

# HOMELESS



HOMELESS INDIVIDUALS AND FAMILIES  
INFORMATION SYSTEM

# CONFIGURATION GUIDE

VERSION 1.0

REACHING HOME | VERS UN CHEZ-SOI



Employment and  
Social Development Canada

Emploi et  
Développement social Canada

Canada

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# GLOSSARY OF TERMS

Term	Definition
Admissions	The process of admitting an individual or family that is homeless or at-risk of homelessness into a service provider.
At-risk of Homelessness	Individuals or families who are not homeless, but whose current economic and/or housing situation is precarious or does not meet public health and safety standards.
Bed Selection	A graphical display of a shelter's rooms and beds.
Bulletin	A message that can be read by users who are logged in to HIFIS.
Case Management	<p>Refers to intentional and collaborative service planning between service providers and their clients. The “intent” of the interactions differentiates various forms of case management. For example, case managers can specialize in the following:</p> <ul style="list-style-type: none"><li>■ <b>Service Navigation:</b> Connecting clients to appropriate services using information gathered through triage and assessment. Includes completing paperwork for various waiting lists and following up on referrals.</li><li>■ <b>Housing-Based Case Management:</b> Helping clients to reduce acuity in the areas of life that present risks to a tenancy. Includes arranging and coordinating a range of services to meet client needs.</li></ul>

Term	Definition
Chronic Homelessness	<p>People who are currently experiencing homelessness and meet at least one of the following criteria:</p> <ul style="list-style-type: none"> <li>■ have a total of at least six months (180 days) of homelessness over the past year; or</li> <li>■ have recurrent experiences of homelessness over the past three years, with a cumulative duration of at least 18 months (546 days).</li> </ul>
Client	An individual or family that is experiencing homelessness or at-risk of homelessness who has accessed or is currently accessing services provided by a service provider.
Client Consent Form	An agreement between the client and the service provider that provides the service provider consent on the collection, retention, and sharing of an individual's data.
Cluster	A functionality in HIFIS allowing the data of clients from specific service providers to be isolated. Service providers in clusters can only view data within their designated cluster.
Community Advisory Board (CAB)	Local organizing committee responsible for approving the Community Plan and recommending projects for funding to the Community Entity.
Community Data- Sharing Agreement (CDSA)	An agreement signed by service providers that governs data-sharing within a community. The CDSA outlines a common understanding of what information is to be shared and why, detailing privacy and security protocol decisions, the quality of data to be provided, data entry protocols and relevant data management practices.
Contributing Factors	Life events that have played a role in leading the client to requiring assistance from a service provider.

Term	Definition
Coordinated Access	A way for communities to bring consistency to the process by which people experiencing or at risk of homelessness access housing and related services within a geographic area. Core components of a strong Coordinated Access system include a Housing First approach; real-time data about the supply of and demand for housing resources; and a streamlined service-delivery approach with access points to service, a standardized workflow for triage and assessment; prioritization and vacancy matching and referral.
Custom Tables	HIFIS module that is used to create customized records for service providers whose needs exceed the defaults of the application. Custom tables are used to gather information on clients with user-created fields.
Data Provision Agreement (DPA)	An agreement between ESDC and a HIFIS Lead organization that authorizes ESDC's quarterly collection of the non-directly identifiable data-fields in exchange for HIFIS.
Family Head	Where individuals are part of a family, the Family Head is the person who has been identified as the lead for the family as a whole (e.g., the primary parent or guardian responsible for dependents).
HIFIS Administrator	The role that is responsible for the administrative functions within HIFIS (e.g., configuration, data integrity, backups).
Homeless Individuals and Families Information System (HIFIS)	Developed by ESDC in collaboration with communities, HIFIS is a comprehensive data collection, reporting and case management system that supports the day-to-day operations of housing and homelessness response service providers. HIFIS is designed to support the implementation of Coordinated Access by allowing multiple service providers from the same community to access real-time data and refer clients to the appropriate services at the right time.

Term	Definition
HIFIS Host	Organization that has the servers on which HIFIS is installed and where client information is stored.
HIFIS Lead	Depending on the context, refers to the organization or dedicated staff responsible for the initial set-up, implementation and ongoing maintenance of HIFIS.
HIFIS Program	A label or tag created by the community to group client transactions by category. For example, <i>HIFIS Programs</i> can be used to track similar kinds of services (e.g., shelter stays, youth programming or assistance provided during a natural disaster) or goods and services funded by the same source (e.g., certain supportive housing units in a building). Reports can be generated using <i>HIFIS programs</i> , summarizing service transactions either within or across HIFIS service providers.
HIFIS Service Provider	Organized and logical "set of services" that is available to individuals and families. HIFIS Service Providers share client information based on their individualized access rights, which are assigned to specific staff roles in the housing and homelessness response system.
Homelessness Management Information System (HMIS)	A tool that captures records client-level data and manages service provider information over time within a housing and homelessness response system. The Homeless Individuals and Families Information System (HIFIS) is one type of HMIS.
Housing First	An approach that involves moving people experiencing homelessness — particularly people experiencing chronic homelessness — rapidly from the street or emergency shelters into stable and long-term housing, with supports.



Term	Definition
Housing and Homelessness Response System	Refers to all the service providers within a geographic boundary that help individuals and families with their housing challenges. In an integrated system with Coordinated Access, service providers most often use the same Homeless Individuals and Families Information System (HIFIS) installation.
Life Events	Life Events are defined as discrete experiences that disrupt an individual's usual activities causing a substantial change and readjustment.
Local Help Desk	A service established by a community that supports HIFIS users to manage the system and resolve technical issues, including incident management, service requests, problem management, advance support, and release management.
Look-up Tables	A functionality that is used to add, edit, or remove values that appear in the drop-down menus throughout HIFIS.
Modules	Key components of HIFIS organized by functions or similar types of service transactions (e.g., Case Management, Housing Placement, Directory of Services, Food Bank).
Person(s) with Lived Experience	Individual or family that has experienced homelessness.
Primary Service Provider	A service provider with the ability to modify the mandatory fields and look-up table values of service providers placed underneath it.
Privacy Assessment	Process used to determine how service delivery could affect the privacy of an individual or family, with the goal of ensuring that privacy issues are identified and resolved or mitigated.

Term	Definition
Rights Templates	Functionality that allows an administrator to apply the same user rights to multiple HIFIS users depending upon their roles and/or responsibilities.
Service Provider	Organization in the housing and homelessness response system that has staff who directly interact with clients to help them address their housing challenges.
Service Prioritization Decision Assistance Tool (SPDAT)	An assessment tool for frontline workers developed by OrgCode Consulting to inform prioritization in a Coordinated Access system and also support case management.
Super-user	A service provider's HIFIS specialist with special privileges needed to administer and maintain the system as well as train HIFIS users.
User Rights	Govern ways by which a user can access HIFIS modules and view information. Rights specify if a user can see, edit, and/or delete data.
Violence Against Women shelter (VAW)	A service provider that caters specifically to women and their children who are fleeing violence, or the threat of violence.
Vulnerability Index Assessment (VAT)	An assessment tool for frontline workers developed by Downtown Emergency Service Centre to measure a person's vulnerability, which could be used to prioritize who should receive service first.
Vulnerability Index - Service Prioritization Decision Assistance Tool (VI-SPDAT)	Self-reported survey used to quickly determine a client's acuity. This triage tool is not designed to provide extensive detail about a client's vulnerability. Results can be confirmed or refined through a full SPDAT assessment.

# THE HIFIS TOOLKIT

Over the last two decades, the ways to measure the extent of homelessness have significantly evolved in Canada. The dedication of service providers and municipal and provincial governments to collect and share data through the [Homeless Individuals and Families Information System \(HIFIS\)](#) and [Point-in-Time counts](#) is at the centre of this success. When used jointly, these data collection efforts provide a comprehensive local and national picture of homelessness. For the first time in history, Canadians have quality data that supports policy and program development, as well as strategic planning in the homelessness sector.

As Canada is moving forward with the [National Housing Strategy](#) and [Reaching Home: Canada's Homelessness Strategy](#), collecting, managing and sharing data becomes more important than ever to advance the collective understanding of homelessness and to support decision-making. In particular, Reaching Home emphasizes coordinated access and introduces a data-driven, client-centred approach to serve individuals and families experiencing or at risk of homelessness.

In this context, the Government of Canada is committed to continuously enhance HIFIS in order to support communities in their data collection and

efforts to eliminate homelessness. Recognizing that HIFIS modernization is driven by the homelessness sector's needs, a National HIFIS working group was created in 2018 to leverage the expertise of communities and experts and help guide HIFIS enhancements.

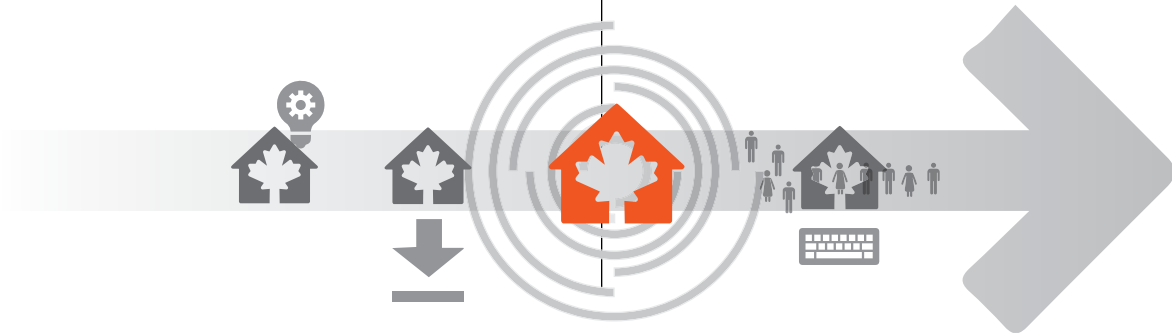
HIFIS is designed to support coordinated access by allowing multiple service providers from the same community to access real-time homelessness data through a community-wide system available via web-enabled devices, such as laptops, smartphones and tablets. HIFIS also allows communities to document the number, characteristics, and needs of homeless individuals and families, as well as the number of people receiving services.

To meet Reaching Home requirements and implement coordinated access systems, communities have to adapt their business model, which encompasses developing and adopting new governance frameworks and data management strategies. Doing so requires planning, committing resources and training to promote data literacy and instill a data-driven culture.

To assist communities in this transformation, ESDC has developed a HIFIS Toolkit composed of four guides. These guides cover the following topics:

1. **Implementation** - Provides guidance from planning to the deployment and maintenance of HIFIS.
2. **Installation** - Describes the technical requirements, architecture and installation procedures.
3. **Configuration** - Explains the configuration procedures to align with community's business needs.
4. **User instruction** - Gives a description of each function and how to use it.

Communities using HIFIS become part of a pan-Canadian movement that is building a data-driven culture to advance the understanding of homelessness in Canada. By working together, we can support the most vulnerable Canadians in providing access to safe, stable and affordable housing and reduce chronic homelessness nationally by 50% by 2027-2028.



# ABOUT THE HIFIS CONFIGURATION GUIDE



**T**he *Configuration Guide* is for the business analyst or project manager who needs step-by-step instructions to set up and configure HIFIS to support the community business model and coordinated access systems. Proper configuration will help communities access information that supports their daily operations and helps measure progress on preventing and reducing homelessness. *The Configuration Guide* covers the configuration of programs, rights templates, look-up tables, reports and others.

The guide should be used with *the Implementation Guide*, which gives an overview of the steps required to implement HIFIS,

including those required before configuring, and explains the considerations for the configuration. For details on how to install HIFIS on a server and technology required to support the system, refer to the *HIFIS Installation Guide*.

For more information to support the implementation and management of HIFIS, you can visit the [Homelessness Learning Hub](#).

To stay connected and get the latest updates on HIFIS, please confirm your interest by sending your consent at [support@hifis.ca](mailto:support@hifis.ca).

For any questions or enquiries, you can contact the HIFIS Clients Support Centre at **1-866-324-2375** or [support@HIFIS.ca](mailto:support@HIFIS.ca)

## INITIAL SET-UP TASKS



### Registration

**P**rior to using HIFIS, you will need to register your installation. This will remove the red 'Unregistered Instance' banner that appears at the top of every page.

The steps to register are:

1. Click on the red banner, or Registration from the Administration menu. Click Begin Registration and enter the required information. The registration will be approved by ESDC.
2. Sign and Upload the Data Provision Agreement (DPA). This DPA will be counter-signed by ESDC.
3. Download the counter-signed DPA.
4. Receive your community Site Identifier.
5. Activate HIFIS.

Following activation, the red banner will be removed.

### Change the Name of the Default Service Provider

**W**hen HIFIS is installed, there is one default service provider called 'Set up new Organization.' If you intend to set-up service providers using a hierarchy, this service provider will be at the top of the hierarchy and will likely be the organization that is responsible for the overall management of the system.

One of the first configuration tasks to perform is to change the name of this Service Provider.

**Note:** If the Service Provider's name is not changed, it will be changed automatically to the name on the Registration when the Registration process is complete.

Steps to follow:

1. From the Administration menu, select Service Provider. This will bring you to the Service Provider Details page.
2. On the Service Provider Details page, click the Edit button.
3. Update the service provider's name.
4. Click the Save button.

**Note:** The remainder to the fields will be changed when you set-up your service providers.

## HIFIS SETTINGS



### Determine Application Settings

The Application Settings module allows the system administrator to specify settings that govern how various functionalities in the system will work. The Application Settings module consists of two tabs, Settings and Clusters.

The table below describes what each application setting does. These settings are determined by the organization responsible for administering the system.

Application Setting	Description
Bing Maps Key	When searching for a Housing Unit, Bing Maps can be used to show them on a map. A Bing Maps key is required for this. To learn more and create your <a href="http://www.bingmapsportal.com">Bing Maps key</a> , visit <a href="http://www.bingmapsportal.com">www.bingmapsportal.com</a> .
Clients in People Search	This setting allows you to indicate if you also want Client records to be searched in addition to People records.  In several locations in the application, you can associate a person (people record) with a record (or a transaction). By entering the person's name in the appropriate field, the system performs a search for that person.
Two-Factor Authentication	Enables a two-tier login system where a code or security key must be entered in addition to your password to log into the system.  HIFIS natively supports <a href="#">Twilio SMS message</a> , however, there is an additional cost to use Twilio services.
OrgCode Key	Is a placeholder setting for the unique code from OrgCode to unlock SPDAT assessments for registered HIFIS instances.

Enable GeoRegion Filter	A list of places can be filtered by the geographic region and city in which they are. The Enable GeoRegion Filter allows this feature to be turned on or off.
	<b>Note:</b> If turned on, a Geographic Region Mapping tab will appear.
Minimum Character Input for Search	The minimum number of characters that must be entered in the search fields for the search to be performed.
Password Age Limit (days)	The number of days for which a user's password is valid.
Password Complexity Help Message	The text that will appear on the screen when the user is entering a new password.
Use default File Numbers	A File Number is part of a Client record. If default file numbers are used, every time a new client record is created, a file number will be assigned to the client. The file number will be incremented by 1 (one) for each client. If default file numbers are not used, the File Numbers field will be left blank if nothing is entered by a user.
E-Mail link expiry (Days)	When a user's password is reset by a system administrator, they are sent an email that contains a link to follow to enter a new password. The E-Mail link expiry (Days) field controls how long the link sent to the user will be valid.



## Enter Application Settings

Steps to follow:

1. From the Administration menu, select Application Settings.
2. If Bing Maps is used with the Housing Placement - Housing Search, enter your Bing Maps key.
3. Indicate whether Clients should appear in People Search.
4. Indicate whether two-factor authentication is used.
5. If applicable, enter the OrgCode Key.
6. Indicate whether Geographic Region filtering is used.
7. Enter the number of characters required to perform a client search.
8. Enter the number of days before a user password expires.
9. Enter the text that will appear when a user enters a new password.
10. Indicate whether default file numbers are used.
11. Enter the number of days before a password reset link expires.
12. Click the Save button.

## Geographic Region Mapping

**G**eographic Region Mapping filters a list of places by geographic region and city. In HIFIS, a place is always associated with a city, and a city can be associated with a geographic region. This feature allows a user to look at all of the places in a given region, or filter this list by a specific city in that region and see only the places in that city.

This filtering is activated by enabling the Geo Region filter in the Application Settings module. Prior to doing Geographic Region Mapping, it is necessary to determine what

geographic regions will be used in the Geo Region Look-up Table (instructions on adding Look-up Table Values can be found in the [Determine Look-up Table Values section](#)).

Screens where values can be filtered by Geographic Region include:

- Housing Units when doing a Housing Placement or looking at units in the Housing Units module
- Places in the Directory of Services
- Admissions - Bed Availability

## Enter Geographic Region Mapping

Steps to follow:

1. From the Administration menu, select Application Settings.
2. On the Application Settings screen, select the Geographic Region Mapping tab.

**Note:** The Geographic Region Mapping tab will only appear when you are logged in to a site that is in a cluster where the Enable GeoRegion Filter is set to Yes on the Application Settings > Settings screen.

3. Click the Edit button beside the Geographic Region to which you want to add map Cities.
4. Add the Cities that are in the Geographic Region.
5. Click the Save button.
6. Repeat steps 3-5 until Cities are mapped to all Geographic Regions.

## Determine Clusters

**H**IFIS is a tool for coordinated access. A core principle related to HIFIS is the ability to access client's data across service providers, so service providers helping a client can see the same information. This benefits the individual as they can be referred to the support services that will best help them without having to tell their story multiple times. This is accomplished by the creation of one client record for each client. When the client consents to share data among service providers, a record is created that is visible to multiple service providers (to the level of detail appropriate for their role).

Although the single shared client record is a core concept in HIFIS, in some instances, data sharing across the community is not appropriate due to safety and privacy considerations. In cases where a service provider or group of service providers cannot share any of their client information with other service providers, such as a Violence Against Women (VAW) shelter, a separate cluster can be created for these service providers. In cases where a client is served by service providers in different clusters, the record of this client will be created in each cluster without the possibility of it being shared.

**Note:** A service provider can have access to the personal information of any client in the community who gives consent to data sharing (when the legal framework is established). Assigning user rights and service provider settings allows for the management of information.

When HIFIS is first installed, only one cluster exists — the Integrated Cluster. Additional clusters can be added for VAWs or other organizations that require their data not be shared.

## How to enter Clusters

Steps to follow:

1. From the Administration menu, select Application Settings.
2. On the Application Settings screen, select the Clusters tab.
3. Click the Add Cluster button.
4. Enter the name of the cluster.
5. Indicate whether client consent is enforced in the cluster. If Yes, users will be required to enter client consent information when the client record is created. Otherwise, consent will be implied by default.

6. If applicable, enter how many days until client consent expires.
7. Indicate whether sharing will be enabled. Some fields in HIFIS have an additional level of security and can be hidden from other service providers (e.g. Financial Profile, Health Information). If sharing is enabled, when adding financial or health information, users will be able to select whether this should be shared or modified among service providers.
8. Indicate whether client search will be restricted. If set to Yes, client searches performed without anything entered in the Client Search field will not return any results.
9. If applicable, enter the minimum age of consent.
10. Indicate whether users will have to provide attestation before they are able to view client records.
11. If applicable, enter the text that will be presented to users when they are providing attestation.
12. Click the Save button.

**HELPFUL HINT:**

Enabling attestation creates a pop-up that allows the end user to verify the proper client file. The attestation message can be customized based on the community requirements. Once a service provider attests to providing services to a client, the attestation will no longer appear.

**SERVICE PROVIDERS**

**T**he Service Provider module defines the organizations involved in the implementation of HIFIS, as well as the services that are offered in the community.

Defining each service provider allows users to be attached to the service provider in which the work takes place.

Establishing Service Providers has three main functions:

- Reporting;
- Determining mandatory fields; and,
- Determining look-up table values.

These three functions can be customized within each service provider to allow for: reporting at the service provider level (while also reporting on a group of service providers, or at the community level), the creation of different mandatory fields for different service providers, and the creation of different look-up table values for different service providers.

By default, service providers are primary service providers; however, HIFIS has the ability to create secondary service providers that give the primary service provider the ability to modify the mandatory fields and look-up table values for secondary service providers. This gives a primary service provider an additional level of control over the secondary service provider.

Further details about determining which organizations are service providers can be found in the HIFIS Implementation Guide.

### Determine Service Provider Profiles

A HIFIS implementation can include multiple service providers. The following items are identified for each service provider during implementation:

- Name and contact information
- Type of site – A service provider type will be set up and configured to suit how they will use HIFIS. For example, shelters and non-shelters will vary in their set-up (e.g. non-shelters will not use any of the emergency bed features of HIFIS.)
- Information about staff who will use HIFIS: This will help with the initial set-up of user accounts.
- Genders served
- Client Type – adult, youth, children, male only, female only, ages served (maximum and minimum)
- Funding programs
- Room and bed information

### Enter and Manage Service providers

The Service Provider Details Page lists the fields that must be filled to create a service provider. With the exception of Cluster and Primary Service Provider, the remaining fields act as tags to identify the service provider's role within the system.

### How to Add a Service Provider

Steps to follow:

1. From the Administration menu, select Service Providers.
2. On the Service Provider Details page, expand the Service Provider Management menu and select List of Service Providers.
3. On the Service Provider List page, select the Add Service Provider button.
4. On the Service Provider Details page, enter the service provider's name.
5. Indicate whether the service provider is part of an existing cluster.
  - If Yes, select the cluster the service provider will join.
  - If No, enter the name of the new cluster.
6. Select the type of service provider.
7. If applicable, if you are adding a secondary service provider, select the parent primary service provider. A secondary service provider will be able to inherit mandatory data fields and the look-up table values of a primary service provider.
8. If applicable, select the genders served, other attributes and services offered at the service provider.
9. If applicable, select the target clientele, the referrer category type and indicate whether the service provider allows concurrent stays.

**Note:** Concurrent stays allow a client to be booked into multiple shelters at the same time.

10. If applicable, indicate whether the service provider is active.
11. If applicable, select a service provider from which it is possible to copy mandatories and look-ups.

This will duplicate the existing settings (for look-ups and/or mandatories) from the selected service providers to the newly created service provider. Once a provider is created, you can further customize the look-ups and mandatories as you like, with no impact on the other service provider, unless mandatories are required by the parent primary service provider.

#### HELPFUL HINT:



Setting Mandatories and Look-up Tables can be done more easily when all the HIFIS Service Providers have been created. This will allow a Primary Service Provider the ability to simultaneously apply the same mandatory or custom look-up values to the Secondary Service Providers in the tree structure. This will reduce the need to visit each HIFIS Service Provider's settings individually to make the same customization.

12. If applicable, enter the cut-off time and the service provider's contact information in the Telephone, Extension, Fax Number, Email Address and Website fields.
13. If applicable, add any additional information concerning the service provider in the Comments field.
14. Select the Address tab, and enter the service provider's address by entering information in the Address Line 1, Country, Province/Territory and City fields.

15. If applicable, complete the Place Name, Address Line 2, Postal Code and Geographic Region fields.
16. Click the Save button.

#### How to Enter a Service Provider's Settings

Service Provider Settings allow the Administrator to customize what types of clients the service provider can access within the database (e.g., by gender, or by age) and other features.

Steps to follow:

1. From the Administration menu, select service providers.

**Note:** Clicking on Service providers in the Administration menu will bring you directly to the service provider's details page for which you are logged in. To define the settings for another service provider, expand the Service Provider Management menu and select List of Service providers. In the Service Provider List page, type to search for a service provider or click the Expand/Collapse Tree button to see the whole service provider hierarchy. Locate the service provider for which you want to define the settings and click on the service provider name. Open the Service Provider menu and select Settings.

2. On the Service Provider Details page, click the Service Provider Management menu and select Settings.
3. From the Service Provider Settings page, indicate whether users logged in under this service provider will be able to see adult males, adult females, youth or children.

4. Select the maximum childhood and youth ages.
5. Select the minimum senior and family head ages.
6. If custom tables are created at this service provider, enter the name of the custom table tab.
7. Indicate whether this service provider data is hidden from other service providers.
8. Indicate whether the default room and bed display should be expanded or minimized. At the intake, the beds are always displayed as expanded icons.
9. Click the Save button.

**HELPFUL HINT:**

The Hide Service Provider Data setting allows all the information entered in the Client Management menu to be hidden from other service providers.

**How to Add Rooms and Beds**

Steps to follow:

1. From the Administration menu, select Service Providers.

**Note:** Clicking on Service Providers in the Administration menu will bring you directly to the Service Provider's Details page for which you are logged in. To define the settings for another service provider, expand the Service Provider Management menu and select List of Service providers. In the Service Provider List page, type to search for a service provider or click the Expand/Collapse Tree button to see the whole service provider hierarchy. Locate the service provider for which you want to define the settings and click on the service provider name. Open the Service Provider menu and select Settings.

2. On the Service Provider Details page, click the Service Provider Management menu and select Rooms and Beds.
3. From the Rooms and Beds page, click the Add Room button.
4. Enter the name of the room, the start index and the number of additional rooms to be added, if applicable.
5. Indicate whether the room is active.
6. Click the Save button.
7. From the room list, locate the room to which you want to add a bed and select the Manage Beds button.
8. From the Manage Beds page, select the Add Bed button.
9. Enter the name of the bed, the start index and the number of additional beds to be added, if applicable.

10. Select the type and status of the bed.

**Note:** specifying this has no impact on the HIFIS behaviour but it will allow the service provider to describe the beds available for clients.

11. Indicate whether the bed is an overflow bed, and whether the bed is mobile. Note: specifying this has no impact on the HIFIS behaviour but it will allow the service provider to describe the beds available for clients.

12. Indicate whether the bed is active.

13. Click the Save button.

#### HELPFUL HINT:



Note that if beds are located in different rooms, they can have the same bed number. For example, room number 101 can have a bed numbered 1, and room number 202 can have a bed with the same bed number, although these are two separate beds.

#### How to Set the Service Provider's Mandatory and Disabled Fields

Steps to follow:

1. From the Administration menu, select Service providers.

**Note:** Clicking on Service Provider in the Administration menu will bring you directly to the service provider's details page for which you are logged in. To define the settings for another service provider, expand the Service Provider Management menu and select List of Service providers. In the Service Provider List page, type to search for a service provider or click the Expand/Collapse Tree button to see the whole service provider hierarchy. Locate the service provider for which you want to define the settings and click on the service provider name. Open the Service Provider menu and select Settings.

2. On the Service Provider Details page, click the Service Provider Management menu and select Mandatories.
3. In the Service Provider Mandatories page, select any of the sections to expand the content.
4. Select the desired module and expand the content to select which field to force as mandatory or mark as disabled.

Marking an item as mandatory will add a red star after the field and force users to enter information in this field before saving.

Marking an item as disabled will grey out the field and users will not be able to enter any information or attach documents.

**Note:** Once a selection is made, a green checkmark will appear. The changes are saved automatically.

## Link Service Provider to Configuration Items

### How to link a Service Provider to Rights Templates

If a service provider is going to be managing its own users, it needs to be linked to the rights templates it will be assigning to the users.

If you have not created Programs, see the [Rights Templates section](#).

Steps to follow:

1. From the Administration menu, select Rights Templates.
2. On the Rights Template List page, locate the rights template to which you want to link the service provider. Click the Edit button.
3. From the Edit User Template page, in the Service Provider field, select the service provider(s) you want to allow to use the template.
4. Click the Save button.

### How to link a Service Provider to Custom Tables

To be able to view and use a custom table, a service provider must be linked to it.

Steps to follow:

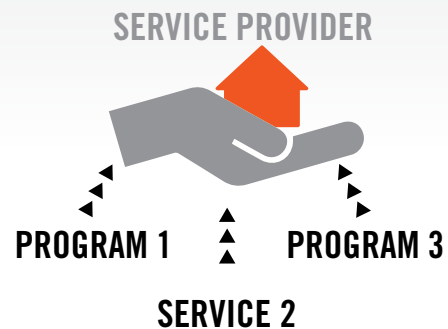
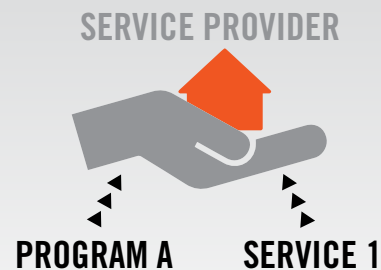
1. From the Administration menu, select Custom Tables.
2. On the Custom Table List page, locate the custom table you want to link to the service provider. Click the Table button.
3. From the Edit Custom Table page, in the Service Provider field, select the service provider(s) you want to link to the custom table.
4. Click the Save button.

## PROGRAMS

**T**he Programs module is used to define the programs used by the service provider and the community.

HIFIS can be configured so that client transactions or services can be associated to a particular program. For example, HIFIS can record that all goods and services provided to a client were captured under a program called Homelessness Prevention. One or more services can be associated with a program.

For more details, refer to the Programs section in the Data Sharing and Configuration Chapter (section 2.4) of the HIFIS Implementation Guide.





## Enter and Manage Programs

### How to Add a Program

Steps to follow:

1. From the Administration menu, select Programs.
2. On the Program List page, click Add Program.
3. On the Add Program page, enter the name of the program.
4. Select the program type to categorize the program.
5. If applicable, enter the owner of the program.

---

**Note:** Once saved, only the owner will be able to make changes to the program.

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6. Select the services to which the program may be linked. This will make the program visible in the selected modules.
7. Confirm the accuracy of the start date and, if applicable, enter the end date.
8. If applicable, enter the maximum amount of funding per period.

---

**Note:** If Stay was selected in the Services field, then enter the maximum number of beds per period, if applicable.

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9. If applicable, enter the time unit.
10. If applicable, enter the rate of the program.
11. If applicable, indicate whether the program is active. Only active programs will appear in drop down lists.

12. If applicable, add any additional information concerning the program in the Comments field.
13. Click the Save button.

### How to Edit a Program

Steps to follow:

1. From the Administration menu, select Programs.
2. On the Program List page, locate the program you want to modify and click the Manage button.
3. On the Display Programs page, select the Details tab and click the Edit button.
4. On the Edit Program Details page, you can edit the existing information or add any missing information.
5. Click the Save button.

### How to Link a Program to One or Multiple Service Providers

Linking a service provider to a program will allow the program to be selected in the Programs drop down list in the HIFIS module when the user is connected to the service provider. Only service providers that have been linked to the program will be able to select the program in HIFIS modules.

Steps to follow:

1. From the Administration menu, select Programs.
2. On the Program List page, locate the program to which you want to add a service provider and click the Manage button.
3. Select the Service Providers tab, then click the Add Service Provider button.
4. On the Add Service Provider window, select the service provider.

5. Enter the start date and, if applicable, the end date.

---

**Note:** If the start date is already entered, confirm its accuracy.

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6. Click the Save button.

### How to Add a Fixed Cost to a Program

A fixed cost is a non-variable operation expenditures covered by the program for the specified period (i.e. a mortgage payment, or property taxes, which are a fixed cost that must be paid every month.)

Steps to follow:

1. From the Administration menu, select Programs.
2. On the Programs List page, locate the program to which you want to add a fixed cost and click the Manage button.
3. On the Display Program page, select the Fixed Costs tab, then click the Add Fixed Cost button.
4. If applicable, in the Add Fixed Cost window, enter the fixed cost amount.
5. Enter a description of the fixed cost.
6. If applicable, enter the start and end dates.

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**Note:** If the start date is already entered, confirm its accuracy.

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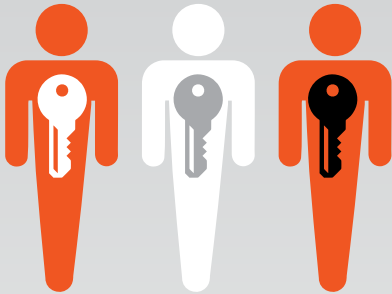
7. If applicable, indicate the amount of allocated funding and beds per period.
8. If applicable, enter the time unit.
9. If applicable, enter the rate of the program.
10. If applicable, add any additional information concerning the service provider in Comments.
11. Click the Save button.

### How to Edit a Program's Fixed Cost

Steps to follow:

1. From the Administration menu, select Programs.
2. On the Programs List page, locate the program with the fixed cost you want to modify and click the Manage button.
3. Select the Fixed Costs tab, then locate the fixed cost you want to modify and click the Edit button.
4. On the Edit Fixed Cost page, you can edit the existing information or add any missing information.
5. Click the Save button.

## USERS



### Create User Accounts in Service Providers

Individuals need a HIFIS account in order to input or view data in the system. The Users module gives the ability to create an account, configure access rights, consult users' activities, activate or deactivate the account, lock or unlock the account, reinitialize information access, etc.

#### HELPFUL HINT:



If Users will have access to multiple HIFIS Service Providers, completing the set-up phase for all HIFIS Service Providers before creating the Users will allow the Administrator to more easily add HIFIS Service Providers and apply access rights. This will limit the need to revisit each user every time a new HIFIS Service Provider is created.

### How to Add a User

Steps to follow:

1. From the Administration menu, select Users.
2. On the User List page, select the New User button.
3. On the Add User Profile page, enter the user name that will be used when logging into HIFIS.
4. Enter the user's first and last name.
5. If applicable, enter the user's email address.
6. Select the user's gender.
7. Select the language in which HIFIS will launch when the user logs in.
8. Indicate whether the user account will allow concurrent logins. Concurrent logins will allow multiple users to connect using the same user account at the same time. Note: Consider potential confidentiality issues if concurrent logins are authorized.
9. Select the service provider(s) with which the user has associated access rights.
10. Enter the categories of reports the user will access. Each report in HIFIS is given a category. Users will only be able to generate reports for which they have been given access.
11. If applicable, enter the categories of reports to which the user will have access.

**Note:** If user rights are granted to the user via a rights template, the reports to which the user has access will be determined based on the rights template rather than what is entered on the user profile.

12. Select the user's role(s).

**Note:** If the user is a caseworker, ensure that Caseworker is selected for their name to appear in the Caseworker field throughout HIFIS.

13. If applicable, add any additional information concerning the user in the Comments field.

14. If applicable, enter a security key for this user. This is the secondary password if two-factor authentication is turned active under Application Settings.

15. Click the Save button.

**Note:** The user will be inactive until they are activated. Go to the Quick Access Buttons to activate or deactivate the account.

### How to Add Contact Information to a User Profile

Once the user account is created, it is now possible to add contact information.

Steps to follow:

1. From the Administration menu, select Users.
2. From the Users List page, locate the user for whom you want to add contact information and click the User Account button.
3. In the User Account page, click the Contact Information tab.
4. Select the means of communication.
5. Enter information in the Value field.
6. Click the Save button.

**Note:** The contact information will now appear in the Existing Contact Information table.

### How to Assign Rights to a User

User Rights can be assigned two ways:

1. Select a rights template to assign to the user. If Rights Templates have not been created, see Rights Templates; or,
2. Assign individual rights by searching for a specific module or by expanding the rights tree and then clicking the checkbox to give or take away rights.

Giving rights this way does not require you to use the save button, as changes will be recorded immediately.

Steps to follow:

3. From the Administration menu, select Users.
4. From the User List page, locate the user to whom you want to assign rights and click the User Account button.
5. On the User Account page, click on the Rights tab then select which service provider will be affected by those rights.
6. Repeat these steps for all service providers to which the user needs access.

## RIGHTS TEMPLATES

**T**he Rights Templates module is used to create pre-set rights that can be applied to users in a quick and efficient way when creating a new user profile.

Rights templates are set up to reflect the various types of users that will be using the system (e.g. Shelter Worker, Outreach Worker, Case Manager, Site Administrator, etc.). Identifying and grouping the types of users service providers employ can help define the rights templates that will reflect what each group can and cannot do in the system.

For more information, see the HIFIS Implementation Guide.

### Enter and Manage Rights Templates

#### How to Add a Rights Template

Steps to follow:

1. From the Administration menu, select Rights Template.
2. On the Rights Template List page, select the Add Template button.
3. On the Add Template page, enter the name of the template.
4. Select the owner of the template. Only the owner of the template can modify it once it is saved.
5. Select the service provider(s) to whom the template will apply.
6. If applicable, select the categories of reports to which a user who is assigned this rights template will have access.
7. If applicable, select the template you wish to copy as a base for the new template.
8. Indicate whether the template is active.
9. If applicable, add any additional information concerning the template in the Description field.
10. Click the Save button.
11. In the Edit User Template page, click in the Template Rights tab and expand the Rights tree.
12. Expand the Rights tree.
13. Click the checkbox next to a right to add it to the template.

**Note:** Once a selection is made, the changes are automatically saved.

### How to Edit a Rights Template

Steps to follow:

1. From the Administration menu, select Rights Templates.
2. On the Rights Template List page, locate the template you want to edit and select the Edit button.

3. Within the Template Details tab, you can edit the existing information or add any missing information.
4. Click the Save button.
5. Within the Template Rights tab, expand the Rights tree and locate the rights you want to add or remove to the template in the rights list.
6. Click the checkbox to add or delete a right.

**Note:** Once a selection is made, the changes are automatically saved.

## REPORTING



It is important to document a community and an organization's reporting needs then determine if they are met by the standard reports that come with HIFIS, or if additional custom reports are required. If custom reports are developed, they can be uploaded to HIFIS in the Administration section of the system.

Please refer to the HIFIS Implementation Guide for more details on reporting.

### Upload Reports

Steps to follow:

1. From the Reports menu, select Reports Manager.
2. From the Report Manager page, select the Add Report tab.
3. Enter the name of the report.
4. Enter a description of the report.
5. Select the report categories.

**Note:** The Report Categories field governs what reports a user can access.

- If the user has been assigned rights using a rights template, users will have access to reports where the report categories of the report and the rights template match.
- If the user has not been assigned rights using a rights template, users will have access to reports where the report categories of the report and the user profile match.

6. Select the service providers that will have access to the report, allowing them to generate corresponding reports.
7. Click the Browse button to select which report file you want to upload.
8. Click the Upload button.

### Report Access Management

There are two scenarios for a user to have access to a given report.

#### Scenario 1: User has been granted system rights using a Rights Template

If the user's access rights were assigned using a Rights Template (as discussed in [How to Assign Rights to a User](#)):

1. The Report Categories selected on the Rights Template assigned to the user must match one of the Report Categories selected when uploading the report.
2. The user must be assigned a Rights Template that includes the Report Category at the service provider for which they want to run the report the service provider must match one of the service providers selected when uploading the report. ([See How to Assign Rights to a User.](#))

#### Scenario 2: User has been granted system rights by assigning individual rights (not using a Rights Template)

If the user's system rights were assigned by assigning individual rights rather than by using a Rights Template (as discussed in [How to Assign Rights to a User](#)):

1. The Report Categories selected on the user's account must match one of the Report Categories selected when uploading the report.

2. The user must be assigned rights at the Service Provider for which they want to run the report ([see How to Assign Rights to a User](#)).

### Reporting FAQs

1. A user is trying to run a report. On the Report Parameters screen, the service provider for which they're trying to run the report isn't appearing in the list displayed in the Enter Service Providers field. Why not?

There are several reasons this might occur, including:

- The Rights Template assigned to the user for that service provider doesn't include the Generate Reports right. It will need to be added to the Rights Template to enable the user to run the report for the service provider.
  - The user has been assigned rights (either through a Rights Template or individual rights), but not at the service provider for which they want to run the report.
2. A user can see and edit the details of Client Management transactions (e.g. Case Management) for a service provider for which they are not logged in. Why?

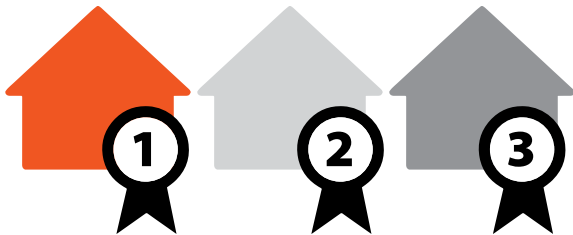
In this case, the user will have been assigned the view and edit rights for another HIFIS Service Provider. Even though they are not currently logged into that service provider, the rights are applied to all records at the HIFIS Service Provider for which the right was granted.

3. I want to set up a user so they can only run a specific report for specific service providers. How do I do this?

To set this up:

- a. In Administration – Look-up Tables, add a new/unique value to the Report Categories look-up table.
- b. Edit the report to which you want the user to have access – add the new Report Category to the report.
- c. Create a Rights Template that includes:
  - The new Report Category
  - The service providers for which you want the user to be able to run the report
  - The Generate Reports right
- d. Assign the Rights template to the user for the service providers for whom you want them to be able to run the report.

## HOUSING CONTINUUM



**T**he Housing Continuum module allows the administrator to assign a categorical rank for various housing types in order to track a client's progress out of homelessness. Categories to be used in a housing continuum (e.g. emergency shelter, supportive housing) need to be defined prior to implementing HIFIS. Once the categories have been defined, it is also necessary to identify which specific housing types belong in each category.

**Note:** The Housing Continuum can be changed and updated as definitions and priorities evolve.

### Enter and Manage Housing Continuum

#### How to Add a Housing Continuum

Steps to follow:

1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, select Add Housing Continuum.
3. Enter the name of the housing continuum.
4. Click the Save button.

#### How to Add a Housing Continuum Category

Steps to follow:

1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, locate the Housing Continuum to which you want to add a category and select the Manage button.
3. On the Manage page, select the Add Category button.
4. Enter the name of the category.
5. If applicable, select the housing types to be included in the housing continuum category.
6. Click the Save button.



### How to Change the Order of Housing Continuum Categories

Steps to follow:

1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, locate the Housing Continuum you want to modify and select the Manage button.
3. On the Manage page, select the Change Category Order button.
4. On the Change Category Order page, click and drag the categories to change the order.
5. Click the Save button.

### How to Edit a Housing Continuum Category

Steps to follow:

1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, locate the Housing Continuum you want to modify and select the Manage button.
3. On the Manage page, locate the category you want to modify and select the Edit button.
4. On the Update Category page, you can edit the existing information or add any missing information.
5. Click the Save button.

### How to Delete a Housing Continuum Category

Steps to follow:

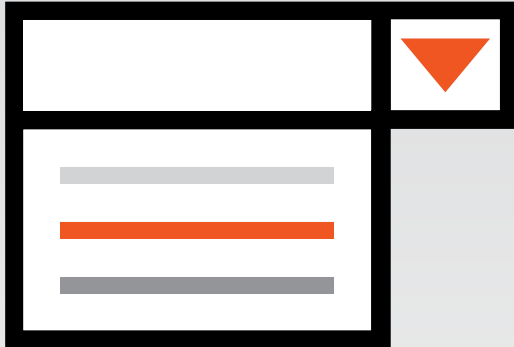
1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, locate the Housing Continuum from which you want to delete a category and select the Manage button.
3. On the Manage page, locate the category you want to delete and select the Delete button.
4. Select Delete from the confirmation pop-up window.

### How to Add a Housing Type to a Housing Continuum Category

Steps to follow:

1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, locate the Housing Continuum to which you want to add a category and select the Manage button.
3. In the Manage page, locate the housing continuum category to which you want to add a housing type and select the Edit button.
4. Click in the Housing Types field and select the housing type(s) you want to add to the category.
5. Click the Save button.

## LOOK-UP TABLES



The Look-up Tables module is used to add, edit or remove any of the look-up values that appear in the drop-down lists throughout HIFIS. The configuration of look-up tables allows the Administrator to make changes to values, not the tables themselves. For example, it is not possible to add a look-up table. It is, however, possible to consider the configuration of custom tables. Also, it is not possible to delete a table, but it is possible to consider changing to inactive the field associated to the table.

Note: Certain drop-down lists and their standard values are mandatory by ESDC and therefore cannot be modified (e.g., the non-directly identifiable data fields that are provided to ESDC).

Please refer to the *HIFIS Implementation Guide* for information about determining look-up values in Drop-Down Menus and Look-up Table Values (section 2.4.2.4).

### Enter and Manage Look-Up Table Values

#### How to Add a Look-Up Value

Steps to follow:

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Table List page, locate the table to which you want to add a value and click the Customize Look-up Table Values button.
3. On the Customize Look-up Table Values page, select Add Look-up Value for the content to expand.
4. Enter the English and French name of the look-up value.
5. Select the roll-up value of the look-up value.
6. Indicate whether or not the look-up value is active.
7. If applicable, select additional service providers that should be subscribed to the look-up value.
8. Click the Save button.

**Note:** The look-up value will now appear in the Existing Look-ups table.

### How to Deactivate a Look-Up Value

Steps to follow:

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Table List page, locate the table you want to modify and click the Customize Look-up Table Values button.
3. On the Customize Look-up Table Values page, locate the look-up you want to deactivate and select the Unsubscribe button.

**Note:** Once a selection is made, the changes are automatically saved.

### How to Edit a Look-Up Table Value

Steps to follow:

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Table List page, locate the table in which the field you want to modify is found and click the Customize Look-up Table Values.
3. On the Customize Look-up Table Values page, locate the look-up you want to modify and click the Edit button.

**Note:** Users, with necessary rights, can only modify look-up values that have been added at the service provider to which they are connected.

4. On the Edit Look-up Value page, you can edit the existing information or add any missing information.
5. Click the Save button.

### How to Edit the Look-Up Table Order

Steps to follow:

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Table List page, locate the table for which you want to modify the table order and click the Customize Look-up Table button.
3. On the Customize Look-up Table Values page, click the Sort Look-up Table Values button.
4. From the Sort Look-up Table Values screen, modify the order of the fields by selecting and dragging the fields up and down the list or click the Alphabetical Order button to sort the values alphabetically.
5. Click the Save button once the modifications to the look-up table order are complete.

## DIRECTORY OF SERVICES



The Directory of Services module is used to record the location and contact information for various places used in multiple HIFIS modules, such as a pharmacy for when adding medication records or a school for education records.

For those familiar with HIFIS 3.8, the Referrers module found in the Localised Tables menu has been implemented into the Directory of Services module.

It is important to organize and create the most commonly used places in HIFIS during the initial set up of the system. After the system is implemented, users who have the rights can continue to enter new places into the system as they are identified.

#### HELPFUL HINT:



Adding entries to the Directory of Services is how the Referred To and Referred From drop-down lists are populated.

Please refer to the *HIFIS Implementation Guide* for information about determining places to enter in the Directory of Services in Determine Places in Directory of Services (section 2.4.2.5).

### Enter and Manage Places in the Directory of Services

#### How to Add a Place

Steps to follow:

1. From the Front Desk menu, select Directory of Services.
2. On the Directory of Services page, click the Add Place button.
3. Enter the place's name.
4. Select the type of place.
5. If applicable, select the type of services offered.
6. Indicate whether or not the place is active.
7. If applicable, add people who may be associated with this place.
8. Select the referrer category type.
9. Indicate whether clients can be referred from and/or to this place.
10. If applicable, add any additional information concerning the place in the Comments field.
11. Enter the place's Country, Province/Territory and City. If applicable, enter the place's address by entering information in the Address Line 1, Postal Code and Geographic Region fields.
12. Click the Save button.

#### How to Edit a Place Record

Steps to follow:

1. From the Front Desk menu, select Directory of Services.
2. On the Directory of Services page, locate the place you want to modify and click the Edit button.
3. On the Place Details page, you can edit the existing information or add any missing information. Click the Save button.
4. Add Click Save button

## FOOD BANK ITEMS



**F**ood items used in the Food Banks module are created in the Food Bank Item module.

Identifying the most common food bank items provided by service providers will allow users to include these transactions in the record keeping. After the system is implemented, users can continue to enter new food bank items into the system as items are identified.

### Enter and Manage Food Bank Items

#### How to Add a Food Bank Item

Steps to follow:

1. From the Administration menu, select Food Bank Items.
2. At the bottom of the Food Bank Items List page, select Add Food Bank Item, located under the table, for the content to expand.
3. Select the Behaviour Type for the food item.

4. Enter the English and French name of the item.
5. Select the number of days for which the item is covered.
6. If applicable, enter the cost of the item for the service provider.
7. Enter the number of adults and children that the item can feed.
8. Indicate whether or not the food bank item is active.
9. If applicable, enter a product code for the food bank item.
10. Click the Save button.

#### How to Edit a Food Bank Item

Steps to follow:

1. From the Administration menu, select Food Bank Items.
2. On the Food Bank Items List page, locate the food bank item you want to modify and click the Edit button.
3. On the Edit Food Bank Item page, you can edit the existing information or add any missing information.
4. Click the Save button.

