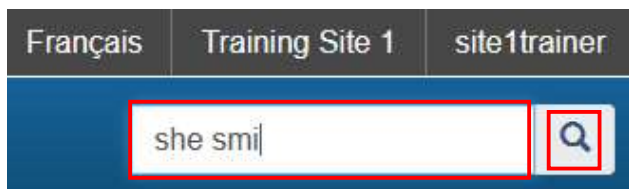


How to Enter a Basic Client Record



1. Log-in to HIFIS. If you need assistance see the Quick Reference Guide on “How to Log Into HIFIS and Change Service Provider”.


◆ **NOTE:** There are no steps 2 – 5, continue to step 6.



6. On the **HIFIS Home Screen**, enter part of the client’s name in the **Client Search** dialog box.

◆ **NOTE:** You must enter a minimum of three characters to execute a search. You may search by a client’s first, middle and/or last name. The less you enter the better the chance to find an existing name. For example, for “Shelley Smithers” you could enter “She Smi”.

7. Click the **Search** button to see if a client record exists.



8. If the name exists in the system, you will see it on a list of search results. If this is the correct person, click on the name to verify the information in the client’s record and do not create a duplicate record.

9. If the name that comes up on the list is not the client, click the **Add Client** button to add the client to the system.



10. If there is no record for the client, you will see the **No data is available in the table** message.

11. Click the **Add Client** button to add the client to the system.

There are nine (9) fields which are mandatory when creating a new client record. It is important that these nine fields be correctly completed and that a trauma-informed approach, which promotes sensitivity and respect during data collection, be used to responsibly collect the data. Please carefully study the information for each of the mandatory field contained in this guide sheet.

A trauma-informed approach involves understanding, recognizing and responding to the impacts of all types of trauma by: 1) ensuring clients feel physically and emotionally safe; 2) being clear about why the data is being collected and how it will be used; 3) building trust through respectful interactions; 4) ensuring clients understand they have control of their own data; and 5) considering cultural/historical context which may be impacting clients.

It should be noted that any reporting of the data collected for public purposes will never identify a specific person. Disaggregated data, for which many of the mandatory fields in the Client Vitals is used, is a powerful tool for making informed, effective and equitable policies and decisions. It is data that is broken down by sub-categories such as age, gender identity, Indigenous status, etc. It ensures that the needs of all populatoin groups are understood and addressed, leading to better more efficient and effective outcomes for everyone.

Add Client

Consent Type ★ 12

Consent Start Date

Last Name ★ 13

First Name ★ 14

Middle Name 15

Alias 1

Alias 2

Date of Birth Known Yes No 16

Date of Birth ★ 17

Information Verified Yes No 18

Gender ★ 19

Disability Yes No

MedicAlert Yes No

Client is Visible Invisible

Veteran Status ★ 20

Citizenship/Immigration Status ★ 21

12. From the drop-down list, select the **Consent Type**:

Explicit – if the client provided consent

Declined - Anonymous – if the client did not provide consent

Inherited – if the client is unable to provide consent (e.g. child, cognitively challenged) and consent was provided on their behalf by a guardian

Coordinated Access + Explicit - Do Not Use at this time

❖ **IMPORTANT:** Clients receiving a rent supplement from an Outreach program **must** have **Explicit** consent. If **Declined - Anonymous** is selected as the **Consent Type**, use the following steps to enter the client's information:

- **Last Name** – Enter **ANON** followed by the **Site Name** (e.g., ANON Fraser Shelter)
- **First Name** – Enter anything you like if it hasn't been used before at your site and isn't the client's real name

Only **Explicit** consent can be **Inherited** and its Start Date will be the same as the Explicit.

❖ **NOTE:** Consent Start Date can be changed after SAVE, if needed, via Client Information → Consent. It is hoped that Explicit will be the primary consent type as it leads to be best quality of data.

13. Enter the **Last Name** of the client. This is a searchable field and ideally should be the client's legal name.

14. Enter the **First Name** of the client. This is a searchable field and ideally should be the client's legal name.

15. Enter the **Middle Name** of the client. This is a searchable field and should be the client's legal name.

❖ **IMPORTANT:** Although Middle Name is not a mandatory field we request it be entered to help differentiate between clients with the same first and last names.

❖ **NOTE:** Variations of the client's legal names should be entered in **Alias 1**, which is also a searchable field.

16. If the date of birth is unknown set the **Date of Birth Known** toggle to **No** and enter the approximate **Age**. If **Consent is Declined** set toggle to **No** and enter the client's actual **Age**.

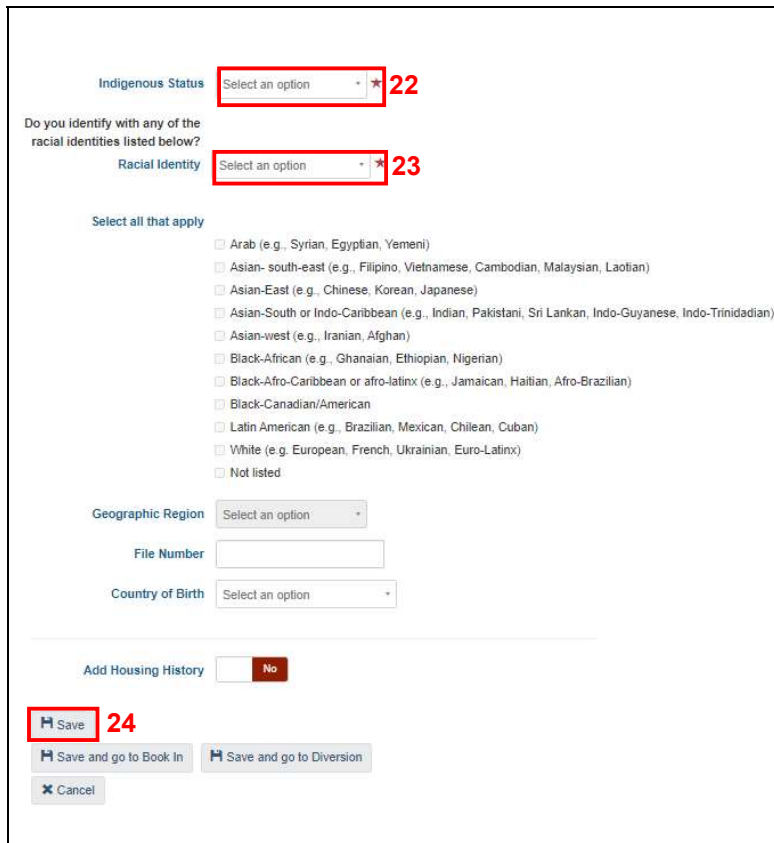
17. Enter **Date of Birth**.

18. **Information Verified** should only be set to **Yes** if the **Date of Birth** has been verified, otherwise leave it at its default setting of **No**.

19. Select **Gender**.

20. Select **Veteran Status**.

21. Select **Citizenship/Immigration Status**.



The screenshot shows a form for creating a client record. It includes fields for 'Indigenous Status' (22), 'Racial Identity' (23), 'Geographic Region', 'File Number', and 'Country of Birth'. There is a list of racial identities to select from, and a 'Save' button (24) at the bottom left. The 'Indigenous Status' and 'Racial Identity' fields are marked with a red asterisk, indicating they are mandatory.

❖ **IMPORTANT:** If the client is not a Canadian Citizen then this field should be reviewed from time-to-time and updated if the Immigration status has changed.

22. Select **Indigenous Status**.

23. Select **Racial Identity**. If **Yes**, select the applicable option(s) from the list below.

24. Select **Save** to complete the creation of a new client record.

❖ **NOTE:** Fields with a red asterisk are mandatory and all other fields are optional. Middle Name, Alias 1 and File Number are non-mandatory fields which are searchable.

Below are guidelines and suggested wording for asking the mandatory questions, except for Consent Type. All mandatory questions should be asked of respondents and not assumed. For any question it can be helpful if you are able to reassure your respondent how the information being collected will be used and who has access to it. Ask questions respectfully and neutrally. After asking a question and pausing to allow the respondent to give an answer, you may provide the list of choices. When providing the list of options for a question you should not read “refused”, “undeclared”, etc. These are options available for your selection if the respondent refuses to answer or the question was missed and the answer is not known.

Name – This may be asked in one question, “*What is your name?*”, followed by “*Is this your legal name?*” after the respondent has given an answer. If they indicate it is not their legal name then probing questions should follow to determine and enter their legal name into HIFIS, if possible. If a legal name cannot be obtained, it is better to have and enter the name they provided than to have no name. Conversely you could first ask “*What is your last name?*” followed by “*What is your first name?*”, then ask “*Are these your legal names?*”. Obtaining the respondents Middle Name is also requested, by asking “*What are your middle names?*”. For Last Name, note that it is common for some persons to have two surnames, and if this is the case please accurately enter both in the Last Name field.

Date of Birth – *What is your date of birth?*

Gender - *Can you please share your gender identity?*

Veteran Status – This question may be asked in two parts. First, “*Are you a veteran?*” and if they answer “yes”, then probe to determine which of the available options matches their veteran status, which may be done by provide the list of options.

Citizenship/Immigration Status – *What is your citizenship/immigration status?* If they answer they are a Canadian Citizen, then you must probe to determine if they were born in or outside of Canada. If they are not a Canadian Citizen, you may provide the list of options to determine which option provided best matches their immigration status.

Indigenous Status – *Can you please share your Indigenous status?*

Racial Identity – *Can you please share what race or ethnicity you identify as? This may mean multiple races, so feel free to name as many as apply to you.*

For the questions which may require you to provide the respondent with the list of options (Gender, Veteran Status, Immigration Status, and Racial Identity), it is helpful to have the list of values available for the respondent to see/read, instead of you reading the options out.