

## 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.

## Add Client

Consent Type	Select an option	*	12
Consent Start Date	2020-08-19		
Last Name		*	13
First Name		*	14
Middle Name			
Alias 1			
Alias 2			
Date of Birth Known	Yes		15
Date of Birth		*	16
Information Verified	No		
Gender	Select an option	*	17
Disability	No		
MedicAlert	No		
Veteran Status	Select an option	*	18
Citizenship/Immigration Status	Select an option	*	19
Indigenous Status	Select an option	*	20
Geographic Region	Select an option		
File Number			
Country of Birth	Select an option		
	Save	Save and go to Book In	Cancel

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

◆ **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.

13. Enter the **Last Name** of the client. This is a searchable field.

14. Enter the **First Name** of the client. This is a searchable field.

15. If the date of birth is unknown, set the **Date of Birth Known** toggle to **No** and enter the approximate **Age**.

16. Enter **Date of Birth**.

17. Select **Gender**.

18. Select **Veteran Status**.

19. Select **Citizenship/Immigration Status**.

20. Select **Indigenous Status**.

21. 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.