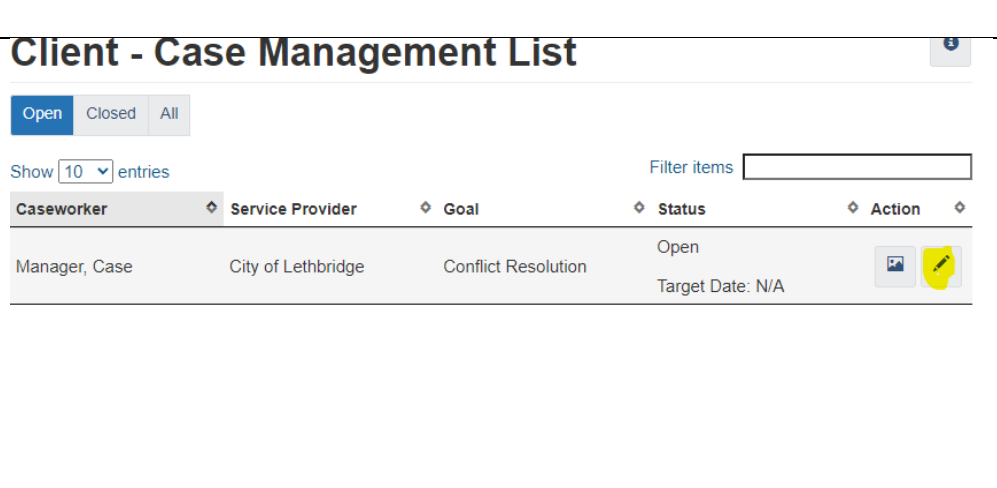
**\*Note – Users can multi-select files for a maximum of 5MB per upload. Not all file types are permitted (e.g. pptx).**

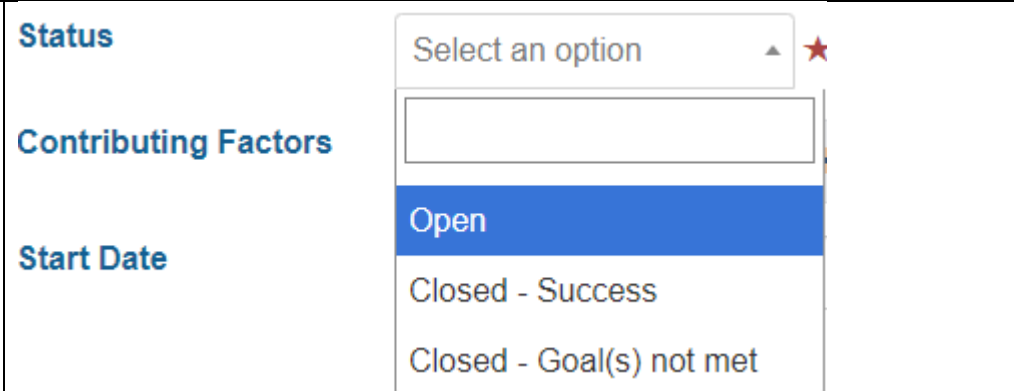
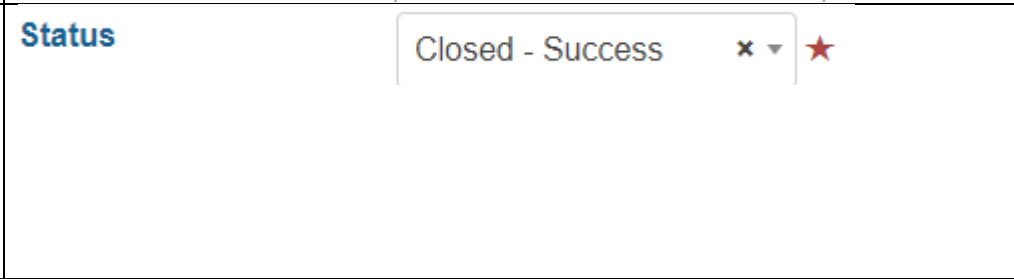

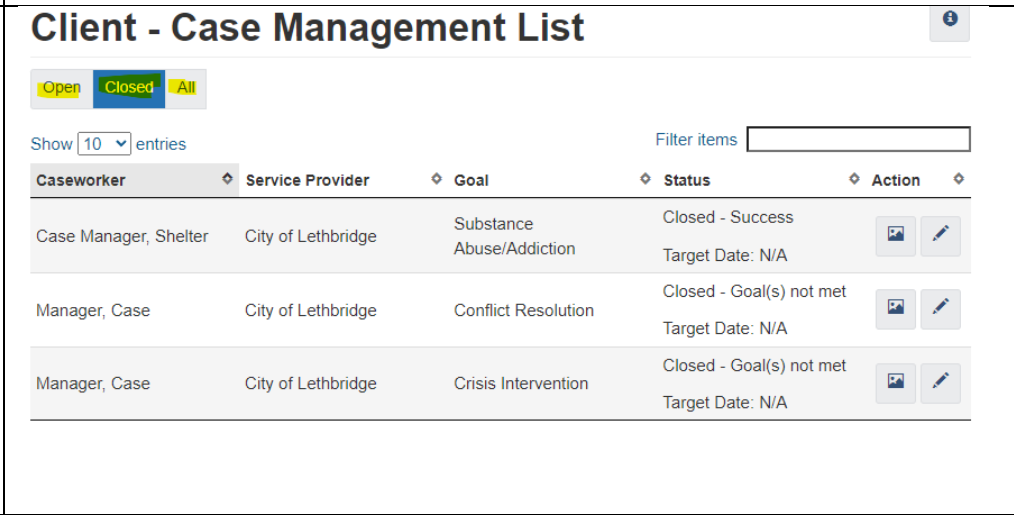
**4. Procedure to Add a Case Comment (Case Notes)**

Action	
<p>1. From the Client Management drop down list, click on Case Management and navigate/click on Display Case Management Icon</p>	 <p>The screenshot shows the 'Client - Case Management List' interface. At the top, there are tabs for 'Open', 'Closed', and 'All'. Below that, there is a 'Show 10 entries' dropdown and a 'Filter items' search box. A table header includes 'Caseworker', 'Service Provider', 'Goal', 'Status', and 'Action'. A single row is visible with the following data: 'Manager, Case', 'City of Lethbridge', 'Conflict Resolution', 'Open', and 'Target Date: N/A'. There are icons for adding and editing items. A blue notification badge with the number '1' is in the bottom right corner.</p>
<p>2. On the Display Case Management page, navigate and click on Case Comments &gt; + Add Comment</p>	 <p>The screenshot shows the 'Display Case Management' page with the 'Case Comments' tab selected. It features a 'Show 10 entries' dropdown and a search box. Below is a table with headers 'Date', 'User', and 'Subject'. The table content is empty, displaying the message 'No data is available in the table'. At the bottom, there is a prominent 'Add Comment' button with a plus icon.</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><b><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></b></p>	

### 5. Procedure to close a Goal

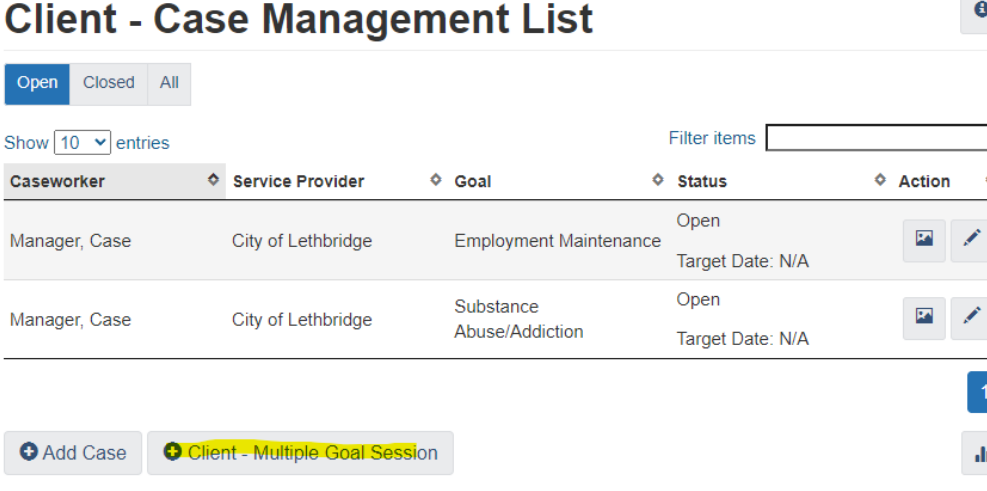
<p><b>Action</b></p> <p>1. Navigate to client record/profile and navigate to Client Management drop down list and select Case Management, select Edit icon.</p>	
---	--

<p>2. On the Client - Edit Case Management &gt; Details page, navigate down to Status drop down field.</p>																					
<p>3. Change Status field to Closed – Success or Closed – Goal(s) not met.</p>																					
<p>4. Click Save</p>																					
<p>5. Navigate back to Case Management main page – Client Management &gt; Case Management &gt; Client Case Management List to review Open, closed or All entries.</p>	 <table border="1"> <thead> <tr> <th>Caseworker</th> <th>Service Provider</th> <th>Goal</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Case Manager, Shelter</td> <td>City of Lethbridge</td> <td>Substance Abuse/Addiction</td> <td>Closed - Success Target Date: N/A</td> <td> </td> </tr> <tr> <td>Manager, Case</td> <td>City of Lethbridge</td> <td>Conflict Resolution</td> <td>Closed - Goal(s) not met Target Date: N/A</td> <td> </td> </tr> <tr> <td>Manager, Case</td> <td>City of Lethbridge</td> <td>Crisis Intervention</td> <td>Closed - Goal(s) not met Target Date: N/A</td> <td> </td> </tr> </tbody> </table>	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	
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																		

## 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.**

Action																
1. From the Client – Details main page, navigate to Client Management > Case Management > + Client - Multiple Goal Session	 <p><b>Client - Case Management List</b></p> <p>Open Closed All</p> <p>Show 10 entries Filter items</p> <table border="1"> <thead> <tr> <th>Caseworker</th> <th>Service Provider</th> <th>Goal</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Manager, Case</td> <td>City of Lethbridge</td> <td>Employment Maintenance</td> <td>Open Target Date: N/A</td> <td> </td> </tr> <tr> <td>Manager, Case</td> <td>City of Lethbridge</td> <td>Substance Abuse/Addiction</td> <td>Open Target Date: N/A</td> <td> </td> </tr> </tbody> </table> <p>+ Add Case + Client - Multiple Goal Session</p>	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	
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													

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

4. Enter the sessions Activity and if applicable, enter a description of Activity.




**Activity** Select an option 

**Description**

**and Time**

- Accompaniment to Appointments / Services
- Advocacy
- Assessment
- Assistance with Decision Making
- Case Conferencing / Consultation
- Case Planning

5. Confirm the Start Date and Time of the Activity, and if needed, you can change the date/time manually.

**Date and Time** 2024-11-15  9:47 AM  

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.

**Expended Time - Total**

**Hours**

**Minutes**

Split time equally between goals

**Expended Time - "Employment Maintenance - Manager, Case"**

**Hours**

**Minutes**

**Expended Time - "Substance Abuse/Addiction - Manager, Case"**

**Hours**

**Minutes**

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

## 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

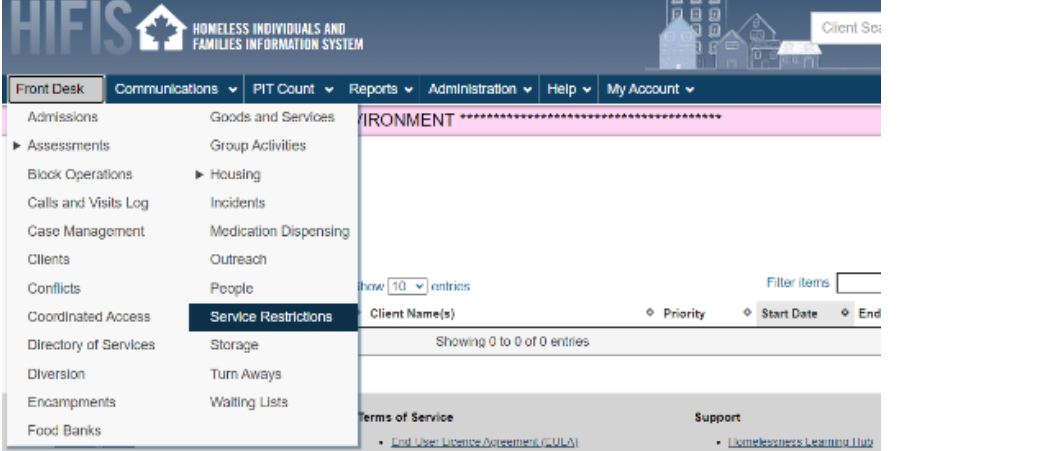

profile/record. **Service Restrictions**



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	
<p>1. From the HIFIS main page, navigate to the Front Desk drop down menu and select Service Restrictions.</p>	 <p>The screenshot shows the HIFIS (Homeless Individuals and Families Information System) interface. The 'Front Desk' menu is open, and 'Service Restrictions' is selected. The background shows a search results page for 'Environment' with a table header including 'Client Name(s)', 'Priority', 'Start Date', and 'End'. The table currently shows 'Showing 0 to 0 of 0 entries'.</p>
<p>2. From the Service Restriction</p>	 <p>The screenshot shows a button labeled '+ Add Service Restriction' with a plus icon.</p>



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

Requested By field.			
6. Enter the dates for when the service restriction starts and ends for the client.	<b>Start Date and Time</b>	2024-11-21 	10:14 AM
	<b>End Date and Time</b>	2024-11-21 	10:14 AM
7. Select the Service Providers for which the Service Restriction applies to.	<b>Service Providers</b>	Select an option	+ - ★
8. Enter the Modules for which the Service Restriction applies to.	<b>Modules</b>	<div data-bbox="553 863 870 1213"> Select an option  Admissions  Food Banks  Goods  Services  <b>Group Activities</b> </div>	+ - ★ <input type="text"/> ★ View ▾ 1 A ▾
<p><b>*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.</b></p>			
<p><b>*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:</b></p>			
<div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <p><b>Client Has Active Service Restrictions</b></p> <p>An active service restriction for this client within the Stays module has been flagged. Initiating new transactions within this organization's module will not be approved until this service restriction is resolved.</p> </div>			

9. Enter the Reason for Restriction and then additional information below that will provide context for why the client is being restricted.

Reason for Restriction

Select an option



Comments

Rich text editor with menu: Edit, Insert, Format, View, Table. Includes font size, bold, italic, underline, and link options. A red star icon is in the top right corner. The text area is empty. A status bar at the bottom right shows "Words: 0".

9. Click Save.

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:**

Client Information

Client Management

+

Bruce Banner

Client Alerts

Consent Status	Active
Client State	Active
Housing Status	Housed
Chronically	No

## Client - Details

Vitals | Contact Info | Physical Appearance | Languages | Comments | Custom Tables

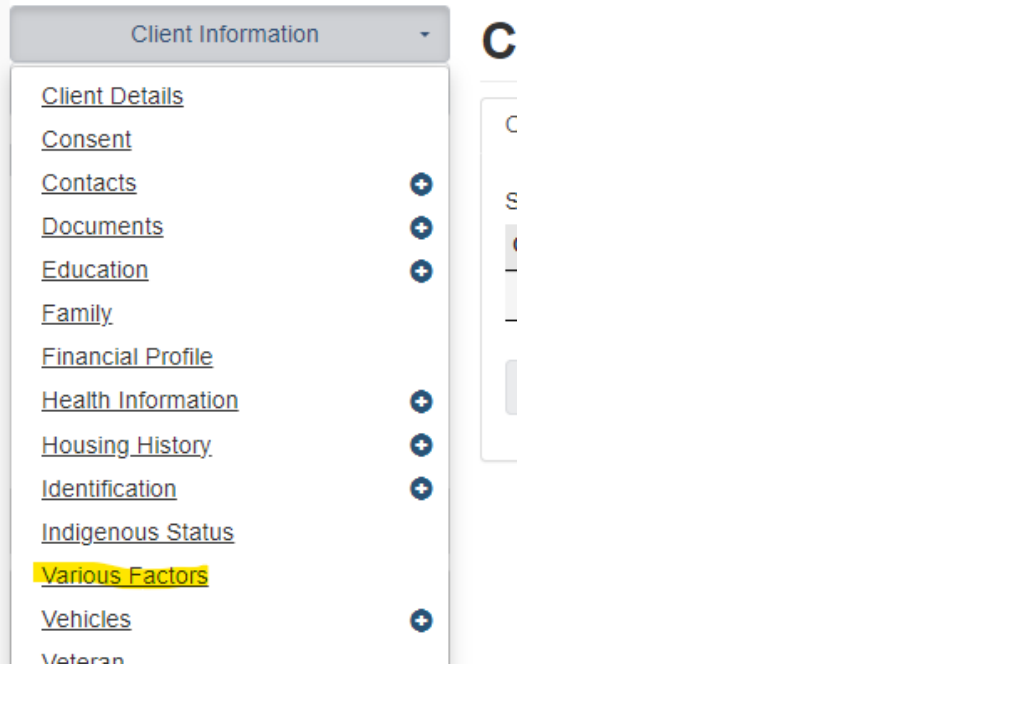
Consent Type	Explicit
Full Name	Bruce Banner
Gender	Male
Alias	
File Number	000000006
Date of Birth	1962-05-12
Date of Birth Known	Yes
Approximate Age	62
Information Verified	Yes
Country of Birth	Canada
Province/Territory of Birth	N/A

## 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.	 <p>The screenshot shows the 'FAMILIES INFORMATION SYSTEM' interface. The 'Front Desk' menu is open, displaying a list of options. The 'Clients' option is highlighted in a dark blue bar. Other visible options include Admissions, Assessments, Block Operations, Calls and Visits Log, Case Management, Conflicts, Coordinated Access, Directory of Services, Diversion, Encampments, Food Banks, Goods and Services, Group Activities, Housing, Incidents, Medication Dispensing, Outreach, People, Service Restrictions, Storage, Turn Aways, and Waiting Lists.</p>

2. From the Client – Details pages, navigate to Client Information and select Various Factors.



3. From the Client-Variou Factors page, select the Behavioural Risk Factors tab and select the + Add Behavioural Risk button.



4. Proceed with filling out all required fields and if applicable, optional fields.

**Client - Add Behavioural Factor**

**Behavioural Factor**  ★

**Start Date**   ★

**End Date**

**Severity**

**Comments**


5. Enter the Behavioural Risk Factor of the client.

**Behavioural Factor**  ★

6. Confirm the Start Date and if applicable, you can manually change the start date.

**Start Date**   ★

7. If applicable, enter the End Date, Severity of the behavioural factor and any additional comments concerning the behavioural factor (optional).

**End Date**  

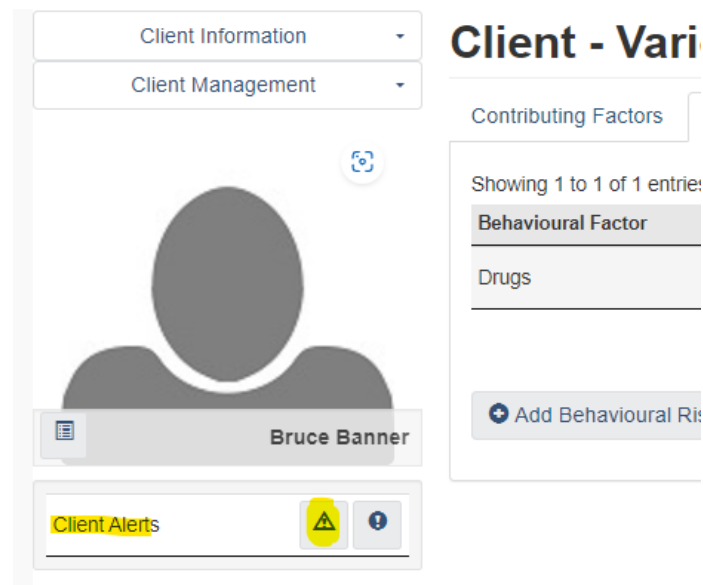
**Severity**

**Comments**

8. Click Save.



**\*Note – The Behavioural Risk Factor Alert will show up next to Client Alerts for users to view:**

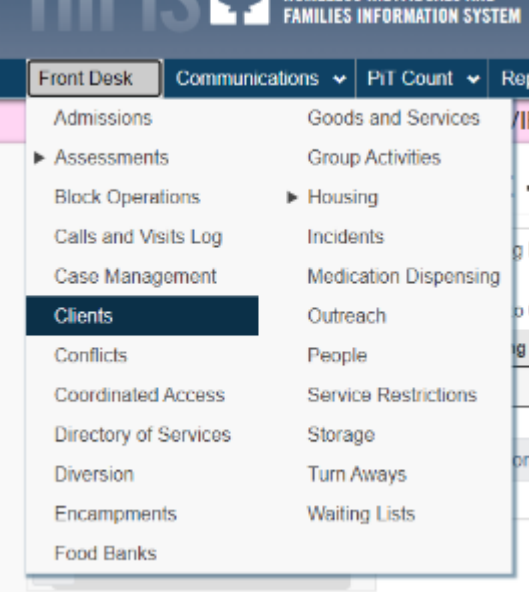
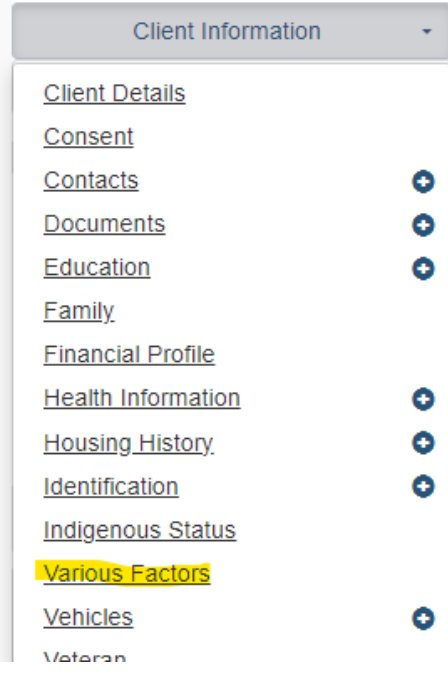


The screenshot shows a client profile for 'Bruce Banner'. On the left, there are navigation tabs for 'Client Information' and 'Client Management'. The main profile area includes a placeholder for a profile picture, the name 'Bruce Banner', and a 'Client Alerts' section with a yellow warning icon. On the right, the 'Client - Vari' section is visible, with a sub-tab for 'Contributing Factors'. Below this, it says 'Showing 1 to 1 of 1 entries:' and lists 'Behavioural Factor' and 'Drugs'. At the bottom of this section is a button labeled '+ Add Behavioural Risk Factor'.

**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 Non-compliance etc.).

Action	
<p>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.</p>	
<p>2. From the Client- Details under Vitals page, select Client Information and click on Various factors.</p>	



3. Under Client – Various Factors page, navigate to Watch Concerns tab and click on + Add Watch Concern.

## Client - Various Factors

Contributing Factors Behavioural Risk Factors **Watch Concerns**

Showing 0 to 0 of 0 entries | Show  entries

Watch Concern  Start Date  End Date

No data is available in the table

 **Add Watch Concern**

4. In the Client – Add Watch Concern page, fill in the required fields.

### Client - Add Watch Concern

**Watch Concern**   

**Start Date**  

**End Date**  

**Severity**





**Comments**

 Save

Cancel


5. Select the Watch Concern pertaining to client.

**Watch Concern**   

<p>6. If applicable, fill in the optional fields;</p> <ul style="list-style-type: none"><li>• Start Date</li><li>• End Date</li><li>• Severity of the Watch Concern and;</li><li>• Additional Comments concerning the Watch Concern</li></ul>	<p><b>Start Date</b> <input type="text" value="2024-11-21"/> </p> <p><b>End Date</b> <input type="text"/> </p> <p><b>Severity</b> <input type="text" value="Select an option"/> </p> <p><b>Comments</b> <input type="text"/></p>
<p>7. Click Save.</p>	<p></p>
<p><b><i>*Note – The active Watch Concern Alert will now show up next to Client Alerts from client profile/record:</i></b></p>	

Client Information ▾

Client Management ▾



**Bruce Banner**

Client Alerts

Consent Status	Active
Client State	Active
Housing Status	Housed
Chronically Homeless	No
File Number	0000000006
Current Stay	Not Booked In
Gender	Male

## Client

Contr

Show

Life E

+ A

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

### Client List

All
Active
Inactive
Deceased
Archived

Showing 1 to 1 of 1 entries | Show 10 entries

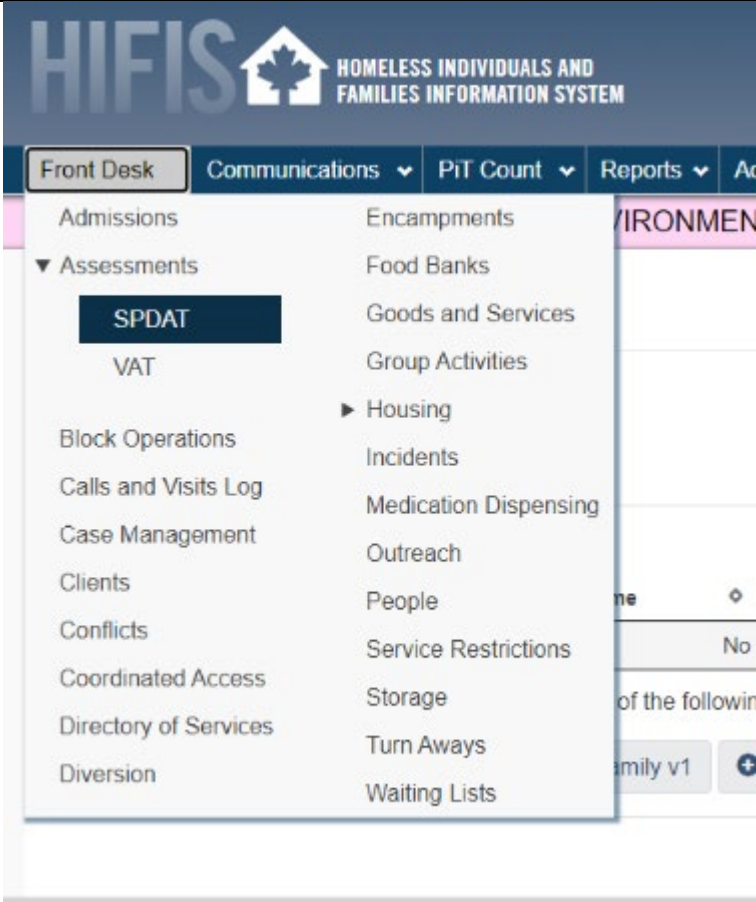
ID	Full Name	Gender	Alias	Date of Birth	Age	File Number	Housing Status	Action
6	<a href="#">Banner, Bruce</a>	Male		1962-05-12	62	0000000006	Housed	

**8. Procedure to Add an SPDAT (Service Prioritization Decision Assistance Tool) Assessment to Client Record/Profile**

The purpose of this tool is to help service providers prioritize their service delivery based on standardized assessments given to individuals and families who are homeless or at-risk. The different versions of this tool have been implemented in the HIFIS application to give HIFIS users an easy and efficient way to record SPDAT assessments and to make decisions based on the results.

Under Assessments (Front Desk > Assessments) from the Intake List page, the different tabs provided in the assessments are the VI-SPDAT (Vulnerability Index – SPDAT), the main SPDAT assessment and the Family and Youth version of both.

<p><b>Prerequisite</b></p>	<ul style="list-style-type: none"> <li>• Must have a pre-existing client already created in the HIFIS system to perform this function.</li> </ul>
----------------------------	---

Action	
<p>1. From the Front Desk drop down menu, select the Assessments tab, then select SPDAT.</p>	 <p>The screenshot shows the HIFIS (Homeless Individuals and Families Information System) interface. At the top, there is a navigation bar with the HIFIS logo and the text 'HOMELESS INDIVIDUALS AND FAMILIES INFORMATION SYSTEM'. Below this, there is a 'Front Desk' dropdown menu that is open, displaying a list of options. The 'Assessments' option is selected, and a sub-menu is visible showing 'SPDAT' as the active selection. Other options in the 'Front Desk' menu include Admissions, Communications, PiT Count, Reports, and Additions. Other options in the 'Assessments' sub-menu include Encampments, Food Banks, Goods and Services, Group Activities, Housing, Incidents, Medication Dispensing, Outreach, People, Service Restrictions, Storage, Turn Aways, and Waiting Lists.</p>

2. From the SPDAT Intake List page, select the SPDAT tab.

## SPDAT Intake List

Filter: All ▾

VI-SPDAT **SPDAT**

Showing 1 to 2 of 2 entries | Show 10 entries

Client Name	Start Date and Time	Caseworker	Type	Version	Score
Banner, Bruce	2024-11-06 9:26 AM	Manager, Case	Adult	4	20

3. From the SPDAT Intake list page and selecting the SPDAT tab, select the option depending on the type of client and version of the assessment you would like to use (e.g., + Adult v4)- (v4 = Version 4).

Start a new SPDAT assessment by selecting one of the following:

- + Adult v3
- + Adult v4
- + Family v1
- + Family v2
- + Youth v1

4. From the Add SPDAT page, fill in all required fields marked with a red star and if applicable, fill in optional fields as well.

### Add SPDAT - Single Adult Version 4 Intake

**Client Name**  ★

**Caseworker**  ★

**Start Date and Time**   ★

**Assessment Period**  ★

**Pre-Screen Period**  ★

**Consent**

**Identifies as LGBTQ2S+?**

**Pet(s)?**

**Program**

**Description**

Edit | Insert | Format | View | Table

Font Sizes | A | A | B | I | U | S

[List icons]

---

[Empty text area]

5. Under Client Name, type to search for existing client, then select the client from search results.

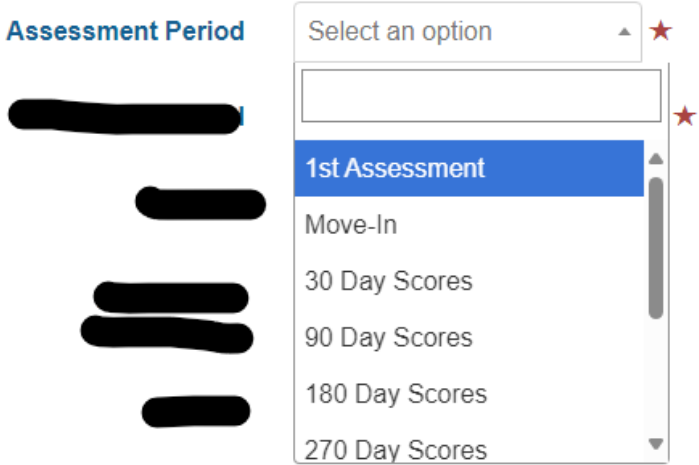
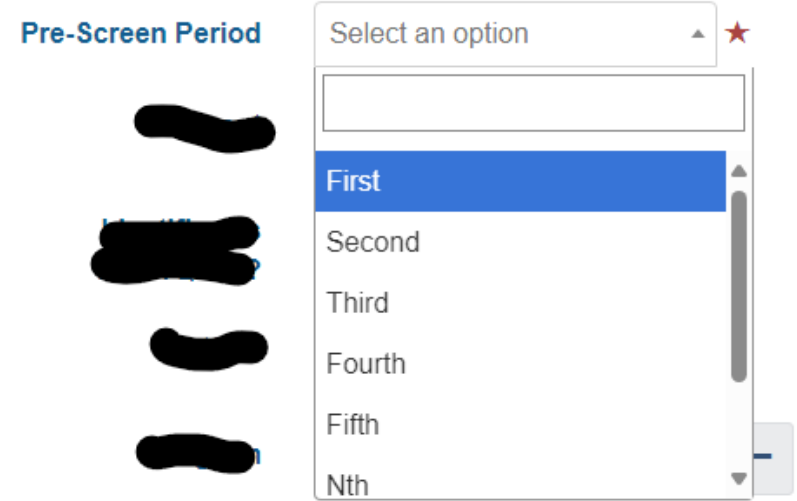
**Client Name**  ★

6. Select the caseworker conducting the assessment with cline from drop down list.

**Caseworker**  ★

7. Confirm the Start Date and Time of the

**Start Date and Time**   ★

assessment taking place.	
<p>8. Select the Assessment Period by which period this assessment for the client is being conducted:</p> <ul style="list-style-type: none"> <li>• 1<sup>st</sup> Assessment</li> <li>• Move-In</li> <li>• 30 Day Scores</li> <li>• 90 Day Scores</li> <li>• Etc.</li> </ul>	<p><b>Assessment Period</b></p> 
<p>9. Select the Assessment Pre-Screen Period to indicate if the assessment has been completed before (first time, second time, etc.)</p>	<p><b>Pre-Screen Period</b></p> 
<p>10. Indicate whether the client has given their Consent to perform assessment.</p>	<p><b>Consent</b> <input checked="" type="checkbox"/> Yes</p>

11. If applicable, fill in remaining optional fields.  
  
In the Description field, if applicable, add any additional information concerning the SPDAT assessment in text box.

**Identifies as LGBTQ2S+?**  No

**Pet(s)?**  No

**Program** Select an option

**Description**

Edit | Insert | Format | View | Table

Font Sizes | A | A | B | I | U | S

Words: 0

***\*Note – From this point on, the caseworker and client can now proceed with answering and completing the SPDAT Assessment.***

12. For each question in SPDAT Assessment, select a number (1, 2, 3, 4) to indicate the score with the option to provide an additional written justification for reason of score.

**Wellness**

#	Question	Answer
A	Mental Health & Wellness & Cognitive Functioning	<input type="radio"/> 4 <input checked="" type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1 <input type="radio"/> 0

***\*Note – To view the full description of the question for each section, click on the arrow next to the title to expand it. You can also hover over each score (1, 2, 3, 4) in the answer column to see the description of that number selected indicates. This will ensure the assessment is being answered in a standardized way:***



**Wellness**

# Question Answer

Mental Health & Wellness & Cognitive Functioning

- Have you ever received any help with your mental wellness?
- Do you feel you are getting all the help you need for your mental health or stress?
- Has a doctor ever prescribed you pills for nerves, anxiety, depression or anything like that?
- Have you ever gone to an emergency room or stayed in a hospital because you weren't feeling 100% emotionally?
- Do you have trouble learning or paying attention?
- Have you ever had testing done to identify learning disabilities?
- Do you know if, when pregnant with you, your mother did anything that we now know can have negative effects on the baby?
- Have you ever hurt your brain or head?
- Do you have any documents or papers about your mental health or brain functioning?
- Are there other professionals we could speak with that have knowledge of your mental health?

A

4  
 3  
 2  
 1  
 0

**Score Description**

Any of the following:

- Heightened concerns about state of mental health, but fewer than 2 hospitalizations, and/or without knowledge of presence of a diagnosable mental health condition
- Diminished ability to perform tasks and functions of daily living or communicating intent because of a brain injury, learning disability or developmental disability

**\*Note – There is a Progress Panel on the left side of your SPDAT Assessment page in which allows you to keep track of your progress through the whole assessment. Hovering or click on this panel will expand it, revealing more details of your progress and highlight incomplete sections.**

Progress Panel x

<b>Housing History</b>	Answered <b>0</b>
0%	
<b>Risks</b>	Answered <b>0</b>
0%	
<b>Socialization and Daily Functions</b>	Answered <b>0</b>
0%	
<b>Wellness</b>	Answered <b>1</b>
20%	
<b>Presenting Needs</b>	Answered <b>0</b>
NaN%	
<b>Vulnerabilities and Housing Support Needs</b>	Answered <b>0</b>
NaN%	

**Mental Health & Wellness & Co**

- Have you ever received any hel
- Do you feel you are getting all th health or stress?
- Has a doctor ever prescribed yo depression or anything like that
- Have you ever gone to an emer because you weren't feeling 100
- Do you have trouble learning or
- Have you ever had testing done
- Do you know if, when pregnant that we now know can have neg
- Have you ever hurt your brain o
- Do you have any documents or brain functioning?
- Are there other professionals w knowledge of your mental healt

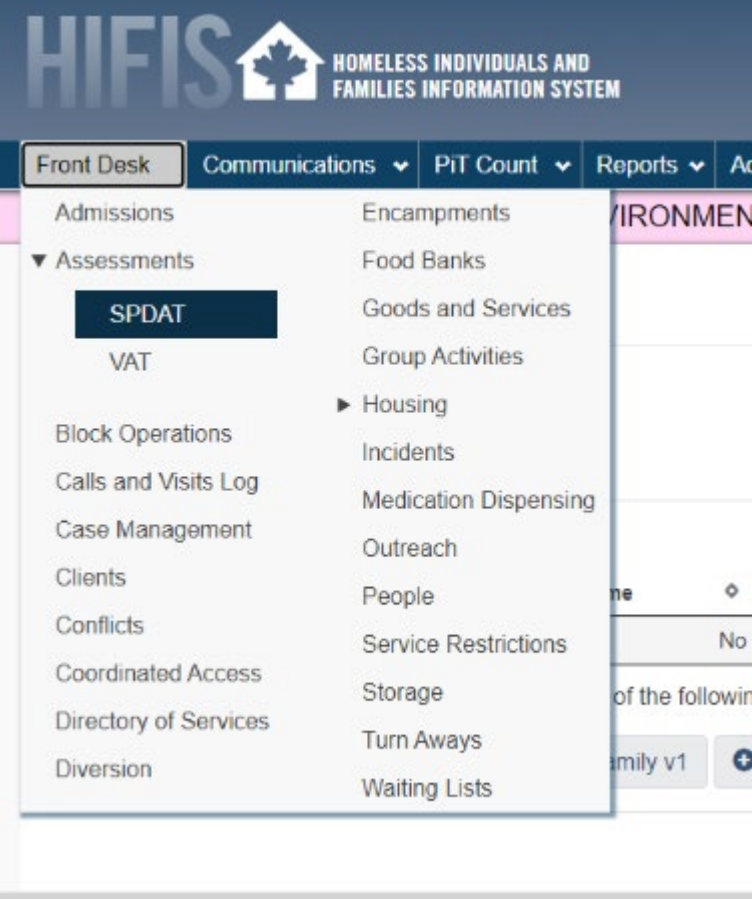
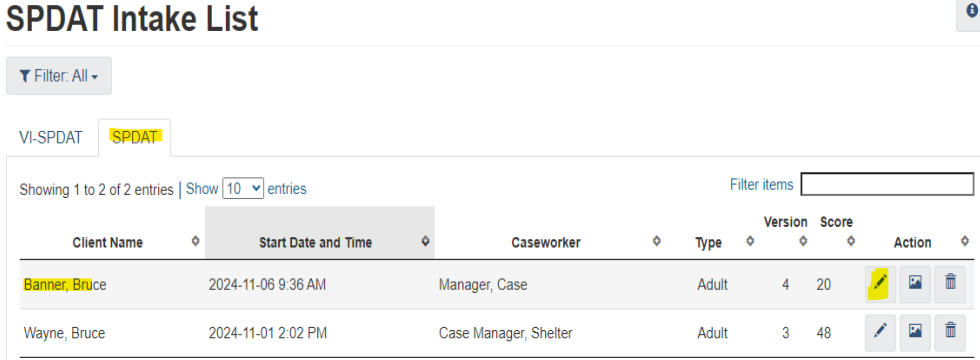
A

B

13. Once the assessment has been completed, click Save.



## 9. Procedure to Review or Edit an Assessment performed on Clients in HIFIS

Action																						
<p>1. From the HIFIS main page, navigate to the Front Desk drop down menu and select the Assessments drop down and select SPDAT.</p>	 <p>The screenshot shows the HIFIS Homeless Individuals and Families Information System interface. The 'Front Desk' menu is open, and the 'Assessments' sub-menu is expanded. The 'SPDAT' option is highlighted in a dark blue box. Other options in the 'Assessments' sub-menu include VAT, Block Operations, Calls and Visits Log, Case Management, Clients, Conflicts, Coordinated Access, Directory of Services, and Diversion. Other main menu items include Communications, PIT Count, Reports, and Admissions.</p>																					
<p>2. From the SPDAT Intake List page, select the SPDAT tab and find/locate the client assessment from the list and click on the Edit icon.</p>	 <p>The screenshot shows the 'SPDAT Intake List' page. At the top, there is a filter dropdown set to 'All' and a 'Filter items' search box. Below this, there are tabs for 'VI-SPDAT' and 'SPDAT', with 'SPDAT' being the active tab. The page indicates 'Showing 1 to 2 of 2 entries' and a 'Show 10 entries' dropdown. The main content is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Client Name</th> <th>Start Date and Time</th> <th>Caseworker</th> <th>Type</th> <th>Version</th> <th>Score</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Banner, Bruce</td> <td>2024-11-06 9:36 AM</td> <td>Manager, Case</td> <td>Adult</td> <td>4</td> <td>20</td> <td>[Edit] [View] [Delete]</td> </tr> <tr> <td>Wayne, Bruce</td> <td>2024-11-01 2:02 PM</td> <td>Case Manager, Shelter</td> <td>Adult</td> <td>3</td> <td>48</td> <td>[Edit] [View] [Delete]</td> </tr> </tbody> </table>	Client Name	Start Date and Time	Caseworker	Type	Version	Score	Action	Banner, Bruce	2024-11-06 9:36 AM	Manager, Case	Adult	4	20	[Edit] [View] [Delete]	Wayne, Bruce	2024-11-01 2:02 PM	Case Manager, Shelter	Adult	3	48	[Edit] [View] [Delete]
Client Name	Start Date and Time	Caseworker	Type	Version	Score	Action																
Banner, Bruce	2024-11-06 9:36 AM	Manager, Case	Adult	4	20	[Edit] [View] [Delete]																
Wayne, Bruce	2024-11-01 2:02 PM	Case Manager, Shelter	Adult	3	48	[Edit] [View] [Delete]																

3. From the Edit Intake page, you can edit existing information or add any additional information missed.

## Edit SPDAT - Single Adult Version 4 Intake

Programs

Client Name	Banner, Bruce	★	
Caseworker	Manager, Case	★	
Start Date and Time	2024-11-06	9:36 AM	★
Assessment Period	1st Assessment	★	
Pre-Screen Period	First	★	
Consent	<input checked="" type="checkbox"/> Yes		
Identifies as LGBTQ2S+?	<input type="checkbox"/> No		
Pet(s)?	<input type="checkbox"/> No		
Program	OSSI Funded		
Description	<input type="text" value="Edit Insert Format View Table"/>		

***\*Note – On the Edit Intake Page, you can also edit the existing scores inputted previously or return where you left off on the Assessment.***

4. Click Save.

 Save