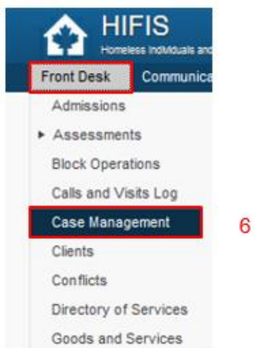
BC HOUSING

How to Add a Case Plan and Record Related Activities

1. From the HIFIS log-in screen, enter your **User Name**.
2. Enter your **Password**.
3. Select the **Service Provider** from the drop-down list.

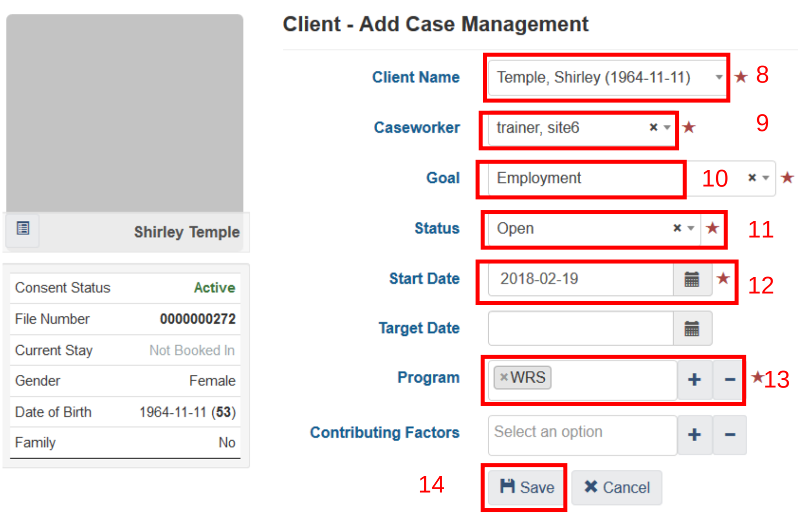
NOTE: If nothing appears in the Service Provider drop-down list, click the **Refresh** button .

4. Select **Log In**.
5. If you have forgotten your password, you can request to have it reset by selecting **Forgot Password?**



6. From the **Front Desk** menu, select **Case Management**.

7. From the **Case Management List** screen, click the **Add Case** button.



8. From the **Client** - **Add Case Management** screen, type to search for an existing client in the **Client Name** field. Select the client from the search results.
9. Select the **Caseworker** assigned to the case.
10. Select the **Goal** the client is tyring to achieve from the drop-down list.

NOTE: If there are several outcomes that are being pursued for the client, a Case Management record can be entered for each.

11. Leave the **Status** field as **Open**.
12. Enter the **Start Date** of when the Case Management record is being entered.
13. Enter the **Program** funding the services provided to the client.
14. Select **Save**.

How to Enter a Case Session for a Client

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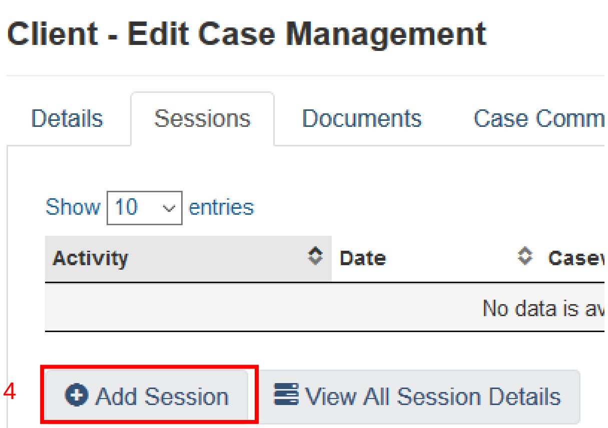
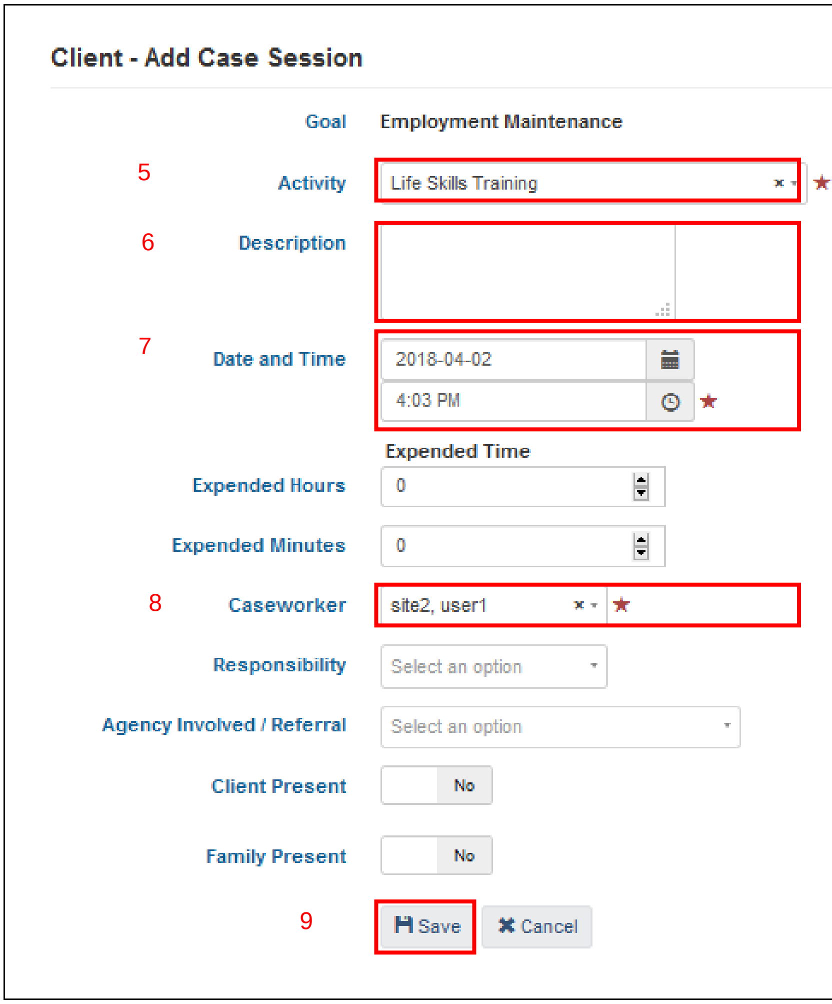
1. Select **Front Desk**.
2. Select **Case Management**.

3. From the **Case Management List** screen, locate the record you want to add session details to and click the **Edit** button.

4



4. From the **Client – Edit Case Management** screen, select **Add Session**.



5. Select the **Activity** from the drop-down list.
6. In the **Description** field, enter a more detailed description of what was done.
7. Enter the **Date and Time**. This information can be changed.
8. Enter the **Caseworker** who assisted with the activity.
9. Select **Save**.