

Training Materials – Entering Case Management & Record/Related Activities

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

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

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

1. **Case Management Summary List** - (Front Desk > Case Management)
 - Shows a list of all case plans under your agency created at the site for a given period of time.
2. **View All Client Case Session Details or Add Session** – (Front Desk > Clients > Search Client > Client Vitals > Client Management – Case Management > Sessions > View All Sessions Details or Add Session).
 - Displays all case session details for a client’s case plan or add a new case session.

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

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

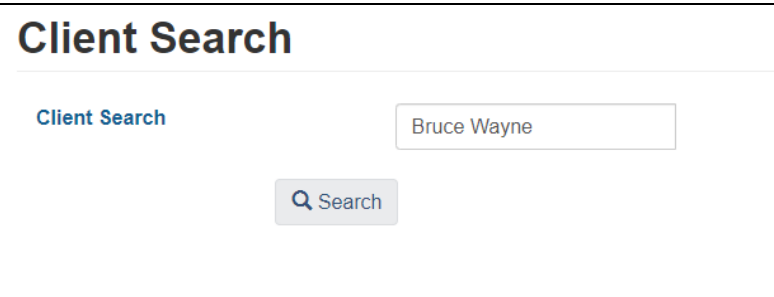
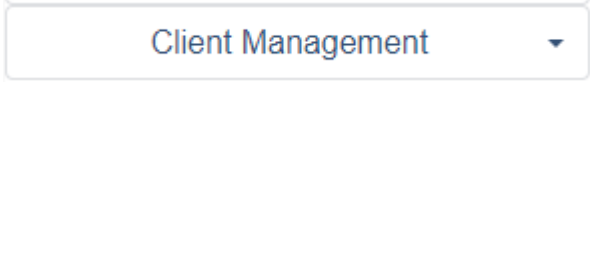
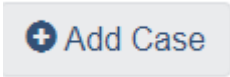
Enter a Case Management & Record Related Activities

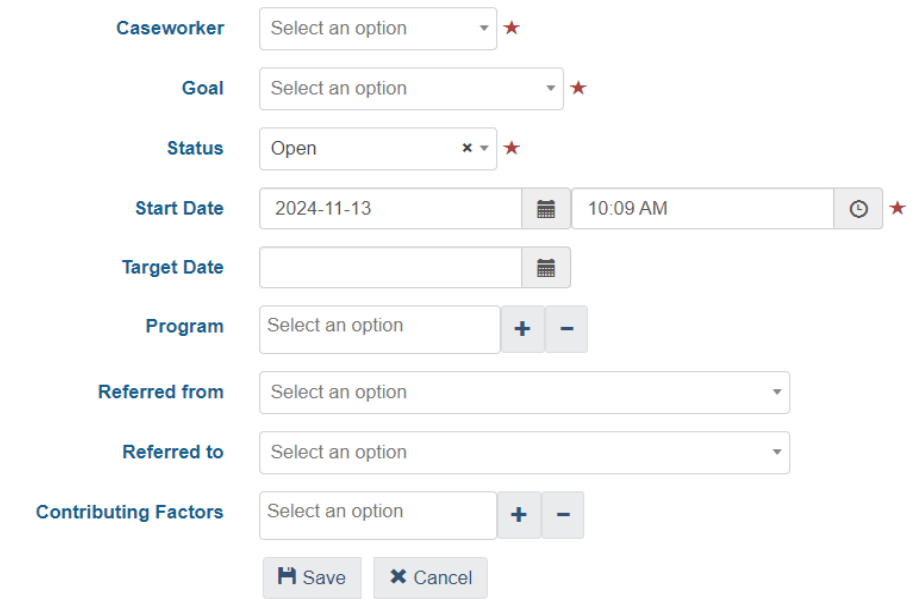
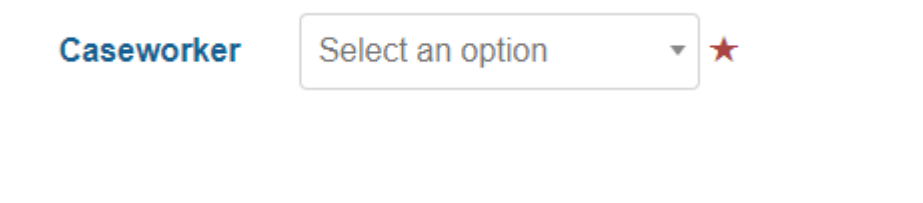
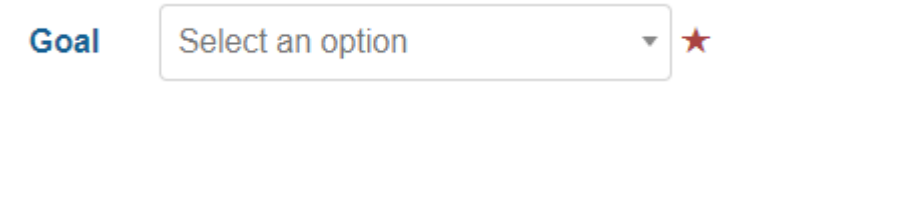

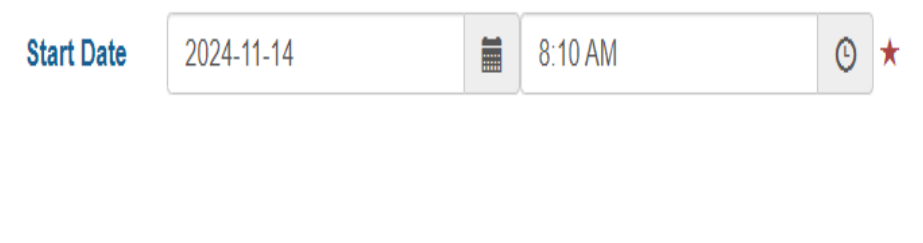
Prerequisite	Client Profile/Record has been created in advance.
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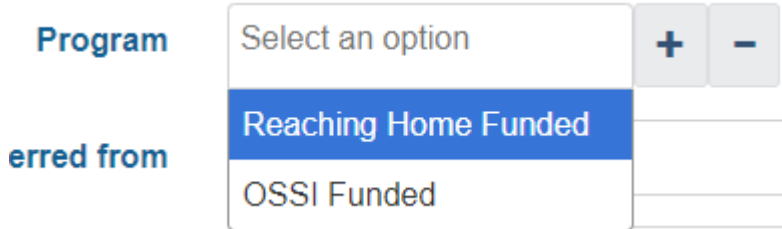
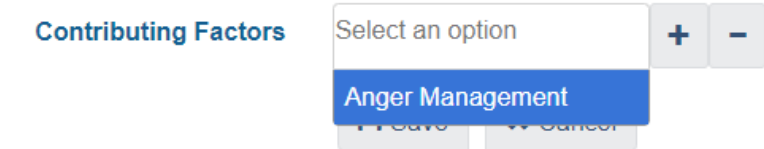
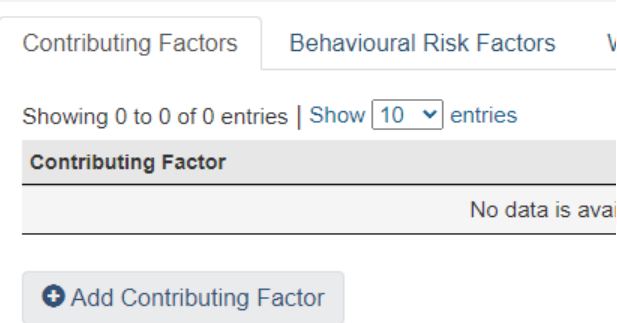
Benefits of Case Management in HIFIS:

- 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>Client Search</p> <p>Client Search <input type="text" value="Bruce Wayne"/></p> <p><input type="button" value="Search"/></p>
2. From the Client Management drop down menu, click on Case Management.	 <p>Client Management ▼</p>
3. From the Client – Case Management List page, select the + Add Case Button.	 <p><input type="button" value="+ Add Case"/></p>

<p>4. From the Client - Add Case Management page, fill in all required fields marked with a red star and any additional/optional fields to fill in on behalf of client:</p>	
<p>5. Select the case worker that is working with the client.</p>	
<p>6. Select the appropriate goal the client is trying to achieve.</p>	
<p>*Note – If there are several goals that a client is trying to pursue, a Case Management Record will need to be created for each goal.</p>	
<p>7. Leave “Status” field set to Open</p>	
<p>8. In Start Date field, enter the date the Case Management record is being created.</p>	

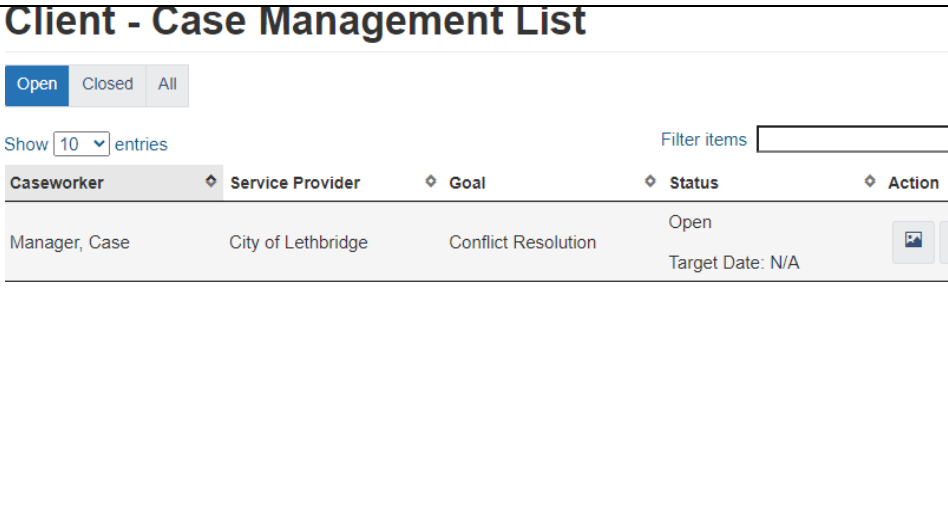
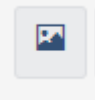
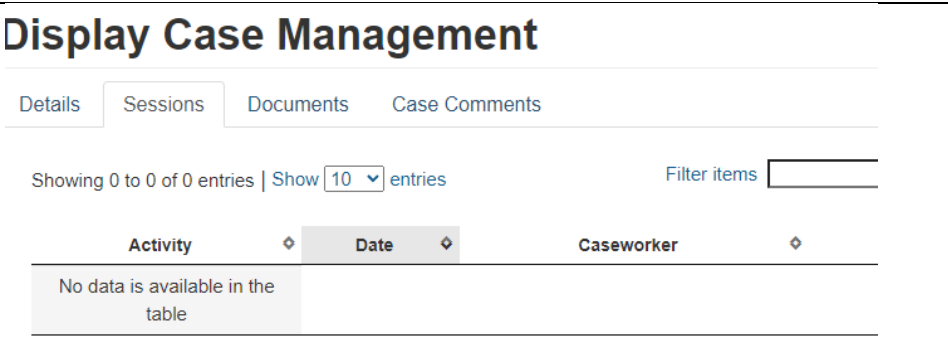
<p>9. In the Program field, enter the program that is funding the services provided to client (Reaching Homes or OSSI).</p>	
<p>10. Pick the Contributing Factors that are related to the main Goal.</p>	
<p>*Note – Contributing Factors will only appear in the dropdown box if they have been pre-entered in the Various Factors option, see example below:</p>	
<p>11. Various Factors (Contributing Factors) option, navigate to Client Information drop down list > Various Factors > + Add Contributing Factor</p>	<h3 style="text-align: center;">Client - Various Factors</h3> 
<p>*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.</p>	

12. Click Save	<div style="border: 1px solid #ccc; padding: 10px;"> <h3 style="margin: 0;">Client - Add Case Management</h3> <div style="margin-top: 10px;"> <p>Caseworker <input style="width: 100%;" type="text" value="Manager, Case"/> x v ★</p> <p>Goal <input style="width: 100%;" type="text" value="Conflict Resolution"/> x v ★</p> <p>Status <input style="width: 100%;" type="text" value="Open"/> x v ★</p> <p>Start Date <input style="width: 150px;" type="text" value="2024-11-14"/> <input style="width: 100px;" type="text" value="8:35 AM"/> 📅 ⌚ ★</p> <p>Target Date <input style="width: 150px;" type="text"/> <input style="width: 100px;" type="text"/> 📅</p> <p>Program <input style="width: 100%;" type="text" value="x OSSI Funded"/> + -</p> <p>Referred from <input style="width: 100%;" type="text" value="Select an option"/> v</p> <p>Referred to <input style="width: 100%;" type="text" value="Select an option"/> v</p> <p>Contributing Factors <input style="width: 100%;" type="text" value="x Anger Management"/> + -</p> <p style="text-align: center; margin-top: 10px;"> <input style="background-color: #90EE90; border: 1px solid #ccc; padding: 5px 10px;" type="button" value="Save"/> <input style="border: 1px solid #ccc; padding: 5px 10px;" type="button" value="Cancel"/> </p> </div> </div>
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- The Process presented above is one of 2 ways to create a Case Management profile in HIFIS. Another quick process to add a Case Management profile is navigating to Front Desk > Case Management > + Add Case.
- Once the Goal for case management has been inputted, activities performed to meet the goal can be entered as a **Case Session**.

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


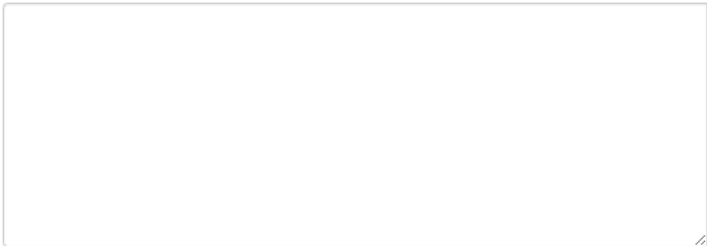


2. Procedure to Add a Case Session

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

4. From the Client - Add Case Session page, fill in all required fields marked with a **red star** and any additional/optional fields to fill in on behalf of client:

Goal	Conflict Resolution	
Activity	Select an option	★
Description	<div style="border: 1px solid #ccc; height: 100px;"></div>	
Date and Time	2024-11-14	9:03 AM ★
Expended Time		
Hours	0	
Minutes	0	
Caseworker	Select an option	★
Responsibility	Select an option	
Agency Involved / Referral	Select an option	
Client Present	<input type="checkbox"/> No	
Family Present	<input type="checkbox"/> No	


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

<p>5. Select what the Activity was</p>	<p>Activity</p> <p>Select an option </p> <p>Description</p> <p>Accompaniment to Appointments / Services</p> <p>Advocacy</p> <p>Assessment</p> <p>Assistance with Decision Making</p> <p>Case Conferencing / Consultation</p>
<p>6. Input any comments or details towards the activity (optional)</p>	<p>Description</p> <p></p>
<p>7. Select the Case Worker that was involved in the Activity</p>	<p>Caseworker</p> <p>Select an option </p>
<p>8. Click Save</p>	<p></p>
<p><i>*Note – Once the Session has been saved to a Case Management record, the goal cannot be changed.</i></p>	

3. Procedure to Add a Document

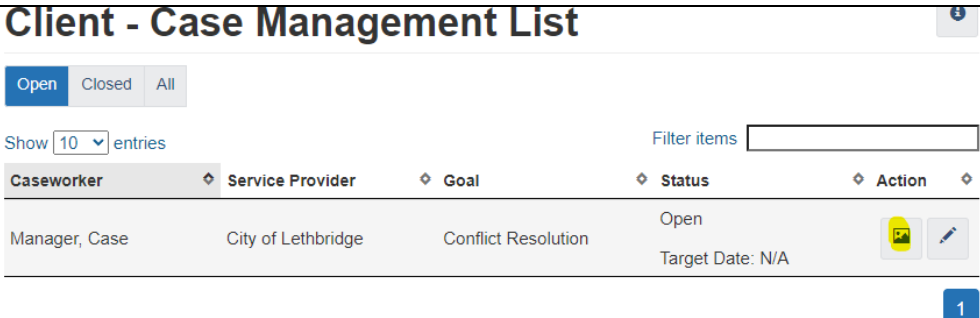
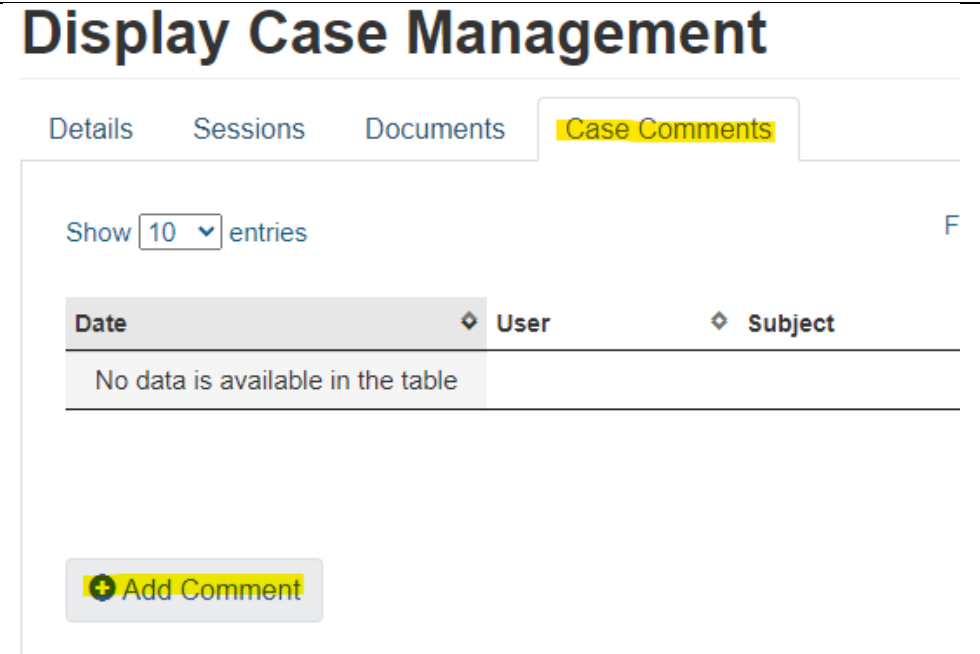
*Please Note - Service providers should only upload documents to HIFIS that help clients navigate the system of supports. This information must be uploaded to modules in the **Client Management** drop down menu of the application (with the exception of consent forms, which can be uploaded on the Client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

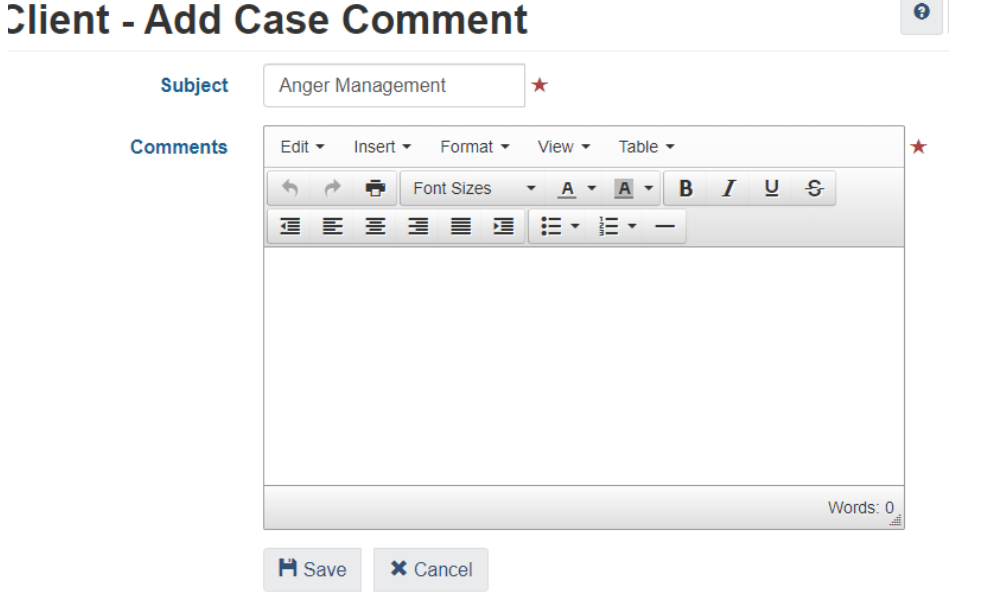

- Housing Placements > Housing Placement Details > Documents
- Housing Loss Prevention > Housing Loss Prevention Details > Documents
- Incidents > Add Incidents > Attachments

Action	
<p>1. From the Client Management drop down list, click on Case Management and navigate/click on Display Case Management Icon</p>	

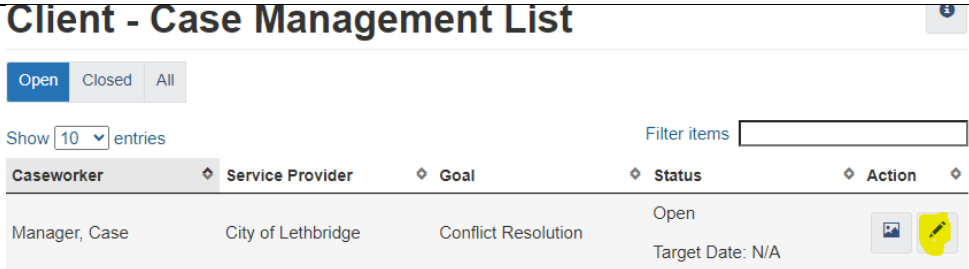
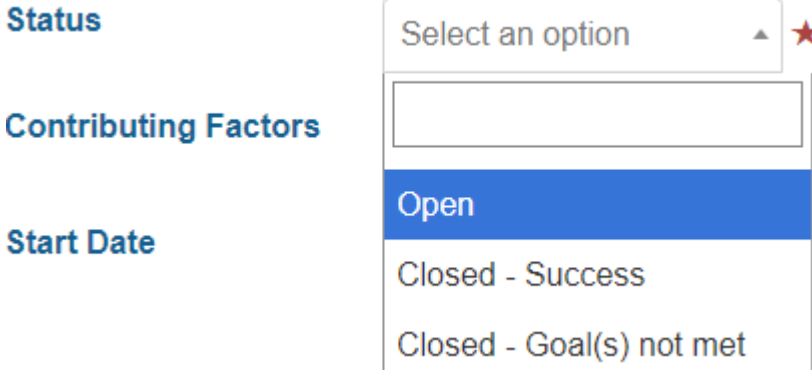


<p>2. On the Display Case Management page, navigate and click on Documents > Select a file / Browse to find the documents you want to upload to this case.</p>	<h3 style="text-align: center;">Display Case Management</h3> <div style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: center;"> Details Sessions Documents Case Comments </p> <hr/> <p> Show 10 ▼ entries Filter ite </p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p style="margin: 0;">Existing Attachments ⬵ Actions</p> <hr/> <p style="text-align: center; color: #666;">No data is available in the table</p> </div> <p> Documents Select a file... Browse ★ </p> <p style="text-align: center; margin-top: 20px;"> 🏠 Save </p> </div>
<p>3. Click Save</p>	<div style="border: 1px solid #ccc; padding: 10px; text-align: center;"> 🏠 Save </div>
<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.</p>	
<p><i>*Note – Users can multi-select files for a maximum of 5MB per upload. Not all file types are permitted (e.g. pptx).</i></p>	

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>2. On the Display Case Management page, navigate and click on Case Comments > + Add Comment</p>	

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

5. Procedure to close a Goal

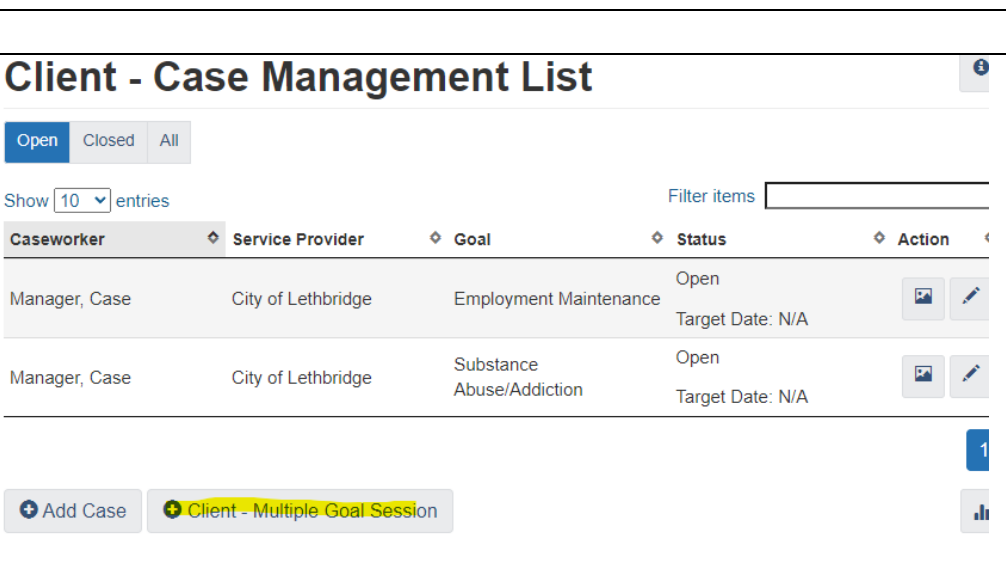
<p>Action</p> <p>1. Navigate to client record/profile and navigate to Client Management drop down list and select Case Management, select Edit icon.</p>	
<p>2. On the Client - Edit Case Management > Details page, navigate down to Status drop down field.</p>	
<p>3. Change Status field to Closed – Success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

<p>5. Navigate back to Case Management main page – Client Management > Case Management > Client Case Management List to review Open, closed or All entries.</p>	 <p>Client - Case Management List</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>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	
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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.***

<p>Action</p> <p>1. From the Client – Details main page, navigate to Client Management > Case Management > + Client - Multiple Goal Session</p>	 <p>Client - Case Management List</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

<p>4. Enter the sessions Activity and if applicable, enter a description of Activity.</p>	<p>Activity Select an option </p> <p>Description <input type="text"/></p> <ul style="list-style-type: none"> Accompaniment to Appointments / Services Advocacy Assessment Assistance with Decision Making Case Conferencing / Consultation Case Planning <p>and Time</p>
<p>5. Confirm the Start Date and Time of the Activity, and if needed, you can change the date/time manually.</p>	<p>Date and Time 2024-11-15  9:47 AM  </p>

<p>6. Indicate, in hours and minutes, how much time was spent on the session (Goal) in the Expended Hours and Expended Minutes fields. This includes the option to split time equally between goals.</p>	<p style="text-align: center;">Expended Time - Total</p> <p>Hours <input type="text" value="0"/></p> <p>Minutes <input type="text" value="0"/></p> <p><input type="checkbox"/> Split time equally between goals</p> <p>Expended Time - "Employment Maintenance - Manager, Case"</p> <p>Hours <input type="text" value="0"/></p> <p>Minutes <input type="text" value="0"/></p> <p>Expended Time - "Substance Abuse/Addiction - Manager, Case"</p> <p>Hours <input type="text" value="0"/></p> <p>Minutes <input type="text" value="0"/></p>
<p>7. Select the Caseworker that was assigned to the sessions and if applicable, the individual who was responsible for the session (either Client or Caseworker).</p>	<p>Caseworker <input style="float: right; text-align: right;" type="text" value="Manager, Case"/> x ▼ ★</p> <p>Responsibility <input style="float: right; text-align: right;" type="text" value="Select an option"/> ▼</p>

<p>8. If applicable, select the Agency or Referral Involved with the case session. This includes indicating if the client and/or family were present for session.</p>	<p>Agency Involved / Referral <input type="text" value="Select an option"/></p> <p>Client Present <input type="checkbox"/> <input checked="" type="checkbox"/> No</p> <p>Family Present <input type="checkbox"/> <input checked="" type="checkbox"/> 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.

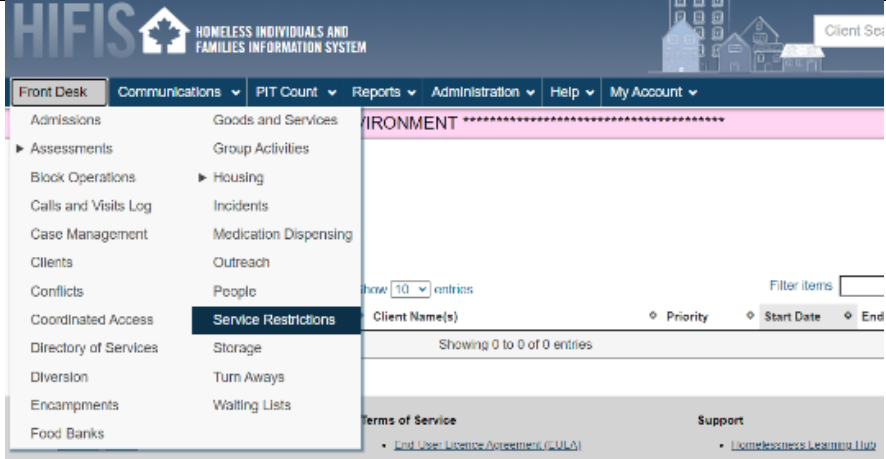


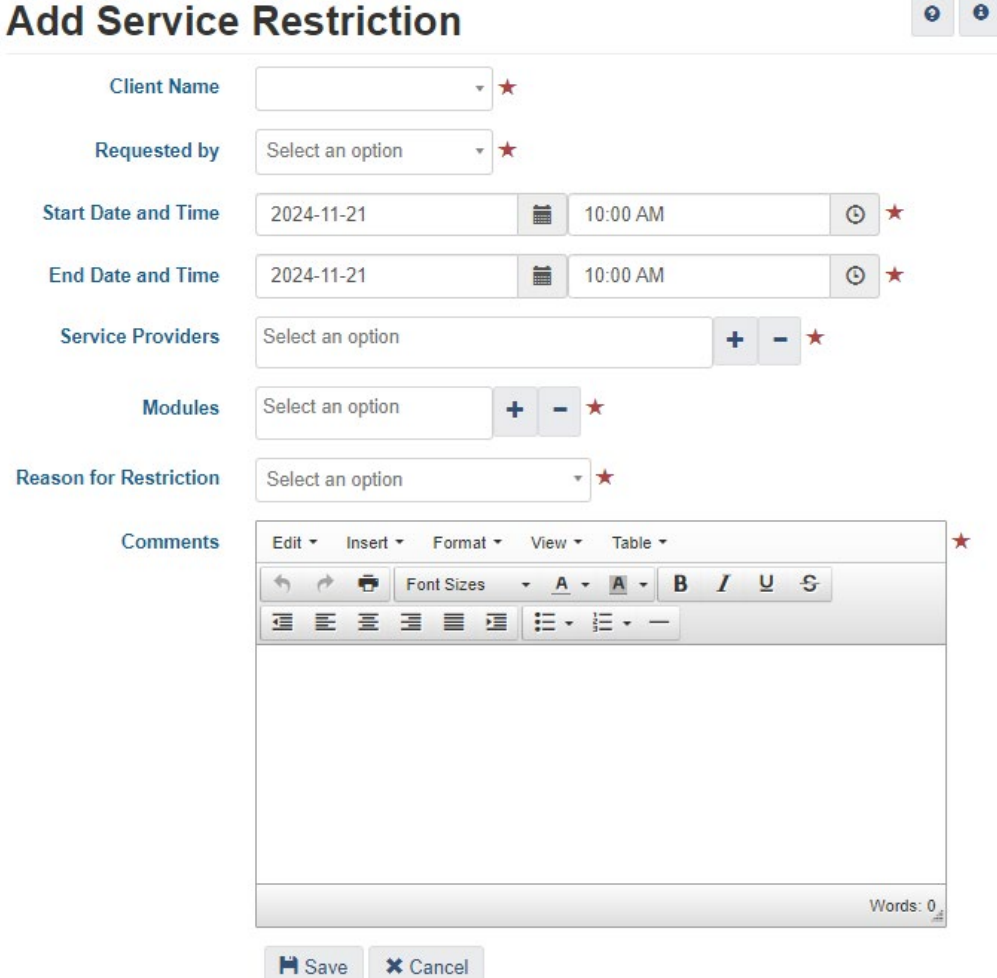
Service Restrictions

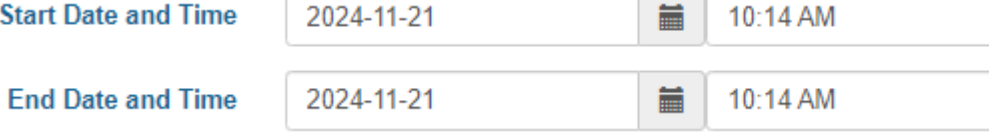

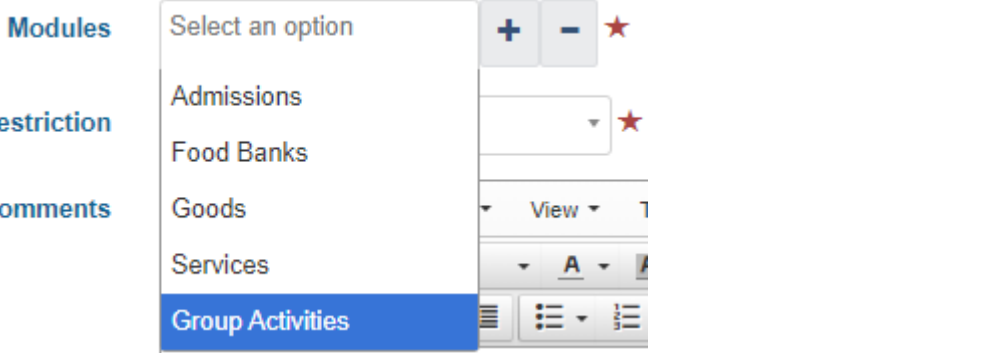
The Service Restrictions List shows all service restrictions for a client for a given period of time.

*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>2. From the Service Restrictions</p>	

<p>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>Add Service Restriction</p> <p>Client Name <input type="text"/> ★</p> <p>Requested by <input type="text" value="Select an option"/> ★</p> <p>Start Date and Time <input type="text" value="2024-11-21"/> <input type="text" value="10:00 AM"/> ★</p> <p>End Date and Time <input type="text" value="2024-11-21"/> <input type="text" value="10:00 AM"/> ★</p> <p>Service Providers <input type="text" value="Select an option"/> + - ★</p> <p>Modules <input type="text" value="Select an option"/> + - ★</p> <p>Reason for Restriction <input type="text" value="Select an option"/> ★</p> <p>Comments <div style="border: 1px solid #ccc; padding: 5px;"> Edit Insert Format View Table Font Sizes A A B I U Words: 0 </div> ★</p> <p>Save Cancel</p>
<p>4. Search and select the client in client Name field</p>	<p>Client Name <input type="text"/> ★</p>
<p>5. Enter who requested the Service</p>	<p>Requested by <input type="text" value="Select an option"/> ★</p>

<p>Restriction in the Requested By field.</p>	
<p>6. Enter the dates for when the service restriction starts and ends for the client.</p>	
<p>7. Select the Service Providers for which the Service Restriction applies to.</p>	
<p>8. Enter the Modules for which the Service Restriction applies to.</p>	
<p>*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.</p>	
<p>*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:</p>	

Client Has Active Service Restrictions

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.

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

Edit ▾ Insert ▾ Format ▾ View ▾ Table ▾ ★

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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


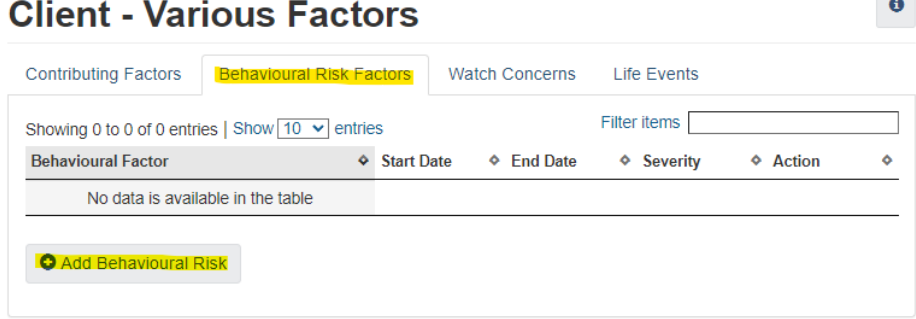
Consent Type	Explicit
Full Name	Bruce Banner
Gender	Male
Alias	
File Number	0000000006
Date of Birth	1962-05-12
Date of Birth Known	Yes
Approximate Age	62
Information Verified	Yes
Country of Birth	Canada
Province/Territory of Birth	N/A

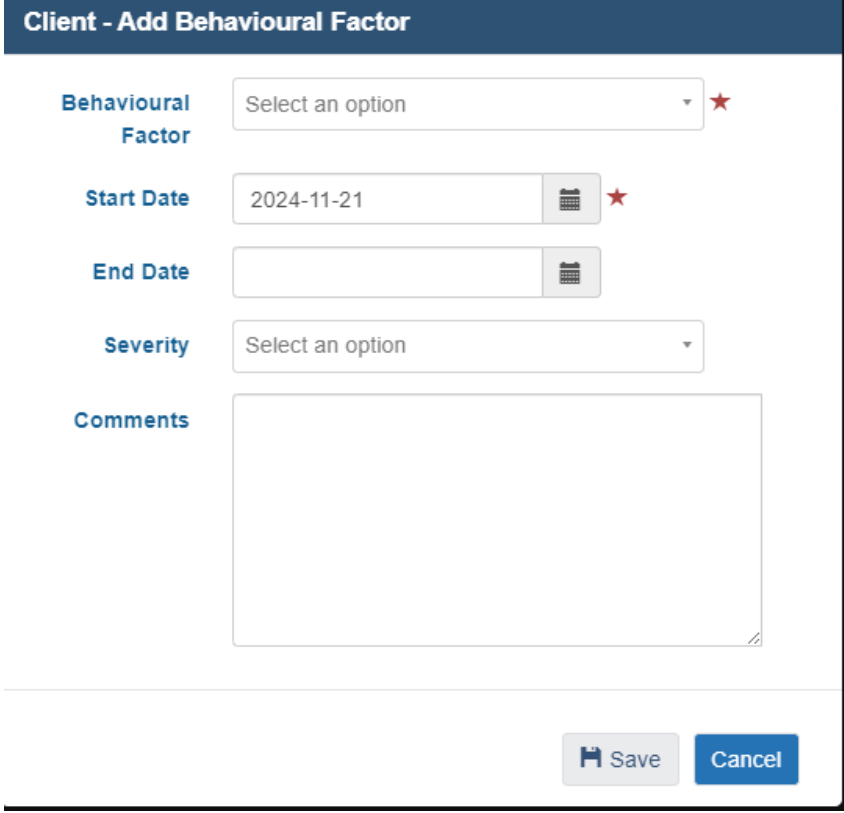
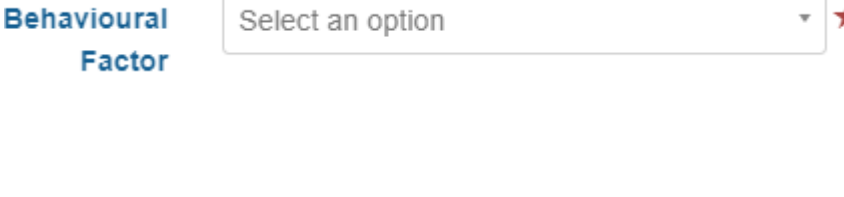
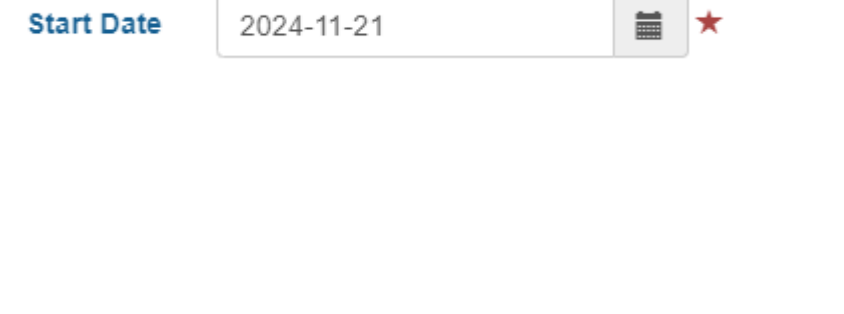
Behavioural Risk Factor



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	
<p>1. Navigate to Front Desk and select the Clients option, search up existing client in system.</p>	

<p>2. From the Client – Details pages, navigate to Client Information and select Various Factors.</p>	 <p>The screenshot shows a sidebar menu titled 'Client Information' with a dropdown arrow. The menu items are: Client Details, Consent, Contacts, Documents, Education, Family, Financial Profile, Health Information, Housing History, Identification, Indigenous Status, Various Factors (highlighted in yellow), Vehicles, and Veteran.</p>
<p>3. From the Client-Variou Factors page, select the Behavioural Risk Factors tab and select the + Add Behavioural Risk button.</p>	 <p>The screenshot shows the 'Client - Various Factors' page. It has tabs for 'Contributing Factors', 'Behavioural Risk Factors' (selected and highlighted in yellow), 'Watch Concerns', and 'Life Events'. Below the tabs, it says 'Showing 0 to 0 of 0 entries Show 10 entries' and 'Filter items'. A table header is visible with columns: Behavioural Factor, Start Date, End Date, Severity, and Action. The table content is empty, displaying 'No data is available in the table'. At the bottom, there is a '+ Add Behavioural Risk' button highlighted in yellow.</p>

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

<p>7. If applicable, enter the End Date, Severity of the behavioural factor and any additional comments concerning the behavioural factor (optional).</p>	<div style="display: flex; flex-direction: column;"> <div style="margin-bottom: 10px;"> <p>End Date <input style="width: 150px;" type="text"/> </p> </div> <div style="margin-bottom: 10px;"> <p>Severity Select an option ▼</p> </div> <div> <p>Comments <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div></p> </div> </div>
<p>8. Click Save.</p>	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> Save </div>

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

Client Information ▼

Client Management ▼

Bruce Banner

Client Alerts

Client - Vari

Contributing Factors

Showing 1 to 1 of 1 entries:

- Behavioural Factor
- Drugs

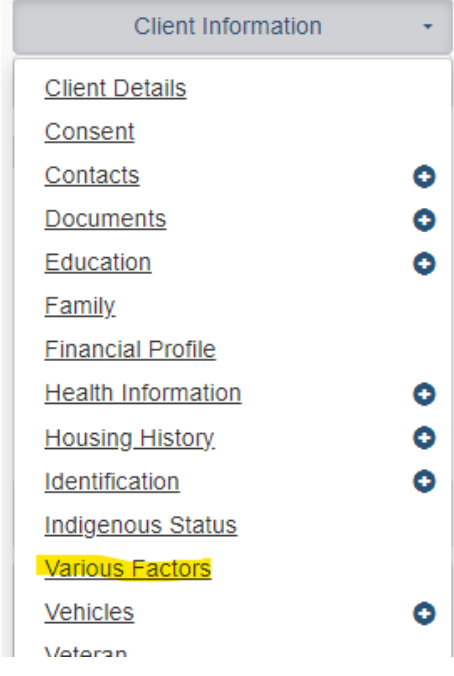
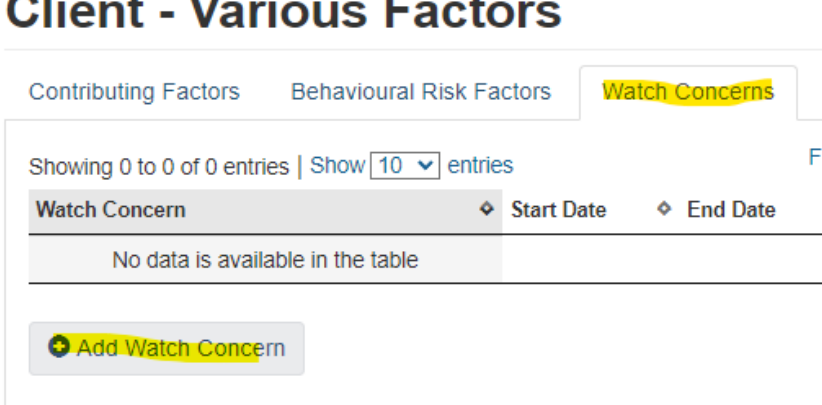
+ Add Behavioural Ri

Watch Concerns




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

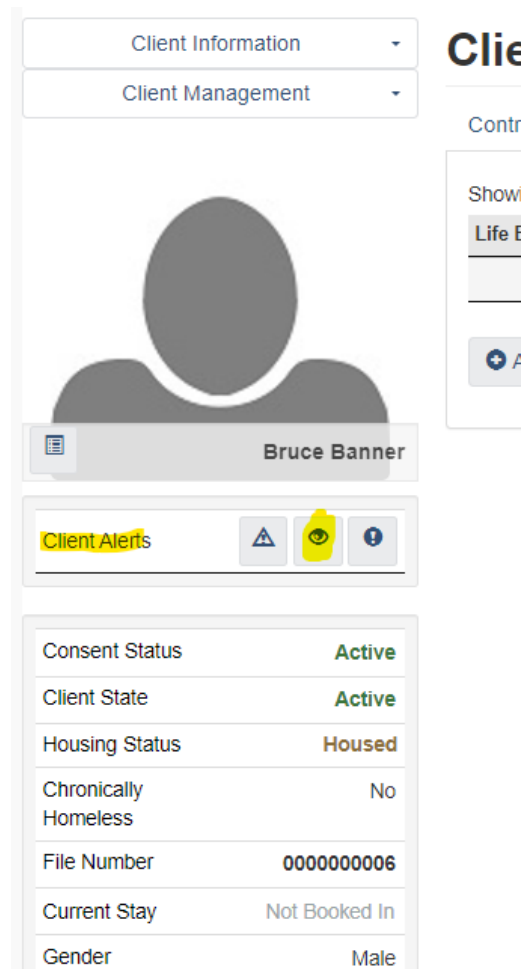
Action	
<p>1. From the HIFIS main page, navigate to the Front Desk drop down menu and select the clients options, and perform the existing client search.</p>	<p>The screenshot shows the 'FAMILIES INFORMATION SYSTEM' interface. The 'Front Desk' menu is open, displaying a list of options. The 'Clients' 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>

<p>2. From the Client- Details under Vitals page, select Client Information and click on Various factors.</p>	 <p>The screenshot shows a dropdown menu titled 'Client Information'. The menu items are: Client Details, Consent, Contacts, Documents, Education, Family, Financial Profile, Health Information, Housing History, Identification, Indigenous Status, Various Factors (highlighted in yellow), Vehicles, and Veteran. Each item has a plus sign icon to its right.</p>
<p>3. Under Client – Various Factors page, navigate to Watch Concerns tab and click on + Add Watch Concern.</p>	 <p>The screenshot shows the 'Client - Various Factors' page. At the top, there are three tabs: 'Contributing Factors', 'Behavioural Risk Factors', and Watch Concerns (highlighted in yellow). Below the tabs, it says 'Showing 0 to 0 of 0 entries Show 10 entries'. There is a table header with columns: 'Watch Concern', 'Start Date', and 'End Date'. The table body contains the text 'No data is available in the table'. At the bottom, there is a button labeled '+ Add Watch Concern' (highlighted in yellow).</p>



<p>4. In the Client – Add Watch Concern page, fill in the required fields.</p>	<div style="border: 1px solid black; padding: 10px;"> <h3 style="background-color: #1a3d4d; color: white; padding: 5px;">Client - Add Watch Concern</h3> <p>Watch Concern <input type="text" value="Select an option"/> ★</p> <p>Start Date <input type="text" value="2024-11-21"/> </p> <p>End Date <input type="text" value=""/> </p> <p>Severity <input type="text" value="Select an option"/></p> <p>Comments <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div></p> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </div> </div>
<p>5. Select the Watch Concern pertaining to client.</p>	<div style="border: 1px solid black; padding: 10px;"> <p>Watch Concern <input type="text" value="Select an option"/> ★</p> </div>
<p>6. If applicable, fill in the optional fields;</p> <ul style="list-style-type: none"> Start Date End Date Severity of the Watch Concern and; Additional Comments concerning the 	<div style="border: 1px solid black; padding: 10px;"> <p>Start Date <input type="text" value="2024-11-21"/> </p> <p>End Date <input type="text" value=""/> </p> <p>Severity <input type="text" value="Select an option"/></p> <p>Comments <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div></p> </div>

Watch Concern	
7. Click Save.	

***Note – The active Watch Concern Alert will now show up next to Client Alerts from client profile/record:**



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

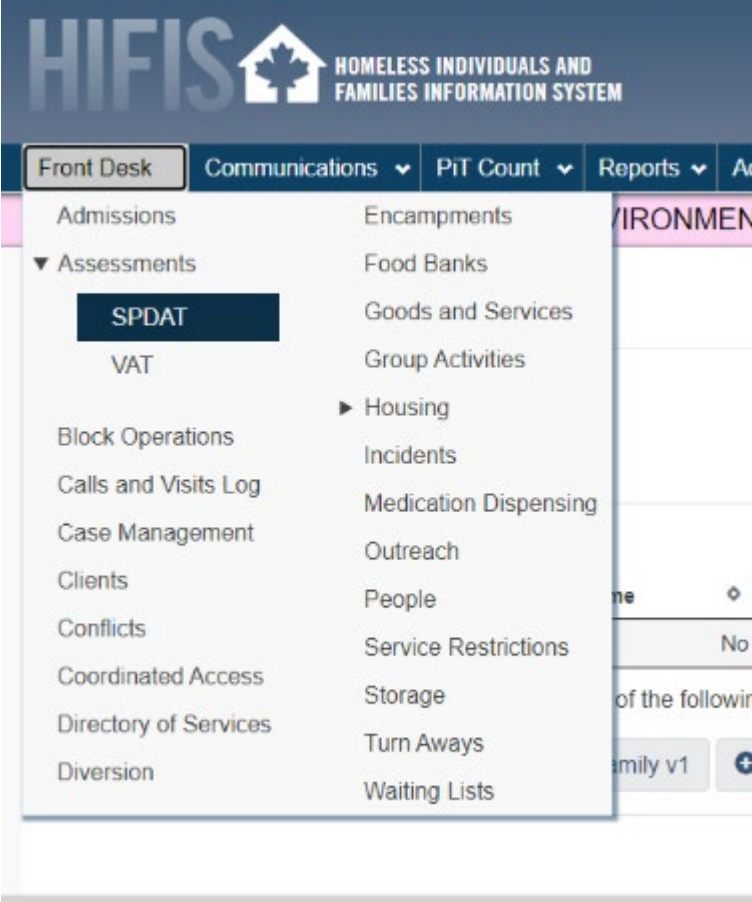
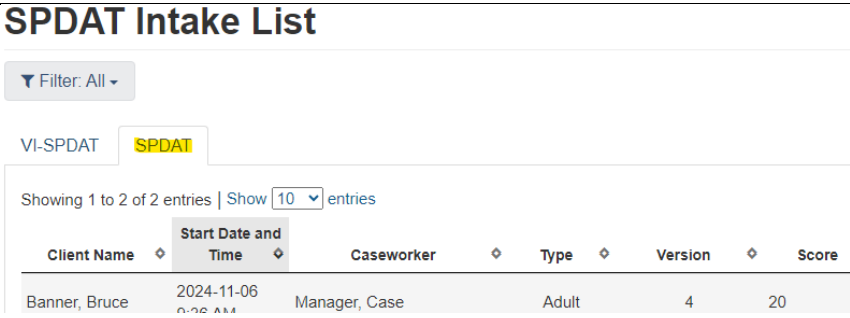
Client List								
All Active Inactive Deceased Archived								
Showing 1 to 1 of 1 entries Show 10 entries								
ID	Full Name	Gender	Alias	Date of Birth	Age	File Number	Housing Status	Action
6	Banner, Bruce	Male		1962-05-12	62	0000000006	Housed	 

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.

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

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 is a 'Front Desk' dropdown menu that is open, showing various options. The 'Assessments' option is selected, and a sub-menu is displayed with 'SPDAT' highlighted in a dark blue box. Other options in the sub-menu include VAT, Block Operations, Calls and Visits Log, Case Management, Clients, Conflicts, Coordinated Access, Directory of Services, and Diversion. The main menu also includes Admissions, Encampments, Food Banks, Goods and Services, Group Activities, Housing, Incidents, Medication Dispensing, Outreach, People, Service Restrictions, Storage, Turn Aways, and Waiting Lists.</p>												
<p>2. From the SPDAT Intake List page, select the SPDAT tab.</p>	 <p>The screenshot shows the 'SPDAT Intake List' page. At the top, there is a filter dropdown set to 'All'. Below this, there are two tabs: 'VI-SPDAT' and 'SPDAT', with 'SPDAT' being the active tab. The page indicates 'Showing 1 to 2 of 2 entries Show 10 entries'. A table displays 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> </tr> </thead> <tbody> <tr> <td>Banner, Bruce</td> <td>2024-11-06 9:26 AM</td> <td>Manager, Case</td> <td>Adult</td> <td>4</td> <td>20</td> </tr> </tbody> </table>	Client Name	Start Date and Time	Caseworker	Type	Version	Score	Banner, Bruce	2024-11-06 9:26 AM	Manager, Case	Adult	4	20
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


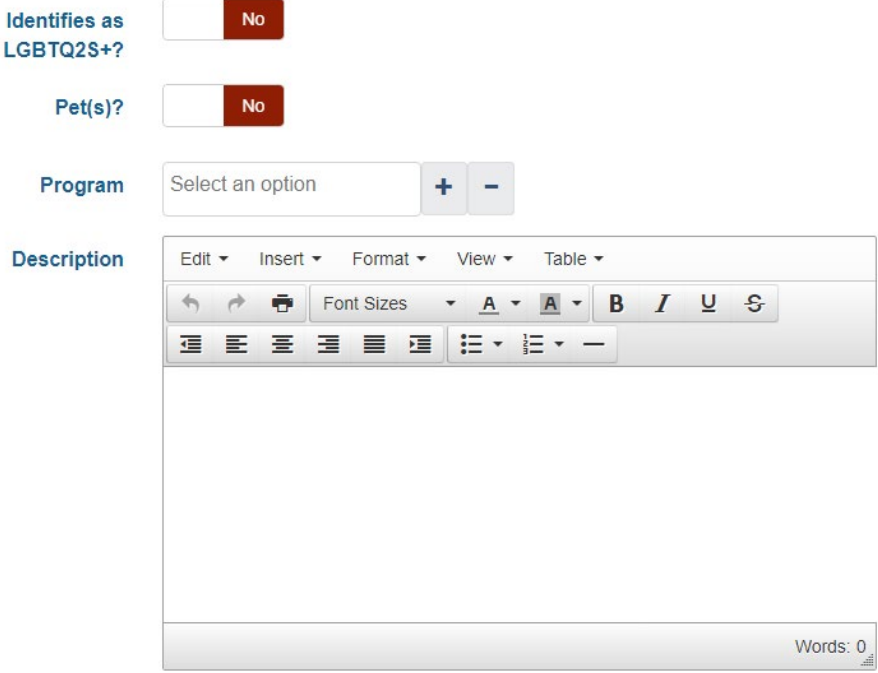
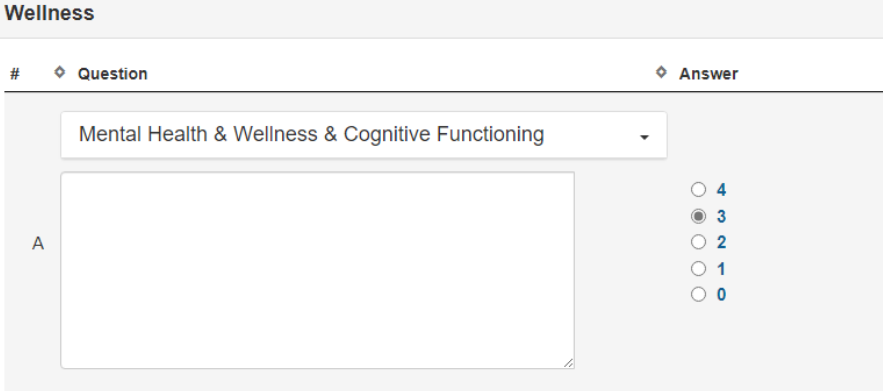
+ Family v1

+ Family v2

+ Youth v1

<p>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.</p>	<div data-bbox="483 224 1414 1276"> <h3>Add SPDAT - Single Adult Version 4 Intake</h3> <p>Client Name <input type="text"/> ★</p> <p>Caseworker <input type="text" value="Select an option"/> ★</p> <p>Start Date and Time <input type="text" value="2024-11-25"/> <input type="text" value="10:17 AM"/> ★</p> <p>Assessment Period <input type="text" value="Select an option"/> ★</p> <p>Pre-Screen Period <input type="text" value="Select an option"/> ★</p> <p>Consent <input type="checkbox"/> <input checked="" type="checkbox"/> No</p> <p>Identifies as LGBTQ2S+? <input type="checkbox"/> <input checked="" type="checkbox"/> No</p> <p>Pet(s)? <input type="checkbox"/> <input checked="" type="checkbox"/> No</p> <p>Program <input type="text" value="Select an option"/> + -</p> <p>Description <div data-bbox="737 919 1377 1268"> <p>Edit Insert Format View Table</p> <p>Font Sizes A A B / U</p> </div></p> </div>
<p>5. Under Client Name, type to search for existing client, then select the client from search results.</p>	<div data-bbox="483 1276 1414 1570"> <p>Client Name <input type="text"/> ★</p> </div>
<p>6. Select the caseworker conducting the assessment with cline from drop down list.</p>	<div data-bbox="483 1570 1414 1822"> <p>Caseworker <input type="text" value="Select an option"/> ★</p> </div>

<p>7. Confirm the Start Date and Time of the assessment taking place.</p>	<p>Start Date and Time 2024-11-25 10:17 AM</p>
<p>8. Select the Assessment Period by which period this assessment for the client is being conducted:</p> <ul style="list-style-type: none"> • 1st Assessment • Move-In • 30 Day Scores • 90 Day Scores • Etc. 	<p>Assessment Period</p> <p>Select an option</p> <ul style="list-style-type: none"> 1st Assessment Move-In 30 Day Scores 90 Day Scores 180 Day Scores 270 Day Scores
<p>9. Select the Assessment Pre-Screen Period to indicate if the assessment has been completed before (first time, second time, etc.)</p>	<p>Pre-Screen Period</p> <p>Select an option</p> <ul style="list-style-type: none"> First Second Third Fourth Fifth Nth

<p>10. Indicate whether the client has given their Consent to perform assessment.</p>	
<p>11. If applicable, fill in remaining optional fields.</p> <p>In the Description field, if applicable, add any additional information concerning the SPDAT assessment in text box.</p>	
<p align="center">*Note – From this point on, the caseworker and client can now proceed with answering and completing the SPDAT Assessment.</p>	
<p>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.</p>	

***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
A	<p>Mental Health & Wellness & Cognitive Functioning</p> <ul style="list-style-type: none"> • 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? 	<p> <input type="radio"/> 4 <input checked="" type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1 <input type="radio"/> 0 </p>

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.

The screenshot displays a 'Progress Panel' on the left and a 'Mental Health & Wellness & Co' section on the right. The 'Progress Panel' lists several categories with their completion status:

Category	Progress	Answered
Housing History	0%	0
Risks	0%	0
Socialization and Daily Functions	0%	0
Wellness	20%	1
Presenting Needs	NaN%	0
Vulnerabilities and Housing Support Needs	NaN%	0

The 'Mental Health & Wellness & Co' section is expanded, showing a list of questions:

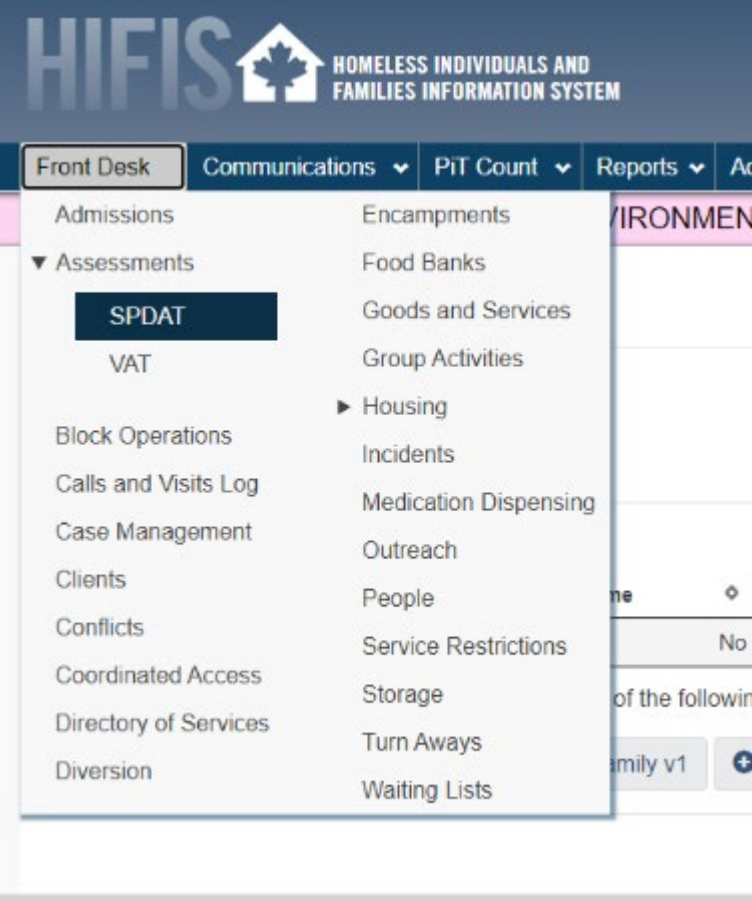
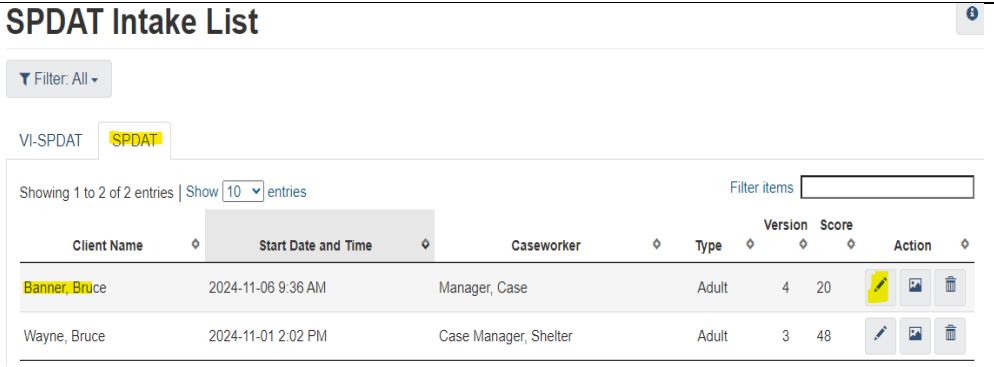
- Have you ever received any hel
- Do you feel you are getting all tl health or stress?
- Has a doctor ever prescribed yc depression or anything like that
- Have you ever gone to an emer because you weren't feeling 10l
- Do you have trouble learning or
- Have you ever had testing done
- Do you know if, 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

Below the questions, there are two input fields labeled 'A' and 'B'. Field 'A' is empty, and field 'B' is partially visible.

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' 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 Admissions, Encampments, Food Banks, Goods and Services, Group Activities, Housing, Incidents, Medication Dispensing, Outreach, People, Service Restrictions, Storage, Turn Aways, and Waiting Lists.</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. It features a filter dropdown set to 'All', a 'VI-SPDAT' tab, and a 'SPDAT' tab. Below the tabs, it indicates 'Showing 1 to 2 of 2 entries' and a 'Show 10 entries' dropdown. A table lists 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, Briice</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, Briice	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, Briice	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]																

<p>3. From the Edit Intake page, you can edit existing information or add any additional information missed.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <div style="text-align: right; margin-bottom: 10px;"> Programs </div> <h2 style="margin: 0;">Edit SPDAT - Single Adult Version 4 Intake</h2> <hr/> <div style="margin-bottom: 10px;"> <p>Client Name ★</p> <div style="border: 1px solid #ccc; padding: 2px;">Banner, Bruce</div> </div> <div style="margin-bottom: 10px;"> <p>Caseworker ★</p> <div style="border: 1px solid #ccc; padding: 2px;">Manager, Case</div> </div> <div style="margin-bottom: 10px;"> <p>Start Date and Time ★</p> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 5px;">2024-11-06</div> <div style="margin-right: 5px;">📅</div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 5px;">9:36 AM</div> <div style="margin-right: 5px;">🕒</div> <div style="margin-left: auto;">★</div> </div> </div> <div style="margin-bottom: 10px;"> <p>Assessment Period ★</p> <div style="border: 1px solid #ccc; padding: 2px;">1st Assessment</div> </div> <div style="margin-bottom: 10px;"> <p>Pre-Screen Period ★</p> <div style="border: 1px solid #ccc; padding: 2px;">First</div> </div> <div style="margin-bottom: 10px;"> <p>Consent</p> <div style="display: flex; align-items: center;"> <div style="width: 20px; height: 15px; background-color: #0056b3; margin-right: 5px;"></div> <div style="border: 1px solid #ccc; padding: 2px;">Yes</div> </div> </div> <div style="margin-bottom: 10px;"> <p>Identifies as LGBTQ2S+?</p> <div style="display: flex; align-items: center;"> <div style="width: 20px; height: 15px; background-color: #ccc; margin-right: 5px;"></div> <div style="border: 1px solid #ccc; padding: 2px;">No</div> </div> </div> <div style="margin-bottom: 10px;"> <p>Pet(s)?</p> <div style="display: flex; align-items: center;"> <div style="width: 20px; height: 15px; background-color: #ccc; margin-right: 5px;"></div> <div style="border: 1px solid #ccc; padding: 2px;">No</div> </div> </div> <div style="margin-bottom: 10px;"> <p>Program</p> <div style="border: 1px solid #ccc; padding: 2px;">OSSI Funded</div> </div> <div style="margin-bottom: 10px;"> <p>Description</p> <div style="border: 1px solid #ccc; padding: 2px;"> Edit Insert Format View Table </div> </div> </div>
<p><i>*Note – On the Edit Intake Page, you can also edit the existing scores inputted previously or return where you left off on the Assessment.</i></p>	
<p>4. Click Save.</p>	<div style="border: 1px solid #ccc; padding: 10px; text-align: center;"> <div style="background-color: #d9d9d9; padding: 5px 15px; display: inline-block; border-radius: 5px;"> Save </div> </div>