

Version 3: Updated March 14, 2025

Modules Testing – Housing Placement Module

Note: *It is likely you will be documenting your main Case Management efforts in the Case Management Module (see Case Management training materials). However, the Housing Placement Module can be utilized when you are attempting to locate, secure, and move a client into housing.*

The Housing Placement module is used to track efforts made by a caseworker, or other staff members, in placing a client into housing. Once the housing placement is complete, and a client moves into the housing unit, a Housing History record is automatically created in the client’s profile.

When accessing the Housing Placement module, there are two additional lists that assist users with accessing records in a timely manner: Follow-Ups Due this Month and Past Target Date for Housing Placement from the “Filter options” button above the list. Click the name of the list to expand it and view the records.

On the Housing Placement Details page, the status at the top of the page indicates the stage at which the client is in a placement attempt: from housing not secured, to moving into their house. This page also lets you see and record details on housing searches and follow-ups performed after a client has moved in.

*Note – Before commencing the process of creating a housing placement record for the client, ensure to first review their housing placement history (Front Desk > Clients > Search Client > Client - Details > Client Management > Housing Placements) to see if they have another open placement of Moved Into Housing status. If they do have an open Moving Into Housing status, contact the service provider that entered it or HIFIS Support Desk and have the placement closed.

Similarly, ensure to check the client’s Housing History record (Client > Client Vitals > Client Information > Housing History) ahead of time to see if they have an open Housing History.

The system will not allow a client to be moved into a placement while the system shows no End Date for their Housing History.

Test Modules	Action
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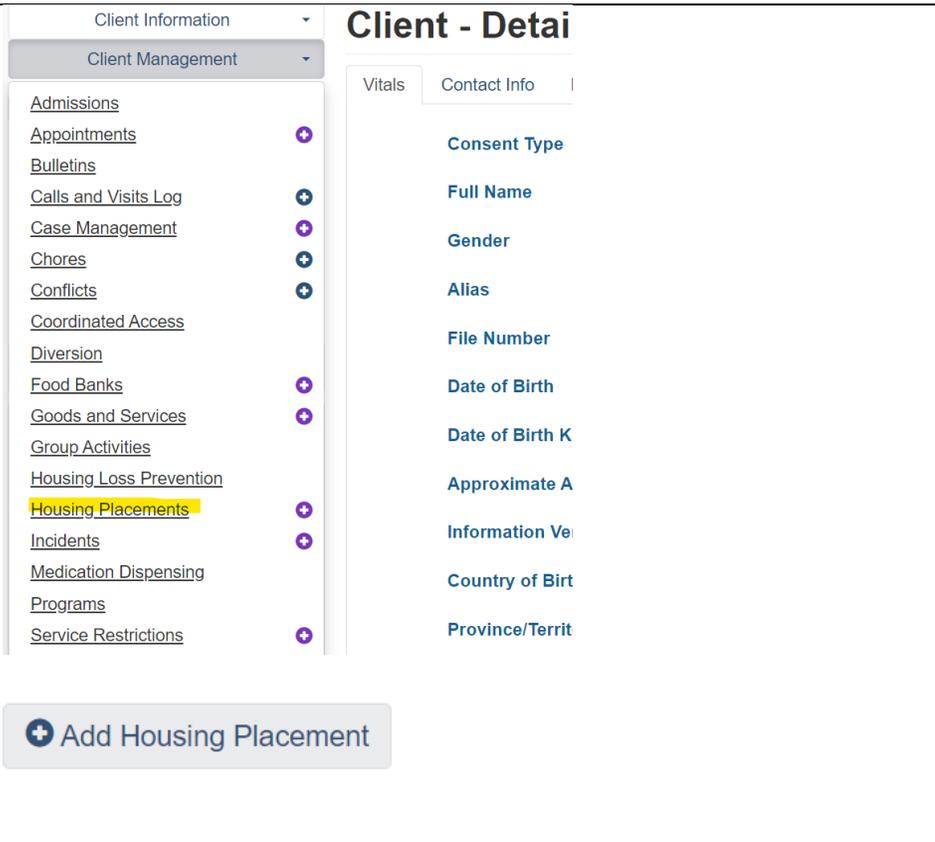
1. Housing Placement Record	New Record (Create Housing Placement Record) in Client Profile <ul style="list-style-type: none"> • Front Desk > Housing > Housing Placement > + Add Housing Placement
2. Edit Housing Placement Record	New Record (Edit Housing Placement Record) in Client Profile <ul style="list-style-type: none"> • Front Desk > Housing > Housing Placement > Housing Placement List page > Locate Housing Placement Record you want to Edit
3. Housing Placement - Secure Housing Unit	New Record (Secure Housing Unit for Client) <ul style="list-style-type: none"> • Front Desk > Housing > Housing Placements > Housing Placements List > Action – Manage Icon > + Add and Secure Housing Unit
4. Housing Placement - Record Client Move In	New Record (Record Client Move In) <ul style="list-style-type: none"> • Housing Placement Details > Move In
5. Housing Rent Supplement	New Record (Add Rent Supplement) <ul style="list-style-type: none"> • Front Desk > Clients > Search Clients > Client – Details > Client Management > Housing Placements > Manage > + Add Subsidy
6. After Client has “Moved In”	New Record (Add Attempts and Follow-Ups) Front Desk > Housing > Housing Placements > Housing Placement Details > Attempts & Follow-Ups
7. Entering Landlord Information	New Record (Add Landlord) Front Desk > People > + Add Person

Enter a Housing Placement & Record Related Activities

Prerequisite	<ul style="list-style-type: none"> • Client Profile/Record has been created in HIFIS. • Client must not already have a current Moved Into Housing Status
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1. Procedure to Add Housing Placement Record

3 Stages of Adding a Housing Placement Record - *Housing Not Secured (open a housing placement and begin working with client to find their housing), Housing Secured (Desired housing or housing unit has been secured for client) and Moved Into Housing (Client has successfully/physically moved into housing).*

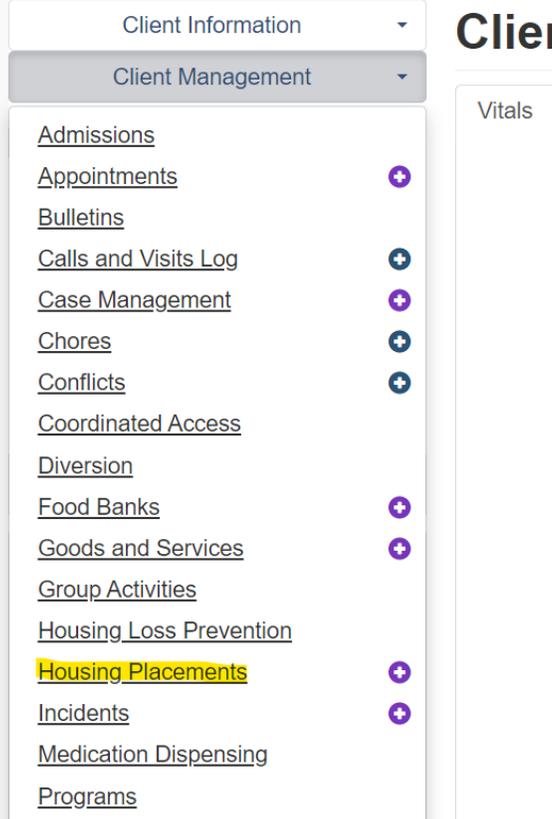
Action	
<p>1. From the HIFIS main page, navigate to Front Desk > Housing > Housing Placements > + Add Housing Placement</p>	

<p>2. From the Add Housing Placement page, fill in all required fields marked with a red star including any optional fields for reference.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <h3 style="margin: 0;">Add Housing Placement</h3> <div style="margin-top: 10px;"> <p>Client Name <input type="text"/> ★</p> <p>Caseworker <input type="text" value="Select an option"/> ★</p> <p>Housing Type(s) Sought <input type="text" value="Select an option"/> + - ★</p> <p>Search Started Date <input type="text" value="2024-11-20"/> 📅 ★</p> <p>Target Date <input type="text"/> 📅</p> <p>Program <input type="text" value="Select an option"/> + -</p> <p>Referred from <input type="text" value="Select an option"/> ▾</p> <p>Referred to <input type="text" value="Select an option"/> ▾</p> <p style="text-align: right;"> <input type="button" value="Start Housing Placement"/> <input type="button" value="Cancel"/> </p> </div> </div>
<p>3. Type the pre-existing Client Name that is looking for a Housing Placement.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Client Name <input type="text"/> ▲ ★</p> <p>Caseworker <input type="text"/> ★</p> <p>Type(s) Sought <input type="text" value="Please enter 3 or more characters"/></p> </div>
<p>4. Select the Caseworker responsible for the housing placement.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Caseworker <input type="text" value="Select an option"/> ▾ ★</p> </div>
<p><i>*Note – The HIFIS system will auto populate the name of the user entering the Housing Placement information if they have Caseworker as a role. You may select a different user if adding the record on behalf of someone else.</i></p>	
<p>5. Select one or more Housing Type(s) Sought field - Housing Type(s) Sought: will create a bunch of housing units in the background in HIFIS, ensure they</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Housing Type(s) Sought <input type="text" value="Select an option"/> + - ★</p> </div>

<p>are tagged with a “housing type”. Select all (+) for testing purposes. - If you only have 1 housing unit in here, it may be difficult for the system to detect (depending on if the housing unit is tagged with this ahead of time in the Housing Units List). - Will add the type of housing your client wants to be in.</p>	
<p>6. Confirm/Select the Search Started Date for a housing placement for client, if applicable, you may change this date manually.</p>	<p>Search Started Date <input type="text" value="2024-11-22"/>  </p>
<p>7. If applicable, enter the Target Date by which you hope to have the client placed.</p>	<p>Target Date <input type="text"/> </p>
<p>8. If applicable, select the program that is involved (funding) the services provided to the client.</p>	<p>Program <input type="text" value="Select an option"/>  </p>

<p>9. Click the Start Housing Placement button.</p>	
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2. Procedure to Edit a Housing Placement Record

Action	
<p>1. From the HIFIS main page, navigate to Front Desk drop down menu and select Housing > Housing Placements</p>	
<p>2. From the Housing List page, locate the Housing Placement record you wish to modify and click on the Edit icon.</p>	

3. On the Client - Edit Housing Placement page, you can edit the existing page and add any additional information you may have missed.

Client - Edit Housing Placement

Search Started Date  ★

Target Date 

Housing Secured Date  ★

Date Moved In  ★

Next Scheduled Follow-up 

Program N/A

Referred from ▼

Referred to ▼

Caseworker ★

Housing Type(s) Sought   ★

 Save  Cancel

3. Procedure to Secure a Housing Unit for Client

Action	
<p>1. From the Front Desk drop down menu, click Housing and select Housing Placements.</p>	
<p>2. From the Housing Placement List page, navigate and select the correct Housing Placement record for the client and select the Manage icon.</p>	
<p>3. From the Housing Placement Details page, you will see the title for the client housing placement page as “Housing Placement Details - Housing Not Secured”.</p>	<p>Housing Placement Details - Housing Not Secured</p>
<p>4. Select the + Add and Secure Housing Unit button.</p>	

<p>5. Fill in all required fields marked with a red star and if applicable, any optional fields from the Add Housing Unit prompt open text box.</p>	<div data-bbox="568 231 1291 1186"> <h3>Add Housing Unit</h3> <p>Housing Type <input type="text" value="Select an option"/> ★</p> <p>Status <input type="text" value="Select an option"/> ★</p> <p>Status Date <input type="text" value="2024-11-20"/> ★</p> <p>Place Name <input type="text"/></p> <p>Address Line 1 <input type="text"/> ★</p> <p>Address Line 2 <input type="text"/></p> <p>Unit/Apartment Number <input type="text"/></p> <p>Country <input type="text" value="Canada"/> x ▾ ★</p> <p>Province/Territory <input type="text" value="Select an option"/> ▾</p> <p>City <input type="text" value="Select an option"/> ▾</p> <p>Postal Code <input type="text"/></p> <p>Expected Move In Date <input type="text" value="2024-11-20"/> </p> <p><input type="button" value="Save and secure"/> <input type="button" value="Close"/></p> </div>	
<p>6. Select the Housing Type of the housing unit.</p>	<p>Housing Type <input type="text" value="Select an option"/> ▾ ★</p>	
<p>7. Select the Status (condition) of the selected housing unit.</p>	<p>Status <input type="text" value="Select an option"/> ▾ ★</p>	
<p>8. Enter the Status Date for when confirming the condition of the housing unit.</p>	<p>Status Date <input type="text" value="2024-11-22"/> ★</p>	
<p>9. Enter the address information of the housing unit. For Address Line 1.</p>	<p>Address Line 1 <input type="text"/> ★</p>	

<p>10. If applicable, after entering the Country of which the housing unit is located (Canada), enter the following fields for additional information:</p> <ul style="list-style-type: none"> • Province/Territory • City • Postal Code 	<p>Country <input type="text" value="Canada"/> x v ★</p> <p>Province/Territory <input type="text" value="Select an option"/> v</p> <p>City <input type="text" value="Select an option"/> v</p> <p>Postal Code <input type="text"/></p>
<p>11. Enter the Expected Move-In Date by which you hope to move your client into the housing unit.</p>	<p>Expected Move In Date <input type="text" value="2024-11-20"/> </p>
<p>12. Once all required fields have been inputted, select the Save and Secure button.</p>	<p> Save and secure</p>
<p>*Note – You can End Housing Placement Record after creating and starting a housing placement for your client by clicking the End Housing Placement button at the bottom of Housing Placement Details page. This option (button) will only be available through the Housing Not Secured and Housing Secured stages.</p> <p> End Housing Placement</p>	

4. Procedure to Record Client Move In

***Note – If the client has an active housing history record, a prompted Warning message will appear above the Move In fields:**

Warning!

The client has an active housing history record, you can proceed with the move in, but are required to provide an end date for the active housing history record. [Go to active client housing record](#)

Before proceeding with the Move In function, a link is provided in the Warning message for you to go to the client's Housing History and provide an End Date for their current Housing History:

Display Housing History

Details

Follow-ups

Subsidies

Housing Type

Couch Surfing – Staying Temporarily with Others

Start Date

2024-09-02

End Date

- -

Select the Edit button at the bottom of Display Housing History and select the End Date for when client had moved out of their original housing:

Client - Edit Housing History

Details

Follow-ups

Subsidies

Housing Type

Couch Surfing – Staying Temporarily ...  

Start Date

2024-09-02



End Date

2024-11-20



Please Note - For reporting purposes, a client is defined as experiencing homelessness if any of the following Housing Types are recorded/chosen when creating a new client profile in HIFIS (Add Housing History):

- Add Client > Add Housing History > Housing Type or;
- Client Information > Housing History:

Add Housing History Yes

Housing Type

Start Date *

End Date

Country

Client - Housing History

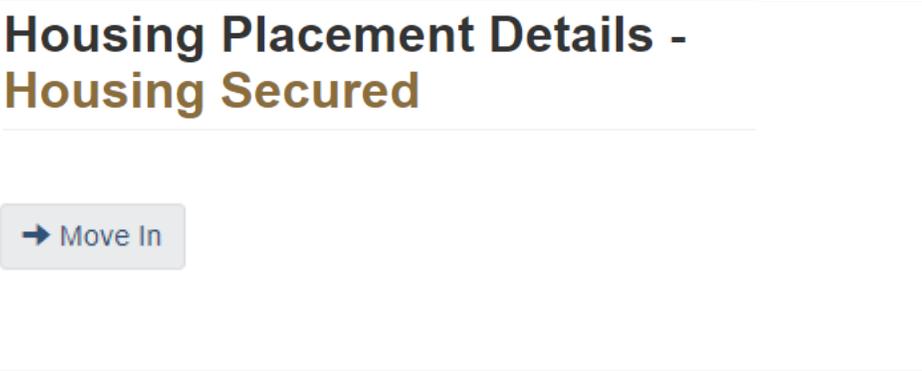
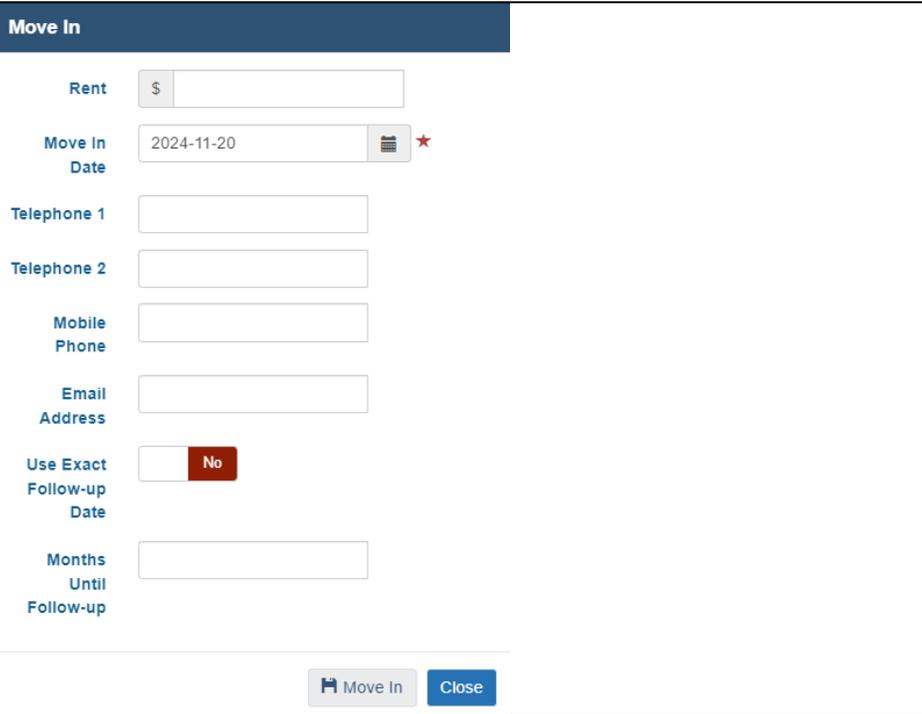
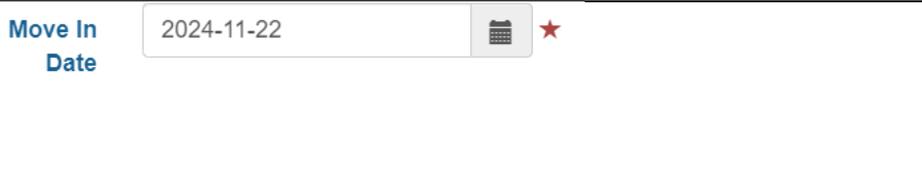
Housing History Risk of Homelessness

Showing 0 to 0 of 0 entries | Show entries

Housing Type	Address	Start Date
No data is available in the table.		

If any of the below Housing Type(s) option are selected, the client will display as Homeless for their current Housing Status:

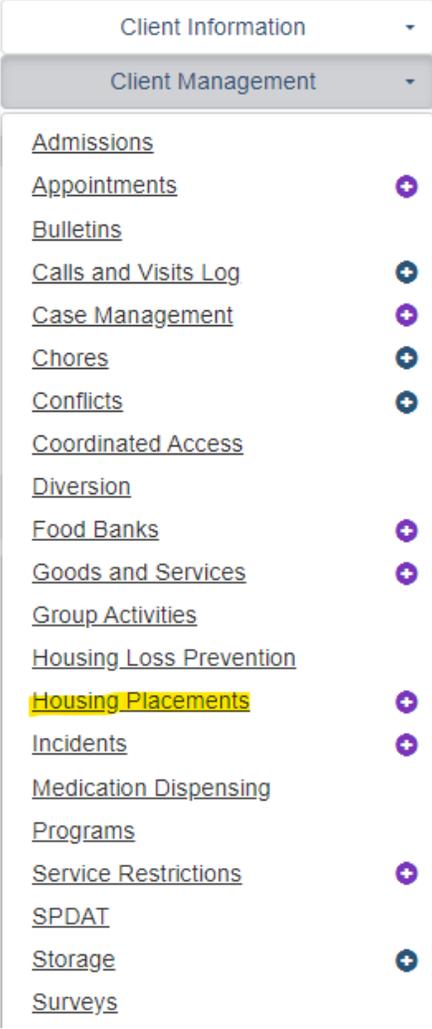
- Abandoned Building
- Emergency Shelter
- Encampment/Campsite
- Hostel
- Hotel / Motel
- Makeshift/Street
- Staying with friends/Relatives (Couch-surfing)
- Trailer/RV without rent
- Vehicle

Action	
<p>1. With the Housing Placement Details page now set as “Housing Placement Details – Housing Secured”, select the Move In button</p>	 <p>Housing Placement Details - Housing Secured</p> <p>→ Move In</p>
<p>2. Once the above function has been updated, return to the Move In function for Client and proceed with filling in all required fields marked with a red star and if applicable, any additional/optional fields.</p>	 <p>Move In</p> <p>Rent \$ <input type="text"/></p> <p>Move In Date 2024-11-20 <input type="text"/> ★</p> <p>Telephone 1 <input type="text"/></p> <p>Telephone 2 <input type="text"/></p> <p>Mobile Phone <input type="text"/></p> <p>Email Address <input type="text"/></p> <p>Use Exact Follow-up Date <input type="checkbox"/> No</p> <p>Months Until Follow-up <input type="text"/></p> <p><input type="button" value="Move In"/> <input type="button" value="Close"/></p>
<p>3. Enter the Rent amount charged by the Landlord (optional)</p>	 <p>Rent \$ <input type="text"/></p>
<p>4. Enter the Move In Date by which the client had moved into the unit.</p>	 <p>Move In Date 2024-11-22 <input type="text"/> ★</p>

5. If applicable, enter the Landlord's phone numbers and email address fields (optional)	<p>Telephone 1 <input type="text"/></p> <p>Telephone 2 <input type="text"/></p>
6. Change the "Use Exact Follow-up Date" to Yes.	<p>Use Exact Follow-up Date <input checked="" type="checkbox"/></p>
7. Enter the appropriate Months Until Follow-up from the date you are entering the Move In for client. This will generate a scheduled reminder for the Case Manager as first required follow-up in HIFIS.	<p>Next Scheduled Follow-up <input type="text"/> </p>
8. Select the Move In button.	<p></p>
9. On the Housing Placement Details page, the title will now show as "Housing Placement Details – Moved Into Housing"	<p>Housing Placement Details - Moved Into Housing</p> <hr/>
<p>*Note – HIFIS generates a report of upcoming Housing Placements follow-ups that are due.</p>	

5. Procedure to Add Rent Supplement & Housing Placement Attempts

If the client has an Open Housing Placement, navigate to the client’s Housing Placement Record: Front Desk > Clients > Search Client > Client – Details > Housing Placements > Housing Placement List

Action	
<p>1. From the Client- Details page, navigate to Client Management and click on Housing Placements > Housing Placement List</p>	

<p>2. Click on the Manage Icon beside the Housing Placement record.</p>	<h3>Housing Placement List</h3> <p>Filter Options</p> <p>Showing 1 to 2 of 2 entries Show 10 entries</p> <table border="1"> <thead> <tr> <th>Service Provider</th> <th>Caseworker</th> <th>Search Started Date</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>City of Lethbridge</td> <td>Manager, Case</td> <td>2024-11-20</td> <td>Moved Into Housing Next Scheduled Follow-up: 2025-05-20</td> <td></td> </tr> </tbody> </table>	Service Provider	Caseworker	Search Started Date	Status	Action	City of Lethbridge	Manager, Case	2024-11-20	Moved Into Housing Next Scheduled Follow-up: 2025-05-20			
Service Provider	Caseworker	Search Started Date	Status	Action									
City of Lethbridge	Manager, Case	2024-11-20	Moved Into Housing Next Scheduled Follow-up: 2025-05-20										
<p>3. At the bottom of the client's Housing Placement Details page, select the Subsidies tab and click on the + New Subsidy button</p>	<p>Follow-ups Attempts Subsidies Documents</p> <p>Showing 0 to 0 of 0 entries Show 10 entries Filter items</p> <table border="1"> <thead> <tr> <th>Program Name</th> <th>Service Provider</th> <th>Amount</th> <th>Start Date</th> <th>End Date</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td colspan="6">No data is available in the table</td> </tr> </tbody> </table> <p></p> <p>Back to Housing Placement List Edit Placement Details</p>	Program Name	Service Provider	Amount	Start Date	End Date	Action	No data is available in the table					
Program Name	Service Provider	Amount	Start Date	End Date	Action								
No data is available in the table													
<p>4. For the New Subsidy prompted text box, fill in all required fields and if applicable, optional fields as well.</p> <p>Please indicate in the comments whether the subsidy is paid to Landlord or paid to Client.</p>	<h4>New Subsidy</h4> <p>Program <input type="text" value="Select an option"/> *</p> <p>Start Date <input type="text" value="2024-11-20"/> *</p> <p>Reason for Service <input type="text" value="Select an option"/> *</p> <p>End Date <input type="text"/></p> <p>Amount \$ <input type="text" value="0"/> *</p> <p>Payment Date <input type="text"/></p> <p>Pay Frequency <input type="text" value="Select an option"/></p> <p>Comment <input type="text"/></p> <p><input type="button" value="Save"/> <input type="button" value="Close"/></p>												
<p>5. For Program, enter the program that is</p>	<p>Program <input type="text" value="Select an option"/> *</p>												

funding the rent supplement.	
6. For the Start Date field, enter the date for when the client will start to receive the rent supplement.	<p>Start Date <input type="text" value="2024-11-20"/>  ★</p>
*Note – The Start Date cannot be before the Move In date for the client.	
7. Enter the Reason for Service	<p>Reason for Service <input type="text" value="Select an option"/> ▼ ★</p>
8. For the End Date field, ensure you enter the date for when you predict/estimate you will stop providing the supplement to the client.	<p>End Date <input type="text"/> </p>
*Note – The End Date must be the last day of the month for when you estimate the client will no longer be receiving the supplement.	
9. In the Amount field, enter the monthly supplement amount you will be providing to the client.	<p>Amount <input type="text" value="\$ 0"/> ★</p>
10. The Payment Date and Pay Frequency are optional fields to fill in if applicable.	<p>Payment Date <input type="text" value="2024-11-30"/> </p> <p>Pay Frequency <input type="text" value="Monthly"/> × ▼</p>
11. Click Save	<p></p>

*Note – Ensure you enter the **Monthly** supplement amount for *Rent Supplement* for the client, not the full amount you are providing for the whole period for which they will be receiving supplement. Entering the amount for the whole period will show up on reports as though you are providing the full amount monthly (e.g., January Rent Supplement for XYZ Client - \$8,400.00, and should rather be January Rent Supplement for XYZ Client - \$700.00).

6. After Client has “Moved Into Housing”

1. Once clicking Save, you will be redirected to the Housing Placement Details page of the client.

Housing Placement Details - Moved Into Housing

Family Members	Mcfly, Marty	Search Started Date	2024-12-05
Housing Type(s) Sought	View All	Next Scheduled Follow-up	N/A
Caseworker	Manager, Case	Service Provider	City of Lethbridge
Program		Referred to	
Housing Secured Date	2024-12-05	Secured Housing Unit	1234 Riverstone Blvd
Housing Type	Single Room Occupancy	Date Moved In	2024-12-05
Rent	\$1000.00	Address	1234 Riverstone Blvd
Status	Excellent	Landlord	

Follow-ups **Attempts** Subsidies Documents

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

Follow-up Date	Service Provider	Caseworker	Months Elapsed	Action
2024-12-05	City of Lethbridge	Supervisor, CM	0	

2. Navigate down the page and click on “Attempts” :

Housing Placement Attempt button – indicates when you tried to find housing for client and it did not workout (not a good fit, couldn’t afford it etc.)

Housing Type	Single Room Occupancy	Date Moved In	2024-12-05
Rent	\$1000.00	Address	1234 Riverstone Blvd
Status	Excellent	Landlord	

Follow-ups **Attempts** Subsidies Documents

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

Date Attempted	Caseworker	Reason Housing Not Secured	Comments
No data is available in the table			

← Back to Housing Placement List
Edit Placement Details

Note: You will notice that there is no “Housing Placements Attempt” button available as the client has their current housing status set to **“Moved Into Housing”**. **The Housing Placement Attempt button will only be available to utilize before any point of moving the client into housing (i.e, Housing Not Secured and Housing Secured stages).**

3. **Follow-Ups –** indicates you have checked in with the client and all is well. Can add comments and date you followed up

Follow-ups	Attempts	Subsidies	Documents
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Showing 1 to 1 of 1 entries | Show 10 entries Filter items

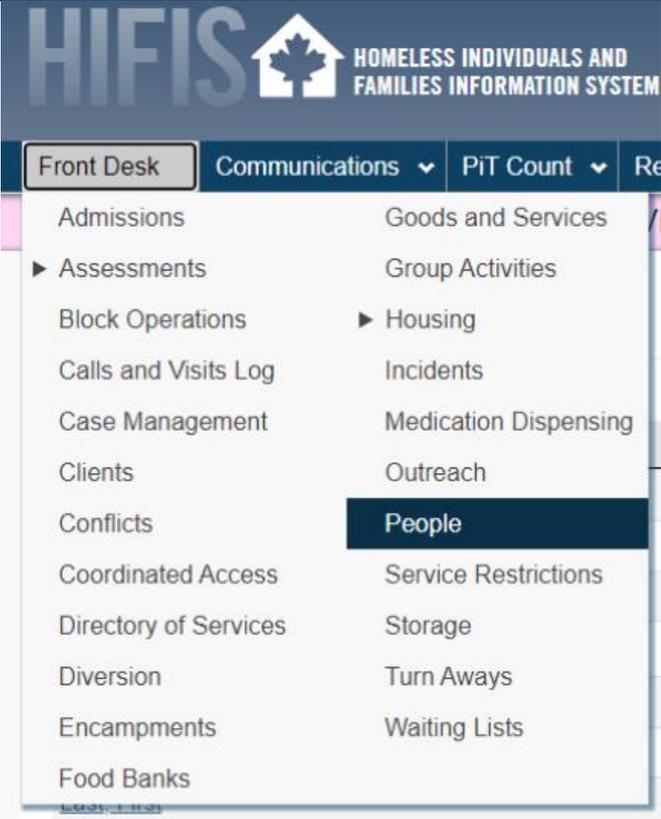
Follow-up Date	Service Provider	Caseworker	Months Elapsed	Action
2024-12-05	City of Lethbridge	Supervisor, CM	0	✎ 📎

➕ Add Follow-up
1

and indicate if they are still housed.	
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7. Procedure for Entering Landlord Information on Housing Placement

*Note - If the landlord does not appear in the dropdown list you will need to add them in the People module (Front Desk > People > + Add Person).

Action	
<p>1. From the HIFIS main page, navigate and select Front Desk and click on People.</p>	

2. From the People List, elect the + Add Person button below.

People List

Filter

Full Name	Gender	Role(s)
Anonymous, Anonymous	Don't Know	
Baines, Amber	Female	Staff
Case Manager, Shelter	Don't Know	CaseWorker
Eyjolfson, Kristina	Don't Know	2 Roles
Fang, Welyu	Don't Know	Contract Worker
Jiang, Canming	Don't Know	Contract Worker
Last, First	Other (Not Listed)	Staff
Manager, Case	Don't Know	CaseWorker
Moncrieff, Allison	Don't Know	Unassigned
Navigator, System	Don't Know	Staff

3. From the Add Person page, fill in all required fields and if applicable, any optional fields.

Add Person

Last Name ★

First Name ★

Middle Name

Gender ★

Alias 1

Alias 2

Date of Birth Known Yes

Date of Birth

Roles + -

Active Yes

4. *On the "Roles" field, click in the option text box and ensure you select the "Landlord" option

Roles + -

Active

- Emergency Contact
- Volunteer
- Landlord**
- Probation/Parole Officer
- Social Assistance Officer

5. Ensure the status of the new Person profile is set to “Yes” for the Active field.	 The screenshot shows the word "Active" in blue text. To its right is a dropdown menu with a white background and a blue border. The word "Yes" is displayed in white text on a blue background within the dropdown, indicating it is the selected option.
6. Click Save.	 The screenshot shows a light gray rectangular button with rounded corners. On the left side of the button is a blue floppy disk icon, and to its right is the word "Save" in a dark gray font.