BC HOUSING

Homeless Individuals and Families Information System 4.0 (HIFIS) User Manual

November 2021
Version 3.0

Contents

1 Introduction

The Homeless Individuals and Families Information System 4.0 (hereafter referred to as "HIFIS") is a web-based, electronic client management information system providing for a standardized assessment of client needs, individualized service plans and service records.

Both BC Housing and service providers that receive funding from BC Housing and provide shelter and outreach services in B.C. use HIFIS to understand the nature of homelessness, develop policies and initiatives to address homelessness, and coordinate case management services. HIFIS was created by Employment and Social Development Canada (Government of Canada) and is used in B.C. by BC Housing. BC Housing performed a full review of the HIFIS application prior to implementation. This resulted in a variety of enhancements to the system to accommodate BC-specific privacy and user needs.

BC Housing developed this manual to guide HIFIS use and set forth requirements of accountability, continuity, and compliance. BC Housing will review and update this manual periodically. The user manual provides guidelines, requirements, responsibilities, processes, and procedures governing the use of the BC Housing instance of HIFIS.

To access the BC Housing instance of HIFIS a user will require the following:

1. A device with internet access and web browser (e.g. Google Chrome, Firefox, Microsoft Edge);
2. The internet address (URL) for login; and
3. An active HIFIS user account.

2 Key Concepts

2.1 Clusters

While the intent is to have a single client record in HIFIS for each client and to share this record among service providers, it is recognized that in some cases this is not appropriate. One example is women's transition houses' Homeless Prevention Program (HPP) clients, whose information needs to be kept separate for privacy and safety reasons.

Clusters were developed in HIFIS so that service providers and their clients can be separated into different groups. Clients served by service providers in a cluster can only be viewed by service providers in that same cluster.

Most service providers and their clients will be in the main cluster which is called the Integrated Cluster. Other clusters, referred to as Private Clusters, will be created as needed to accommodate women only or women and children only shelters, and women's transition houses' HPP clients.

Worth noting is that if a client is served by service providers in two or more different clusters, separate client records must be created in each. As a result, several records for the same client can exist in HIFIS.

The diagram below shows the Integrated Cluster and three other clusters. Note that Sally Smith has a client record in two clusters.
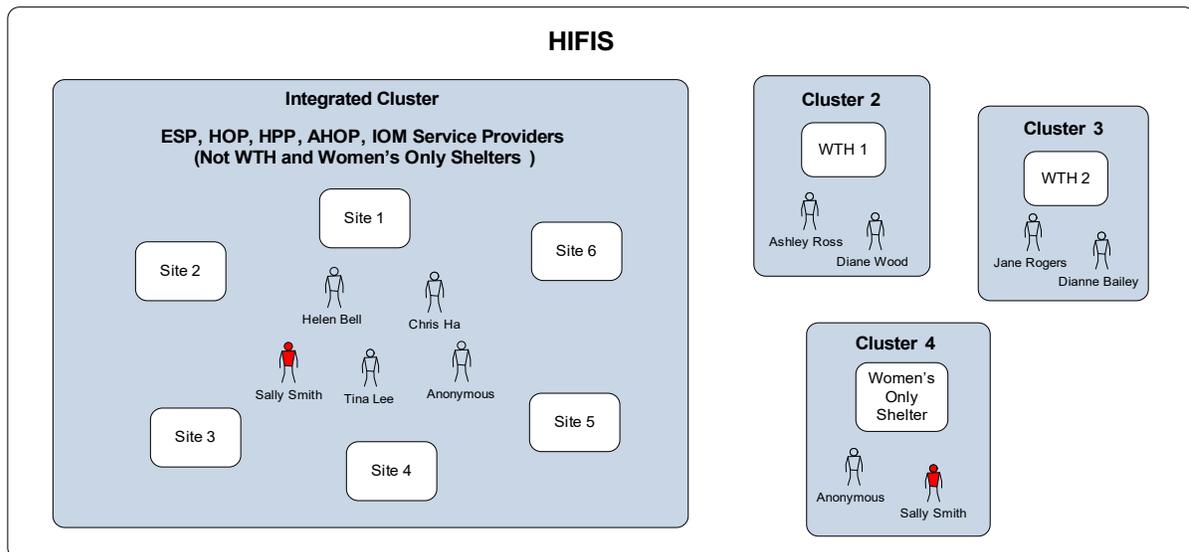
Figure 1: Illustration of an integrated cluster and three other clusters.

2.2   Data Sharing

With the implementation of HIFIS 4.0, BC Housing moved to a shared data access model for the collection of information about clients experiencing homelessness. This means clients should have only one client record in the system in each cluster (with some exceptions) and that all service providers in a cluster working with a client should access the same client record. BC Housing moved to this model with the intent that continuity of service will yield better long-term housing outcomes for clients.

Worth noting is that the full details for some types of information will be shared by all service providers (e.g. name, date of birth, gender), while only summary level data will be shared for other types of information (e.g. services provided, case plans).

The detailed information shared by all service providers, with some exceptions, is found in the

Client Information ▾ drop-down menu on the client's record, whereas the information for

which only summary information is shared is under the Client Management ▾ drop-down menu. Both are described below.

2.2.1   Client Information

Data in the Client Information section includes demographic information that is shared by all service providers in a cluster. It includes information for the categories listed below.

- o Aboriginal/Indigenous Status
- o Additional Information
- o Consent
- o Contacts
- o Country of Birth
- o Dietary Requirements
- o Documents
- o Education
- o Family
- o Financial Profile*
- o Health*

- o Housing History
- o Identification
- o Languages
- o Medication*
- o Physical Appearance
- o Profile Picture
- o Various Factors
- o Vehicles
- o Veteran Service
- o Vitals

* Note: While information in this section is automatically shared, there is the ability to manually restrict the sharing of certain items. BC Housing has chosen to restrict the sharing of the items marked with an asterisk. Users are instructed to enter this information in a way that reflects this.

2.2.2 Client Management

The Client Management section contains records of activities and services performed by service providers in the cluster. The detailed records in this section are viewable only by staff at the service provider where the activity/service was performed, and include items in the following categories:

- o Admissions
- o Appointments
- o Calls and Visits Logs
- o Case Management
- o Chores
- o Conflicts
- o Good and Services
- o Group Activities
- o Housing Placements

- o Incidents
- o Medication Dispensing
- o Service Restrictions
- o Storage
- o Surveys
- o Vulnerability Assessment Tool (VAT)
- o Waiting Lists

Staff who work with the client at other service providers in the cluster can see basic summary information for the activity/service but are unable to view the detailed records. The example below shows what information is shared for a Goods and Services entry:
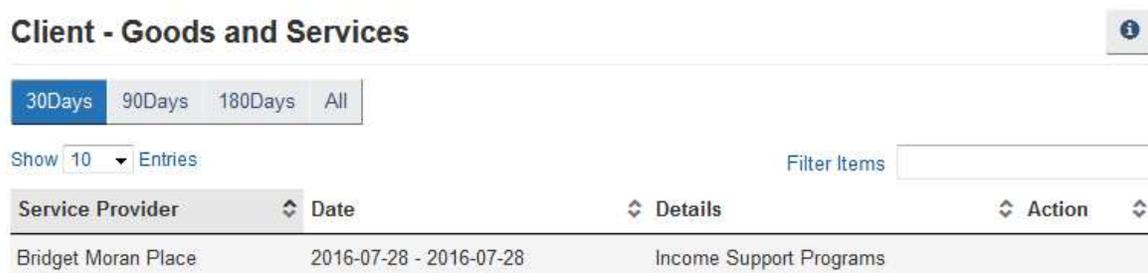
2.3 Client Consent and Attestations

When a new client record is created in HIFIS, the client's consent information must be entered. There are four options for consent type: Explicit, Declined, Inherited and Coordinated Access + Explicit; however, BC Housing is not currently using the Coordinated Access option so it should not be selected. The consent ensures clients are made aware of the ways their information will be shared and used before agreeing to give their information. The consent also confirms service providers are complying with privacy laws.

Once Explicit or Inherited consent is entered and a client's record is created, it will be available to users at other sites in the same cluster (see Section 2.1 for information about clusters). Only one consent is required for a client and prior to viewing and working with a

client's record users at other sites will have to attest that they have a valid reason for accessing it.

If Declined consent is entered an anonymous record for the client should be created and only users at the site which created the Declined consent record will be able to access the client record. A client's name nor date of birth should be entered in HIFIS if there is no signed consent. (See PR5 – Enter Basic Client Record.) Clients receiving a BC Housing funded rent supplement must provide and have a valid consent.

Examples of valid reasons for accessing records in HIFIS include:

- Searching for a client who you are booking in for the night.
- Viewing the file of an outreach client who you are serving to see what services they have received in the past.

Examples of when it is not acceptable to access records in HIFIS include:

- Searching for a family member who you have lost touch with.
- Looking for a relative, friend, or colleague.
- Looking for someone who you have heard about in the news.
- At a friend's request (e.g., "Can you take a look to see what's on my file?").

Why is this not appropriate?

- This access is not for the purpose of performing your job duties.
- Your friend needs to go through formal channels to gain access to their file.
- This access is not for the purpose for which it was collected.
- Information could exist on the file that your friend is not aware of. They may not have asked you to look at the file if they knew.

HIFIS will prompt you to provide attestation the first time you go to the client's record. The screenshot below shows the screen presented.

◆NOTES:

- Users at the site where the client record was created should not need to provide attestation.
- You should only be prompted to attest the first time you access a client's record.
- Only one consent is required for a client. If a client already has consent and refuses to sign another Client Consent Form, it does **not** automatically end the client's existing Explicit Consent. A user will need to determine if the client **also** desires to withdraw existing HIFIS consent. If:
    - o **YES**, review file and End Date consent, <u>if applicable</u> (e.g. no active rent supplements with another Agency), then create an Anonymous record.
    - o **NO**, continue to use HIFIS record.
    - o **DON'T KNOW**, continue to use HIFIS record.

2.4   **Timeliness of Data Entry**

Shelter provider must, at minimum, enter the client's basic information into HIFIS nightly to assign the client to a bed. All providers will strive daily to enter Client information, including supplemental information, into HIFIS. If the provider is unable to enter this information daily,

- shelter providers will do so within five days of meeting the client,
- outreach providers will do so within seven days of meeting the client.

All providers will continue to enter relevant information into HIFIS within the timeframe mentioned here.

2.5   **Audit Logs and Reports**

All actions taken by HIFIS users are recorded in a system audit log. Several reports are generated from the audit log, which are reviewed on a regular basis to ensure users are not inappropriately accessing client records.

2.6   **System Rights/Rights Templates**

Users are given a set of system rights for each site they work at. Rights are grouped into Rights Templates that are assigned to a user.

A user's rights grant or restrict access to HIFIS modules, sub-modules, and reports. For example, a template can be created to allow access to a client's record and their shelter

stays, but not to their case plans. Rights can also be set to specify if a user can create, edit, or view records.

See Appendix C: Summary of Rights Templates for a listing of available Rights Templates and details regarding what functions each template enables.

2.7 Key Performance Indicators

As part of the agreements between BC Housing and service providers, service providers agree to work towards specific goals that are called key performance indicators (KPIs).

The KPIs are largely focused on:

1. Finding housing for clients experiencing homelessness.
2. Supporting clients who experience risks of losing housing and need assistance to maintain it.

In HIFIS:
- Finding housing for clients experiencing homelessness is recorded in the Housing Placements module.
- Supporting clients who have housing to maintain it is recorded in the Housing Loss Prevention module.

When service providers correctly create a record for a client (including their housing history) and follow procedures PR9 – PR15 (see HIFIS Procedures), they will have entered everything required by BC Housing for recording KPI information.

The following diagram provides an overview of the activities included in HIFIS procedures PR9 – PR15, which are required for capturing KPI information.
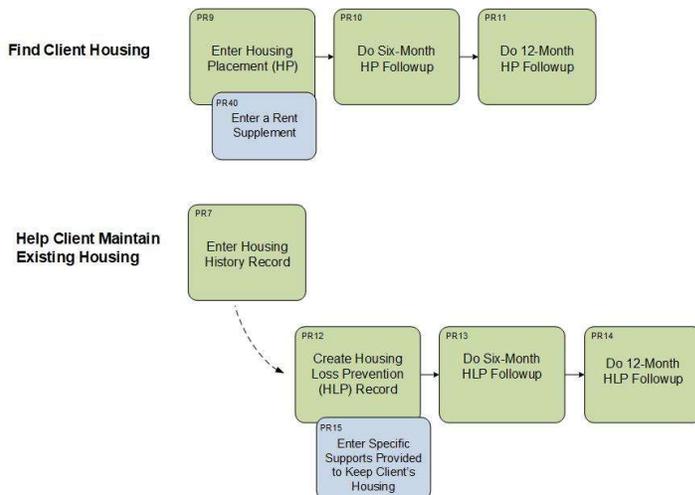
Figure 2: Overview of activities required for capturing KPI information.

3 HIFIS Procedures

3.1 Introduction

This section contains BC Housing-specific procedures that supplement the more generic training materials in the Training Centre within the HIFIS application.

BC Housing-specific procedures are created when additional details are needed regarding:

- Context related to why information is being entered.
- Specific values that should be entered in data fields.
- Scenarios that users will encounter that should be entered in a consistent way by all service providers to ensure information in the system is accurate.
- Who should perform a task (e.g., the service provider site administrator is responsible for creating questionnaires)?
- What approvals are required for a task to be performed (e.g., who must approve the deletion of a client record).
- Some procedures are included because, while they include little BC Housing-specific content, they are a core piece of functionality and their absence would be noticeable (e.g. PR6 - Enter Contributing Factors and PR7 - Enter Housing History).

A procedure is not included in this document if it can be found and used "as is" in the HIFIS training materials available in the HIFIS application.
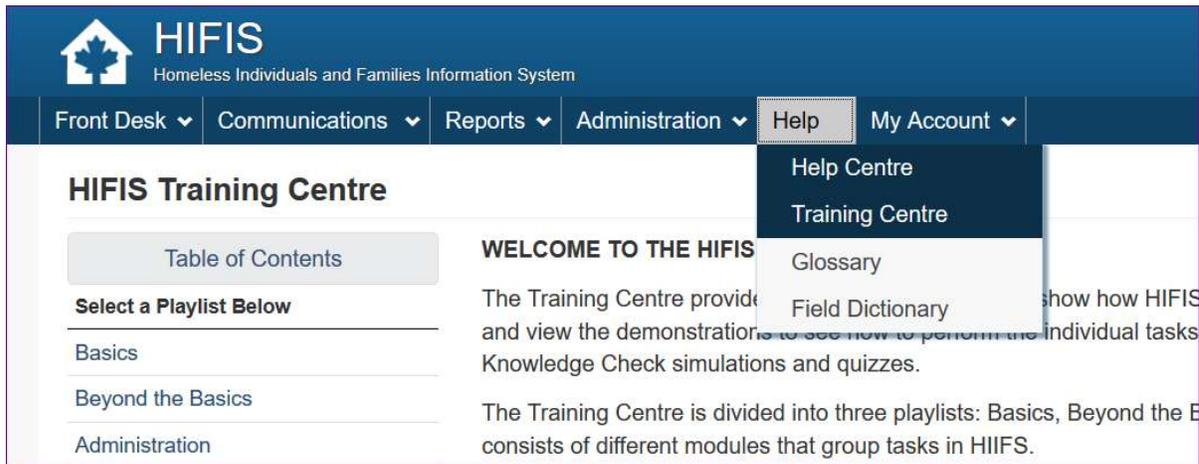
3.2 User Procedures

3.2.1 Enter New Client Records

<u>**Procedures**</u>

- PR5 - Enter Basic Client Record
- PR6 - Enter Contributing Factors
- PR7 - Enter Housing History

3.2.1.1 PR5 – Enter Basic Client Record

Procedure	PR5 - Enter Basic Client Record
Prerequisite	PR4 - Search for a Client in HIFIS
Related Procedures	PR6 - Enter Contributing Factors PR7 - Enter Housing History Families in HIFIS

When a new client is entered into HIFIS, three things should always be done: creation of the basic client record; entry of the client's contributing factors (life events that led to them requiring assistance); and entry of the client's housing history.

These steps are included as three related procedures:
- PR5 - Enter Basic Client Record
- PR6 - Enter Contributing Factors
- PR7 - Enter Housing History

The procedure outlined here is the first of the three. Once the basic client record is entered, the contributing factors and housing history must be entered within five days by shelters or seven days by outreach providers. This information is vital to serving the client. While not included as a key performance indicator (KPIs) for a site, the entry of this information is mandatory.

Prior to entering a new client record, users must always perform a search to see if the client already exists in the cluster (PR4 – Search for a Client in HIFIS). Do not create a new record for the same client if one is found, instead access the existing client record, edit, and add transactions as needed.

Procedure

1. Perform a Client Search (PR4 – Search for a Client in HIFIS). If the client isn't found in the search results they need to be added.
2. Click the button at the bottom of the screen.
3. Select the Consent Type:
    a. If the client provided consent, select Explicit.
    b. If the client did not provide consent, select Declined – Anonymous.
    c. If the client is a dependant and consent was provided on their behalf by their guardian, select Inherited.
    d. Do not use Coordinated Access + Explicit.

⚠**IMPORTANT:** If Declined – Anonymous is selected, use the following steps for entering the client's information:

- Last Name – Enter ANON followed by a consistent identifier such as your site's name (e.g., ANON Fraser Shelter).
- First Name – Enter anything you like, as long as it is not the client's real name and has not been used before at your site (e.g., Joe; Jennifer; A1; 123).
- Date of Birth -entered Age and not the client's actual date of birth.

⚠**NOTES:**

- For more additional information about client consent, see documents HIFIS Key Concepts.

- BC Housing recommends that service providers upload the signed consent form to HIFIS when creating the client record.

- Do not enter a Consent Expiry Date when creating consent. This field should only be used when a client withdraws explicit consent.

- If a client's consent expires in HIFIS, service providers who have previously updated the client's record can view the record's details, but not add to or edit it. Service providers who have not previously entered any information to the client's record will not be able to access it without entering a new consent record.

4. Complete the Client Information as self-reported by client (all fields displaying the ★ must be completed):
    a. Last Name (searchable)
    b. First Name (searchable)
    c. Date of Birth (if unknown, set the toggle to No and enter the Approximate Age)
    d. Gender
    e. Veteran Status
    f. Citizenship/Immigration Status
    g. Indigenous Status (Select Non-Indigenous if the client is not of Indigenous descent).
5. If the client has a file number with the provider, enter it in the File Number field. If the client does not have a number, the system will automatically assign one. When editing the File Number field insert a space and add to any pre-existing data, as this is a searchable field and removing content will mean other users can no longer search on content they may have added.

⚠**NOTE:** Clients who were converted into HIFIS from the legacy Homelessness Services System (HSS) will have the File Number field populated with the HSS Client ID and Agency ID number if one was present.

6. Fields not described above are optional and may be used as desired, with the following notes:
    a. Middle Name is a searchable field
    b. Alias 1 is a searchable field
    c. Client State should not be changed to 'Archived' but can be changed to 'Deceased' as needed
    d. Client State of 'Inactive' is system generated and dependant on transactions as outlined below:

Module	Transaction
Admissions	Client is booked into a shelter
Assessment	Assessment is conducted
Calls and Visits Log	New record (Add Log) in Call and Visit Log is created
Case Management	New record (Add Case) in Client - Case Management List is created
Case Management	New record (Add Session) under the Sessions tab in Display Case Management is created;
Case Management	New record (Add Comment) under the Case Comments tab in Display Case Management is created
Food Banks	New record (Add Food Bank Transaction) in Client – Food Banks is created
Goods and Services	New record (Add Goods and Services Transaction) in Client – Goods and Services is created
Group Activities	Client is identified as an Attendee in a Group Activity
Housing Placement	New record (Add Housing Placement) in Housing Placement List is created
Housing Placement	New record (Add Follow-up or Add Housing Placement Attempt) in Housing Placement Details is created
Housing Loss	New record Housing Loss Prevention interaction is created
Medication Dispensing	Client is provided medication through Medication Dispensing in Front Desk – Medication Dispensing
Service Restrictions	New record (Add Service Restriction) in Client – Service Restrictions is created
Storage	New record (Add Storage Item) in Client – Storage is created
Survey	Client takes a survey in Client Management- Survey

NOTES
The following actions **do not affect Client State**: 1) Viewing and/or editing client information under Client Information 2) Identifying a client in a Bulletin or Message.
Making a transaction on an Archived or Deceased client's file **does not change** the Client State to Active. Instead HIFIS users should change a Client State of Archived or Deceased back to Inactive, if needed.

7. Click the appropriate Save button:

   a. **H Save** : Saves the record and takes you to Clients – Vitals screen.
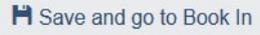
   b. **H Save and go to Book In** : Saves the record and takes you to the Add Book In screen.
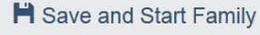
   c. **H Save and Start Family** : Saves the record and takes you to the Client – Family screen.

⚠ **IMPORTANT:** Once the basic client record has been created, a client's Contributing Factors and Housing History must be entered within five days by shelter or seven days by outreach providers. This information is vital to serving the client and, if not collected and entered shortly after the creation of the client record, it might not get done. See procedures PR6 - Enter Contributing Factors and PR7 – Enter Housing History.

3.2.1.2 PR6 – Enter Contributing Factors

Procedure	PR6 - Enter Contributing Factors
Prerequisite	Client record has been created.
Related Procedures	PR5 - Enter Basic Client Record PR7 - Enter Housing History

Once a basic client record has been created (PR5 – Enter Basis Client Record), it is important that the client's contributing factors be determined and entered in HIFIS within five days for shelter providers and seven days for outreach providers.

Contributing factors are life events that have, in some part, played a role in leading the client to require assistance from the service provider. These can be factors that are vital in serving the client, such as loss of housing or a financial crisis. Identifying contributing factors can help service providers develop meaningful goals with clients. They can also assist service providers and BC Housing in understanding factors that contribute to homelessness.

Procedure
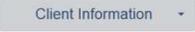
1. Navigate to the client's record.
2. Click the [Client Information ▾] drop-down menu.
3. Select Various Factors.
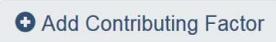
4. Click the [⊕ Add Contributing Factor] button.
5. Select an option from the drop-down list.
6. Edit the Start Date if needed (see Note below).
7. Click [💾 Save].

⚠️ **NOTES:**
- If the client has more than one contributing factor, enter each by repeating steps 3-7.

- If you are a service provider delivering the Homeless Prevention Program (HPP) or Canada Housing Benefit (CHB-HPP), be sure to enter the client group(s) they are in:
  - o For leaving the corrections system: Discharge from Correctional/Jail.
  - o For leaving the hospital system: Discharge from Treatment – Medical or Discharge from Treatment – Psychiatric.
  - o For women who have experienced violence or are at risk of violence: Parental Abuse – Physical, Parental Abuse – Psychological, Parental Abuse – Sexual, Partner Abuse – Financial, Partner Abuse – Physical, Partner Abuse – Psychological, Partner Abuse – Sexual, Personal Safety, or Sexual Abuse.
  - o For clients who recently left the foster care system: Discharge from Foster Care (this is additional information that is useful for serving the client).
- Clients in the Indigenous and Youth at Risk HPP client groups are identified by information entered in the Client – Vitals screen.
- If you are a service provider delivering the Homeless Prevention Program (HPP) or Canada Housing Benefit (CHB-HPP), the Start Date of the Contributing Factor must be on or before any associated HPP/CHB transactions.

3.2.1.3 PR7 – Enter Housing History

Procedure	PR7 - Enter Housing History
Prerequisite	Client record has been created.
Related Procedures	PR5 - Enter Basic Client Record

A client's Housing History records an account of where the client has lived, including periods of homelessness.

Complete and accurate Housing History records provide better understanding of clients' housing needs, are critical for HIFIS to function as intended, and for the service provider's performance reporting to be correct.

Information derived from the aggregate Housing History records, combined with the aggregate Contributing Factors records in the system will inform policy development and planning activities, and assist with the prioritization of programs and services to address the needs of people who are experiencing homelessness.

It is crucial that every client record created has an associated Housing History record for at least the past year that is as complete and accurate as possible.

Entry of the Housing History record must be done within five days by shelter or seven days by outreach providers from when the client's record is created in the system. This information is vital to serving the client and, if not collected and entered shortly after the creation of the client record, might not get entered.

Procedure

1. Navigate to the client's record.
2. Click the Client Information drop-down menu.
3. Click the ⊕ beside Housing History to open the Client – Add Housing History data entry screen.

⚠ NOTE: If you click Housing History, you will be taken to the screen that displays all Housing History records that have been previously entered into the system for the client. From this screen, you would click the ⊕ Add Housing button.
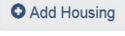
4. Enter the known information, including an end date, unless they are currently living at that location.

NOTE: For reporting purposes, a client is defined as experiencing homelessness if any of the following Housing Types are recorded:

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

5. Click 🖫 Save .

3.2.2 Book a Client In/Out of a Shelter

Procedures

- PR17 – Book Client In To Shelter
- PR18 – Book Client Out Of Shelter

3.2.2.1 PR17 – Book Client In To Shelter

Procedure	PR17 - Book Client In To Shelter
Prerequisites	Client record has been created. User has system rights to enter shelter stays.
Related Procedures	PR5 - Enter Basic Client Record

Procedure

1. From the Front Desk drop-down menu navigate to the Admissions screen.
2. Click .
3. Search for client by entering values from any of the searchable field on the Client Vitals screen (ID, First Name, Middle Name, Last Name, Alias 1, or Reference Number) of the client you want to book in. The system will display a drop-down list of all matching clients.
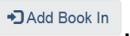
⚠ **NOTE:** If a client record has not previously been created, you will need to enter it (PR5 - Enter Basic Client Record) before you can book the client in.

4. Select the client from the drop-down list.

⚠ **NOTE:** If you have not previously provided attestation for the client record, the Attestation pop-up screen will appear. Click Yes. By providing attestation, you are declaring that you have a valid reason for accessing the client's record.

5. Start Date and Time refers to when the client is booked in and defaults to the current day and time. This can be changed if needed.

⚠ **NOTE:** If you are making the entry after midnight be sure to edit the Start Date and Time to reflect the client entered before midnight (i.e. the previous day).

6. Select the main reason the client is going to be staying at the shelter.
7. Enter the program that is funding the stay.
8. All other fields are optional.
    a. If you know when the client will likely book out, enter the date in Expected Book Out Date.
    b. If you know that the client was referred from another place or service provider, select it in the Referred from field.

    ⚠ **NOTE:** If the referrer does not appear in the drop-down menu, it can be added by your site's HIFIS administrator.

c. If you know the name of the person who referred the client, enter it in the Referred by field.

9. Click [⊕ Next] .

10. Each blue square represents a bed that is vacant. Assign the client a bed by clicking on one.

11. Click [🖫 Save] .

⚠**NOTE:** The procedure described above is one way to book in a client to a shelter space.

A user may also search the client and from the Client List screen then click [🏠] under the far, right Action column in the row corresponding to the client being booked in. Next click [⊕ Book In] and follow the appropriate steps outlined above.

⚠**IMPORTANT:** If two clients are staying in the same bed, record this in HIFIS as two separate book ins with them booked in to separate beds. This will ensure the total number of clients recorded as booked in to the shelter is accurate.

3.2.2.2 PR18 – Book Client Out of Shelter

Procedure	PR18 - Book Client Out of Shelter
Prerequisites	Client record has been created. Client has been booked in to the shelter. User has system rights to manage shelter stays.
Related Procedures	PR5 - Enter Basic Client Record PR17 – Book Client In to Shelter

Procedure

1. From the Front Desk drop-down menu navigate to the Admissions screen.
2. From the list, locate the client you want to book out. Click [icon] under the far, right Action column in the row corresponding to the client being booked out.
3. The Book Out Date and Time defaults to the current day and time. This can be changed if needed.
4. Enter the reason the client is leaving the shelter.
5. If you are referring the client to another service provider, select it in the Referred to field.

⚠️ **NOTE:** If the service provider you are referring the client to does not appear in the drop-down list in the Referred to field, it can be added by your HIFIS site administrator.

6. Click [Book Out] .

⚠️ **NOTE:** The procedure described above is one way to book out a client from a shelter space. A user may also search the client and from the Client List screen then click [icon] under the far, right Action column in the row corresponding to the client being booked out. Next click [Book Out] and follow the appropriate steps outlined above.

3.2.3 Enter a VAT Assessment

<u>Procedure</u>

- PR19 – Enter a VAT Assessment

3.2.3.1 PR19 – Enter a VAT Assessment

Procedure	PR19 - Enter a VAT Assessment
Prerequisites	Client record has been created. User has received VAT training.
Related Procedures	PR5 - Enter Basic Client Record

The vulnerability assessment tool (VAT) is used to measure an individual's level of vulnerability while one is experiencing homelessness and is based on 10 different domains of one's life. The tool is designed for use by service providers accustomed to interacting directly with individuals experiencing homelessness. Training is required to ensure reliable application of the tool. The results are then used by the provider to appropriately match clients with housing.

This procedure provides direction on how to enter a VAT assessment into HIFIS; it does not provide guidance on how to perform the assessment. It is assumed that users entering VAT assessments into HIFIS have received appropriate training on the use of the tool.

Procedure

1. From the Front Desk drop-down menu navigate to the Vulnerability Assessment Tool List screen by selecting Assessments then VAT.
2. Click the ⊕VAT button.
3. Search for client by entering values from any of the searchable field on the Client Vitals screen (ID, First Name, Middle Name, Last Name, Alias 1, or Reference Number) of the client you want to enter the assessment. The system will display a drop-down list of all matching clients.

⚠ **NOTE:** If a client record has not previously been created, you will need to enter it (PR5 - Enter Basic Client Record) before you can enter the VAT.

4. Select the client from the drop-down list.

⚠ **NOTE:** If you have not previously provided attestation for the client record, the Attestation pop-up screen will appear. Click Yes. By providing attestation, you are declaring that you have a valid reason for accessing the client's record.

5. Enter the name of the caseworker who performed the VAT.

⚠ **NOTE:** If the caseworker's name does not appear on the list, you will have to ask your HIFIS site administrator to add it.

6. Enter the date when the VAT was performed.
7. Set the Consent toggle to Yes.
8. Enter the program that is funding the services to this client.
9. In the Description field, enter summary information.
10. For each of the VAT questions, enter the score by clicking the associated radio button and add the narrative or notes in the corresponding text box.
11. Click .

NOTE: The procedure described above is one way to enter a client's VAT. A user may also search the client, access the client record from the Client List, select VAT in the Client Management menu, then click the and follow the appropriate steps outlined above.

3.2.4 Do Case Management

Procedure

- PR20 - Enter a Case Management and Record Related Activities

3.2.4.1 PR20 – Enter a Case Management and Record Related Activities

Procedure	PR20 – Enter a Case Management and Record Related Activities
Prerequisite	Client record has been created.
Related Procedures	PR5 - Enter Basic Client Record

In HIFIS the recording of a Case Management record may comprise of four components: Details, Sessions, Documents and Case Comments. Users can record a client's goals, the activities they are involved in to achieve these goals, and the progress they are making.

Benefits of case management:

- Enables goal setting, such as conflict resolution, employment, legal support and skill enhancement.
- Session details can be recorded.
- Comments regarding each case and session can be recorded.
- Documents can be uploaded and kept with the case.

Procedure to add a Case Goal

1. Navigate to the client's record.
2. From the Client Management ▾ drop-down menu, select Case Management.
3. Click ⊕ Add Case .
4. Select the caseworker who is working with the client.
5. Enter the Goal the client is trying to achieve.

⚠ **NOTE:** If there are several goals which are being pursued for the client, a Case Management record will need to be created for each.

6. Leave the status set to Open.
7. In the Start Date field, enter the date the Case Management record is being created.
8. If there is a target date for completion of the goal enter it in the Target Date field.
9. Enter the program that is funding the services provided to the client. More than one program may be available for selection; select only one.
10. Select Contributing Factors that are related to the goal. Contributing factors are life events that have, in some part, played a role in leading the client to requiring assistance from the service provider.

⚠ **NOTE:** Contributing Factors will only appear in the drop-down box if they have been already entered in the Various Factors (Contributing Factors) module.

11. Click [Save] .

⚠️**NOTE:** The procedure described above is one way to create a Case Management record. A user may also navigate to Front Desk > Case Management then click the [Add Case] and follow the appropriate steps outlined above.

Once a case management goal has been entered, activities performed to meet the goal can be entered as a Case Session.

Procedure to add a Case Session

1. Click the Sessions tab in the related Case Management record.
2. Click [Add Session] .
3. Select what the activity was.
4. Enter other details about the activity such as when it was done, how much time was spent, and a more detailed description.
5. Select the caseworker who was involved in the activity.
6. Click [Save] .
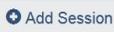
⚠️**NOTE:** Once a Session has been saved to a Case Management record the Goal cannot be changed.

Procedure to add a Document

1. Click the Documents tab in the related Case Management record.
2. Click [Browse] .and find the document(s) you want to upload
3. Click [Save] .

⚠️**NOTE:** Users may multi-select files for a maximum of 5MB per upload, and not all file types are permitted (e.g. pptx).

Procedure to add a Case Comment

1. Click the Case Comments tab in the related Case Management record.
2. Click [Add Comment] .
3. Enter a subject.
4. Enter comments.
5. Select the caseworker who was involved in the activity.
6. Click [Save] .

Procedure to close a Goal

1. Navigate to the client's record.
2. From the [Client Management ▾] drop-down menu, select Case Management.
3. Click ✏ icon.
4. Change Status from Open to Closed – Success or Closed Goal(s) not met.

5. Click [🖫 Save] .

3.2.5 Provide Services to a Client

<u>Procedures</u>

- PR21 - Enter a Good Provided to a Client
- PR22 - Enter a Service Performed for a Client

3.2.5.1 PR21 – Enter a Good Provided to a Client

Procedure	PR21 - Enter a Good Provided to a Client
Prerequisite	Client record has been created.
Related Procedures	PR22 - Enter a Service Performed for a Client PR40 - Enter a Rent Supplement

Goods provided to clients are recorded in the HIFIS Goods and Services module.

⚠**IMPORTANT:** This is where non-rent subsidies funded by BC Housing are entered. However, since shelters funded under ESP or Temp Shelter are allowed to enter subsidies, caution must be exercised by these shelters when selecting Program if they also have BC Housing rent supplement funding.

Procedure

To enter a good that you provided:

1. Navigate to the client's record.
2. From the [Client Management ▾] drop-down menu select Goods and Services.
3. Click [⊕ Express Good] .

⚠**NOTE:** Clicking [⊕ Add Goods and Services Transaction] takes you to the Client – Add Goods and Services Transaction screen. This is a longer means of creating Goods and Services Transaction records. [⊕ Express Good] and [⊕ Express Service] allow you to enter the information quicker.

4. Select one of the options under Standard Goods from the Good drop-down menu.
5. Enter the program that is paying for the item. More than one program may be available for selection; select only one.
6. Select All in Unit of Measure.
7. Enter the value of the item in the Unit Price field only if it is funded through BC Housing.
8. Select Reason for Service from the drop-down menu. The reason for service should reflect the main reason the client is receiving the Good from the service provider.
9. If applicable, enter Comments. You may record value of item paid from non BC Housing funded rent supplements in the Comment field.

Click [🖫 Save] .

⚠**NOTE:** The procedure described above is one way to create a Good record. A user may
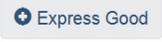
also navigate to Front Desk > Goods and Services then click the [⊕ Express Good] and follow the appropriate steps outlined above.

3.2.5.2 PR22 – Enter a Service Performed for a Client

Procedure	PR22 - Enter a Service Performed for a Client
Prerequisite	Client record has been created.
Related Procedures	PR21 - Enter a Good Provided to a Client

Services provided to clients are recorded in the HIFIS Goods and Services module.

Procedure

To enter a service that you provided:

1. Navigate to the client's record.
2. From the [Client Management ▾] drop-down menu select Goods and Services.

⚠**NOTE:** Clicking [⊕ Add Goods and Services Transaction] takes you to the Client – Add Goods and Services Transaction screen. This is a longer means of creating Goods and Services Transaction records. [⊕ Express Good] and [⊕ Express Service] allow you to enter a record quicker.

3. Click [⊕ Express Service].
4. Select one of the options under Standard Services from the Service drop-down menu.
5. Enter the program that is funding the provision of the service. More than one program may be available for selection; select only one.
6. Select at option from the Reason for Service. The reason for service should reflect the main reason the client is receiving the Service from the service provider.
7. Enter other relevant information.

⚠**NOTE:** If you referred the client to another outreach provider, shelter, or support, you can record it in the Referred to field. The filter (▼) allows you to narrow down providers that are specific to a region or city.

8. Click [💾 Save].

⚠**NOTE:** The procedure described above is one way to create a Service record. A user may also navigate to Front Desk > Goods and Services then click the [⊕ Express Service] and follow the appropriate steps outlined above.

3.2.6 Find Housing for Client

<u>Procedures</u>

- PR9 - Enter the Tenancy of a Client Placed Into Housing
- PR40 - Enter a Rent Supplement
- PR10 - Enter a Six-Month Housing Placement Follow-up
- PR11 - Enter a 12-Month Housing Placement Follow-up

3.2.6.1 PR9 – Enter the Tenancy of a Client Placed Into Housing

Procedure	PR9 – Enter the Tenancy of a Client Placed Into Housing
Prerequisite	Client record has been created.
Related Procedures	PR5 – Enter Basic Client Record PR10 - Enter a Six-Month Housing Placement Follow-up PR11 - Enter a 12-Month Housing Placement Follow-up

Recording the tenancy start date of a client who has secured housing involves three steps in HIFIS. This procedure outlines the creation of a Housing Placement (HP) record (step 1), securing a housing unit (step 2), and recording the move in (step 3).

⚠**NOTE:** Before creating a new HP record, review the client's HP history to see if they have another open placement in 'Moved Into Housing' status. If they do, contact the service provider who entered it or the HIFIS Support Desk to have the placement closed. Similarly check the client's Housing History to see if they have an open Housing History record. The system will **not** allow a client to be moved into a placement while they appear to be living somewhere else.

Procedure

1. To create the HP record.
    a. Navigate to the client's record.
    b. From the [Client Management ▼] drop-down menu, select Housing Placements.
    c. Select [⊕ Add Housing Placement].
    d. Select the caseworker who is performing the placement.
    e. Select the housing types the client is looking for.

⚠**NOTE:** Selecting [+] will select all housing types.

    f. Enter when you started the housing search.
    g. Enter the target date when you hope to have the client placed (optional).
    h. Enter the program that is funding the services provided to the client. More than one program may be available for selection; select only one.
    i. Click [🖫 Start Housing Placement].

2. Once a housing unit has been secured, add this information.

     a. Click [⊕ Add and secure a housing unit] .
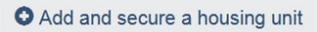
     b. Select the housing type of the housing unit.

     c. Select the Status (condition) of the unit.

     d. Enter the address information for the housing unit.

     e. The Geographic Region field is pre-populated with your region. Leave this as is unless the unit is in a different region.

     f. Enter the expected move-in date.

     g. Click [H Save and secure] .
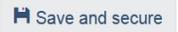
⚠ **NOTE:** You can end a HP record after step 1 or 2 by clicking [✖ End Housing Placement] at the bottom of the screen.

3. Record the client move in.

⚠ **NOTE:** Complete this last step **on or after** Move In, <u>not before</u>.

     a. Click [➔ Move In] .

     b. Enter the rent amount charged by the landlord (optional).

     c. Enter the date when the client moved into the unit.

     d. If desired, enter the landlord's phone numbers and email address in the Telephone 1, Telephone 2, Mobile Phone, and Email Address fields (optional).

     e. Change the **Use Exact Follow-up Date** [Yes] toggle set to Yes.

     f. Enter the date six month after the Move In date in the Next Scheduled Follow-up field (this generates a reminder for the first required follow-up by BC Housing).

     g. Click [H Move In] .

⚠ **NOTE:** HIFIS generates a report of upcoming HP follow-ups that are due. If you want the landlord's name to appear on this report, you must go into the Housing Unit record that you created and add them. You can navigate to the Housing Unit record by clicking on the address in the Secured Housing Unit field of the Housing Placement Details record.

⚠ **NOTE:** The procedure described above is one way to create a HP record. A user may also navigate to Front Desk > Housing > Housing Placement then click the [⊕ Add Housing Placement] and follow the appropriate steps outlined above.

3.2.6.2 PR40 – Enter a Rent Supplement

Procedure	PR40 - Enter a Rent Supplement
Prerequisite	Client record has been created.
Related Procedures	PR5 - Enter Basic Client Record PR7 - Add Housing History PR9 - Enter the Tenancy of a Client Placed Into Housing

BC Housing's Outreach Programs provide rent supplements to clients for:

1. **Ongoing rent supplements:** Monthly rent supplements provided to a client for a period in circumstances where they are not able to make the complete rent payment.

2. **One-time rent supplements:** One-time rent supplements provided to address the client's immediate housing concerns, such as paying for utilities to ensure they keep their housing. For a full list of acceptable uses, refer to the Rental Supplement Guidelines.

<u>Procedure</u>

1. **If the client does not have an open Housing Placement in HIFIS**, see procedure PR12 - Enter a Housing Loss Prevention Record, or
   If the client has an open Housing Placement in HIFIS, navigate to the Housing Placement record.

2. Click the Manage button (⚙) beside the Housing Placement record.

3. On the Subsidies tab, click ⊕ New Subsidy .
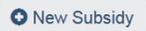
4. Enter the program that is funding the rent supplement. <u>If the value populated is incorrect change it</u>.

5. In the Start Date field, enter the date when the client will start to receive the supplement.

⚠ **NOTE:** The Start Date cannot be before the Move In date.

6. Enter the Reason for Service.

7. In the End Date field, enter <u>the last day of the month</u> when you estimate you will stop giving the supplement to the client.

8. In the Amount field, enter the monthly supplement amount you will be providing to the client.

9. The Payment Date field is optional and may be left blank.

10. Monthly is the default value for Pay Frequency and cannot be changed.

11. Click 💾 Save .

⚠️**NOTE:** If you enter a Rent Supplement record for a date range (e.g., January 1 – December 31), you should not enter a new Rent Supplement record each month unless an additional subsidy for rent is provided in a month.

⚠️**IMPORTANT:** If you enter a Rent Supplement record for a date range (e.g., January 1 – December 31) and you stop giving the supplement to the client before the end of that range, you need to go into the Rent Supplement record and update the End Date. If you do not, the system will assume it is still being provided and the rent supplement reports will be incorrect.

⚠️**IMPORTANT:** Be sure to enter the monthly supplement amount you will provide to the client, not the amount you will provide for the whole period for which they will be receiving the supplement. Entering the amount for the whole period will show up on reports as though you are providing that amount each month.

⚠️**NOTE:** The steps above (2-11) are for entering an ongoing rent supplement to pay rent. If the payment is a one-time rent supplement provided to address the client's immediate housing concerns (such as paying for utilities to ensure they keep their housing), complete the following steps (or refer to PR21 - Enter a Good Provided to a Client):

1. From the client's record, navigate to the Client - Goods and Services screen (Client Management > Goods and Services).
2. Click ⊕ Express Good .
3. In the Good field, select what you provided to the client.
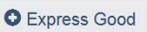
⚠️**NOTE:** Everything selected in the Good field will be reported against the rent supplement budget for your site. Only select items that are identified as eligible uses in the Rental Supplement Guidelines.

4. Enter the program that is funding the rent supplement. More than one program may be available; select only one.
5. Enter ALL in Unit of Measure field.
6. Enter the amount provided to the client in the Unit Price field.
7. Enter the Reason for Service.
8. Click 💾 Save .

⚠️**NOTE:** This records a Good as being paid for on the day you created the record. Use the Edit button if the date needs to be changed.

3.2.6.3 PR10 – Enter a Six-Month Housing Placement Follow-up

Procedure	PR10 - Enter a Six-Month Housing Placement Follow-up
Prerequisites	Client record has been created. Client has moved into housing.
Related Procedures	PR9 – Enter the Tenancy of a Client Placed Into Housing

Housing follow-ups that need to be completed can be found on the Housing Placement List screen. It can be navigated to from the Front Desk drop-down menu (Front Desk > Housing > Housing Placements).

The purpose of recording the results of the follow-ups is to:

- better understand chronic homelessness, such as how many people experience chronic homelessness, how long and how often they experience chronic homelessness*

- measure housing stability

* Chronic homelessness means a client who has experienced homelessness for six months or more in the past year (i.e. has spent more than 180 cumulative nights in a shelter or place not fit for human habitation) and/or has experienced homelessness three or more times in the past year. This also includes individuals exiting institutions (e.g. mental health facilities, hospitals, correctional institutions, and children leaving care) who have a history of chronic homelessness and cannot identify a fixed address upon their release.

Homelessness refers to a situation where an individual or family is not stably housed or is living in temporary accommodation where they do not have control over the length and conditions of tenure and do not have adequate personal space. This includes living in: public spaces without legal claim (e.g. on the streets, in abandoned buildings or in tent cities); a homeless shelter, a transition house, a public facility or service (e.g., hospital, care facility, rehabilitation or treatment centre, correctional facility) and cannot return to

housing; or where they are financially, sexually, physically or emotionally exploited to maintain their shelter.

This procedure provides steps to complete a six-month follow-up. The three possible scenarios are: the client is still living in the same place; unable to determine if the client is still living in the same place (e.g. no contact); or the client has move and no longer living in the same place.

Procedure

1. Find the Housing Placement that you want to follow up on in the Housing Placement List.
2. Click the Manage button (⚙) beside the Housing Placement record.
3. On the Follow-ups tab click ⊕ Add Follow-up .
4. The Follow-up Date is pre-populated with today's date. Change it if the actual follow-up occurred on a different date.

5.	If the client is living in the same housing unit:	a. Enter: • Months Elapsed = Leave at system calculated number • Final Follow-up = No • Use Exact Follow-up Date = Yes • Next Scheduled Follow-up = Enter applicable date • All Clients Still In Housing = Yes

	b. Click [Save] . This will leave the Housing Placement open. Perform a 12-month follow-up when due.
If you are unable to determine if the client is still living in the housing unit:	c. Enter: • Months Elapsed = Leave at system calculated number • Final Follow-up = No • Use Exact Follow-up Date = Yes • Next Scheduled Follow-up = Enter applicable date • All Clients Still In Housing = Unable to Contact. d. Click [Save] . This will leave the Housing Placement open. Perform a 12-month follow-up when due.
If the client is not living in the housing unit they were placed into:	e. Enter: • Months Elapsed = Leave at system calculated number • Final Follow-up = Yes • All Clients Still In Housing = No • Clients That Have Left Housing = Click [+] to insert the client • Reason Left Housing – Select the reason • Is Housed Elsewhere = Select the appropriate option • House Now Available = Yes f. Click [Save] . This will close the initial Housing Placement record. You now need to create a new Housing Placement record for the place they are now living if you assisted in placing the client in the new housing (see PR9 – Enter the Tenancy of a Client Placed Into Housing) or create a Housing History record if the client found new housing on their own.

IMPORTANT: If there is an active rent supplement, end it (enter End Date) <u>before</u> entering the final Follow-up in the placement. (For information about working with rent supplements, see PR40 - Enter a Rent Supplement.)

NOTE: The procedure described above is one way to access a Housing Placement record. A user may also manage the Housing Placement record from within a client record and follow the appropriate steps outlined above.

3.2.6.4 PR11 – Enter a 12-Month Housing Placement Follow-up

Procedure	PR11 - Enter a 12-Month Housing Placement Follow-up
Prerequisites	Client record has been created. Client has moved into housing. A six-month Follow-up has been done where the client was still housed.
Related Procedures	PR9 – Enter the Tenancy of a Client Placed Into Housing PR10 – Enter a Six-Month Housing Placement Follow-up

Housing Follow-ups that need to be completed can be found on the Housing Placement List screen. It can be navigated to from the Front Desk drop-down menu (Front Desk > Housing > Housing Placements).

Procedure

1. Find the Housing Placement that you want to follow up on in the Housing Placement List.
2. Click the Manage button (⚙) beside the Housing Placement record.
3. On the Follow-ups tab, click ⊕ Add Follow-up .
4. The Follow-up Date is pre-populated with today's date. Change the date if the actual Follow-up occurred on a different date.
5. In the Months Elapsed field, leave at system calculated number.

If the client(s) is still in the housing unit:

    a. Set Final Follow-up toggle to No.
    b. Leave the Use Exact Follow-up Date toggle set to No and the Months Until Next Follow-up field empty.
    c. Select Yes in the All Clients Still In Housing field.
    d. Click 💾 Save .

⚠️**NOTE:** If there is a supplement, when it ends ensure the supplement end date is correct in the system <u>before</u> entering a final Follow-up.

If the client(s) has left the housing unit:

    a. Set Final Follow-up toggle to Yes.
    b. Select No in the All Clients Still In Housing field.
    c. Select the client(s) who have left the housing unit.

⚠️**NOTE:** If there was only one client included in the Housing Placement and you indicate they have left the housing unit, the system will automatically make this the final Follow-up and close the placement when you click 🖫 Save .

    d. Enter the reason the client(s) left the housing.
    e. If you know the Date Left Housing enter it, otherwise the system will End Date the Housing History with the current date
    f. If you know the client(s) is housed elsewhere set the Is Housed Elsewhere toggle to Yes; otherwise leave it set to No.
    g. If you know that the housing unit is now available for another client, set the House Now Available toggle to Yes; otherwise leave it set to No.
    h. Click 🖫 Save .

⚠️**IMPORTANT:** If there is an active rent supplement, end it (enter End Date) <u>before</u> entering the final Follow-up in the placement. (For information about working with rent supplements, see PR40 - Enter a Rent Supplement.)

⚠️**NOTE:** The procedure described above is one way to access a Housing Placement record. A user may also manage the Housing Placement record from within a client record and follow the appropriate steps outlined above.

3.2.7 Support Client to Maintain Existing Housing

<u>Procedures</u>

- PR12 - Enter a Housing Loss Prevention Record
- PR15 - Enter Specific Supports Provided to Keep Client's Housing
- PR13 - Enter a Six-Month Housing Loss Prevention Follow-up
- PR14 - Enter a 12-Month Housing Loss Prevention Follow-up

3.2.7.1 PR12 – Enter a Housing Loss Prevention Record

Procedure	PR12 - Enter a Housing Loss Prevention Record
Prerequisites	Client record has been created. Client has existing housing.
Related Procedures	PR13 - Enter a Six-Month Housing Loss Prevention Follow-up PR14 - Enter a 12-Month Housing Loss Prevention Follow-up PR15 - Enter Specific Supports Provided to Keep Client's Housing

Key goals of BC Housing's outreach programs are to find housing for clients experiencing homelessness and to support clients to keep their housing. This procedure relates to the second: supporting clients to keep their housing.

Creating a Housing Loss Prevention (HLP) record indicates that support was provided to a client to <u>maintain existing housing</u>. It also allows Follow-ups to be performed to determine if the client remained housed six and twelve months after the start of the support.

Once the HLP record is created, details of what was provided must be entered. Options include ongoing rent supplements, one-time rent supplements, or services such as working with a landlord to improve the relationship with the client. PR15 - Enter Specific Supports Provided to Keep Client's Housing provides instructions for how to enter that information.

Procedure

1. Navigate to the client's Housing History (Client Information > Housing History).
2. Click ⊕ Add Housing Loss Prevention .

⚠️**NOTES:**
- The HLP record will automatically be associated with the client's current address/housing record.
- If the ⊕ Add Housing Loss Prevention button doesn't appear on the screen, it means either there isn't a current Housing History record for the client or a Housing Loss Prevention record has already been created for the current Housing History record. You can navigate to it by going to Client Management > Housing Loss Prevention.

3. Enter the Reason for Service.
4. Enter the date the support was provided.
5. Select the caseworker (or staff member) who assisted the client.
6. Enter the program that is funding the support. More than one program may be available for selection; select only one.
7. Enter a First Follow-up Date that is six months from the start date.

8. Click ⊞ Save .

⚠️**NOTES:**
- After completing this procedure, PR15 - Enter Specific Supports Provided to Keep Client's Housing must be performed to record what was provided to the client.
- HIFIS generates a report of upcoming housing loss prevention Follow-ups that are due. If you want the landlord's name and telephone number to appear on this report, you must enter their name and phone number in the Housing History record associated with the HLP record, in the following fields:

  - Landlord name – enter in Place Name field
  - Landlord telephone – enter in Telephone 1 field

⚠️**IMPORTANT:** A service provider should never have a HP and a HLP for the same address.

⚠️**IMPORTANT:** Only one HLP may be associated with a Housing History record, therefore once the final follow-up has been completed on a HLP, another HLP cannot be added, even if the client is still living at the address (Housing History record). If another HPL is required, then another housing history record will need to be created for the same address.

3.2.7.2 PR15 - Enter Specific Supports Provided to Keep Client's Housing

Procedure	PR15 - Enter Specific Supports Provided to Keep Client's Housing
Prerequisite	Client record has been created.
	Housing Loss Prevention record has been created.
Related Procedures	PR5 - Enter Basic Client Record
	PR7 - Enter Housing History
	PR12 - Enter a Housing Loss Prevention Record

BC Housing's outreach programs support clients who are at risk of homelessness to keep their housing.

When supporting a client to keep their existing housing, a Housing Loss Prevention (HLP) record is created in HIFIS (PR12 – Enter a Housing Loss Prevention Record). The creation of the HLP record allows the activity to be followed up on at six and twelve months to determine if the client maintained their housing.

Once the HLP record has been created, the details of the support provided must be entered. Support provided to assist a client to maintain existing housing includes the following:

1. **Ongoing rent supplements:** Monthly rent supplements provided to a client for a period in circumstances where they are not able to make the complete rent payment.

2. **One-time rent supplements:** One-time rent supplements provided to address the client's immediate housing concerns, such as paying for utilities to ensure they keep their housing. For a full list of acceptable uses, refer to the Rental Supplement Guidelines.

3. **Services:** Services provided to a client to assist them to maintain their current housing. Examples include working with a landlord to improve the relationship with the client or assisting the client to apply for benefits they are eligible for that can assist them to pay their rent.

Procedure

1. Navigate to the client for whom you want to enter HLP activity details.

2. **To enter an ongoing rent supplement:**
    a. Navigate to the HLP Details screen (Client Management > Housing Loss Prevention) of the HLP record recently created in PR12 - Enter a Housing Loss Prevention Record.
    b. Click the ⚙ button.
    c. On the Subsidies tab, click ⊕ New Subsidy .
    d. Enter the program which is funding the rent supplement. More than one program may be available; select only one.

e. In the Start Date field, enter the date when the client will start to receive the supplement.

    ⚠ **NOTE:** The Start Date cannot be before the start of the HLP record.

f. Enter the Reason for Service.
g. In the End Date field, enter <u>the last day of the month</u> when you estimate you will stop giving the supplement to the client .
h. In the Amount field, enter the monthly supplement amount you will be providing to the client.
i. The Payment Date field is optional and may be left blank.
j. Monthly is the default value for Pay Frequency and cannot be changed.

k. Click [💾 Save] .

⚠ **NOTE:** If you enter a Rent Supplement record for a date range (e.g., January 1 – December 31), you do not need to enter a new Rent Supplement record each month.

⚠ **IMPORTANT:** If you enter a Rent Supplement record for a date range (e.g., January 1 – December 31) and you stop giving the supplement to the client before the end of that range, you need to go into the Rent Supplement record and update the End Date. If you do not, the system will assume it is still being provided and the rent supplement reports will be incorrect.

⚠ **IMPORTANT:** Be sure to enter the monthly supplement amount you will provide to the client, not the amount you will provide for the whole period for which they will be receiving the supplement. Entering the amount for the whole period will show up on reports as though you are providing that amount each month.

3. **To enter a one-time rent supplement:**
    a. Navigate to the Client - Goods and Services screen (Client Management > Goods and Services).

    b. Click [➕ Express Good] .
    c. In the Good field, select what you provided to the client.

⚠ **NOTE:** Everything selected in the Good field will be reported against the rent supplement budget for your site. Only select items that are identified as acceptable uses in the Rental Supplement Guidelines.

    d. Enter the program that is funding the rent supplement. More than one program may be available; select only one.
    e. Select ALL in Unit of Measure.

f. Enter the amount provided to the client in the Unit Price field.

g. Enter the Reason for Service.

h. Click [**H** Save] .

4. **To enter a service provided to the client to help them maintain housing:**

a. Navigate to the Client - Goods and Services screen (Client Management > Goods and Services).

b. Click [**⊕ Express Service**] .

c. Select the service provided to the client to help them keep their housing.

d. Enter the program that is funding the provision of the service. More than one program may be available for selection; select only one.

e. Enter the Reason for Service.

f. Enter other relevant information.

g. Click [**H** Save] .

3.2.7.3 PR13 – Enter a Six-Month Housing Loss Prevention Follow-up

Procedure	PR13 - Enter a Six-Month Housing Loss Prevention Follow-up
Prerequisites	Client record has been created. Housing History record has been created for current address. Housing Loss Prevention record has been created.
Related Procedure	PR12 - Enter a Housing Loss Prevention Record

Activities performed to help clients maintain their current housing are recorded as Housing Loss Prevention (HLP) records in HIFIS. HLP records that have been created are shown on the Housing Loss Prevention List (Front Desk > Housing > Housing Loss Prevention).

Upcoming Follow-ups that are due for HLP records are displayed on the Past Due/Upcoming Follow-ups button on the Housing Loss Prevention List screen. The next scheduled follow-up date is also displayed in the Status field for each record.

The purpose of recording the results of the follow-ups is to:

- better understand chronic homelessness, such as how many people experience chronic homelessness, how long and how often they experience chronic homelessness*

- measure housing stability

* Chronic homelessness means a client who has experienced homelessness for six months or more in the past year (i.e. has spent more than 180 cumulative nights in a shelter or place not fit for human habitation) and/or has experienced homelessness three or more times in the past year. This also includes individuals exiting institutions (e.g. mental health facilities, hospitals, correctional institutions, and children leaving care) who have a history of chronic homelessness and cannot identify a fixed address upon their release.

Homelessness refers to a situation where an individual or family is not stably housed or is living in temporary accommodation where they do not have control over the length and conditions of tenure and do not have adequate personal space. This includes living in: public spaces without legal claim (e.g. on the streets, in abandoned buildings or in tent cities); a homeless shelter, a transition house, a public facility or service (e.g., hospital, care facility, rehabilitation or treatment centre, correctional facility) and cannot return to housing; or where they are financially, sexually, physically or emotionally exploited to maintain their shelter.

This procedure provides steps to complete a six-month follow-up. The three possible scenarios are: the client is still living in the same place; unable to determine if the client is

still living in the same place (e.g. no contact); or the client has move and no longer living in the same place.

Procedure

1. Find the Housing Loss Prevention Record that you want to follow up on in the Housing Loss Prevention List.
2. Click the Manage button (⚙) beside the Housing Loss Prevention record.
3. Click ⊕ Add Follow-up .
4. The Follow-up Date is pre-populated with today's date. Change it if the actual follow-up occurred on a different date.

5.	If the client is living in the same housing unit:	a. Enter: • Months Elapsed = Leave at system calculated number • Final Follow-up = No • Use Exact Follow-up Date = Yes • Next Scheduled Follow-up = Enter applicable date • All Clients Still In Housing = Yes b. Click 💾 Save . This will leave the Housing Loss Prevention record open. Perform a 12-month follow-up when due.

If you are unable to determine if the client is still living in the housing unit:	c. Enter:
	   • Months Elapsed = Leave at system calculated number
	   • Final Follow-up = No
	   • Use Exact Follow-up Date = Yes
	   • Next Scheduled Follow-up = Enter applicable date
	   • All Clients Still In Housing = Unable to Contact.
	
	d. Click [Save] .
	
	This will leave the Housing Loss Prevention record open. Perform a 12-month follow-up when due.

If the client is not living in the housing unit being supported to maintain housing:	e. Enter (for the initial housing unit):
	   • Months Elapsed = Leave at system calculated number
	   • Final Follow-up = Yes
	   • All Clients Still In Housing = No
	   • Clients That Have Left Housing = Click [+] to insert the client
	   • Reason Left Housing – Select the reason
	   • Is Housed Elsewhere = Select the appropriate option
	   • House Now Available = Yes
	
	f. Click [Save] .
	
	This will close the initial HLP record. Whether you create a new HP record or Housing History with a HLP record will depend on what transpires and your involvement.

IMPORTANT: If there is an active rent supplement, end it (enter End Date) <u>before</u> entering the final Follow-up in the placement. (For information about working with rent supplements, see PR40 - Enter a Rent Supplement.)

NOTE: The procedure described above is one way to access a HLP record. A user may also manage the HLP record from within a client record and follow the appropriate steps outlined above.

3.2.7.4 PR14 – Enter a 12-Month Housing Loss Prevention Follow-up

Procedure	PR14 - Enter a 12-Month Housing Loss Prevention Follow-up
Prerequisites	Client record has been created. Housing History record has been created for current address. Housing Loss Prevention record has been created. A six-month housing loss prevention Follow-up has been done where the client was still housed.
Related Procedures	PR12 - Enter a Housing Loss Prevention Record PR13 – Enter a Six-Month Housing Loss Prevention Follow-up

Activities performed to help clients maintain their current housing are recorded as Housing Loss Prevention (HLP) records in HIFIS. HLP records that have been created are shown on the Housing Loss Prevention List (Front Desk > Housing > Housing Loss Prevention).

Upcoming follow ups that are due for HLP records are displayed on the Past Due/Upcoming Follow-ups button on the Housing Loss Prevention List screen. The next scheduled Follow-up date is also displayed in the Status field for each record.

Procedure

1. Find the Housing Loss Prevention record for the client who you want to follow up on in the Housing Loss Prevention List (Front Desk > Housing > Housing Loss Prevention List).

2. Click the Manage button (⚙) beside the Housing Loss Prevention record.

3. On the Follow-ups tab, click ⊕ Add Follow-up .

⚠ **NOTE:** If ⊕ Add Follow-up does not appear, it is likely that you are in a Housing Loss Prevention record for which all Follow-ups have been completed.

4. The Follow-up Date is pre-populated with today's date. Change the date if the actual Follow-up occurred on a different date.
5. In the Months Elapsed field, leave at system generated number.

<u>If the client(s) is still in the housing unit:</u>

a. Set Final Follow-up toggle to No.
b. Set the Use Exact Follow-up Date toggle to Yes and enter the date for the 12-month follow-up in the Next Scheduled Follow-up field.
c. Select Yes in the All Clients Still In Housing field.
d. Click **H Save** .

⚠**NOTE:** When the supplement ends, ensure the supplement End Date field is correct in the system <u>before</u> entering a final Follow-up.

<u>If the client(s) has left the housing unit:</u>

a. Select No in the All Clients Still In Housing field.
b. Click **+** on the Clients That Have Left Housing field. This will insert the client's name.
c. Enter the reason the client left the housing.
d. If you know the client is housed elsewhere set the Is Housed Elsewhere toggle to Yes; otherwise leave it set to No.
e. Click **H Save** .

⚠**NOTE:** When a final Follow-up is completed the system inputs the current date as the End Date in the corresponding Housing History record. There is not an option to enter the End Date as there is when completing a final Follow-up in a Housing Placement record. **Be sure to edit the Housing History End Date if needed**.

⚠**NOTE:** The procedure described above is one way to access a HLP record. A user may also manage the HLP record from within a client record and follow the appropriate steps outlined above.

3.2.8 Additional Procedures

Additional Procedures – Miscellaneous Related to Client

- PR37 - Log On to HIFIS
- PR4 - Search for a Client
- PR39 - Enter a Service Restriction

Additional Procedures – Find Housing for a Client

- PR34 - Enter an Inventory of Housing Units
- PR36 - Enter Housing Placement Using an Inventory of Housing Units (Search for Existing Units)

3.2.8.1 PR37 – Log on to HIFIS

Procedure	PR37 – Log On to HIFIS
Prerequisite	User account has been set up.

Procedure

1. Navigate to the HIFIS Homepage at: https://app.hifisbc.ca.
2. Enter your user name.
3. Enter your password.
4. Click Log In / Connexion .
5. If you have forgotten your password click on Forgot Password? / Mot de passe oublié? to recover your password and follow the instructions on the screen.

NOTES:
- If you have difficulty logging in, you can contact the HIFIS Support Desk at the number or email address displayed at the bottom of the screen.
- If you have access to more than one service provider (site) you will be logged into your "primary" service provider. If you desire for your primary service provider to be changed you can contact HIFIS Support Desk.
- If you have access to more than one service provider be sure you are logged in to the site for the transaction you are entering. Although you can access a client with any login, the transactions must be created and edited when logged in to the appropriate service provider.

3.2.8.2 PR4 – Search for a Client

Procedure	PR4 – Search for a Client

This task is done when a HIFIS user is seeking to find a client in their cluster.

⚠ **NOTE:** A client can be searched for by ID, First Name, Middle Name, Last Name, Alias 1 or File Number fields. At least three characters must be entered before a search can be executed. Searches are based on the beginning string of characters; a search is not case sensitive and only numbers and letters are utilized in searching. There are certain words which are excluded from being searched on like "the", "from", and "have". If any client names begin with such words and you are unable to find them, please contact the HIFIS Support Desk.

Procedure

1. Log on to HIFIS.
2. Search

   Search by ID:

⚠ **NOTE:** The ID is a unique, system-generated number. By default, HIFIS displays the ID in the File Number field with leading zeros when a new client is created, but the File Number field may be edited.

   a. Enter at least the first three numbers of the ID in Client Search and execute search (i.e., press Enter or Click on Search button).
   b. For ID 12345, you can enter 123, 1234 or 12345. You cannot search by entering enter 234 or 345.

   Search by Name (choice of Last Name, First Name and Middle Name fields):

⚠ **NOTE:** All marks (such as accents or cedillas), punctuation and special characters are removed from name fields, including Alias 1, before stored as meta-search fields.

   a. Enter at least the first three letters of any Name field saved in HIFIS or enter any number of letters for a name field separated by a space before entering letters of another name field. For example, for 'Janice Sonia Martin', you can enter 'jan', 'son', 'mar', 'j so', 's ma', or 'j s m', to name a few possible options.
   b. For 'Janice', using 'ani' or 'ice', for example, will <u>not</u> find 'Janice'.
   c. You will find 'J.S.M.' by searching 'jsm'.
   d. You will find 'Peggy-Sue' by searching 'peggy-sue' or 'peggysue', to name a few possible options.

Search by Alias 1:

⚠NOTE: HIFIS allows a user to store two aliases, but only a name saved in Alias 1 is searchable and visible when a Client List is displayed

   a. Enter at least the first three characters of the name that would have been saved in the Alias 1 field.

Search by File Number:

⚠NOTE: A 50-character free text field is initially populated with the ID Number and leading zeros to form a 10-digit number. Leading zeros in the File Number field are ignored.

   a. Enter at least the first three characters of a string in the File Number field.

⚠NOTE: The File Number may consist of a series of strings separated by, for example, a space, punctuation, or a hyphen.

3. Once any search has been completed, you may drill down further by adding a space and additional text to the search string previously queried.
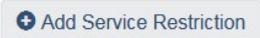
3.2.8.3 PR39 – Enter a Service Restriction

Procedure	PR39 – Enter a Service Restriction
Prerequisite	Client record has been created.
Related Procedure	PR5 - Enter Basic Client Record

HIFIS allows service restrictions to be recorded in a client's record. Below is guidance regarding restricting shelter services to clients (Admissions module):

- While discriminatory criteria for admission are not tolerated, the provider is not expected to deliver services to individuals in circumstances where the safety and/or security of the provider or any other individual may be threatened.
- Sites must have clearly written policies and procedures for providing services to clients, including policies for situations where services to a client may be temporarily restricted for the safety of other clients or staff. These policies must:
    - o define reasons for, and conditions of, expulsion
    - o be clear and simple to understand
    - o describe the conditions and process for re-admission, including the appeal and complaints procedure
    - o require reasonable efforts to provide an appropriate referral
- A client's ability to access services and remain in the shelter is generally determined by their behaviour towards other clients and staff. Clients should not be refused services unless extenuating health or safety issues are present (e.g., assaults/threats to clients or staff and/or medical needs beyond what the shelter can accommodate).

Procedure

1. Navigate to the detailed record of the client for whom you want to enter a service restriction.
2. From the [Client Management ▾] drop-down menu, select Service Restrictions.
3. Click [⊕ Add Service Restriction].
4. Enter who requested the service restriction in the Requested by field.
5. Enter the dates when the service restriction starts and ends.
6. Select Service Providers for which the service restriction applies.
7. Enter the Modules for which the service restriction applies.

⚠**NOTE:** When a service restriction is entered for a module, HIFIS won't allow an entry to be made for the client in that module as long as the service restriction is active; however, a user with Site Administrator rights can over-ride a service restriction. If the client has, for example, a service restriction for shelter stays (Admissions module), the

client cannot be booked into the shelter. The following message will be displayed:

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.

8. Enter the reason for the restriction and some information that provides context regarding why the client is being restricted.

9. Click [🖫 Save].

⚠ **NOTE:** When a service restriction is entered, an alert is displayed in the client's profile. Clicking on the link takes you to the service restriction.

3.2.8.4 PR34 – Enter an Inventory of Housing Units

Procedure	PR34 - Enter an Inventory of Housing Units
Related Procedure	PR36 - Enter a Housing Placement Using an Inventory of Housing Units

Service providers who have a relatively stable inventory of housing units they place clients into and who want to closely manage these units can enter this inventory into HIFIS. These units will then be available to the service provider when they are recording a Housing Placement in the system.

⚠**NOTE:** For those who use BC Housing's Housing Connections database, these systems are not connected to HIFIS. If a client is tenanted through Housing Connections, a user will still need to create the applicable housing record in HIFIS.

Procedure

1. Navigate to Front Desk > Housing > Housing Units.
2. Click the ⊕ Add Housing Unit button.
3. Enter the Status and leave the Status Date set to today's date.
4. Set the Occupancy Status to Available.
5. If desired, select the unit's Landlord.

⚠**NOTES:**
- For a landlord to appear in the drop-down list, a record for them must have been previously created in Front Desk > Housing > Landlords.
- HIFIS generates a report of upcoming housing placement Follow-ups that are due. If you want the landlord's information on this report, the housing unit must have a landlord associated with it.

6. If you want the unit to only be available to you (your site/service provider), select your site/service provider in the Service Provider field.

⚠**NOTE:** When a housing unit is associated with a specific service provider, the unit will not appear in Housing Unit searches performed by other service providers.

7. If you want the housing unit to be unavailable once a client is placed into it, set Shareable toggle to No. If you want to be able to place multiple clients into the housing unit (i.e., the housing unit will always be available) set Shareable to Yes.
8. Leave the Active toggle set to Yes.
9. Click the Address tab.

10. Enter the required information.
11. Click . .
12. Repeat steps 1-11 for all required housing units.

4 Site Administrator Responsibilities

4.1 Overview

Each site should have a HIFIS user with site administrator rights who can preform the following functions, which include functions other users are unable to perform:

- Request access for new users.
- Notify BC Housing immediately when a staff is on leave from, or has left, your organization, so BC Housing can deactivate that person's access to HIFIS.
- Report an issue or request a system change, including changes to rooms/beds.
- Request information/reports.
- Enter bulletins (PR35 – Enter a Bulletin).
- Create questionnaires (PR30 - Create a Questionnaire).
- Add a place to the directory of services (PR29 - Add a Place to the Directory of Services).
- Delete entries which other users do not have the rights to delete (e.g. shelter stays, rent subsidy).

4.1.1 Request Access for New Users

All new HIFIS users must complete applicable training provided by BC Housing. The HIFIS User Information Form available on the HIFIS Support Centre at www.hifisbc.ca should be completed and emailed to HIFISTraining@bchousing.org. Additionally, new users will be required to file a completed Confidentiality and User Agreement form before gaining HIFIS access, also available on the HIFIS Support Centre website.

4.1.2 Deactivate a User Account

When a user no longer requires access to HIFIS (e.g. no longer employed, changed responsibilities within the organization, temporary leave of absence) the HIFIS Support Desk should be contacted, at HIFISSupport@bchousing.org or call 1-833-454-5435, so that the user account can be deactivated as soon as possible. Site administrators should regularly run the Audit – User Rights report and review the status of their users.

4.1.3 Report an Issue or Request a System Change

Users with site administrator rights are responsible for reporting issues and requesting system changes on behalf of their site, including changes to the rooms and beds configuration at a shelter. Report issues and submit system change requests to the HIFIS Support Desk.

4.1.4 Request Information/Reports

Site administrators are responsible for requesting information/reports on behalf of their site. Send requests to the HIFIS Support Desk.

4.1.5 Enter Bulletins

Site administrators can send out bulletins that will appear on the home screen of users at their site. See procedure PR35 – Enter a Bulletin.

4.1.6 Create Questionnaires

Customized questionnaires can be created by service providers to collect additional information about clients, or to obtain client feedback on the services they received.

The steps for creating questionnaires are documented in PR30 – Create a Questionnaire.

4.1.7 Add Places to Directory of Services

The Directory of Services module in HIFIS is used to add records for places that clients regularly interact with such as service providers, government offices, and other resources.

Once a place is entered in the Directory of Services it will be available for selection in a drop-down list and will not need to be entered every time. This feature is available in a variety of locations in HIFIS, including:

- Services providers and agencies that a client is being referred to.
- Pharmacies when entering a client's medication.
- Schools when entering a client's Education record.

The steps for adding a place to the Directory of Services are documented in PR29 – Add a Place to the Directory of Services.

⚠️ **NOTE:** To reduce instances where a Place record is created several times in HIFIS, only users with site administrator rights have the ability to add new Place records. If a user does not find a place they need in a drop-down, they should contact their site administrator and request that it be added.

4.1.8 Delete Entries

Site administrators can delete certain transactions user with other rights are not able to, such as rent supplements and shelter stays.

4.2 Site Administrator Procedures

4.2.1 PR29 – Add a Place to the Directory of Services

Procedure	PR29 – Add a Place to the Directory of Services
Prerequisite	User has the right to add places to the system.

The Directory of Services module in HIFIS is used to add records for places that clients regularly interact with such as service providers, government offices, and other resources.

Once a place is entered in the Directory of Services it will be available for selection in a drop-down list and will not need to be entered every time. This feature is available in a variety of locations in HIFIS, including:

- Services providers and agencies that a client is being referred to.
- Pharmacies when entering a client's medication.
- Schools when entering a client's Education record.

NOTE: To reduce instances where a place record is created several times in HIFIS, only site administrators have the ability to add new place records. If you do not find a place you need in a drop-down list, you should contact your site administrator and request that it be added.

Procedure

1. Navigate to Front Desk > Directory of Services.
2. Click Add Place .
3. Enter the Place Name. This is what will appear in the drop-down box.
4. In Place Type, select the value that best describes the place.
5. Set Active toggle to Yes.
6. Select the Referrer Category Type that best describes the place. This will appear before the place name in the drop-down box when you are referring the client somewhere (e.g., Health Services – Dr. Joe Smith).
7. Set the Referable from and Referable to toggles to Yes.
8. Enter any relevant comments.
9. Enter the place's address information.
10. Click Save .
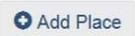
NOTE: If you want the place to automatically appear in drop-down lists for HIFIS users in more than one region, you can enter each region in the Geographic Region field.

4.2.2 PR30 – Create a Questionnaire

Procedure	PR30 – Create a Questionnaire
Prerequisites	User has the Site Administrator role in the system.

HIFIS provides the ability to create custom questionnaires to collect additional information about clients. The questionnaire must first be created in the administration area (Administration > Questionnaires), after which it can be completed and added to a client's record.

This procedure explains how to set up the questionnaire in the administration area of HIFIS.

Procedure

1. Navigate to Administration > Questionnaires.
2. Click ⊕ Add Questionnaire .
3. Enter the Questionnaire Name. (Enter the same name in both English and French.)
4. Add the service provider(s) who will be able to use the questionnaire.
5. Leave the switch to Active if you are creating a new questionnaire that you want active.
6. Set the Owner. This is the service provider who will be able to edit the questionnaire template.
7. Click ⊞ Next .
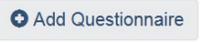
⚠ **NOTE:** Now that you have initiated a questionnaire, you need to add the questions. Repeat the following steps for each questionnaire:

8. Enter the question.
9. Leave the switch to Active.
10. Select the Question Type (Yes/No; Numeric; Text; Date; Single or Multiple Selection Dropdown)
11. Then click one of the following buttons:
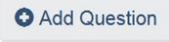
    a. ⊕ Add Question If you selected a Multiple Selection Dropdown, this button takes you to the Add Drop-down Value screen, where you can enter the values you wish to have displayed.

    b. ⊕ Save Question and Finish Questionaire

    c. ⊞ Discard Question and Finish Questionaire
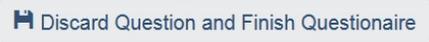
⚠️**NOTE:** If you selected a single or multiple selection drop-down questions, when you click [⊕ Add Question], the next window will allow you to enter values for the drop-down responses. Enter a value; then click [⊕ Drop-down Value - English]. Each value must be entered separately. On the final value, click [⊕ Save Value and Finish Question].

12. Repeat steps 8 – 11 to add more questions.

13. After all questions have been entered, click [⊕ Save Question and Finish Questionaire].

⚠️**NOTE:** The questionnaire will now be available for the selected service providers to complete. This is done from the client's record (Client Management > Surveys).

4.2.3 PR35 – Enter a Bulletin

Procedure	PR35 - Enter a Bulletin
Prerequisites	User has the right to add bulletins to the system.

Bulletins can be created by site administrators to communicate important information to staff members, such as safety concerns or team meetings. Bulletins are displayed on a user's home screen until acknowledged.

Procedure

1. Click the Communications drop-down menu.
2. Select Bulletins.
3. Click ⊕ Add Bulletin .
4. Enter the Subject.
5. Select the Priority (High; Normal; Low)
6. If relevant, select Requested by (who is requesting the bulletin be issued).
7. Select the Owner (the service provider issuing the bulletin).
8. Select the Service Providers you wish to share the bulletin with (you can send the bulletin to all sites for which you have the system rights to send bulletins).
9. Enter the Start Date of the bulletin.
10. Enter the End Date of the bulletin.
11. Enter the Bulletin Content; (the reason for the bulletin; e.g., details about an incident or contents of a team meeting).
12. Click 🖫 Save .

How to Acknowledge a Bulletin

1. Click the Communications drop-down menu.
2. Select Bulletins.
3. Click the Close Bulletin button (✖) beside the bulletin.
4. Click Close Bulletin in the pop-up box. The bulletin will be removed from the home screen but will remain in Bulletin List until it is deleted.

5 HIFIS-Related Policies

5.1 Client Consent Expiry

Once a client provides consent to record their information in HIFIS, it does not expire and is valid unless the client indicates they would like to withdraw it.

5.2 Review of Client Data

When a service provider comes into contact with a client they have not interacted with in the past three months, they should perform a general review of a client's information in HIFIS to verify it is up-to-date and correct.

Key items for review are the client's Contributing Factors (under Various Factors) and Housing History.

5.3 Documents in HIFIS

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 area of the application (with the exception of consent forms, which can be uploaded on the Client Vitals screen). These modules include:

- Case Management: Display Case Management > Documents
- Housing Placements: Housing Placement Details > Documents
- Housing Loss Prevention: Housing Loss Prevention Details > Documents
- Incidents: Add Incidents > Attachments

In particular, scanned client identification documents (e.g., driver's licence, BC Services Card) are useful items to store in the system. A client's health records should never be uploaded into HIFIS.

⚠ **NOTE:** The file size limit for uploading documents is 5MB. If your document is larger than 5MB it will first have to be compressed or divided into smaller segments.

6 Need to Know

This section contains a variety of notes about items that are important for users to know when using HIFIS and are not contained in a single procedure document or included in the Key Concepts section.

6.1 Importance of Housing History

A client's Housing History records where the client has lived, including periods of homelessness.

Complete and accurate Housing History records are critical for HIFIS to function as intended and for the analytics provided by the system to be correct. For example, clients experiencing chronic homelessness can be identified using the information in the Housing History. If a client's Housing History is not entered and a VAT is not recorded, it cannot be determined if they experienced chronic homelessness. This will affect the reporting for two of the Emergency Shelter Program (ESP) key performance indicators (KPIs).

Information derived from the aggregate Housing History records in the system will inform policy development and planning activities, and assist with the prioritization of programs and services to address the needs of people who are experiencing homelessness. It is crucial that every client record created has an associated Housing History record for the past year (within Canada) that is as complete and accurate as possible.

6.2 Alerts and What Actions Create Them

Several types of entries in a client's record cause an alert to be created. Alerts indicate some piece of information that would be good for workers to know when serving the client. Alerts are created when one of the following is entered for a client:

- Service Restrictions (Front Desk > Service Restrictions) – indicates the service provider, restricted services, length of time, and reason for restriction. ⓘ
- Behavioural Risk Factor (Client Information > Various Factors > Behavioural Risk Factor) – client behaviours that HIFIS users may need to be aware of for the safety of the client, other clients or staff members. ⚠
- Watch Concerns (Client Information > Various Factors > Watch Concerns tab on Client – Various Factors screen) 👁

When an alert is created, an icon is placed on the left side of the screen under the client profile section. Hovering over the icon will provide a description of the alert and clicking on the icon take the user to the screen with details about the alert.

Icons for Service Restrictions and Watch Concerns are also visible from the Client List screen.

6.3 Incidents

In the Incidents module (Front Desk > Incidents), service providers must record the details of all critical incidents significant enough to threaten the continuous operation of the services such as fire, floods, infectious disease outbreaks, a serious injury or death of clients or staff on site, and any events that garner media attention.

Service providers can also record non-critical incidents in the Incidents module.

6.4 Enter One Program in the Program Field

Every service transaction (shelter stay, good or service, housing placement) entered into HIFIS must have a Program entered; this is the program that is funding the transaction.

While more than one program can be selected; select only one. Entry of more than one program on a transaction will impact system reporting.

6.5 Summary Information Screens

There are various screens in HIFIS where a summary of entries/transactions can be found. Some are listed in the table below.

Item	Description
Case Management List (Front Desk > Case Management)	Shows a list of all case plans created at the site for a given period of time.
Housing Placement List (Front Desk > Housing > Housing Placements)	Shows a list of all housing placements created at the site for a given period of time.
Goods and Services List (Front Desk > Goods and Services)	Shows a list of all goods and services transactions entered at the site for a given period of time.
Admission (Front Desk > Admissions)	Shows a list of all clients booked into the shelter.
Client Activity Log (Client Vitals > Client Activity Log)	Shows all activities performed on the client's record.
View All Case Session Details (Client Vitals > Case Management > Display Case Management > Sessions > View All Session Details)	Shows all case session details for a client's case plan.
Service Restriction List (Front Desk > Service Restrictions)	Shows a list of all service restrictions at the site for a given period of time.
Conflict List (Front Desk > Conflicts)	Shows a list of all conflicts at the site for a given period of time.
Incident List (Front Desk > Incidents)	Shows a list of all incidents at the site for a given period of time.

6.6 Shareable Toggle

Several Client Information records contain sensitive information that will not be shared amongst sites. These include:

- Health issues (Client Information > Health Information > Health Issue)
- Medication information (Client Information > Health Information > Medication)
- Financial information (Client Information > Financial Profile)
- Client Comments (Client Vitals)

Any time a record is entered in one of these modules the Shareable toggle must be set to No to prevent it from being shared amongst sites. A script is run daily to ensure the toggle is set to No.

6.7 Referrals

Referrals can be entered in a variety of places in HIFIS:

- Case Session (after a case has been added on the Client – Case Management List: Client Management > Case Management)
- Goods and Services (Front Desk > Goods and Services)
- Admissions (Front Desk > Admissions)
- Group Activities (Front Desk > Group Activities)
- Conflicts (Front Desk > Conflicts)

Sites can enter referrals in any way that works for them. A preferred method is to enter an Express Service transaction with "Referrals" selected as the Service. The specific place the client is being referred to can be selected in the Referred to field.

6.8 Contact Info versus Client Contacts

The Client Vitals screen has two tabs related to contact information:

- Contact Info – this is for the client's contact information.
- Client Contacts – this is for contact information for people associated with the client.

6.9 Families in HIFIS

Family records can be created in HIFIS by linking individual client records. This is done from the [Client Information ▾] menu, in the Family section. From a client's record, you can either start a new family or add the client to an existing family. Generally, family records are created for families staying at a shelter, or for <u>adult</u> outreach clients who are related.

The Training Centre within HIFIS contains full instructions for creating family records (Help > Training Centre > Basics > Working with Clients and Families).

6.10 Medication Dispensing Module

For sites that dispense medication, training on how to enter this information into HIFIS is available in the Medication Dispensing module in the Training Centre (Help > Training Centre > Beyond the Basics > Recording Incidents, Internal Communications and Medication > Medication Dispensing).

6.11   Enter Pets in Contributing Factors

If you want to record that a client has a pet, enter it as a Contributing Factor in the Various Factors module (Client Information > Various Factors). Select Has Pet from the Contributing Factor drop-down list.

6.12   Barcode Created and Saved with Client Record

When a new record is created, a barcode is generated and saved in the client's document list (Client Information > Documents).

The barcode is not currently used for anything in British Columbia.

7 User Support and Administration

7.1 Get Access to HIFIS

To get access to HIFIS, contact the HIFIS administrator at your site.

7.2 HIFIS Support

Support on the use of the BC Housing instance of HIFIS 4.0 is available by telephone (1-833-454-5435) and on the internet (www.hifisbc.ca). The HIFIS Support Desk exits to provide users with assistance in using HIFIS in BC. The Support Centre website exists to provide resources on using HIFIS in BC, and other related materials. The Support Desk may be able to assist with program administration questions, but such matters should be referred to Supportive Housing and Programs or your society's BC Housing contact (i.e. Non-Profit Portfolio Manager, Supportive Housing Advisor).

Staff are typically available at the Support Desk on weekdays from 8:30am to 4:30pm, excluding statutory holidays. When you call the Support Desk on weekdays you may press '1' for Access Request or '2' for All Other Support. After being on hold for three minutes your call will go to voicemail. You should receive a reply from the HIFIS Support Desk within two working days in response to voicemail messages and emails.

After hour, weekend and holiday support is available through a third party for limited user access requests only, by calling the same telephone number, 1-833-454-5435 and pressing '1' for Access Request (e.g. unlocking an account, verifying active account, assistance with logins). The third party Help Desk cannot create or activate an account, nor can they provide technical assistance on the use of the application.

Throughout this manual reference is made as to when to contact the HIFIS Support Desk. On most screens in HIFIS, if you scroll to the bottom you will find HIFIS Support information.

7.3 Confidentiality and End User Agreement

Before being provided access to HIFIS, all users are asked to sign a Confidentiality and User Agreement, which is one of the tools employed to ensure you know how to protect information. The agreement explains the measures required for protecting client information and instructs you to inform BC Housing in the event of a privacy breach. Make sure to read it carefully before signing and to ask for clarification if you have any questions.

Questions can be addressed to HIFISSupport@bchousing.org or by calling 1-833-454-5435.

7.4 How to Retrieve/Reset Password

To reset your HIFIS password, click Forgot Password? on the HIFIS log-in screen, enter your user name or email address, and click Reset Password. An email will be sent to you with instructions.

7.5 Report an Issue or Request a System Change

To report a HIFIS system issue or request a system change, contact your HIFIS site administrator.

7.6 Request Changes to Rooms/Beds

If changes are needed to the setup of rooms and beds at your site, contact your HIFIS site administrator.

7.7 Add a Place to the Directory of Services

The Directory of Services module in HIFIS is used to add records for places that clients regularly interact with such as service providers, government offices, and other resources.

Once a place is entered in the Directory of Services it will be available for selection in a drop-down list and will not need to be entered every time. This feature is available in a variety of locations in HIFIS, including:

- Services providers and agencies that a client is being referred to.
- Pharmacies when entering a client's medication.
- Schools when entering a client's Education record.

To have a place added to the Directory of Services, contact your HIFIS site administrator.

7.8 Post-Conversion Cleanup Activities and Considerations for Sites

This section lists data cleanup activities for sites to perform for data converted from the Homelessness Services System (HSS) to HIFIS. It also includes data conversion implications that may not require changes but that may be useful for sites to know.

7.8.1 HSS to HIFIS

Item	HSS	HIFIS
1	Shelter Stays	Admissions
2	Case Plans	Case Management
3	Case Histories	Case Management
4	Housing	Housing Placements or Housing Loss Prevention

7.8.2 Shelter Stays

Item	Activity	Description
1	Assign clients to correct beds. [*This is no longer applicable.*]	The data conversion from HSS to HIFIS randomly assigns client to beds. Booked-in clients may have needed to been (re)assigned to proper beds in the HIFIS Admissions module.

7.8.3 Client Data

Item	Activity	Description
1	When fields are discovered with the term 'Conversion,' they should be reviewed and updated for accuracy, if possible.	Examples include: • Indigenous Status (shows as Conversion – Indigenous; found under Client – Vitals) • Health Information • Recent Immigrant/Refugee Status • Reason for Service (Admissions)
2	Report duplicate client records	When searching for a client record, you may find that there is more than one record for the client in HIFIS. When this occurs email HIFISSupport@bchousing.org identifying the duplicate clients.

7.8.4 Case Histories

There were no post-conversion cleanup activities required. Case history data was converted as a session in a Case Management record and intended only for historical purposes. It was not intended to be modified or updated in HIFIS once converted. If you edit 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.

7.8.5 Housing

Item	Activity	Description
1	Remove or update the Next Scheduled Follow-up Date on Housing Placement and Housing Loss Prevention records.	Housing placements and/or housing loss prevention records with overdue Next Scheduled Follow-up Dates are displayed when the following button is selected: . Remove or update the Next Scheduled Follow-up Date as required.
2	Update address information in the client's Housing History when record is edited.	Address information may need to be updated in Housing History records in the Client Information module. HSS only had one address field, but HIFIS requires City, Province and Country. HSS data was converted to Address line 1 in HIFIS, City was defaulted to Service Provider city of address, Province was defaulted to BC, and Country was defaulted to Canada. Users may need to edit details where the default values are incorrect.
3	Add valid caseworker to Housing Placement or Housing Loss Prevention records if record is edited.	Housing placement or housing loss prevention records created by the conversion from HSS to HIFIS may include caseworkers who do not exist in HIFIS. If the record is edited, a valid caseworker name will be required.
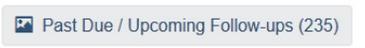
7.8.6 Case Management

Item	Activity	Description
1	Remove programs on Case Management records if your site is funded for multiple programs.	Converted Case Management records may be associated with multiple programs (e.g., HOP, AHOP, HPP, ESP, and/or IOM). 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 that is funding the case management activities.
2	Update status of Case Management record, if desired.	All case plans will be converted to Case Management records with the status of Closed – Conversion. If desired, review converted Case Management records: • 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. ⚠**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.
3	Update caseworker on Case Management record if record is edited.	Case Management records created by the conversion from HSS to HIFIS may include caseworkers who do not exist in HIFIS. If the record is edited, a valid caseworker name will be required.

7.9 Privacy-Related Procedures

7.9.1 How to Respond to an FOI Request

If you receive a request from a client for their information in HIFIS, ask them to make the request in writing and submit it to BC Housing's Operations Support at

HIFISSupport@bchousing.org. BC Housing processes requests from clients in consultation with the service providers who entered the information in HIFIS.

7.9.2 How to Report a Privacy Breach

Privacy breaches must be reported to BC Housing. If you become aware of a privacy breach or if you suspect a privacy breach, report it immediately to BC Housing's Operations Support at HIFISSupport@bchousing.org. Make sure to also report it to your supervisor. BC Housing will work with all service providers involved to investigate and respond to the breach.

7.9.3 How to Respond to Subpoenas, Court Order Requests from Law Enforcement, MCFD or Other Government Entities

A request for client information in HIFIS from entities that are not working with the client to provide them with benefits, services or other forms of assistance are handled by BC Housing in consultation with the service providers who entered information in HIFIS. These types of requests need to be made in writing and forwarded to BC Housing's Operations Support at HIFISSupport@bchousing.org.

7.9.4 How to Respond to Requests from Other Service Providers

Service providers may share information with other service providers and organizations that are working with clients to provide them with benefits, services or other forms of assistance.

Provide information only if you have a client's consent. Use a consent form approved by BC Housing or your organization (e.g. Exchange of Information).

Make sure to also follow any procedures your organization may have for sharing information.

8 Appendix A: Procedures Related to KPI Requirements

The following points identify what procedure(s) must be completed to ensure the required information for key performance indicator (KPI) reporting is entered.

ESP KPI: Percentage of clients housed within 60 days

- PR9 - Enter the Tenancy of a Client Placed Into Housing
- PR7 - Enter Housing History

ESP KPI: Percentage of chronic homeless clients housed within 100 days

- PR9 - Enter the Tenancy of a Client Placed Into Housing
- PR7 - Enter Housing History

ESP KPI: Percentage of clients housed who are verified remain housed at six and 12 months.

- PR9 - Enter the Tenancy of a Client Placed Into Housing
- PR10 - Enter a Six-Month Housing Placement Follow-up
- PR11 - Enter a 12-Month Housing Placement Follow-up

HOP KPI: Percentage of clients who are housed or supported to maintain existing housing

- PR9 - Enter the Tenancy of a Client Placed Into Housing or PR12 - Enter a Housing Loss Prevention Record
- PR7 - Enter Housing History
- PR15 - Enter Specific Supports Provided to Keep Client's Housing

HOP KPI: Percentage of clients housed who are verified remain housed at six and 12 months

- PR9 - Enter the Tenancy of a Client Placed Into Housing
- PR10 - Enter a Six-Month Housing Placement Follow-up
- PR11 - Enter a 12-Month Housing Placement Follow-up

HOP KPI: Percentage of clients supported to maintain existing housing who are verified remain housed at six and 12 months.

- PR7 - Enter Housing History
- PR12 - Enter a Housing Loss Prevention Record

- PR15 - Enter Specific Supports Provided to Keep Client's Housing
- PR13 – Enter a Six-Month Housing Loss Prevention Record Follow-up
- PR14 – Enter a 12-Month Housing Loss Prevention Record Follow-up

HPP KPI: Percentage of clients who are housed or supported to maintain existing housing

- PR6 – Entering Contributing Factors
- PR9 - Enter the Tenancy of a Client Placed Into Housing or PR12 - Enter a Housing Loss Prevention Record
- PR7 - Enter Housing History
- PR15 - Enter Specific Supports Provided to Keep Client's Housing

HPP KPI: Percentage of clients housed who are verified remain housed at six and 12 months

- PR6 – Entering Contributing Factors
- PR9 - Enter the Tenancy of a Client Placed Into Housing
- PR10 - Enter a Six-Month Housing Placement Follow-up
- PR11 - Enter a 12-Month Housing Placement Follow-up

HPP KPI: Percentage of clients supported to maintain existing housing who are verified remain housed at six and 12 months

- PR6 – Entering Contributing Factors
- PR7 - Enter Housing History
- PR12 - Enter a Housing Loss Prevention Record
- PR15 - Enter Specific Supports Provided to Keep Client's Housing
- PR13 – Enter a Six-Month Housing Loss Prevention Record Follow-up
- PR14 – Enter a 12-Month Housing Loss Prevention Record Follow-up

HPP KPI: Minimum of 80% of clients are part of the HPP Target Population

- PR6 – Enter Contributing Factors

9 Appendix B: General Privacy Concepts

9.1 Confidentiality

- Confidentiality is an important measure to protect client information.
- Providing confidentiality shows that we respect our clients and it also helps ensure we comply with our privacy obligations under law.
- Confidentiality applies in written and oral communications:
    - Always be aware of who can hear your conversations, see your documents and look at your computer screen.
- Share information only when you know it is permitted by law:
    - How do you know? Follow the policies and procedures of your organization.
    - If there is no policy or procedure, seek advice from your supervisor to make sure you are permitted to share.
    - Seek help from the person in your organization who is designated to answer questions about privacy.
- Once you know you are permitted to share, share only the minimal information needed for the purpose.

9.2 Safeguards

- You will be provided with privileged access to HIFIS. It is important that you take measures to protect the information in HIFIS.
- Do not look at client files in HIFIS unless you are doing so to perform your job duties.
- Your password: do not share it, ever.
- Your computer:
    - Lock it when you are away from your desk.
    - Hide your screen from view.
- Emails: do not use email to share client information. Email is like a postcard. Information in an email can be intercepted.
- Make sure to carefully read your Confidentiality and User Agreement. It tells you the things you need to do/not do when accessing HIFIS.

9.3 Privacy Breaches

- Examples of privacy breaches include:
    - You said something to someone when you should not have.
    - You mailed client information to the wrong person/address.
    - You sent emailed client information to the wrong person.
    - You lost a report that contained client information.
- It is important to notify BC Housing right away when you discover a privacy breach.
    - Why?
        - We need to assess the risks associated with breaches.
        - We need to understand if there are things we should do differently.
        - We may need to notify the client and others.
        - We may need to put immediate measures in place to prevent similar breaches in the future.
- If you become aware of a privacy breach, make sure to follow the procedure set out in section 7.9.2 of this manual.

9.4 Requests for Information

- Requests for client information can come in many forms:
    - Clients may ask for their own information.
    - Law enforcement agencies may ask for client information.
    - You may receive a Court Order that requires the production of information.
    - The Ministry of Children and Family Development may ask for information for child protection reasons.
- Because client information in HIFIS is often shared among more than one service provider in the Integrated Cluster, requests for client information in the Integrated Cluster in HIFIS are to be sent to BC Housing following the procedure set out in section 7.9 of this manual.
- BC Housing will process these requests in consultation with the service providers who entered the information in the Integrated Cluster in HIFIS.
- If a request is from another service provider or an organization that is working with the client to offer benefits, services, or other forms of assistance, it is acceptable for service providers to share client information, as long as the client has provided their written consent.

9.5 **Establishing Identity**

- It can happen that someone will pose as someone else to attempt to obtain client information. Revealing information to the wrong person is a privacy breach.
- One of the key measures you can take to prevent this type of privacy breach is to verify the identity of the person you are speaking with before providing any information.
- There are many appropriate ways of establishing a client's identity, depending on the nature of your interactions with clients.
- To verify the identity of a client, you can:
  - Ask a series of questions:
    - What is your full name? What is your cell phone number? What is your date of birth? When is the last time you stayed at this shelter? What is the name of your emergency contact on file? Etc.
  - Review the HIFIS file for things only the client would know and probe the client about those.
  - Ask for picture Identification.
- If a service provider has contacted you to obtain client information (and if you have the client's consent to share the information), make sure you know who you are dealing with:
  - You can contact the society at their central number to verify the individual is an employee.

9.6 **Corrections to Data**

- If you find incorrect information in HIFIS, such as a birthdate or a misspelling of a name, you will be able to correct it in the Client Information drop-down menu.
  - Site administrators can delete some non-critical data.

10 Appendix C: List of Acronyms

The following table contains a list of acronyms which are found within this User Manual:

B.C.	British Columbia
CAA	Coordinated Access and Assessment
CHB	Canada Housing Benefit
ESP	Emergency Shelter Program
EWR	Extreme Weather Response
HIFIS	Homeless Individuals and Families Information System 4.0
HLP	Housing Loss Prevention
HOP	Homeless Outreach Program
HP	Housing Placement
HPP	Homeless Prevention Program
HPS	Homeless Partnering Strategy
HSS	Homeless Shelter System
ID	Identification
KPI	Key Performance Indicator
PR	Procedure
VAT	Vulnerability Assessment Tool
WRS	Winter Response Shelter
WTH	Women's Transition House

11 Appendix D: Summary of Rights Templates

A Rights Template governs what actions a user can perform in HIFIS. The primary Rights Templates set up in HIFIS are:

- Shelter Worker - Level 1
- Shelter Worker - Level 2
- Outreach Worker
- Site Administrator
- BC Housing Administrator

An overview of the Rights Templates and detailed descriptions of the actions each allows are provided in the sections which follow.

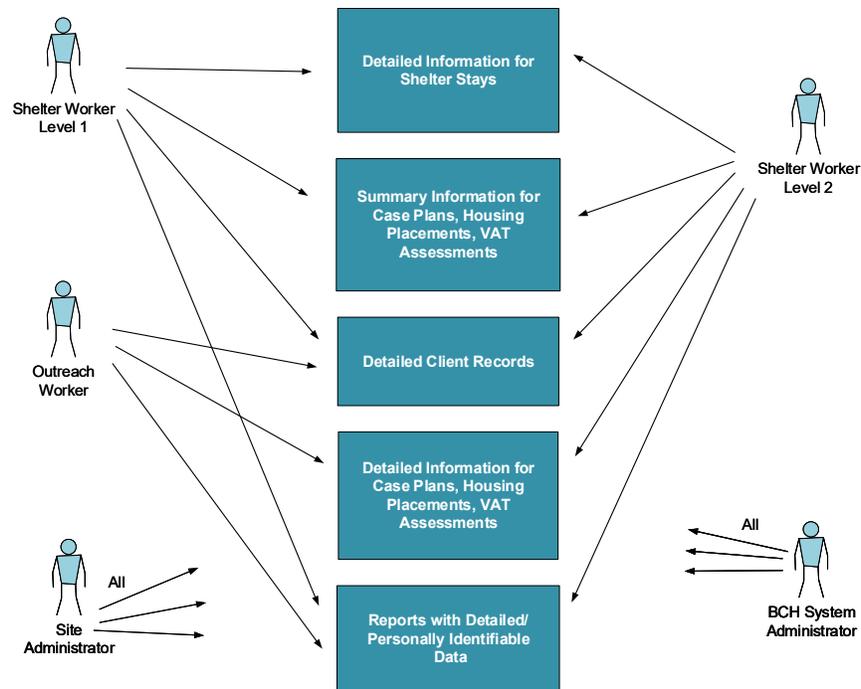## 11.1 Overview of Functions by Rights

HIFIS Functions by Role

Figure 3: HIFIS Functions by Role

11.2   Shelter Worker – Level 1

Rights Template	Shelter Worker – Level 1

Description		
A right provided to front line shelter workers who perform core duties at a shelter, such as booking clients in and out.		

Can See	Can Add/Edit	
✓	✓	All client demographic information
✓	✗	Summaries of all activities and services provided at their own site
		Full details of activities and services provided at their own site, including:
✗	✗	• Case plans
✗	✗	• Housing placements
✗	✗	• Rent supplements
✗	✗	• VAT assessments
✓	✓	• Shelter book ins/outs
✓	✓	• Goods and services
✓	✗	Summary information for activities and services provided at other sites
✗	✗	Full details of activities and services provided at other sites
✓	✗	Reports for a single site
✗	✗	Reports for a collection of sites
✓	✗	Reports with aggregate/summary data
✓	✗	Reports with detailed client data (name, date of birth, address)

11.3   Shelter Worker – Level 2

Rights Template	Shelter Worker – Level 2	
Description A right provided to shelter workers who, in addition to booking clients in and out, have further responsibilities such as case management, entering VAT assessments, and finding housing for clients.		
Can See	**Can Add/Edit**	
✓	✓	All client demographic information
✓	✓	Summaries of all activities and services provided at their own site
		Full details of activities and services provided at their own site, including:
✓	✓	• Case plans
✓	✓	• Housing placements
✓	✗	• Rent supplements
✓	✓	• VAT assessments
✓	✓	• Shelter book ins/outs
✓	✓	• Goods and services
✓	✗	Summary information for activities and services provided at other sites
✗	✗	Full details of activities and services provided at other sites
✓	✗	Reports for a single site
✗	✗	Reports for a collection of sites
✓	✗	Reports with aggregate/summary data
✓	✗	Reports with detailed client data (name, date of birth, address)

11.4   **Outreach Worker**

Rights Template	Outreach Worker

Description
A right provided to outreach workers that enables them to create and maintain client records, perform case management, VAT assessments, and find housing for clients.

Can See	Can Add/Edit	
✓	✓	All client demographic information
✓	✓	Summaries of all activities and services provided at their own site
		Full details of activities and services provided at their own site, including:
✓	✓	• Case plans
✓	✓	• Housing placements
✓	✓	• Rent supplements
✓	✓	• VAT assessments
✘	✘	• Shelter book ins/outs
✓	✓	• Goods and services
✓	✘	Summary information for activities and services provided at other sites
✘	✘	Full details of activities and services provided at other sites
✓	✘	Reports for a single site
✘	✘	Reports for a collection of sites
✓	✘	Reports with aggregate/summary data
✓	✘	Reports with detailed client data (name, date of birth, address)

11.5   Site Administrator

Rights Template	Site Administrator

Description
A right provided to designated staff at each shelter or outreach provider that allows them to perform further functions in addition to those available to general shelter and outreach workers. Examples include adding custom questionnaires, adding reusable templates for frequent transactions, sending bulletins to staff, and entering referral locations.

Can See	Can Add/Edit	
✓	✓	All client demographic information
✓	✓	Summaries of all activities and services provided at their own site
		Full details of activities and services provided at their own site, including:
✓	✓	• Case plans
✓	✓	• Housing placements
✓	✓	• Rent supplements
✓	✓	• VAT assessments
✓	✓	• Shelter book ins/outs
✓	✓	• Goods and services
✓	✘	Summary information for activities and services provided at other sites
✘	✘	Full details of activities and services provided at other sites
✓	✘	Reports for a single site
✘	✘	Reports for a collection of sites
✓	✘	Reports with aggregate/summary data
✓	✘	Reports with detailed client data (name, date of birth, address)

11.6　BC Housing System Administrator

HIFIS Role/Right	BC Housing System Administrator

Description

A role, with a right template, provided to a limited number of BC Housing staff members to enable them to support the HIFIS system. Support includes receiving and investigating issues from users and making system configuration changes.

As this role has a high level of access to records within HIFIS, it is provided to the minimum number of staff required within BC Housing to effectively support the application. These staff members have extensive training and knowledge related to data privacy and security issues and are held to the same privacy and confidentiality guidelines as users.

Can See	Can Add/Edit	
✓	✓	All client demographic information
✓	✓	Summaries of all activities and services provided at their own site
		Full details of activities and services provided at their own site, including:
✓	✓	• Case plans
✓	✓	• Housing placements
✓	✓	• Rent supplements
✓	✓	• VAT assessments
✓	✓	• Shelter book ins/outs
✓	✓	• Goods and services
✓	✓	Summary information for activities and services provided at all sites
✓	✓	Full details of activities and services provided at all sites
✓	✓	Reports for a single site
✓	✓	Reports for a collection of sites
✓	✓	Reports with aggregate/summary data
✓	✓	Reports with detailed client data (name, date of birth, address)