HIFIS 4.0 Report Guide

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Contents

This Report Guide contains a list of all reports in HIFIS, however not all users have access to all reports described in this Guide. Access to reports is dependant upon a user's rights.

Reports Start Date should be from the date a site started using HIFIS or after. Reports run with a Start Date prior to a site using HIFIS may not include all relevant client data prior to such date, except for sites in a Private Cluster where all clients with any activity on or after April 1, 2014 were converted to HIFIS.

Data in reports is based on what is entered in HIFIS at the time the report is run. For reports where a user can specify the date range, the data could be different from one time to the next for the same specified date range since HIFIS is a live application and changes can be made to a client's record in the future which will impact reporting from the past.

HIFIS Reports

Bed List (Revised)

Description: A list of rooms and beds and the name of the client booked into each bed on the date specified.

Purpose: (Shelter) To determine last bed assigned a client on any given day and to determine clients' current length of stay at the shelter.

Comments: There are currently no columns which require further explanation.

Booked-in Client List

Description: Clients booked in during the reporting period, with room and bed, age, book-in/out dates and length of stay. Multiple rows will exist if the client changes beds during the reporting period.

Purpose: (Shelter) To view the bed history of all clients that were booked into the shelter during the reporting period. For the clients listed, their entire stay, from book-in until book-out is displayed; not just the portion of the stay within selected date range.

Comments: There are currently no columns which require further explanation.

Custom Reports

Client Served

Is a concept used in the following reports and include any of records listed below:

Reports: Audit – Activity Review by Site

Audit – Clients Not Served Accessed by Users

Audit – Inactive Clients Accessed by Users

Audit – User Activity Review by Client

Clients Served in Period

Coordinated Access & Assessment

HPP Clients

New Clients

Percentage of Outreach Clients Served who are Housed or Supported to Maintain Existing Housing (*clients whose ONLY services are Subsidy or Shelter Stay records are NOT included*)

Records:

Case Management – Effective on the date of any of the following transactions: case, sessions, document upload, or case comments (i.e. not on-going)

Goods/Services – Effective on the date of the transaction (i.e. not on-going)

Group Activities – Effective on the date of the transaction (i.e. not on-going)

Housing Loss Prevention – on-going until HLP is ended (final follow-up or record still active more than 365 days from service start date)

Housing Placement – on-going until HP is ended (final follow-up; search ended without placement; or placement still active more than 365 days from latest search start date, last placement attempt, or Move-in Date)

Subsidy (for rent) – on-going from Start Date to End Date

Shelter Stay (when applicable) – on-going from Start Date to End Date

VAT – Effective on the date of the transaction (i.e. not on-going)

Audit – Activity Review by Site

Description: A list of all activities performed by all users of a site within the selected date range. The list is displayed in chronological order by activity date and time.

Purpose: (Site Admin) To review/monitor daily system activity of users and to ensure client records are not being accessed in inappropriate ways (e.g. that users are only accessing a client record as a part of their job duties and not for personal purposes).

Comments: There are currently no columns which require further explanation.

Audit – Clients Not Served Accessed by User

Description: A list of users who, during the selected date range, viewed clients never served by their site(s) and where no subsequent service was recorded by their site(s). Details include clients accessed, dates and times.

Purpose: (BC Housing) To review potential inappropriate access of client records, this report allows a user to identify instances where site users have viewed clients who never received a service from the site.

Comments: There are currently no columns which require further explanation.

Audit – Inactive Clients Accessed by User

Description: A list of users who, during the selected date range, viewed clients who have not received services from the selected site(s) for a selected time period. Details include clients accessed, dates and times.

Purpose: (BC Housing) To review potential inappropriate access of client records, this report allows a user to identify instances where a site user has viewed clients who had not received a service from the site for a selected time period.

Comments:

- 'Months Since Last Served' refers to time or beyond since last served by the selected site. Therefore '6' is inclusive of 12 and 24, and '12' is inclusive of '24'.
- The closer the Start/End Dates to the current date the more effective the report.

Audit – User Activity Review by Client

Description: A list of all activities performed on a selected client's record by any user within the selected date range and site(s). The list is displayed in chronological order by activity date and time.

Purpose: (Site Admin) To review/monitor system activity of users and to ensure client records are not being accessed in inappropriate ways (e.g. that users are only accessing a client record as a part of their job duties and not for personal purposes).

Comments: Attestation must have been attained by the site running the report, otherwise no results will be returned.

Audit - User Rights

Description: A list of active users, their access rights, date of last activity and account locked status. Contact HIFIS Support to de-activate users that no longer require access, change access rights or unlock user accounts.

Purpose: (Site Admin) To ensure active users have the correct access rights and identify any users who should not have site access. Users should have no more rights than needed to perform their roles. Users who have not accessed the site in some time or whose accounts are locked may not require access at all.

Comments: BC Housing users are excluded.

Column Heading	Definition
Template Name	HIFIS access is based on a user's role at the site. A template controls what screens a user sees and if they have read-only or update access to the screens they can see. See the HIFIS Roles document at www.hifisbc.ca for descriptions of each role/template.
Role(s)	All site users must have the role of Staff. Users with the role of Caseworker will be available for selection in the Caseworker drop-list though HIFIS.
Last Date of Access	The date the user last accessed HIFIS. Users who have never accessed HIFIS or have not accessed HIFIS for months should be reviewed and access removed or adjusted accordingly.
Locked Out Date	Users who enter the wrong username/password 5 times will be locked out. Call HIFIS Support to unlock accounts. Users who are locked out should be reviewed and access removed or adjusted accordingly.

Case Management Session Details (selected)

Description: Displays Case Session - Description field content for the last 14 days. Only case goal types of Conversion, Employment, Employment Maintenance, General, Housing Placement, and Obtain ID are included. For privacy reasons please don't print this report.

Purpose: To allow users to extract the content of the Description field within the Case Session Details screen of a Case Management record. The extract is intended to allow users to get an output of the content entered within the Description field of the Case Session Details record (over the past 14 days), for specific goals, without having to individually display or edit each entry.

Comments: Only includes sessions from cases with goals of the following types:

- Conversion – Outreach Case History
- Conversion – Shelter Case History
- Employment
- Employment Maintenance
- General
- Housing Placement
- Obtain ID

Clients Placed or Supported and Remained Housed

Description: A list of clients for a service provider with a HP/HLP in the last 6 to 24 months, indicating if the client remained housed at 6 and 12 months after the Move-in/HLP.

Purpose: For a KPI measure.

Comments: For shelters HLP records are excluded from this report.
The definition of *continued housing* (i.e. remained housed) is the period:

- **From** the move-in date of a HP or the service start date of a HLP (where housing type is NOT homeless)
- **Until** the client is no longer housed, or when the client has a gap of more than 30 days measured from the Move-out date of one address to the Move-in date of the next address (as recorded in the client's HH where housing type = housed)
- **Any periods of homelessness or unknown housing statuses where the gap is 30 days or less is considered part of the same continued housing period**

Clients Served in Period

Description: An aggregate count of clients served during the specified period by Gender and Age Groups.

Purpose: To provide counts by Gender and Age Groups, based on definition of "Client Served".

Comments:

- Age is determined by age at time of the first service for the client that falls partially or wholly within the reporting period
- Clients are categorized based on Consent at time of the first service for the client that falls partially or wholly within the reporting period
- See above for who is counted as a "client served".

Column Heading	Definition
Adult LGBTQ2+	Clients 19 years and over with Gender type of Transgender, Transgender-Female, Transgender-Male, Two-Spirit, Non-Binary and Other
Adult Unknown	Clients 19 years and over with Gender type of Unknown
Minor	Clients under 19 years of age whose Consent was Explicit or Declined.
Child	Clients under 19 years of age whose Consent was Inherited.

Coordinated Access & Assessment

Description: A list of clients with selected attributes who are currently homeless or whose homeless status is unknown, for whom a VAT has been completed within the selected date range and entered.

Purpose: To assist in prioritizing homeless candidates for available housing in an area using a coordinated access and assessment model, by generating a "by-name" list.

Comments:

Column Heading	Definition
Current City	City of the client's most current Housing History record or shelter stay
Last Served Date	Date of the client's last recorded transaction with any service provider/site

HPP Clients

Description: HPP clients served within the selected date range, their HPP group(s) and the percentage of clients served that match the site's HPP designated clientele.

Purpose: (HPP Site) To provide the HPP group to which each HPP client is designated (i.e. validate that clients have the correct Contributing Factors) and overall percentage of clients in HPP Designated Group(s). For a KPI measure.

Comments: The effective date of Contributing Factor must be on or before the start date of the HPP transaction. See above for who is counted as a "client served".

Column Heading	Definition
NA	NA = Y means the client has a service transaction designated with HPP funding program but is not identified in any of the five HPP client groups

Housing Follow-ups Due

Description: A list of active Housing Placement and Housing Loss Prevention records created within the selected date range, with details regarding the next housing follow-up due.

Purpose: To provide details of 6 and 12-month follow-ups based on actual Move-in Date and not impacted by follow-ups which may have been incorrectly scheduled or entered. The report also provides details on whether follow-ups are being scheduled correctly.

Comments: Red highlighted columns represent records with a past due follow-up.

Column Heading	Definition
Last Follow-up Completed (months)	Displays *the months entered* in the last completed housing follow-up record. An empty cell indicates a follow-up has not been completed
LFU Months Elapsed	Displays *the actual months* based on the date of the last completed housing follow-up record
Next Scheduled Follow-up Date	Displays the date entered in the next scheduled housing follow-up record. An empty cell indicates a follow-up has not been scheduled
Next SFU Months Elapsed	Displays the actual months of the next scheduled housing follow-up record based on the date entered in the next scheduled housing follow-up record

Housing Placements

Description: Placements where move-in date is within the selected date range.

Purpose: To provide a list of clients housed with selected details.

Comments: Move in Date is taken from the Housing Placement record, whereas the (tenancy) Start Date could have been edited in the Housing History record.

New Clients

Description: A list of new clients (first service transaction) within the selected date range.

Purpose: To allow analysis of selected details for new clients including demographics, consent, housing status and last community lived. Also:

- To ensure personal information was not inadvertently recorded for clients without consent.
- To verify completeness of a client's Housing History.

Comments:

Column Heading	Definition
Anonymous	Client’s consent on the date the report is run. • No: consent is “Explicit” or “Inherited” • Yes: consent is “Declined – Anonymous” • Unknown: no active consent record exists When this column is Yes, the client’s real name should NOT appear on the report. Please ensure client names follow the naming convention for Declined – Anonymous consent.
First Service Date	Date of the first service provided at the selected site.
First Service Type	The type of service provided to the client by a site is one of the following: • Stay • Case Management • Goods and Services • Housing Loss Prevention • Housing Placement (Search Start Date) • Housing Subsidy • VAT • Group Activities (Client must attend the event before a service is created) Unless noted above, the service start date is used; not the date the record was created. If client received multiple services on that day, only one service type will appear

Housing Status	A client’s housing status can be one of:
	• Homeless
	  ○ Client is in a shelter or according to their active Housing History record they are living rough, couch-surfing, etc.
	• Housed / at Risk
	  ○ According to their housing history record, the client is housed
	• Unknown
	  ○ Client has no active shelter or housing history records
	• Blank
	  ○ conflicting housing history records, e.g. over the same period, the client has records indicating both housed and homeless
	
	Housing status is ***determined at the time the report is run***.

Community from?	The community where the client has (or had) stable housing, determined by the client’s most recent Housing History record with a housing type that is not ‘Homeless’. This field will be blank if there are no housing history records for the client.

Percentage of Outreach Clients Served who are Housed or Supported to Maintain Existing Housing

Description: A list of outreach clients served within the selected date range, including the number and percentage who have been housed or supported to maintain housing.

Purpose: (Outreach) For a KPI measure.

Comments: There are currently no columns which require further explanation.

Rent Supplement Budget vs. Actuals

Description: Rent supplement monthly budget vs. actuals for the selected date range.

Purpose: (Outreach) To determine if a site is in a surplus/deficit position based on all subsidy entries recorded in HIFIS.

Comments: There are currently no columns which require further explanation.

Rent Supplement Extended Recipients

Description: Clients from the selected site who received a rent supplement for subsidy or good for the previous 12, 24, 36 or 48 consecutive months from any site.

Purpose: (Outreach) To get a list of clients who have received a subsidy for 12 or more consecutive months, including supplements from other service providers.

Comments: There are currently no columns which require further explanation.

Rent Supplement Recipient Details

Description: Clients who received a rent supplement during the selected date range including the amount and purpose.

Purpose: (Outreach) Allows service providers to monitor the purpose and amount of individual rent supplements distributed each month, and to verify accounting records match rent supplements recorded within the application.

Comments: Red highlighted rows represent records with an amount above the prescribed limit.

Shelter Clients Experiencing Chronic Homelessness Housed

Description: A list of shelter clients experiencing chronic homelessness from the selected date until today, showing if they were housed or not, and if housed within 100 days.

Purpose: (Shelter) For a KPI measure.

Comments:

A client is “homeless” and included in this report if one or both of the following is true:

1. In Admissions module the Book In “Reason for Service” is **not** *Respite from Housing*, *Stranded in Area*, or *Transient Lifestyle*
2. In Housing History module “Housing Type” **is** *Abandoned Building, Campsite, Hostel, Hotel/Motel, Makeshift/Street, Shelter, Staying with Friends/Relatives (Couchsurfing),* or *Vehicle*

A chronic homeless client is a person who falls into one or more of the following categories:

1. has been homeless for more than 180 days (cumulative) or more in the year measured from the Start Date of the most recent stay at this shelter.
2. has experienced three (3) or more episodes of homelessness in the year measured from the Start Date of the most recent stay at the shelter in the reporting period.
    a. the most recent shelter stay is considered as one of the three (3) episodes.
3. has a VAT score of 3 in the Homelessness domain and the VAT was conducted within one (1) year prior to the start date of the most recent shelter stay.
    a. If there is more than one VAT recorded prior to the most recent shelter stay, use the most recent VAT.
    b. The VAT may be administered by any service provider.

Shelter Clients Experiencing Homelessness Housed

Description: A list of shelter clients experiencing homelessness from the selected date until today, showing if they were housed or not, and if housed within 60 days.

Purpose: (Shelter) For a KPI measure.

Comments:

A client is “homeless” and included in this report if one or both of the following is true:

1. In Admissions module the Book In “Reason for Service” is **not** *Respite from Housing*, *Stranded in Area*, or *Transient Lifestyle*
2. In Housing History module “Housing Type” **is** *Abandoned Building, Campsite, Hostel, Hotel/Motel, Makeshift/Street, Shelter, Staying with Friends/Relatives (Couchsurfing),* or *Vehicle*

Shelter Occupancy Report

Description: Daily shelter occupancy summary by client group with gender breakdown for Adults and occupancy rate for Active Beds and BC Housing Funded Beds, within the selected date range.

Purpose: (Shelter) To provide shelter occupancy statistics.

Comments: Numbers are based on what is entered and will not be accurate if data entry has not been completed and verified for the dates selected.

- Clients who book in and out the same day are not counted in the report, so a client is not counted on the report until they spend one night. Therefore, *the End Date on the Report Parameters should never be the current date*.
- Client Group is determined by age at time of book-in
- Clients are categorized based on Consent at time of book-in

Column Heading	Definition
Adult LGBTQ2+	Clients 19 years and over with Gender type of Transgender, Transgender-Female, Transgender-Male, Two-Spirit, Non-Binary and Other
Adult Unknown	Clients 19 years and over with Gender type of Unknown
Minor	Clients under 19 years of age whose Consent was Explicit or Declined.
Child	Clients under 19 years of age whose Consent was Inherited.
Total Stays	Total number of clients who overnighted in the shelter on the specified date.
Active Beds	Total number of active beds, including overflow beds.
BCH Funded Beds	Number of beds funded by BC Housing as per the funding program agreement.

Shelter Occupancy Unique Client Totals

Description: Number of unique clients with shelter stays by client group with gender breakdown for Adults, within the selected date range.

Purpose: (Shelter) To provide numbers of unique clients by client groups (adult, minor, child).

Comments:

- Clients who book in and out the same day are not counted in the report, so a client is not counted on the report until they spend one night. Therefore, *the End Date on the Report Parameters should never be the current date*.
- Client Group is determined by age at time of earliest book-in within the reporting period
- Clients are categorized based on Consent at time of earliest book-in within the reporting period

Column Heading	Definition
Adult LGBTQ2+	Clients 19 years and over with Gender type of Transgender, Transgender-Female, Transgender-Male, Two-Spirit, Non-Binary and Other
Adult Unknown	Clients 19 years and over with Gender type of Unknown
Minor	Clients under 19 years of age whose Consent was Explicit or Declined.
Child	Clients under 19 years of age whose Consent was Inherited.

Site Incidents

Description: A list of incidents recorded for the selected site(s) within the selected date range.

Purpose: For a (shelter) site to be able to review details of incidents entered in HIFIS.

Comments: There are currently no columns which require further explanation.