


Site Administrators – How to Add Places 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 again.

◆ **NOTE:** Only a site administrator can add a new **Directory of Services** record.



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. Select **Front Desk**.
7. Select **Directory of Services**.



8. Select **Add Place** from the bottom of the **Directory of Services** screen.

9 Place Name *

10 Place Type x *

11 Service(s) Offered + -

12 Active Yes

Contact List

13 Referrer Category Type x *

14 Referable from Yes

15 Referable to Yes

16 Comments

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17 Address Line 1

18 Country x *

19 Province/Territory x *

20 City x *

21 Postal Code

Geographic Region + - *

22

9. Enter the **Place Name** from the drop-down list.
 10. Enter the **Place Type**. Select the value from the drop-down list that best describes the place.
 11. Optional: Select the **Service Offered** from the drop-down list.
 12. Set the **Active** toggle to **Yes**.
 13. Select the **Referrer Category Type** that best describes the place. This will appear before the place name in the drop-down list when you are referring a client.
 14. Set the **Referable From** toggle to **Yes**.
 15. Set the **Referable To** toggle to **Yes**.
 16. Optional: Enter any relevant **Comments**.
 17. Enter the address of the place in the **Address** field.
 18. Select the **Country** from the drop-down list.
 19. Select the **Province** from the drop-down list.
 20. Select the **City** from the drop-down list.
 21. Enter the **Postal Code**.
 22. Select **Save**.
- ◆ **NOTE:** If you want the place to automatically appear in the drop-down lists for all HIFIS users in more than one region, you can enter each region in the **Geographic Region** field.