



Homeless Individuals and Families Information System (HIFIS) 4.0

Post-Conversion Cleanup Activities

March 2018
Version 1.0

1 Post-Conversion Cleanup Considerations and Activities for Sites

This section lists data clean-up activities for sites to perform for data converted from HSS to HIFIS. It also includes data conversion implications that may not require changes but which may be useful for sites to know.

1.1 HSS to HIFIS

HSS	HIFIS
Shelter Stays →	Admissions
Case Histories →	Case Management
Case Planning →	Case Management
Housing →	Housing Placements
Special Notes →	Client Vital > Comments

1.2 Shelter Stays

Item	Activity	Description
1	Assign clients to correct beds.	<p>The data conversion from HSS to HIFIS will randomly assigns client to beds. Clients booked-in will need to be assigned to their correct beds (Front Desk > Admissions > Manage Rooms and Beds).</p> <p>Note: If all beds have been assigned and the user needs to perform a reassignment of beds, the user must choose a client to book out first. The steps for booking out a client are:</p> <ol style="list-style-type: none">1. Go to Admissions, choose and record a client to book out.2. Move assignments to beds in the Admission module so that the rest of the beds have been properly assigned.3. Book the client back in (to the correct bed assignment).

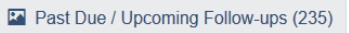
1.3 Case Histories

There are no post-conversion cleanup activities required. Case History data is converted as a Session in a Case Management record and is intended only for historical purposes. It is not intended to be modified or updated in HIFIS once it has been converted. If a user edits a converted Case Management record a valid caseworker will be required to save the record, which could over-write the historical worker's name that was converted.

1.4 Case Planning

Item	Activity	Description
1	Update Status of Case Management record, if desired.	<p>All case plans will be converted to Case Management records with the status of 'Closed – Conversion'.</p> <p>If desired, review converted Case Management records:</p> <ul style="list-style-type: none"> • If you know the goal of the case plan was met, set the status of the Case Management record to 'Closed – Success'. • If you intend to use the record on an ongoing basis and add new information to it, set the status to 'Open'. <p>Note: Case Plans with 'Closed – Conversion' status will not appear in the list when the filter is set to Open or Closed, but will appear when All is selected.</p>
2	Update Caseworker on Case Management record, if record is edited.	<p>Case Management records created by the conversion from HSS to HIFIS may include Caseworkers that don't exist in HIFIS.</p> <p>If the record is edited a valid Caseworker name will be required.</p>
3	Remove Programs on Case Management records if your site is funded for multiple programs.	<p>Converted Case Management records may be associated with multiple programs (e.g. HOP, AHOP, HPP, ESP, and/or IOM).</p> <p>In HIFIS, each Case Management record should be associated with only one program. If you intend to use the Case Management record to record activities going forward, remove any additional programs, leaving only the primary program which is funding the case management activities.</p>

1.5 Housing

Item	Activity	Description
1	Remove or update the Next Scheduled Follow-up Date on Housing Placement (HP) and Housing Loss Prevention (HLP) records.	<p>Housing Placements and/or Housing Loss Prevention records with overdue Next Scheduled Follow-up Dates are displayed when the following button is selected:  .</p> <p>Remove or update the Next Scheduled Follow-up Date as required.</p>
2	Update address information in the client's Housing History if record is edited.	<p>Address information may need to be updated in the Housing History module of client records (Client Information).</p> <p>HSS only had one address field, but HIFIS has separate fields for City, Province and Country. HSS data was converted to Address line 1 in HIFIS, City was defaulted to that of the Service Provider, Province to BC, and Country to Canada. Users should edit default details as required when incorrect information is discovered.</p>
3	Add valid Caseworker to Housing Placement (HP) or Housing Loss Prevention (HLP) records if record is edited.	<p>Housing Placement (HP) or Housing Loss Prevention (HLP) records created by the conversion from HSS to HIFIS may include Caseworkers that don't exist in HIFIS.</p> <p>If the record is edited a valid Caseworker name will be required.</p>

1.6 Special Notes

Special Notes from HSS will be converted to the Comments tab of the Client Vitals module in HIFIS as a non-shareable record, which means only the site which created the Special Note in HSS will be able to view the record and/or edit the note. The record will need to be edited once it is no longer applicable.