



HIFIS HOW TO: COORDINATED ACCESS IN AN OUTBREAK – VIRTUAL TRIAGE AND ASSESSMENT

Staying coordinated across the homelessness response system helps to remain housing-focused during the COVID-19 outbreak. During this period, service providers may have to perform coordinated access related activities virtually, such as triage or assessment to practice physical distancing. For those who are not used to working virtually, this can be a challenge. As a web-based application, HIFIS is designed to support virtual work.

This “HIFIS How To” resource covers the triage and assessment component of the coordinated access and how service providers can work remotely by using HIFIS.

This document is meant to provide HIFIS specific context to compliment the Canadian Alliance to End Homelessness (CAEH) one-pager called “[Coordinated Access in a Pandemic](#)” and report called “[Getting Back to Housing](#)”, which include additional information and guidance.

1. [Recording Remote Consents](#)
2. [COVID-19 Triage – New Screening Processes](#)
3. [COVID-19 Triage – Making a Reservation](#)
4. [COVID-19 Triage – Documenting Referrals](#)
5. [Uploading Coordinated Access Documentation](#)
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1. RECORDING REMOTE CONSENTS

The first step prior to the triage and the assessment is to obtain client consent before obtaining any information. For instance, an individual that receive services will be required to give its consent regarding the collection and sharing of their personal information. They will also need to give consent to be on the unique identifier list (e.g. By-Name List) if they experience homelessness. The following explain how in HIFIS a consent can be captured to ensure adequate and accurate documentation.

DOCUMENTING VERBAL CONSENT

When a client gives consent in-person, over the phone or virtually – choose ‘Explicit’ in the drop-down list. If consent is provided over the phone or virtually, a physical consent form can be signed at a later date (if needed).

There is two ways to capture the consent of a client in HIFIS:

1. Creating a new client; or,
2. Recording **Consent** under the **Client Information**



Creating a new client

1. From the **Front Desk** menu, select **[Clients]**
2. From the **Client List** page, click **[Add Client]**
3. Enter the client's last and first name, and, if applicable, their middle name

Note: After entering the client's last name, in order to avoid client duplication, HIFIS analyzes the database in real time to see if an existing Client record matches the inputted information. If a match is found, the result will be shown on the right-hand side of the page.

4. Enter the **Consent Type**. The Consent Start Date is automatically filled in.
5. If applicable, enter the Consent Expiry Date and attach the signed consent form by clicking **[Browse]**
6. Continue to fill in the required information to add the client.

Recording Consent under the Client Information:

1. From the **Front Desk** menu, select **[Clients]** or search for the client in the **Client Search** bar
2. On the **Client List** page, select the Client record that you want to add a consent record
3. On the **Client - Vitals** page, click the **[Client Information]** menu and select **[Consent]**
4. On the **Client – Consent List** page, select **[Add Consent]**
5. On the **Client – Add Consent** page, select the type of consent that applies
6. Confirm the start date and, if applicable, enter the end date
7. If applicable, click the **[Browse]** button to select a file you want to upload

A **WATCH CONCERN** can be added to a file as a notification to obtain a signed consent form from the client during the next visit such as during a shelter intake. A Client Alert will appear under the client's profile and will remain until the end date that was entered

1. Go into the **Client - Vitals** page
2. Click on **[Client Information]**, then select **[Various Factors]**
3. Click on the **[Watch Concerns]** tab
4. And click on **[Add Watch Concern]**
6. From the **Watch Concern** page insert information (fields marked with * are mandatory)
7. Click **[Save]**

For more information, consult the [HIFIS User Guide](#) page 19 for Consent and page 32 for Watch Concern. You can also contact the [HIFIS Client Support Centre](#).



2. COVID-19 TRIAGE – NEW SCREENING PROCESSES

Communities can work with their local Public Health Authority to determine the role of Coordinated Access or access points in screening clients for COVID-19. Screening results can be documented in the HIFIS questionnaire or a custom table.

HOW TO CREATE A QUESTIONNAIRE

1. From the **Administration** menu, select **[Questionnaires]**
2. On the **Questionnaires List** page, click **[Add Questionnaire]**
3. From the **Add Questionnaire** page, add applicable information (fields marked with * are mandatory)
4. Click **[Next]**
5. On the **Add Question** page, enter the first question of the questionnaire.
6. Indicate if the question is active
7. Select the question type
8. If **Single Selection Drop-down** or **Multiple Selection Drop-down** was selected you will be redirected to the Add Drop-down Value page to provide the values of the dropdowns:
 - a. On the Add Drop-down Value table, enter the drop-down value,
 - b. Indicate if the value is active
 - c. Select **[Add Drop-down Value]** to add another drop-down value
 - d. To move onto the next question select **[Save Value and Finish Question]**
9. Click **[Add Question]** to enter another question
Note: Repeat steps 7 through 9 until all questions have been entered.
10. When all questions have been entered, click **[Save Question and Finish Questionnaire]**

For more information, consult page 91 of the [HIFIS User Guide](#) or contact the [HIFIS Client Support Centre](#).

HOW TO CREATE A CUSTOM TABLE

1. From the **Administration** menu, select **[Custom Tables]**
2. On the **Custom Table List** page, select **[Add Custom Table]**
3. On the **Add Custom Table** page, add applicable information (fields marked with * are mandatory)
4. Click **[Save]**
5. From the **Add Custom Table Field** page, enter the **Type**
Note: Depending on the value selected, different fields will appear.
Enter the name of the field
6. Indicate if the field is mandatory



7. If applicable, enter information in the fields that may have appeared after selecting the type of field
8. Indicate if the field is active
9. Click **[Save]** to continue adding fields to the new custom table or select **[Save and Go To Layout]** to stop adding new fields and see the layout of the new custom table
10. Select **[Discard and Go To Layout]** to discard the field that has been created and proceed to the layout view of the custom table
11. In the **Custom Table Layout**, drag and drop the fields in the order they will appear in the custom table
12. Click **[Save]**

For more information, consult page 84 of the [HIFIS User Guide](#) or contact the [HIFIS Client Support Centre](#).

3. COVID-19 TRIAGE – MAKING A RESERVATION

Communities can work with their local Public Health Authority to determine the role of Coordinated Access or access points in referring clients to isolation or quarantine units following screening results. Service providers can refer clients to isolation or quarantine units using the HIFIS Reservation feature. This is a "pre-intake" step that notifies the HIFIS Service Provider that the client is coming. A **Watch Concern** can be applied to a client's file to notify HIFIS users about a client's COVID-19 status (e.g., symptomatic, pending test results, positive test result, recovered).

HOW TO ADD A RESERVATION

1. From the **Front Desk** menu, select **[Admissions]**
2. On the **Admissions** page, select the **Reservations** tab, then **[Add Reservation]**
3. From the **Reservation** page, type to search for an existing client in the **Client Name(s) field**, then select the client from the search results
4. To make a reservation for additional clients under the same stay record, start typing the next name in the Client Name(s) field and select it
5. Confirm the start date and time
6. If applicable, enter the expected book out date
7. Select the reason for service from the drop-down list. The reason for service should reflect the main reason the client is staying at the service provider
*Note: Add drop down values to the Reasons for Service list by selecting **Reasons for Service** from the Look-up Tables in the Administration tab.*
8. If applicable, enter whom the client was referred from and/or select whom the client was referred by
9. If applicable, add any additional information concerning the reservation in the Comments field
10. Select **[Next]** to go to the **Reservation - Bed Selection** page

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11. The service provider rooms and beds layout appears with the client's name located at the top
12. To assign a bed to a client, click on the client's name (it will turn orange), then click on the appropriate bed icon
13. When a client is successfully placed into a bed, the bed icon will turn green and the client will move into that bed
14. Click **[Save]**
15. Repeat this step for all clients

For more information, consult page 37 of the [HIFIS User Guide](#) or contact the [HIFIS Client Support Centre](#).

4. COVID-19 TRIAGE – DOCUMENTING REFERRALS

In HIFIS, client referrals can be documented both to and from HIFIS service providers as well as other service providers in the community. The Referral fields can also be used to track a client's pharmacy when adding a medication record or a specific school when adding an education record. The ability to track referrals is available in the following HIFIS modules:

- Admissions
- Goods and Services
- Case Management Sessions
- Conflicts
- Group Activities
- Food Banks
- Turnaways

All referral drop down lists are populated through the Directory of Services, except referrals related to Case Management Sessions. The referral drop down list for Case Management Sessions is found in the **Referrer Categ** Look-up Table in the Administration tab.

HOW TO ADD TO THE DIRECTORY OF SERVICES / HOW TO ADD A PLACE

1. From the **Front Desk** menu, select **[Directory of Services]**
2. On the **Directory of Services** page, click **[Add Place]**
3. From the **Add Place** page add relevant information (fields marked with * are mandatory)
Note: Add drop down values to the Type of Place list by selecting **Place** from the Look-Up Tables in the Administration tab.
4. Select Yes/No for the place to appear in the **Referable from** and **Referable to** drop down lists. Click **[Save]**

For more information, consult page 69 of the [HIFIS User Guide](#) or contact the [HIFIS Client Support Centre](#).



HOW TO RECORD REFERRALS

When a field requests **Referred from** or **Referred to**, enter the appropriate service provider by finding them in the drop down menu.

If the organization does not appear, add the organization in the **Directory of Services** or ensure the **Referable from** and **Referable to** fields are turned to **Yes** in the Place settings (Directory of Services – Edit a Place)

5. UPLOADING COORDIANATED ACCESS DOCUMENTATION

Shifting to a paperless triage and assessment process is a helpful way to support physical distancing measures during the outbreak. HIFIS can help to keep tailored access rights to ensure that the authorized workers have access to information that support their activity such as client consent, triage, assessment or housing plan.

HOW TO ADD A DOCUMENT TO A CLIENT RECORDS

1. From the **Front Desk** menu, select **[Clients]**
2. On the **Client List** page, select the Client record to which you want to add a document by clicking the name of the client
3. On the **Client - Vitals** page, click the **[Client Information]** menu and select **[Documents]**
4. Click **[Add Document]**
5. Click **[Browse]** to select which file you want to upload
6. Enter the document name
7. Indicate whether the document is confidential
8. Enter a description of the document
9. Click **[Save]**

Note: Documents that are marked as confidential will only be seen by users who have the access right to view confidential documents.

For more information, consult page 21 of the [HIFIS User Guide](#) or contact the [HIFIS Client Support Centre](#). For more information about setting or modifying access rights, consult the COVID-19 “[HIFIS How To: Coordinated Access in an Outbreak – Access Points and Messaging](#)”.



6. USEFUL INFORMATION

- This document is part of a COVID-19 series of “HIFIS How To” resources. Resources in this series include:
 - Coordinated Access in an Outbreak:
 - i. [Access Points and Messaging](#); and
 - ii. [Prioritization](#)
 - [Finding and Securing Housing in an Outbreak](#)
 - [Preventing Eviction in an Outbreak](#)
 - [Home Visits in an Outbreak](#)
 - [Promoting Healthy Practices in an Outbreak](#)
 - [Tracking Health Issues in an Outbreak](#)
 - [Managing Admissions and Transactions in an Outbreak](#)
- The existing [Reaching Home directives](#) have been updated to provide guidance to funding recipients regarding the eligibility and use of Reaching Home funds, highlighting where adjustments have been made to existing program parameters, as well as to illustrate how existing eligible activities can be employed to reduce and mitigate the impacts of COVID-19.
- Visit the [Canadian Network for the Health and Housing of People Experiencing Homelessness](#), [the Canadian Alliance to End Homelessness](#) or the [Homelessness Learning Hub](#) websites for resources on how the homeless sector can respond to a COVID-19 outbreak.
- Visit the [Public Health Agency of Canada’s](#) website for [guidance for providers of services for people experiencing homelessness \(in the context of COVID-19\)](#).

7. HIFIS SUPPORT AND STAYING CONNECTED

- Have feedback or a “HIFIS How To” tip to share with your peers? Contact the HIFIS Client Support Centre by **email** at support@HIFIS.ca or **phone** at 1-866-324-2375.
- For questions about HIFIS, refer to the [HIFIS Toolkit](#) or contact the HIFIS Client Support Centre by **email** at support@HIFIS.ca or **phone** at 1-866-324-2375.
- To receive the HIFIS Newsletter send a request to sign up by email at info@HIFIS.ca.